

Worksession

MEMORANDUM

April 24, 2012

TO: Government Operations and Fiscal Policy Committee

FROM: Dr. Costis Toregas, Council IT Adviser

SUBJECT: FY13 Operating Budget: MC311 Customer Service Center, within Public Information Section 36 in the Executive's Recommended Budget

The following are expected to attend:

Patrick Lacefield, Director, Office of Public Information
Leslie Hamm, MC311 Call Center Acting Director
Mike Ferrara, Executive Director of Enterprise Projects, Office of the CAO
Representative, Office of Management and Budget (OMB)

The relevant pages from the recommended FY12 operating budget are attached on ©1-6.

Summary of Staff Recommendations:

1. **Ensure** that needed resources identified as requirements not yet finalized in #4 (telecommunications infrastructure upgrades) and #5 (open data hosting) below are included within the requested appropriation amount.
2. **Accept** the Executive's recommended budget of **\$4,015,365**, effectively increasing the budget from FY12 levels by \$184,645.

Overview

For FY13, the Executive recommends total expenditures of \$4,015,365, up \$184,645 or +4.8% from the FY12 approved budget of \$3,830,720. FTEs will increase by 1.0 to 36.3 from 35.3 in FY12.

The MC311 budget appears as a program within the Public Information Office; the entire budget for the Office is presented on ©1-6, with ©3 having the major portion of the changes in the MC311 budget.

The current performance of the center was recently reviewed by CountyStat; selected slides from their presentation and summary action steps are included on ©10-16. The full CountyStat presentation from the March 30, 2012 worksession is at:

http://www.montgomerycountymd.gov/content/exec/stat/pdfs/3_30_12_ppt.pdf.

Additional items of interest

Council staff raised a number of issues upon review of the budget information proposed by the Executive. The questions, responses from the Department of General Services (italicized) and, where appropriate, Council staff comment on the responses, are provided.

1. MC311 is one of several pathways through which residents, businesses and visitors can get to our County and ask questions or receive information. Others include but are not limited to, email, website interaction, phone, and walk-in. Can you provide a chart estimating volume in each of these platforms by year or by 6 month increments? This would help explain trends and broaden the interpretation of the “# of calls coming into MC311” discussions.

MC311 can provide actual Service Request volume as follows: Calendar year 2011 – 515,060 service requests via phone, 20,646 service requests via web portal. Calendar year 2012 Quarter 1 (January through March) – 120,336 service requests via phone, 6,818 service requests via web portal. MC311 does not receive customer requests via “walk in” or email channels. The portal replaced email as a channel in order to improve efficiency.

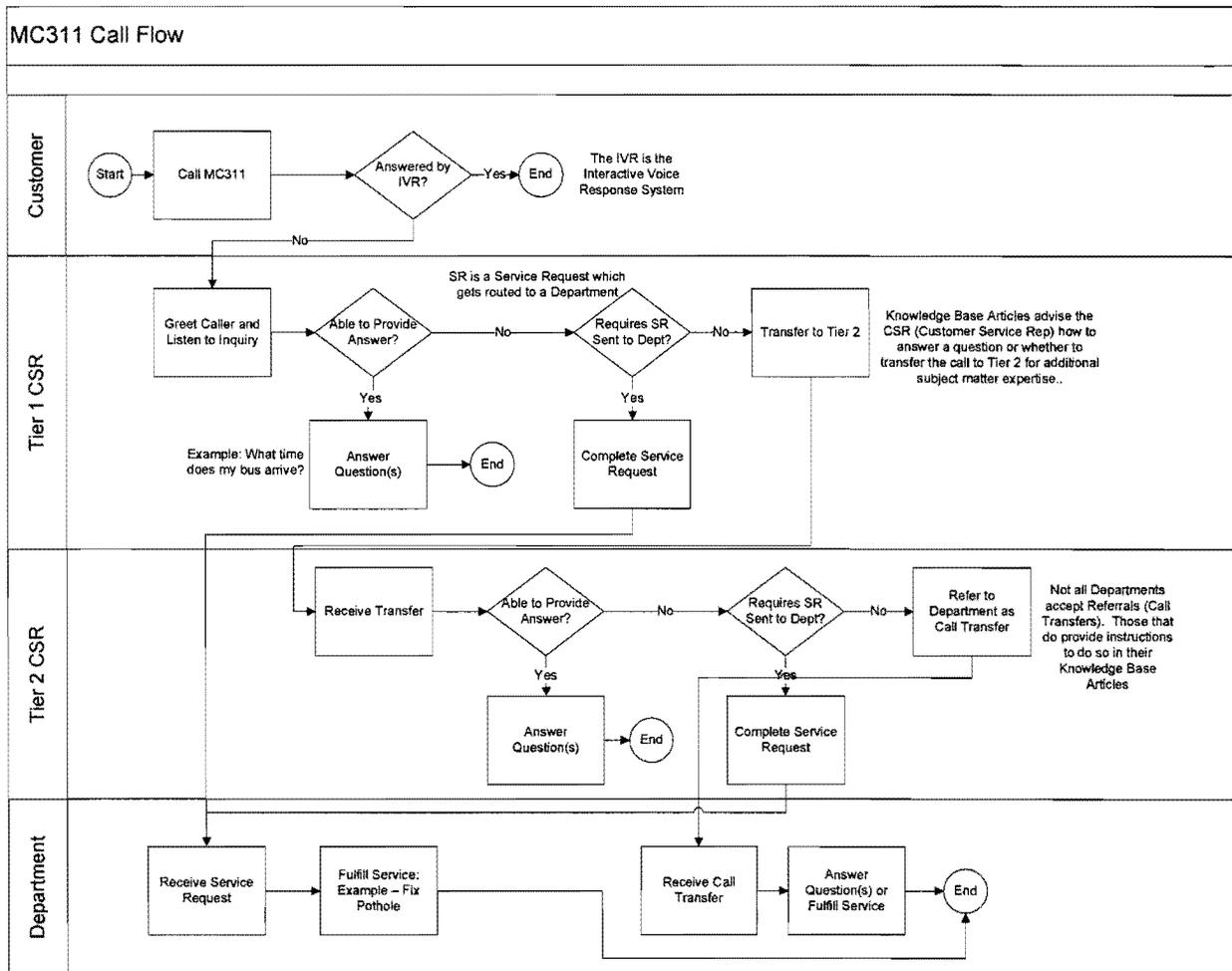
Council Staff comment

The information provided has been put in table format for easy trend comparison:

	CY2011	CY2012 (annualized)	Trend
Phone requests	515,060	481,344	-6.5%
Web portal requests	20,646	27,272	+32.1%
Email Requests	N/A	N/A	
Walk-Ins	N/A	N/A	

The Q1 reports were quadrupled to provide an estimate for the year, which may not be an accurate forecast, given month-to-month variation. However, even allowing for projection errors, the trend is clear: users are beginning to use the portal and its 24x7 availability more. This has implications for further automating the call-taking, ticket-writing and crew-dispatching functions, and in time will have staffing implications as well. However, the Executive must be given time to examine these trends and develop a plan that will manage this changing landscape of service needs. The Call Center management should comment on their internal estimate of this shift and how they are preparing for it.

2. The process of MC311 is complicated and to the uninitiated is difficult to appreciate. Can you provide a flow diagram that would show the path that a typical call would take as it wends its way from Tier I to Tier II to experts in the departments? Feel free to annotate it with useful facts or statistics.



Council Staff comment

The diagram is helpful, as it shows the sequence of events that helps a caller. Ultimately, the “fix pothole” box in the Department lane (last one in the diagram) is the one that generates the most negative calls - when the department is not responding to the call for service in a timely manner. The statistics that will permit the Executive and the Committee to evaluate the responsiveness of each department are being assembled now in a “dashboard” that should make such review easy to organize.

3. Tier II call takers (some 6 positions) represent Finance, OHR, and Recycling. Are other departments contemplated for such detailed support within MC311 in FY13? And what helps you make these choices for Tier II treatment?

We currently have Tier II CSRs for Spanish, Finance and HHS. We have never had OHR Tier II CSRs, primarily because we did not receive call takers or other resources from them. We did have a Tier II for Solid Waste Services (SWS), but last year were able to integrate the former SWS work order system, Oscar, into Siebel, thereby eliminating the need to swivel.

Rather than identifying additional Tier II queues, we are working to “flatten” the call taking process in order improve the customer experience and work more efficiently. The purpose of 311 is to provide general information and serve as intake for the 37 departments and agencies participating in 311. Instead of creating new department queues at the Customer Service Center,

we continue to work with departments to identify additional information that Tier I CSRs can provide via updated and improved Knowledgebase Articles (KBA) that can resolve the customer's request. We continue to revisit the option of transferring customers to department "hotlines" for more emergent issues requiring higher levels of subject matter expertise (DPS/OHR). Departments agree to have these hotlines answered by a live agent within a stated metric.

History

Following the call center consolidation effort, employees transferred from four departments continued to use department systems for customer look ups or to create work orders continued to use them in addition to the Siebel CRM systems. These systems included MUNIS for Finance, CARES/CIS for HHS, Oscar for Solid Waste Services (DEP) and the Highway Service (DOT) Work Order systems. We set up Tier 2 queues for FIN, HHS, and DEP to accommodate this process. When customers called 311 with requests for information or services that require a higher level of subject expertise and/or access to one of the department work order and/or look up systems, customers are transferred into a Tier 2 CSR. This necessitates an additional wait time for the customer, but increases the likelihood of first call resolution.

HHS and FIN Tier II CSRs access department systems to look up detailed information on HHS Income Supports applications and Property Tax Accounts. If the information they provide satisfies the customer's request, the Siebel Service Request is closed. If it appears that additional information or services must be provided, a Siebel Service Request will be assigned to the appropriate department for fulfillment.

CSRs from DOT and DEP were "swiveling", a process that involved creating a Siebel Service Request for each call, then going into the department system to enter the same information to create a work order to be used by the department to fulfill the request. This duplicative effort lengthened After Call Work time and kept CSRs from becoming available to take the next incoming calls. This restricts our ability to manage call volume with existing agents, especially during peak times.

Council Staff comment

The ultimate disposition of the call is important from both a customer satisfaction, and a cost perspective. Data on how many calls can be closed within the boundaries of the call center and how many are sent to the departments for scheduling and execution are not yet available. Further, each department has established a Service Level Agreement (SLA), which basically promises fulfillment of a service call within a given time frame. Since these SLAs appear to be self-initiated and self-adjusted by the departments, it is important to understand whether their current levels are producing satisfied customer responses or not. Circle 43 provides the plan under discussion between the user departments and CountyStat to perform this function. The Committee should be kept informed on progress towards this goal and empowered to use the same tools when available.

