MEMORANDUM

April 12, 2011

TO: Government Operations and Fiscal Policy Committee

FROM: Dr. Costis Toregas, Council IT Adviser

SUBJECT: FY12 Operating Budget and CIP Amendments: MC311, section 35 in the Executive's
           Recommended Budget

The following are expected to attend:
      Patrick Lacefield, Director, Office of Public Information
      Leslie Hamm, MC311 Call Center Director
      Mike Ferrara, Executive Director of Enterprise Projects, Office of the CAO
      Joanne Butler, MC311 Program Director
      John Cuff, Office of Management and Budget (OMB)

The relevant pages from the recommended FY12 operating budget are attached on ©1-6, and those from the
Executive's FY11-16 recommended amended CIP are on ©6-9.

Summary of Staff Recommendations

1. **Accept** the Executive's recommended budget of $3,830,720, effectively reducing the budget from
   FY11 levels by $193,100.
2. **Accept** the Executive's recommended budget of $470,000 in the FY11-16 recommended amended
   Capital Improvements program (CIP) to add project organization sustainability.
3. **Discuss** the planned evolution of MC311 across more agencies and jurisdictions in the area and the
   desire to play a more active role in managing service delivery and making it more accountable to the
   residents.

Overview

For FY12, the Executive recommends total expenditures of $3,830,720, down $193,100 or -4.8% from the
FY11 approved budget of $4,023,820. Workyears will stay the same at 35.3, and the number of positions
will increase by 1 (a Subject Matter Expert previously charged to the CIP). See the following table for detail
and a comparison with last year's investments in the MC311 program.

	FY11Budget	FY12 CE Recommended	Change from FY11 Operating Budget to FY12 Recommended Budget	
			Amount	%
Expenditures	$4,023,820	$3,830,720	-$193,100	-4.8%
Positions:				
Full time	39	40	1	%
Part time				
Total positions	39	40	1	%
Workyears	35.3	35.3	0	0%

The MC311 budget appears as a program within the Public Information Office; the entire budget for the Office is presented on ©1-5, with ©3 having the major portion of the changes in the MC311 budget.

In addition to the Operating Budget, the FY11-16 recommended Amended Capital Improvements Program (CIP) also includes a requested allocation for $470,000 for "application support organization". This request and clarifying details appear on ©6-9.

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 18, 2011 worksession is at:

http://www.montgomerycountymd.gov/content/EXEC/stat/pdfs/4_8_11_ppt.pdf

Here are the salient issues (from a data sample taken in early March 2011) that appear in the chosen sample of CountyStat slides:

- ➤ ©11 shows the current metrics that can provide management information regarding how quickly calls are answered, how often calls are put on hold, and how long it takes for a call to be completed.
- ➤ ©12 shows the types of calls handled by the MC311 operators. The vast majority of the 40,000 monthly calls are General Information calls that are mostly handled at the Center itself.
- ➤ ©13 shows that the top 3 issues being handled are RideOn information, Directory Assistance, and property tax questions.
- ➤ ©14 and ©15 show areas of current and future focus for MC311.
- ➤ ©16 provides the CountyStat observations on data reporting.

CountyStat has also begun a collaborative effort to look beyond the MC311 operations and probe for productivity gains and process improvements in areas of high visibility and citizen interest. Two recent CountyStat sessions focused on pothole repairs and trash pickups; sample issues from the discussions are on ©18-21.

Issues around the budget submission

1. Why is a subject matter expert (SME) transferred to the PIO budget from the CIP? How many others are still in the CIP, yet serving MC311?

The development of MC311 began as a project within the Technology Modernization initiative that is a CIP-funded effort. Last year, MC311 was shifted to the Operating Budget within the Office of Public Information. Two of the required Subject Matter Experts (SMEs) were transferred outright, and the third (an SME from DHCA) is being transferred to the MC311 team in FY12 as per plan. These three Business Analyst positions provide the project with the capacity to look across the 38 participating organizations, ensure that the knowledge base is up to date and well managed, and in general find ways to improve services and provide new capability through analyzing transactions across the entire system. There are no additional SMEs in the CIP portion of MC311, so this transfer will not be repeated in subsequent years.

2. What does the mid-year addition of a supervisor position bring to the project? Why is there no $ impact?

This supervisor is the 4th position foreseen in the operation plan for MC311. There is no financial impact in FY12 as the position is supported through lapses. However, in FY13, all 4 supervisor positions will appear in the operating budget as expenses.

3. What is the long-term strategy for supporting the back end systems? Their interface with ERP?

The Executive has provided the following answer to this important question:

> *The additional $470k in funding in the Tech Mod CIP will allow the project team to obtain the necessary staffing support to begin the formation of the next necessary stage of organization, managed from the Offices of the County Executive and tasked with managing, maintaining, and enhancing the 3 systems included in the Tech Mod budget. The systems are MCTime, MC311, and ERP.*

> *Although the MCTime, MC311, and ERP are on separate development tracks, they will eventually be integrated. For example, it is the County's CRM/311 vision that a 3-1-1 call can initiate a service request that integrates with the ERP work order functions. Similarly, the MCTime vision is to serve as the employee front-end to many of the ERP payroll functions.*

> *As each project within the Tech Mod program is completed, the project will be moved into "sustainability mode." This mode is comprised of operating, maintaining, optimizing, and enhancing the systems, establishing the support infrastructure for the project, and eventually retiring and closing the project. Once all of the Tech Mod projects are completed, the Tech Mod program will also close. An organization designed to sustain the objectives of Tech Mod will replace the program.*

> *There are many decisions yet to be made concerning the ultimate structure of what we are