4. County Stat has recently done a report / assessment. Could you highlight and bring out parts of that report that you feel are relevant to the budget discussion?
 - *Critical need to upgrade existing telecommunications infrastructure, including upgrade of MC311 telephone switch and implementing call recording compliance software*
 - *Fund Operation and Maintenance of Siebel and OBIEE applications as well as the addition of future enhancements*

- *Break fixes and minor enhancements continue in FY12 with existing resources (CSC Performance Dashboards/SLA Aging Reports)*
- *Significant increase in web portal utilization and creation of SRs on web (480 – Jan 11; 2,521 – Jan 2012)*
- *Study extension of operating hours (7 – 7, M – F) using existing resources in FY13; possible in part due to increase in portal usage*
- *Work with DTS to develop Smart App Suite (iPhone, Android); short term solution to “mobile enable” MC311 web portal (June 2012)*

Council Staff comment

The upgrade of existing telecommunications infrastructure is referenced; the Committee should inquire whether the requested budget for MC311 includes this element.

5. Are you making progress in making the MC311 data files available to SOCRATA-like apps? Please describe your plans for FY13 in that area.

Change Request 1-22SJL “Ability to Publish 311 Open Data Hosted by Socrata” has been logged and Siebel O&M funding has been requested for FY13. Assuming the O&M gets funded, this item will be handled jointly by the Siebel O&M Team and DTS in FY13.

Council Staff comment

The assumption for O&M funding should be verified in this worksession before approving the overall budget. It is not clear when this approval is given and by whom.

6. The current GOVERNING site has an article titled “311’s Coming Transformation” by Stephen Goldsmith, <http://www.governing.com/blogs/bfc/col-311-citizen-service-system-transformation.html> (and reproduced at ©45). Where would you position our own future plans in his vision?

Key points:

- *Just finishing 2nd year in operation – many of these are long term goals undertaken by “mature” organizations. MC311’s future plans fall more into the first group cited in Goldsmith’s article: those that help the current model work better. These are short-term (one year planning horizon) and of a tactical and operational nature. Those in the second group – initiatives that transform the model – will require longer-term vision and strategy from the CIO level of the county.*
- *Tight connection of 311 data into the city’s “stat” : Open Data*
- *Improve the clarity of response scripts: Ongoing effort with Departments to update and streamline KBAs*
- *Make better use of automated systems: Increase in services available via portal (Bulk Trash, Scrap Metal)*
- *Intensify efforts to link call-center software to departments’ work-order systems: Working with Departments to identify candidates; Possibility of linking through web services option*
- *Better voice recognition and advances in interactive voice response technology: Working to develop additional channels for communication without losing “personal touch”*
- *New channels for communication, including using a partner to provide high-quality text responses to incoming texts from citizens seeking information from the 311 center: “mobile enabled” web portal*

- *Flexibility to handle surge capacity: Working to develop multichannel communication tools and developing associated business process for monitoring in the departments/call center*
- *Seamless, multichannel communications platform -- one that can accommodate tweets, Facebook posts, texts and more with minimum friction using a variety of devices*
- *Moving from a "burden-on-citizen" approach to a "citizen-as-sensor" model. One step in that process involves advancing more than just a transparency initiative but one in which the 311 Director provides open data sets to community groups, as Morrisroe has done, and asks them for insights into solutions: Open Data, Open 311*
- *Using customer surveys — outbound 311 calls, texts or tweets — that sample satisfaction by service type and geographical area provide insights into where service is exemplary or lagging*
- *"Citizen as partner in fashioning or identifying a solution." Finding collaborative ways for constituents who identify a common problem to work together*
- *Government as a provider of preemptive services, applying analytics to 311 data to solve problems before they occur*
- *Cities developing new applications, often through contests like New York City's BigApps, and then making them available to other cities.*

Council Staff comment

The key points made here are strong targets for FY13. If they are tied to a process that will evaluate and reward progress and achievement of these targets, the County will be in the lead of this vital effort by all counties to hear and respond to their constituents' needs efficiently and transparently.

Public Information

MISSION STATEMENT

The mission of the Office of Public Information is to provide timely, accurate, and effective communication with the public, the County Executive, departments and agencies, media, County employees, the County Council and other elected officials, businesses, civic groups, and every other segment of the Montgomery County community through the mass media, Internet, presentations, publications and graphics, cable television programming, and telephone and electronic requests for information and assistance.

BUDGET OVERVIEW

The total recommended FY13 Operating Budget for the Office of Public Information is \$5,017,257, an increase of \$297,747 or 6.3 percent from the FY12 Approved Budget of \$4,719,510. Personnel Costs comprise 78.3 percent of the budget for 60 full-time positions for 42.70 FTEs. Operating Expenses account for the remaining 21.7 percent of the FY13 budget.

LINKAGE TO COUNTY RESULT AREAS

While this program area supports all eight of the County Result Areas, the following are emphasized:

- ❖ **A Responsive, Accountable County Government**

DEPARTMENT PERFORMANCE MEASURES

Performance measures for this department are included below, with multi-program measures displayed at the front of this section and program-specific measures shown with the relevant program. The FY12 estimates reflect funding based on the FY12 approved budget. The FY13 and FY14 figures are performance targets based on the FY13 recommended budget and funding for comparable service levels in FY14.

Measure	Actual FY10	Actual FY11	Estimated FY12	Target FY13	Target FY14
Multi-Program Measures					
Internal County staff satisfaction with PIO services (scale of 1 [lowest] to 4 [highest])	3.16	3.16	3.23	3.23	3.23

ACCOMPLISHMENTS AND INITIATIVES

- ❖ **Produced cable television specials, brochures, and website features on issues of critical importance to the County Executive such as the Carryout Bag Law, "Good Neighbor" campaign on code enforcement reforms, "Respect the Space" accessible parking for people with disabilities, and other initiatives. In addition, conducted Town Hall Meetings, Online Chats, and Budget Forums.**
- ❖ **Enhanced the MC311 Customer Call Center to provide more direct services to residents, along with the online portal to services that is available around the clock. Promoted these new services to residents via free media, social media, traditional brochures, and flyers.**
- ❖ **Productivity Improvements**
 - **The MC311 Call Center handled more than a half-million calls in its first year of service, and in its second year, the call rate continues to average 40,000 per month, with the number of web portal views averaging 28,000. The average time it takes a customer to speak with a Customer Service Representative is 16 seconds.**
 - **More and more services are being made available to customers via the web portal, such as Bulk Trash/Scrap Metal Pickup Request, which is one of the top requests for services. The new MC311 promotional campaign includes outreach to Spanish language speakers and seniors.**
 - **Public information officers and graphic designers continue to handle media relations and marketing requests from departments that no longer have funds to contract out this function.**
 - **The department continues to enhance the County's weekly news show, "County Report This Week" that covers a wide variety of issues and topics and promotes County programs and services in more interesting ways, despite limited resources.**



PROGRAM CONTACTS

Contact Donna Bigler of the Office of Public Information at 240.777.6537 or Helen P. Vallone of the Office of Management and Budget at 240.777.2755 for more information regarding this department's operating budget.

PROGRAM DESCRIPTIONS

Web Content and Graphic Management

The four major functions of this program include:

Providing creative and technical support to Public Relations, Cable Programming, MC311, and to departments.

Developing and overseeing the County's graphic identity program to ensure consistency in the County's printed communication for the public. The program develops printing guidelines for departments in accordance with Administrative Procedure 1-7, Use of the Montgomery County Coat of Arms, Logotype and Emblem, and Public Communication Guide.

Managing the growth and activity on the County's website and the MC311 web portal, which involves the development of policies and procedures for adding information to the website, as well as providing a leadership role in internet management.

Producing artwork and design services for publications, fliers, decals, exhibits, charts, maps, and other promotional and educational products. Graphic artists provide advice to departments on cost-effective and attractive ways to meet project requirements and objectives.

FY13 Recommended Changes	Expenditures	FTEs
FY12 Approved	96,660	1.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs. Other large variances are related to the transition from the previous mainframe budgeting system to Hyperion.	27,977	0.00
FY13 CE Recommended	124,637	1.00

Public Relations

Under this program, the Office of Public Information:

Educates and informs residents about County issues, programs, and services through press releases, media advisories, news and public events, the county website, e-mail and online newsletters, YouTube, Facebook, and Twitter.

Works directly with media organizations to ensure that reporters and editors have accurate and timely information about County issues, programs, and services.

Develops promotional campaigns to increase awareness of critical issues such as pedestrian safety and code enforcement.

Program Performance Measures	Actual FY10	Actual FY11	Estimated FY12	Target FY13	Target FY14
Percentage of Maryland Public Information Act (MPIA) requests completed within 30 days ¹	95	39	25	90	90
Total utilization of direct resident communication systems - web, YouTube, video, podcasts, Facebook (million)	1.15	1.21	1.76	1.80	2
Number of press conferences ²	164	157	160	160	160
Total attendance at press conferences or press events	1697	1695	1700	1700	1700
Number of press requests under the MPIA	29	78	80	80	80

¹ Although a response goes out within 30 days for each request, extensive requests often take months to complete. The requests from press are becoming more complex, require more information, and are taking more time to complete.

² Number of press events conducted.

FY13 Recommended Changes	Expenditures	FTEs
FY12 Approved	792,130	5.40
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs. Other large variances are related to the transition from the previous mainframe budgeting system to Hyperion.	85,125	0.00
FY13 CE Recommended	877,255	5.40

MC311 Customer Service Center

MC311 is a key strategic, enterprise-wide initiative that provides the public with a single three-digit number (311) to call for County information and service. In addition, it provides the County with a sophisticated ability to count, track, and respond to resident requests. MC311 provides the general public with a higher quality of service delivery and accountability, while helping the Government achieve operational efficiencies.

<i>Program Performance Measures</i>	Actual FY10	Actual FY11	Estimated FY12	Target FY13	Target FY14
Customer satisfaction rating of 85% or higher ¹	NA	78%	85%	85%	85%
Average amount of time it takes to reach a Customer Service Representative after the Welcome Announcement	NA	16	20	20	20
Average rate of calls that come into 311, but are not answered by a Customer Service Representative (CSR) ²	NA	2.36%	5%	5%	5%

¹ Based on quarterly surveys sent to customers who provided an email address.

² Callers may hang up to make a 911 call, if the information needed is in the Welcome Announcement or they enter an existing service request number during the announcement to check on the status and hang up.

<i>FY13 Recommended Changes</i>	Expenditures	FTEs
FY12 Approved	3,830,720	35.30
Shift: Transfer of Principal Administrative Aide Position to the Office of Human Resources	-51,480	-1.00
Multi-program adjustments, including negotiated compensation changes, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting multiple programs. Other large variances are related to the transition from the previous mainframe budgeting system to Hyperion.	236,125	2.00
FY13 CE Recommended	4,015,365	36.30

BUDGET SUMMARY

	Actual FY11	Budget FY12	Estimated FY12	Recommended FY13	% Chg Bud/Rec
COUNTY GENERAL FUND					
EXPENDITURES					
Salaries and Wages	2,817,942	2,873,050	3,026,724	2,957,953	3.0%
Employee Benefits	1,032,006	755,420	974,630	969,854	28.4%
County General Fund Personnel Costs	3,849,948	3,628,470	4,001,354	3,927,807	8.2%
Operating Expenses	1,222,886	1,091,040	815,639	1,089,450	-0.1%
Capital Outlay	0	0	0	0	—
County General Fund Expenditures	5,072,834	4,719,510	4,816,993	5,017,257	6.3%
PERSONNEL					
Full-Time	62	61	61	60	-1.6%
Part-Time	0	0	0	0	—
FTEs	41.50	41.70	41.70	42.70	2.4%

FY13 RECOMMENDED CHANGES

	Expenditures	FTEs
COUNTY GENERAL FUND		
FY12 ORIGINAL APPROPRIATION	4,719,510	41.70
Other Adjustments (with no service impacts)		
Increase Cost: Lump Sum Wage Adjustment	128,813	0.00
Increase Cost: Group Insurance Adjustment	114,573	0.00
Increase Cost: Retirement Adjustment	102,649	0.00
Increase Cost: Longevity Adjustment	4,782	0.00
Increase Cost: Motor Pool Rate Adjustment	60	0.00
Technical Adj: Conversion of WYs to FTEs in the New Hyperion Budgeting System; FTEs are No Longer Measured for Overtime and Lapse	0	2.00
Shift: Help Desk - Desk Side Support to the Desktop Computer Modernization NDA	-230	0.00
Decrease Cost: Printing and Mail Adjustment	-1,420	0.00
Shift: Transfer of Principal Administrative Aide Position to the Office of Human Resources [MC311 Customer Service Center]	-51,480	-1.00
FY13 RECOMMENDED:	5,017,257	42.70

PROGRAM SUMMARY

Program Name	FY12 Approved		FY13 Recommended	
	Expenditures	FTEs	Expenditures	FTEs
Web Content and Graphic Management	96,660	1.00	124,637	1.00
Public Relations	792,130	5.40	877,255	5.40
MC311 Customer Service Center	3,830,720	35.30	4,015,365	36.30
Total	4,719,510	41.70	5,017,257	42.70

CHARGES TO OTHER DEPARTMENTS

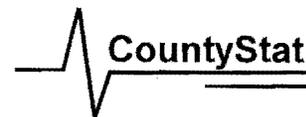
Charged Department	Charged Fund	FY12		FY13	
		Totals	FTEs	Totals	FTEs
COUNTY GENERAL FUND					
Cable Television	Cable Television	684,980	6.60	708,420	6.60
Health and Human Services	County General Fund	45,540	0.70	45,540	0.70
Housing and Community Affairs	Montgomery Housing Initiative	63,060	1.00	63,060	1.00
Permitting Services	Permitting Services	178,830	3.00	178,830	3.00
Solid Waste Services	Solid Waste Collection	71,550	1.25	71,550	1.25
Solid Waste Services	Solid Waste Disposal	299,896	4.75	299,896	4.75
Total		1,343,856	17.30	1,367,296	17.30

FUTURE FISCAL IMPACTS

Title	CE REC.			(\$000's)		
	FY13	FY14	FY15	FY16	FY17	FY18
This table is intended to present significant future fiscal impacts of the department's programs.						
COUNTY GENERAL FUND						
Expenditures						
FY13 Recommended No inflation or compensation change is included in outyear projections.	5,017	5,017	5,017	5,017	5,017	5,017
Elimination of One-Time Lump Sum Wage Adjustment This represents the elimination of the one-time lump sum wage increases paid in FY13.	0	-129	-129	-129	-129	-129
Subtotal Expenditures	5,017	4,888	4,888	4,888	4,888	4,888

Montgomery County 311 Semi-Annual Performance Review

Patrick Lacefield
Director Public Information Office
March 30th , 2011²



7

CountyStat Principles

- **Require Data-Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**



Agenda

- **Status of Follow-Up Items**
- **MC311 Customer Service Center Utilization**
- **MC311 Performance Measurement**
- **Discussion of MC311 Customer Survey Data**
- **Areas of Current and Future Focus**
- **Next Steps / Follow Up Items**



6

Meeting Goals

- **Meeting Goals:**
 - Examine results of the ongoing monitoring of MC311 operations to determine if the project is achieving operational efficiency and effectiveness.
- **How we measure success:**
 - Comparison of performance measures to previous results will determine if operations are improving, maintaining, or declining



Status of Follow-Up Items

STATUS

- **Evaluate the potential of re-directing residents to MC311 rather than the Department of Permitting Service's IVR system (#240-777-6210).**
 - MC311 met with DPS and determined that re-directing residents to MC311 rather than the Department of Permitting Services' IVR system will not improve customer service.
- **MC311 should refine their existing adhoc internal performance data reporting system to ensure better accuracy.**
 - MC311 addressed with Release 2.8 CSC Performance Dashboards on March 26, 2012.
- **MC311 should work with CountyStat to develop a dashboard, accessible by all departments, which provides real-time service-level agreement aging reports.**
 - Currently in progress, funded through June 30th.

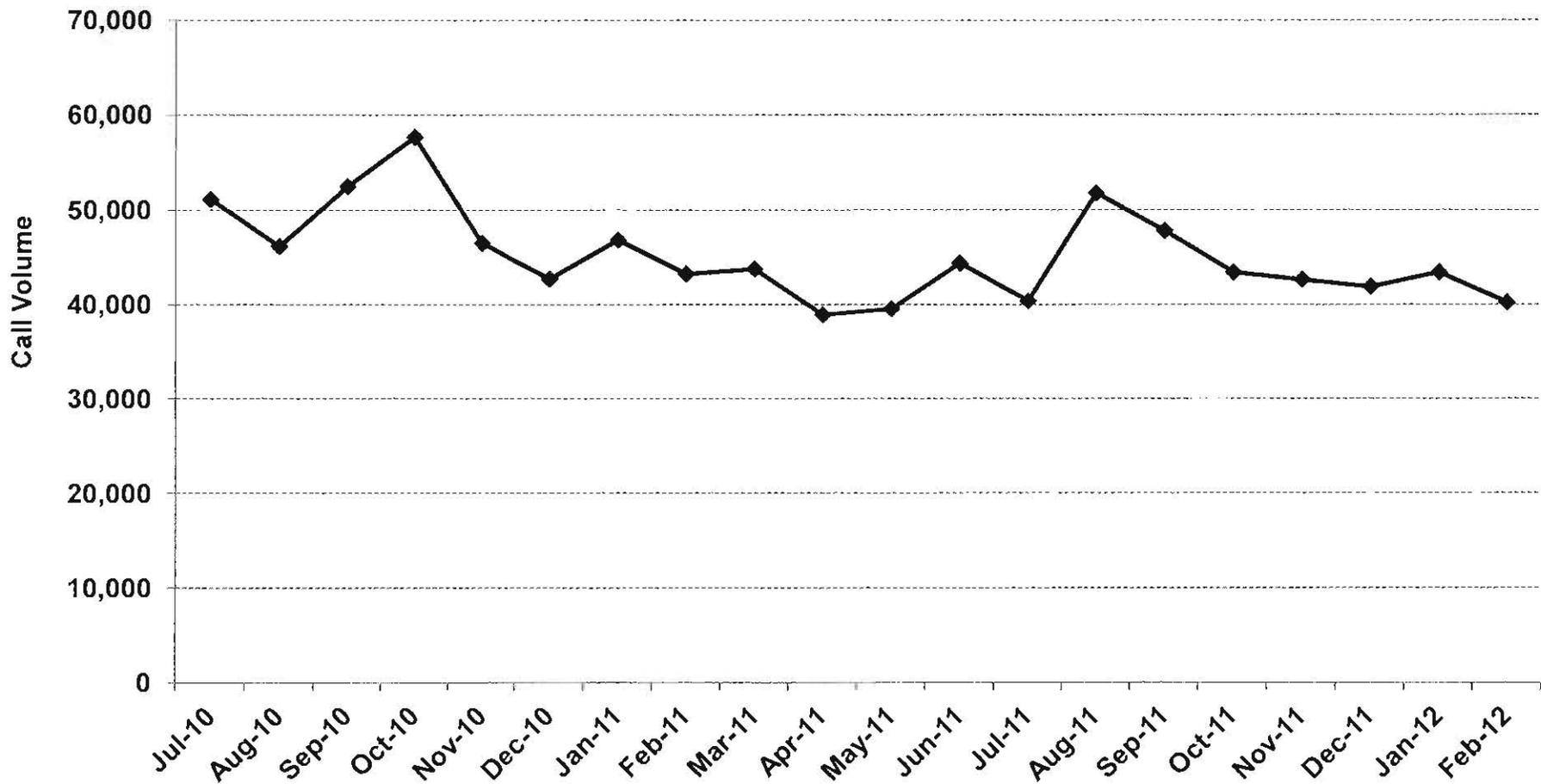
Complete

Complete

In Progress



MC311 Customer Service Center Utilization: Customer Service Center Call Volume Since Official Launch



12

MC311 Customer Service Center Utilization: Customer Service Center Call Volume Since Official Launch

Since July 2010, MC311 averaged 45,364 calls a month.

Comparison of September through February to the same time last year, demonstrates a -9.5% decrease in call volume.

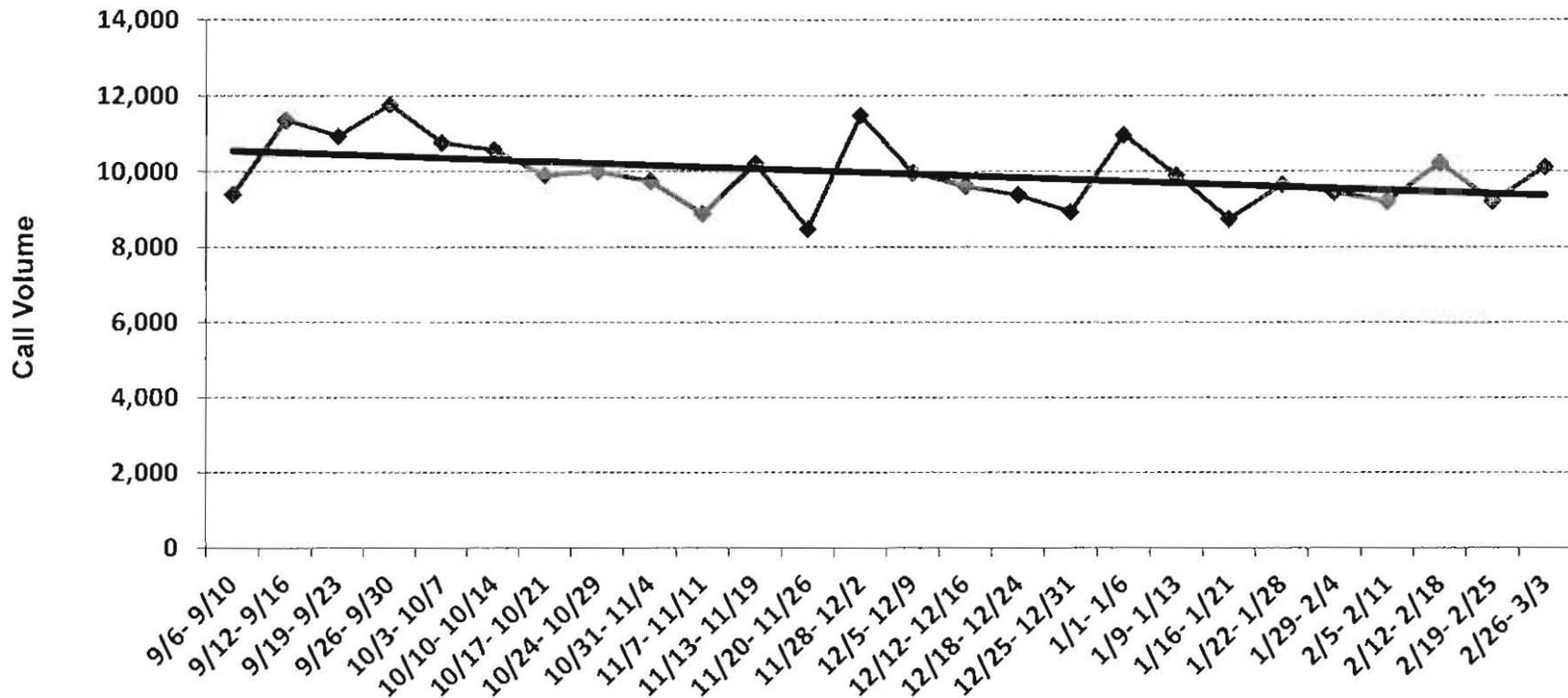
Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
51,150	46,159	52,480	57,658	46,484	42,714	46,823	43,245	43,763	38,902	39,539	44,350

Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12
40,362	51,785	47,809	43,411	42,630	41,877	43,388	40,214



13

MC311 Customer Service Center Utilization: Customer Service Center Weekly Call Volume Sep. to Feb.



MC311 experienced its largest spike in weekly call volume during the early January and overall call volume demonstrates a steady but slightly downward trend

*First two workdays in September are replaced by two days in March



1A

MC311 Customer Language Usage Analysis

Spanish language Usage Mar 2011 – Feb 2012

Language	Customer Service Center	Language Line	Total Calls	% Total Calls
English	476,158	N/A	476,158	95.64%
Spanish	19,355	2,114	21,469	4.31%
Other	N/A	255	255	0.05%
TOTAL CALLS	495,513	2,369	497,882	

MC311 Observations:

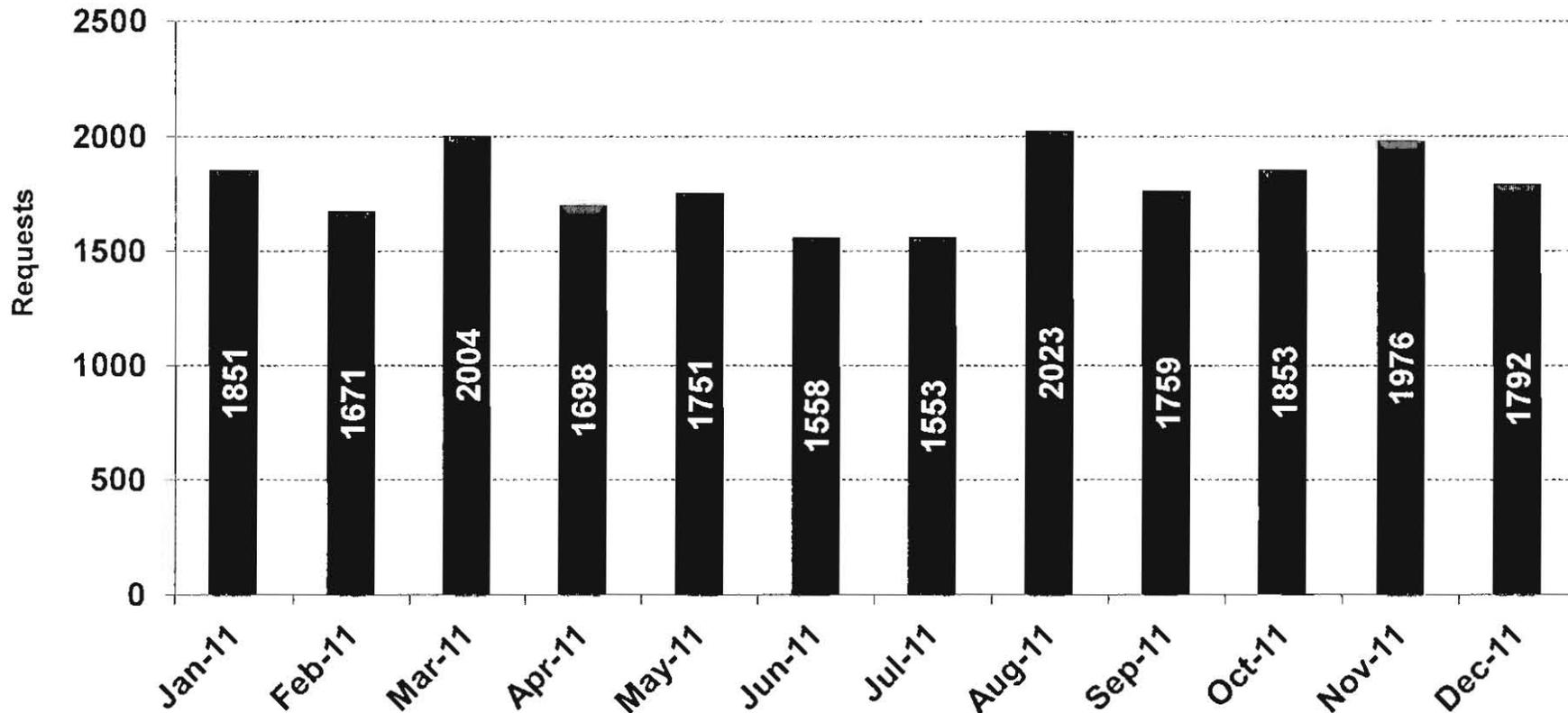
- Almost all callers comfortable speaking English – 96%
- Spanish most common non-English language requested by far
- Spanish Language calls are 4% of total
- Most Spanish calls handled by CSC – 89%
- All Spanish calls prompted by caller during welcome message
- Language Line used for less than 0.5% of all calls



(5)

MC311 Customer Language Usage Analysis

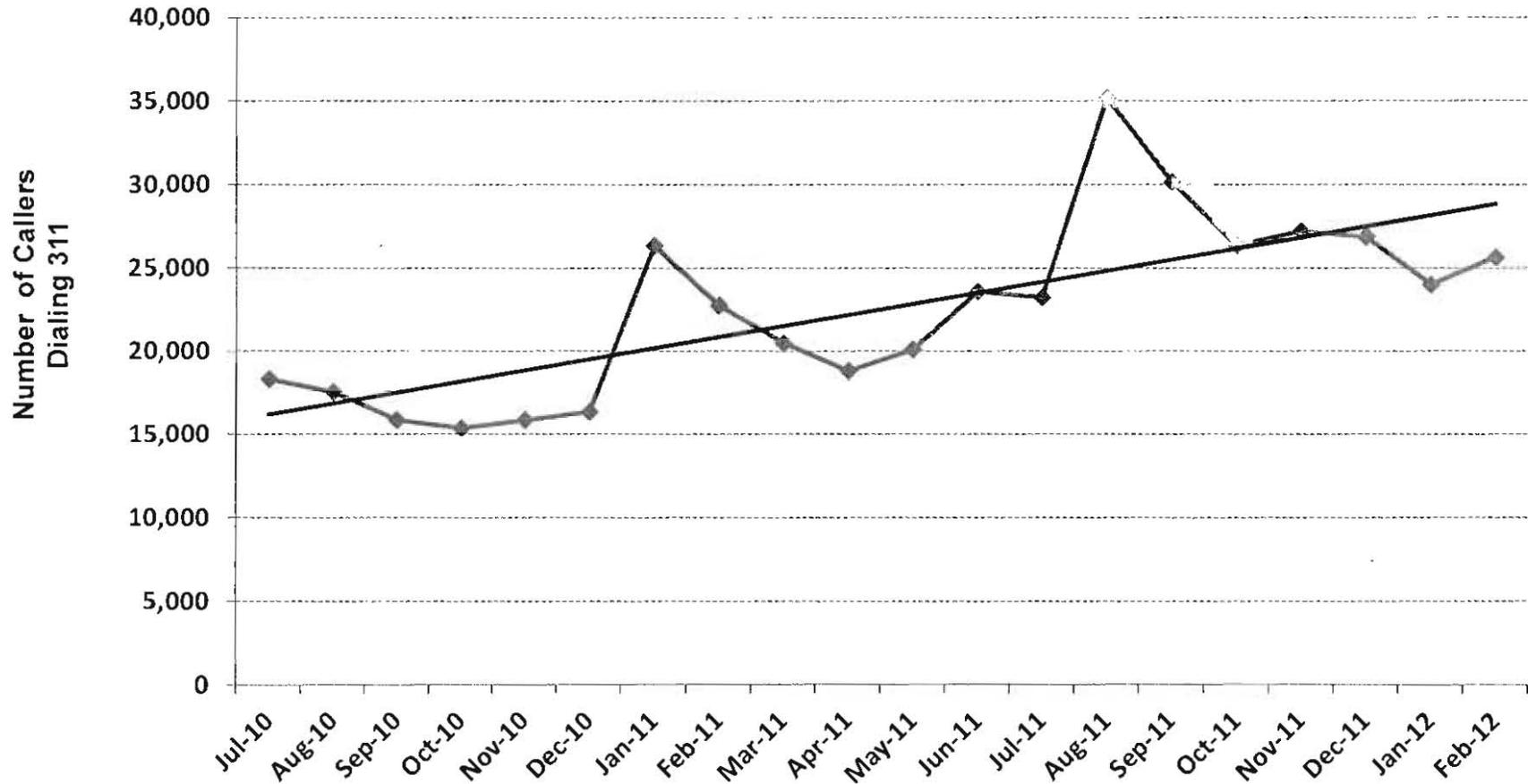
Callers Requesting Spanish Language - Monthly Trend



Spanish language requests spiked in August after promotional efforts in Summer 2011



MC311 Customer Service Center Utilization: Percentage of Customers Dialing "311" Opposed to Legacy Phone Numbers



17

MC311 Customer Service Center Utilization: Percentage of Customers Dialing “311” Opposed to Legacy Phone Numbers

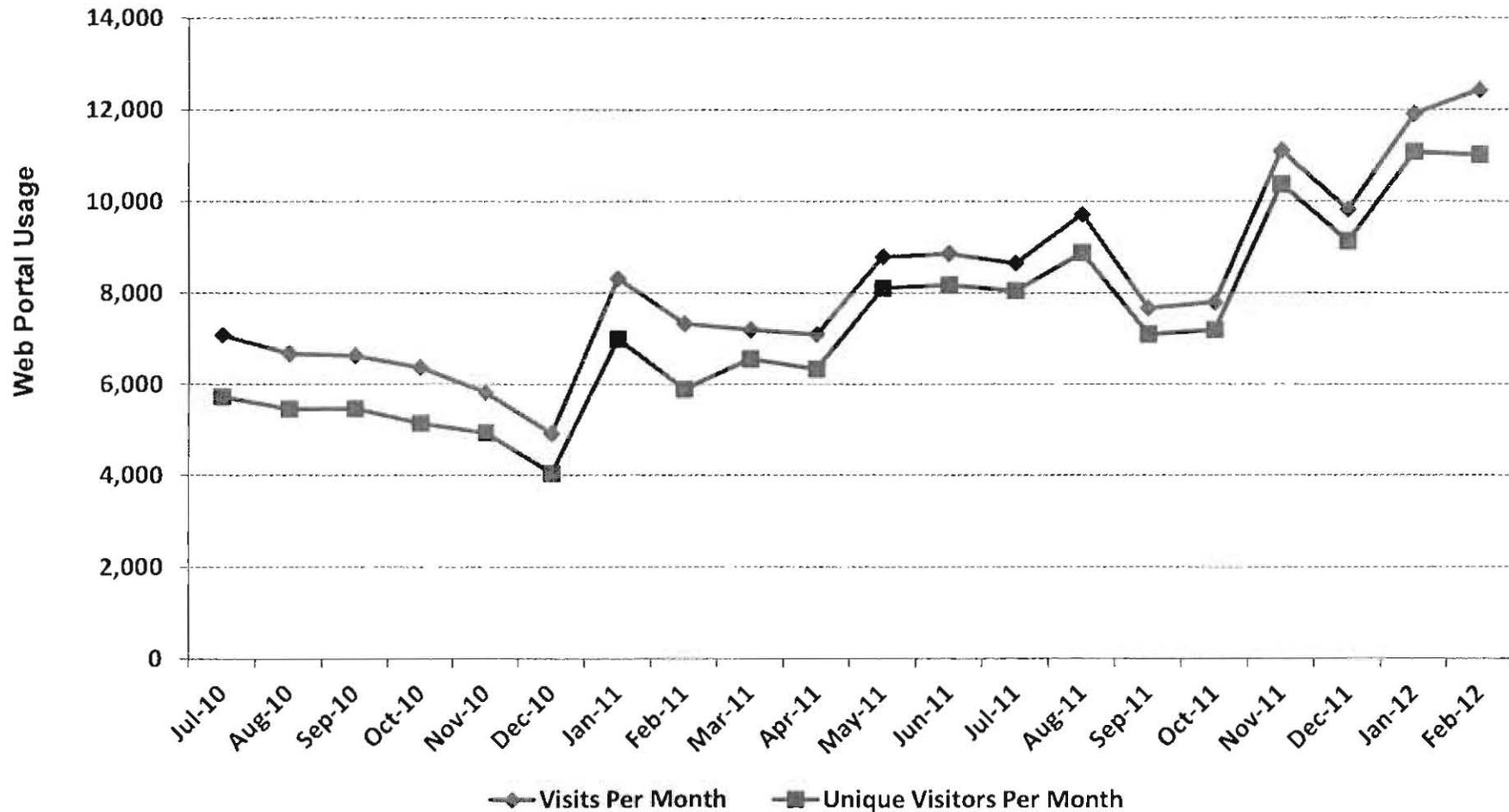
Since July 2010, on average, 50% of all calls are directly to “311”.
Comparison of September through February to the same time last year,
demonstrates a 52.5% increase in direct 311 calls.

Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
36%	38%	30%	27%	34%	38%	56%	53%	47%	48%	51%	53%

Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12
58%	68%	63%	61%	64%	64%	52%	64%



MC311 Customer Service Center Utilization: Web Portal Utilization Metrics



(b)

MC311 Customer Service Center Utilization: Web Portal Utilization Metrics

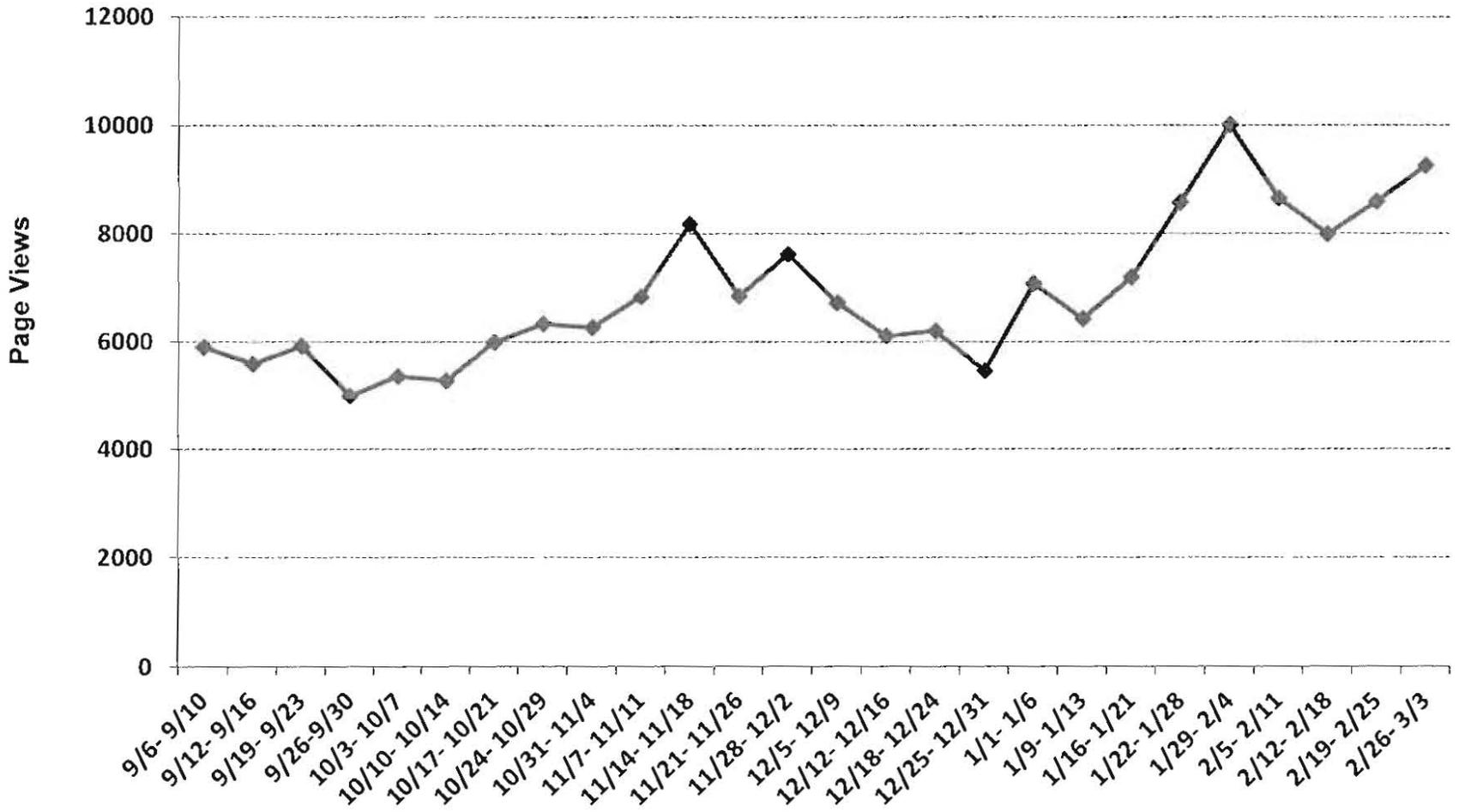
	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
Visits Per Month	7,073	6,674	6,631	6,374	5,822	4,915	8,316	7,328	7,195	7,090	8,791	8,856
Unique Visitors Per Month	5,728	5,458	5,465	5,140	4,929	4,038	6,992	5,894	6,555	6,338	8,104	8,171
	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12				
Visits Per Month	8,651	9,722	7,670	7,802	11,110	9,817	11,905	12,436				
Unique Visitors Per Month	8,047	8,879	7,097	7,192	10,375	9,131	11,078	11,015				

Web portal usage continues to increase as more services are available via the MC311 website.



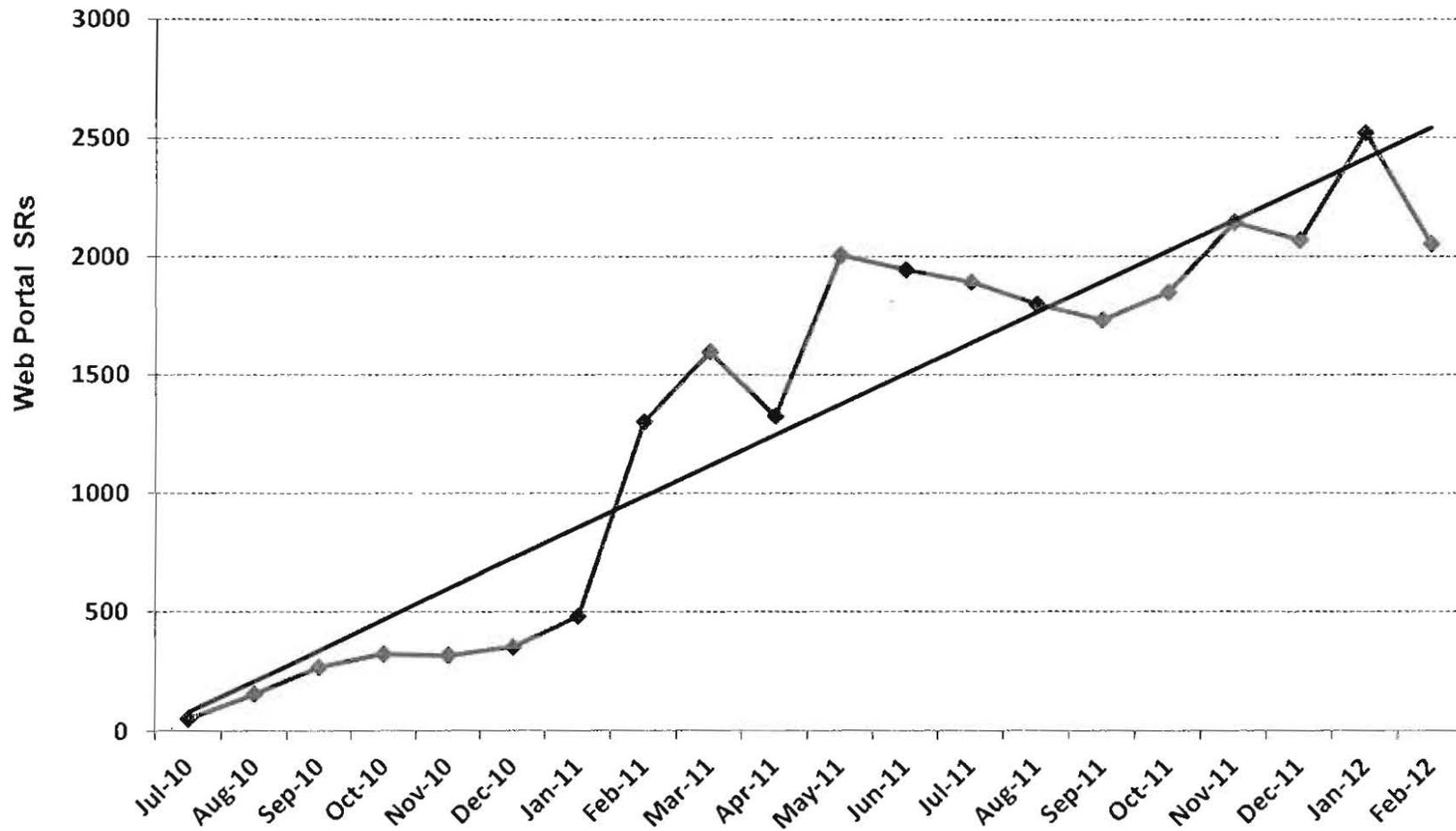
20

MC311 Customer Service Center Utilization: Web Portal Page Views Per Week Sep. '11 to Feb. '12



(2)

MC311 Customer Service Center Utilization: Service Requests Generated Via the Web Portal



2

MC311 Customer Service Center Utilization: Service Requests Generated Via the Web Portal

Comparison of September through February to the same time last year, demonstrates a 306% increase in web generated service requests.

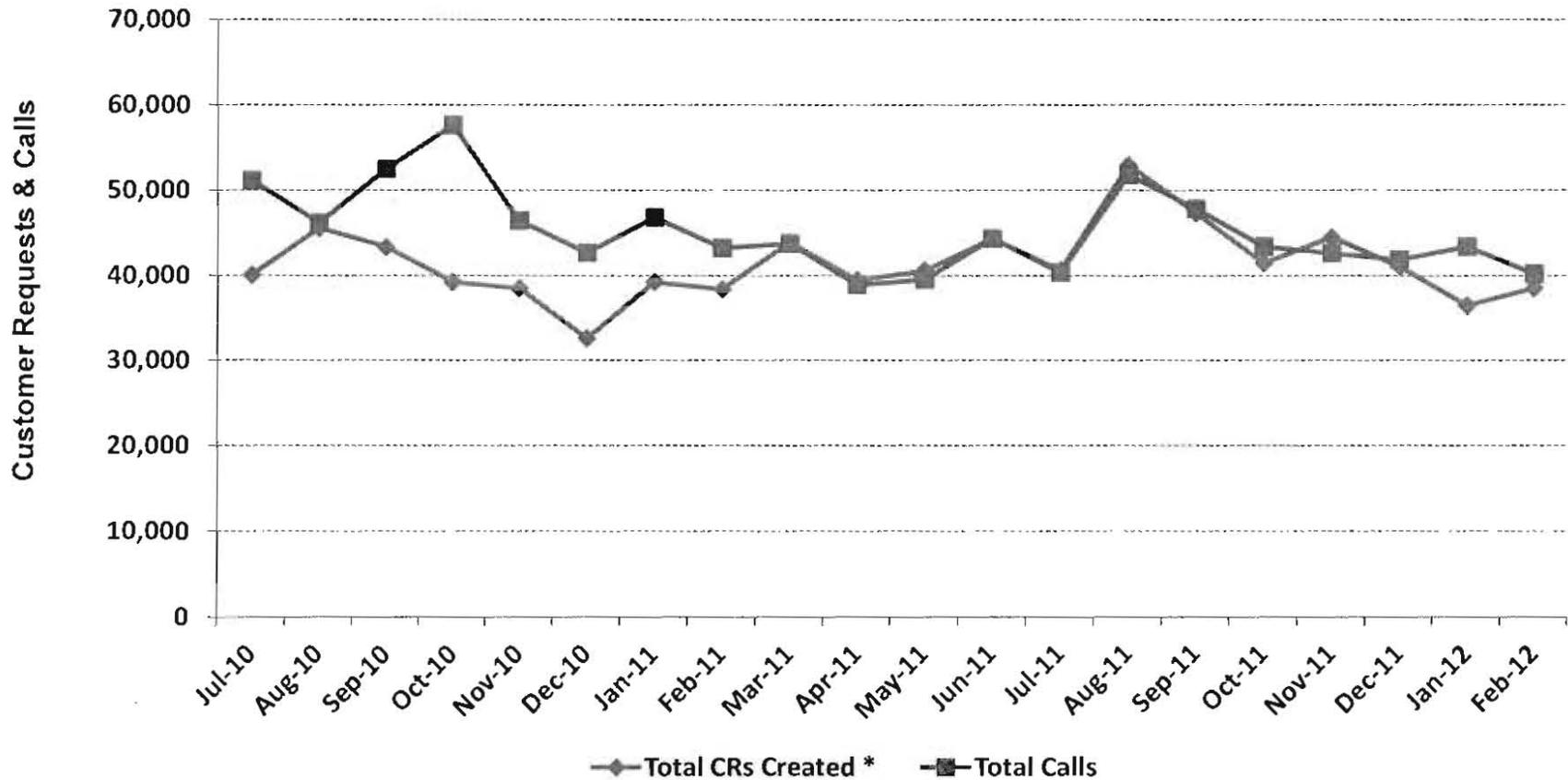
Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
50	153	269	324	317	353	480	1,302	1,597	1,324	2,006	1,944

Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12
1,893	1,798	1,732	1,850	2,144	2,069	2,521	2,054



MC311 Customer Requests Generated

Since March, total Customer Request creation has become much closer to total CRs generated due to improved CSR call management.



MC311 Customer Requests Generated

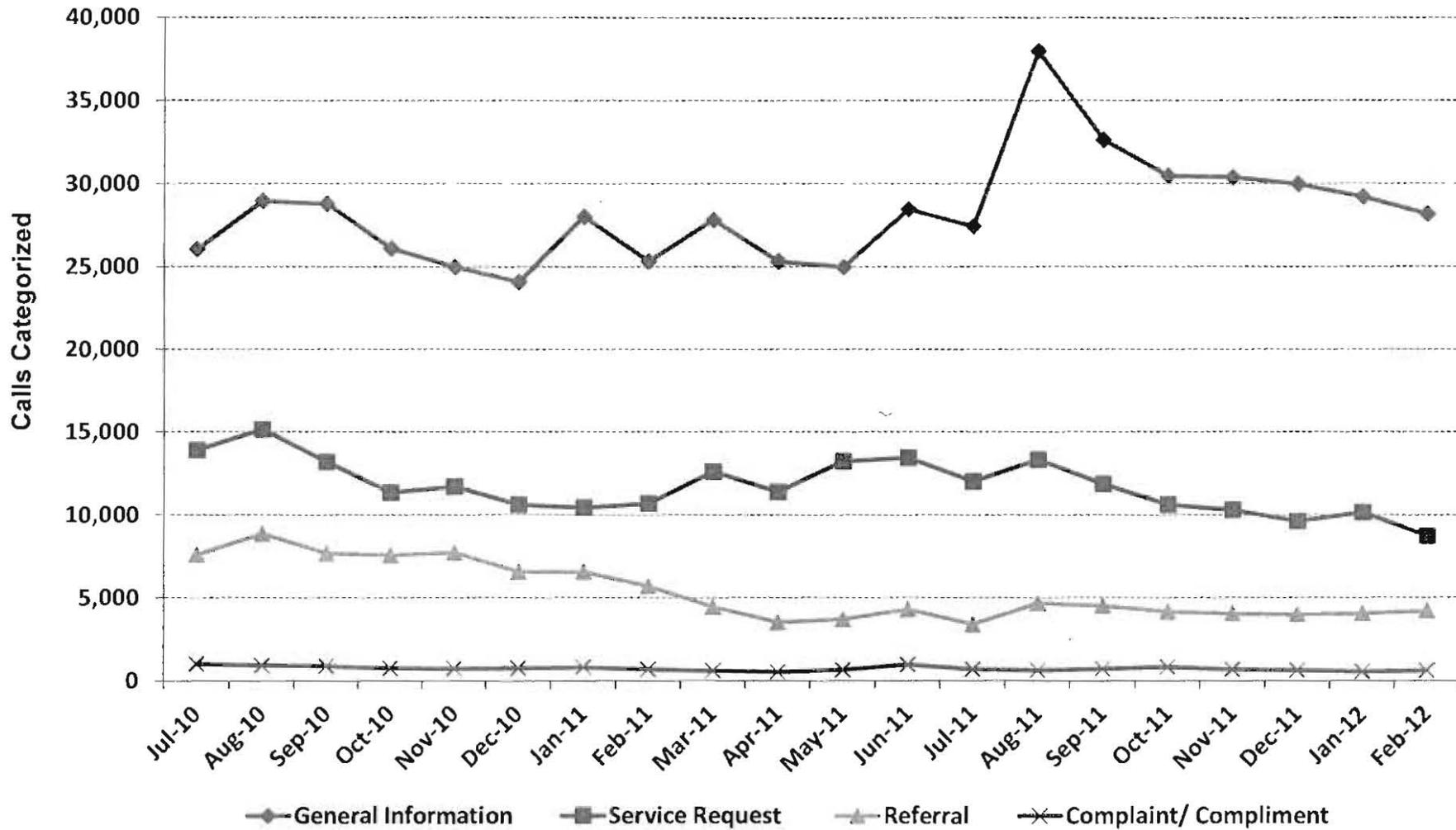
	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
Total CRs Created *	40,084	45,594	43,381	39,241	38,511	32,579	39,236	38,426	43,887	39,428	40,562	44,343
Total Calls	51,150	46,159	52,480	57,658	46,484	42,714	46,823	43,245	43,763	38,902	39,539	44,350
% Resulting in CR	78%	99%	83%	68%	83%	76%	84%	89%	100%	101%	103%	100%
	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12				
Total CRs Created *	40,595	52,945	47,286	41,475	44,520	41,059	36,471	38,533				
Total Calls	40,362	51,785	47,809	43,411	42,630	41,877	43,388	40,214				
% Resulting in CR	101%	102%	99%	96%	104%	98%	79%	96%				

In January, the percentage of calls resulting in the creation of a customer request dipped to the lowest percentage since December 2010.



* Excludes Web Portal CRs created

MC311 Customer Service Center Call Types: Intake Category Statistics



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MC311 Customer Service Center Call Types: Intake Category Statistics

Request Type	JUL '10	AUG '10	SEP '10	OCT '10	NOV '10	DEC '10	JAN '11	FEB '11	MAR '11	APR '11	MAY '11	JUN '11
General Information	26,039	28,975	28,801	26,099	24,972	24,080	28,017	25,309	27,826	25,302	24,979	28,469
Service Request	13,890	15,144	13,183	11,346	11,703	10,617	10,443	10,672	12,592	11,376	13,218	13,428
Referral	7,588	8,850	7,678	7,565	7,732	6,574	6,571	5,706	4,445	3,532	3,709	4,309
Complaint/ Compliment	1,034	939	897	759	738	778	829	693	624	542	663	984

Request Type	JUL '11	AUG '11	SEP '11	OCT '11	NOV '11	DEC '11	JAN '12	FEB '12
General Information	27,414	37,958	32,624	30,456	30,397	29,962	29,214	28,175
Service Request	12,002	13,315	11,846	10,611	10,293	9,615	10,149	8,730
Referral	3,411	4,669	4,516	4,169	4,037	3,996	4,049	4,199
Complaint/ Compliment	695	628	724	837	696	649	558	624



Top 25 Solution Areas From Sep. '11 Through Feb. '12

Organization Name	Solution Name	# of CR	Rank
DOT	Ride On SmartTraveler Arrival Information Through Internet or Cell Phone	23,270	1
FIN	Requests to discuss property tax bill	18,362	2
DOT	Ride On Trip Planning/Location/Status	17,089	3
DEP	Bulk Trash Pick-Up Request	10,732	4
PIO	Hang Up or Dropped Call	10,351	5
PIO	Montgomery County Employee Directory Assistance	8,332	6
DEP	Scrap Metal Pick-Up Request	8,114	7
DEP	Bin Request - New (Recycling)	7,584	8
Non-MCG	MANNA Food Center Referral	4,898	9
DPS	Schedule DPS Building Construction Related Permitting Inspections	4,358	10
FIN	Information printed on the tax bill	3,234	11
DEP	How To Recycle/Dispose of Solid Waste	3,203	12
DPS	Information on the building codes applicable to a specific project	2,972	13



Top 25 Solution Areas From Sep. '11 Through Feb. '12

Organization Name	Solution Name	# of CR	Rank
DPS	Name and telephone number of DPS building inspector	2,883	14
DEP	Holiday Schedule for County Trash & Recycling Collection	2,755	15
DHCA	Landlord Tenant (LT) complaints, disputes or issues	2,423	15
DEP	Unacceptable for Collection (For Use by SWS Field Staff Only)	2,391	17
DOT	Ride On Complaint - Service	2,233	18
FIN	Personal Property Tax Billing	1,906	19
DEP	Transfer Station Questions (Montgomery County)	1,735	20
DHCA	Housing Complaints	1,651	21
DPS	Contacting a Zoning Specialist	1,616	22
Non-MCG	Requests to discuss property tax bill/assessment/credits	1,601	23
DEP	Bin Pick-Up (Recycling)	1,403	24
DOT	Pothole Repair	1,382	25



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MC311 Customer Service Center Utilization: Performance Metrics Defined

Category	Definition
Call Volume	Total # of calls that come in to the phone lines
Call Answer Rate (Average)	Average % of calls that that come into the switch and are answered by a CSR
Abandoned Call Rate (Average)	Average % of calls that come into the switch, but are not answered by a CSR
Scheduled Customer Service Representatives (CSRs)	Total number of CSRs that are scheduled to work on any given day
Actual CSRs	Total number of CSRs who are present and logged into the system
Occupancy Hours (Average)	Average number of hours that a CSR is either taking calls, in after call work or available to take calls.
Average Speed to Answer	Average amount of time it takes to reach a CSR after the Welcome announcement
Average Hold Time	Average amount of time a customer is put on hold during a call
Average Handle Time	Average time it takes a CSR to speak with a customer per call
Average After Call Work	Average Time CSR taking after speaking to a customer before becoming available to work per call
Total Customer Requests Generated	Total number of Customer Requests created in the MC311 CRM system by a CSR
Accuracy Rate	Actual rate of Customer Requests with no errors according to stated standards



8

MC311 Customer Service Center Performance: Call Center Customer Request Performance Metrics

Category	Goal	JUL '10	AUG '10	SEP '10	OCT '10	NOV '10	DEC '10	JAN '11	FEB '11	MAR '11	APR '11	MAY '11	JUN '11
Total Customer Requests Generated	N/A	40,084	45,594	43,381	39,241	38,511	32,579	39,236	38,426	43,887	39,428	40,562	44,343
Accuracy Rate	98%	96.3%	97.9%	98.9%	99.5%	99.6%	99.5%	99.5%	99.3%	99.9%	99.8%	99.7%	99.5%

Category	Goal	JUL '11	AUG '11	SEP '11	OCT '11	NOV '11	DEC '11	JAN '12	FEB '12
Total Customer Requests Generated	N/A	40,595	52,945	47,286	41,475	44,520	41,059	36,471	38,533
Accuracy Rate	98%	99.6%	99.7%	99.7%	99.7%	99.7%	99.6%	99.7%	99.7%



MC311 Customer Service Center Performance: Service Level and Call Handling Performance Metrics

Category	Goal	JUL '10	AUG '10	SEP '10	OCT '10	NOV '10	DEC '10	JAN '11	FEB '11	MAR '11	APR '11	MAY '11	JUN '11
Call Volume		51,150	46,159	52,480	57,658	46,484	42,714	46,823	43,245	43,763	38,902	39,539	44,350
Call Answer Rate (Average)	95%	97.5%	98.1%	97.8%	97.7%	97.7%	97.4%	95.5%	96.5%	98.6%	98.6%	98.6%	98.4%
Abandoned Call Rate (Average)	5%	2.5%	1.9%	2.2%	2.3%	2.3%	2.6%	4.5%	3.5%	1.4%	1.4%	1.4%	1.6%
Average Speed to Answer	0:20	0:15	0:13	0:11	0:09	0:17	0:13	0:34	0:18	0:17	0:18	0:19	0:24
Average Hold Time	0:30	0:43	0:43	0:46	0:45	0:34	0:33	0:35	0:36	0:38	0:35	0:33	5:09
Average Handle Time	2:30	3:08	3:09	3:06	3:07	1:44	1:35	1:35	1:39	3:05	2:57	3:03	1:13
Average After Call Work	1:30	1:19	1:14	1:15	1:12	0:54	1:10	1:30	0:59	0:58	0:51	0:51	98.4%



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MC311 Customer Service Center Performance: Service Level and Call Handling Performance Metrics (2 of 2)

Category	Goal	JUL '11	AUG '11	SEP '11	OCT '11	NOV '11	DEC '11	JAN '12	FEB '12
Call Volume		40,362	51,785	47,809	43,411	42,630	41,877	45,929	40,214
Call Answer Rate (Average)	95%	98.1%	98.1%	97.9%	99.0%	90.7%	98.2%	98.7%	97.7%
Abandoned Call Rate (Average)	5%	1.9%	1.9%	2.1%	1.0%	9.3%	1.8%	1.3%	2.3%
Average Speed to Answer	0:20	0:25	0:14	0:15	0:09	0:29	0:12	0:09	0:14
Average Call Handling Time	3:00	5:06	3:27	3:20	2:54	2:57	3:00	2:51	3:50
Average After Call Work	1:30	1:11	0:57	0:59	0:58	0:58	0:58	0:54	0:53

Based on previous CountyStat sessions, it was agreed that the separate measures for average hold and handle time will be combined to more accurately reflect the call taking process



MC311 Customer Service Center Performance: Occupancy/ Internal Operations Performance Metrics (1 of 2)

Category	Goal	JUL '10	AUG '10	SEP '10	OCT '10	NOV '10	DEC '10	JAN '11	FEB '11	MAR '11	APR '11	MAY '11	JUN '11
Scheduled Customer Service Representatives	N/A	1131	1106	1092	1004	736	917	936	865	935	815	865	823
Actual CSRs	N/A	1056	1047	984	973	700	865	870	813	912	779	842	780
CSR Attendance Rate	N/A	91%	91%	93%	97%	91%	93%	88%	98%	96%	96%	97%	95%
Occupancy Hours (Average)	7:25 Hours	5:41	7:27	7:34	7:24	7:53	8:08	7:58	7:34	7:00	7:26	7:12	6:49

MC311 continually evaluates a number of staffing lessons learned that will guide future operations.

All averages are weighted. Occupancy hours are adjusted to remove scheduled and unscheduled break time.



MC311 Customer Service Center Performance: Occupancy/ Internal Operations Performance Metrics (2 of 2)

Category	Goal	JUL '11	AUG '11	SEP '11	OCT '11	NOV '11	DEC '11	JAN '12	FEB '12
Scheduled Customer Service Representatives	N/A	846	952	928	937	871	928	874	865
Actual CSRs	N/A	820	914	821	906	847	905	850	831
CSR Attendance Rate	N/A	97%	96%	88%	97%	97%	98%	97%	96%
Occupancy Hours (Average)	7:25 Hours	6:38	6:49	6:51	6:03	6:53	6:41	6:39	6:47

MC311 working to improve occupancy by more closely monitoring unscheduled breaks and assuring CSRs select correct codes when away from the phones.



All averages are weighted. Occupancy hours are adjusted to remove scheduled and unscheduled break time.

Discussion of MC311 Customer Survey Data

- **Dates Administered:** 1/23/12 – 2/10/12
- **Distribution Method:** Email
- **Population Included:** Any MC311 Customer Who Provided an Email Address Between 1/23/12 – 2/10/12
- **Next Survey Administration:** April 2012

Survey Completion Statistics	Sep 2010		Jan 2011		Apr 2011		Sep 2011		Jan 2012	
	Total	Percent								
Population Sent To:	2,097	N/A	1,691	N/A	1,627	N/A	1,392	N/A	1,455	N/A
Less Email Bounces:	173	8%	111	7%	149	9%	121	9%	42	3%
Population Receiving Survey Email:	1,924	92%	1,580	93%	1,478	91%	1,271	91%	1,413	97%
Total Responses (includes Opt Outs):	367	19%	304	19%	189	13%	202	16%	159	11%
Request Opt Outs:	27	1%	30	2%	25	2%	40	3%	8	1%



Discussion of Initial MC311 Customer Survey Data: MC311 Customer Self Identification Variables

How many times in the past month did you contact the MC311 Customer Service Center by either dialing 311, 240-777-0311 or one of the 26 other department numbers that now come to 311?

	September 2010		January 2011		April 2011		September 2011		January 2012	
	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count
Once	55.3%	203	36.2%	110	36.0%	68	36%	73	30%	48
Between 2-5	37.1%	136	49.0%	149	45.5%	86	53%	107	59%	94
Between 6-10	4.1%	15	7.2%	22	9.0%	17	5%	10	7%	11
Greater Than 10	0.8%	3	3.0%	9	4.2%	8	4%	8	3%	5
Don't Know	2.7%	10	4.6%	14	5.3%	10	2%	4	1%	1

70 % of survey participants indicate that they are using MC311 on more than one occasion.



MC311 Customer Survey Data: Customer Self Identification

Regarding your most recent call, what was the purpose of the call?										
	September 2010		January 2011		April 2011		September 2011		January 2012	
	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count
Ask a Question	35%	128	36%	108	31%	58	31%	62	33%	53
Report a Problem	28%	103	30%	92	18%	34	24%	48	18%	29
Request Services	28%	104	26%	79	40%	76	34%	68	38%	61
Miscellaneous	5%	20	4%	11	4%	8	8%	17	7%	11
Other	3%	12	5%	14	7%	13	4%	7	3%	5

Since the April survey, the highest percentage of respondents continue to call to “request a service” as opposed to “ask a question”.



MC311 Customer Survey Data: Customer Satisfaction

Please rate your level of satisfaction with the following for your most recent contact to the MC311 Customer Service Center:

		Extremely Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Extremely Dissatisfied	Response Count
The time it took to reach a representative	September 10	38%	39%	10%	6%	7%	366
	January 11	35%	42%	11%	8%	4%	297
	April 11	32%	42%	8%	7%	10%	185
	September 11	37%	46%	6%	6%	5%	202
	January 12	52%	35%	6%	3%	4%	158
The handling of your call	September 10	41%	31%	9%	8%	11%	349
	January 11	31%	41%	10%	11%	7%	287
	April 11	35%	32%	10%	12%	11%	178
	September 11	39%	39%	8%	9%	5%	195
	January 12	49%	29%	3%	12%	8%	147

87% of the survey participants felt the time to reach a representative was satisfactory. This is a increase of 4.8 % from last period. Handling satisfaction remained consistent.



MC311 Customer Survey Data: Customer Satisfaction

Please rate your level of satisfaction with the following for your most recent contact to the MC311 Customer Service Center:

		Extremely Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Extremely Dissatisfied	Response Count
Your overall experience during the call	September 10	40%	31%	9%	9%	11%	349
	January 11	31%	40%	13%	11%	6%	287
	April 11	34%	35%	10%	11%	10%	178
	September 11	37%	42%	8%	8%	5%	196
	January 12	49%	25%	7%	12%	7%	149

79% of the survey participants rated their overall MC311 experience during the call as satisfactory or better.
This is a decline of -2.5 % from last period.



(4)

Discussion of Initial MC311 Customer Survey Data: MC311 Call Service Representative Ratings

Was the Customer Service Representative able to resolve your issue?								
January 2011		April 2011		September 2011		January 2012		
Percent	Count	Percent	Count	Percent	Count	Percent	Count	
Yes	51%	156	56%	106	57%	116	65%	104
No	33%	99	32%	60	32%	64	26%	42
Not Sure	16%	49	12%	23	11%	22	8%	13

The January 2012 survey demonstrated a 14% increase in respondents who felt the Customer Service Representative was able to resolve their issue.



MC311 Areas of Future Focus:

Customer Service Center Operations:

- Study possibility of extending hours of operation to 7:00 – 7:00, Monday through Friday
- Finalize reclassification of transferred employees
- Retiring redirected numbers in a customer friendly manner
- Identify off-site location for contingency plan if Rockville Core becomes unavailable

Ongoing Operations:

- Critical need to upgrade existing telecommunications infrastructure, including upgrade of MC311 telephone switch and implementing call recording compliance software
- Fund Operations and Maintenance of the Siebel and OBIEE applications as well as the addition of future enhancements
- Develop Smart App Suite (iPhone, Android).
- Upgrade the current configured Siebel application to ensure that it is supportable by the vendor.
- Upgrade CMS, Avaya system used to track call data, can be deferred to FY14.
- Transfer the infrastructure support and related budget to DTS, as operations and maintenance of enterprise systems is not a core business function of the PIO



CountyStat Observations and Recommendations

CountyStat is currently working with MC311 to develop a dashboard, accessible by all departments, which provides near real-time service-level agreement (SLA) aging reports

- This dashboard will serve as a macro-level performance management tool for the CAO, an operational reporting mechanism for departmental managers, and a source of greater government transparency for residents

Next Steps:

1. CountyStat will draft guidance to all departments that outlines the proper methodology for closing service requests
2. Departments will audit their existing SLA timeframes if necessary
3. CountyStat and MC311 will work with departments to identify appropriate area and subarea identifiers for departmental knowledge-base articles

After a period of intergovernmental use and refinement, dashboard-generated reports will be available via the county website



Next Steps and Follow-Up Items



311's Coming Transformations

POSTED BY STEPHEN GOLDSMITH | APRIL 18, 2012

This year, Indianapolis will celebrate the 20th anniversary of the Mayor's Action Center, its centralized 311 call center. It was born out of my own unnerving start as mayor. When I asked the staff if I could begin my first day in office answering constituents' calls for services, they asked me which of the 10 places that answer phones I wished to visit.

As Indy celebrates this anniversary, it also trumpets continuing improvements in customer-relations management, the tight connection of 311 data into the city's "stat" program and more. These efforts parallel the build-out of 311 centers around the country, including widely celebrated successes in Baltimore, Chicago and New York City.

Two decades later, now is a good time to reflect both on how much has been accomplished and how a transformative approach can change the relationship between citizens and their governments. New York City, for example, effectively responds to more than 22 million calls a year, providing well prepared responses and using excellent tracking software. There is no buck-passing; there are no untracked service requests.

As many cities now strive to emulate these successes, the existing call centers continue to improve the clarity of their response scripts, make better use of automated systems and intensify efforts to link their call-center software to their departments' work-order systems. This latter improvement not only eliminates the need for double entry of data but also enhances fulfillment and follow up.

At the same time, however, we are at the cusp of truly generational 311 changes that fall into two groups: those that help the current model work better and those that transform the model as well as the relationship between city hall and citizens. In the first category, for example, cities are now investigating both better voice recognition and advances in interactive voice response technology. New York City also is doing exciting pilots with new channels for communication, including using a partner to provide high-quality text responses to incoming texts from citizens seeking information from the 311 center. This process provides the flexibility to handle surge capacity, as shown last year when Hurricane Irene prompted tens of thousands of additional 311 calls in a short timeframe. Moving to a seamless, multichannel communications platform -- one that can accommodate tweets, Facebook posts, texts and more with minimum friction using a variety of devices -- is obviously a requirement.

Yet even advancing the ways in which citizens request services -- from paper, to phone, to interactive voice response, to social networking -- assumes a traditional type of call center. The New York text pilot is the bridge to a dramatically different future. As Joe Morrisroe, the insightful director of NYC 311, says, we are now moving from a "burden-on-citizen" approach to a "citizen-as-sensor" model. One step in that process involves advancing more than just a transparency initiative but one in which the 311 director provides open data sets to community groups, as Morrisroe has done, and asks them for insights into solutions. In addition, customer surveys -- outbound 311 calls, texts or tweets -- that sample satisfaction by service type and geographical area provide insights into where service is exemplary or lagging.

To Morrisroe's list I would add a third model, one that might be called "citizen as partner in fashioning or identifying a solution." Finding collaborative ways for constituents who identify a common problem to work together offers real value. With today's 311 systems, three individuals in a neighborhood might complain about the same issue and not know of each other, let alone be aware of an individual in the area who might have a solution.

Today the very existence of 311 is based on the idea that when citizens need help or have a question, government has the answers. But answers reside everywhere; questions, answers and suggestions must be exchanged in a much more open forum. A more open and collaborative approach raises issues for public officials concerning how information is organized and captured and whether the information is provided by a strategic partner or trusted site or government itself. For example, is three times as much information collected from many and available to all with a 5 percent error rate better or worse than scripted answers to a much smaller universe of questions?

Whatever the answer, the availability of all that information signals the emergence of government as a provider of preemptive services. The future will include applying analytics to 311 data to solve problems *before* they occur -- predicting where a person might fall or a sewer will back up and preventing it rather than merely responding after the fact.

And there will be lots more data to work with. There is much to celebrate in the new Open 311 movement, with cities developing new applications, often through contests like New York City's BigApps, and then making them available to other cities. Clearly the successes of 20 years ago are setting a transformative stage for the future.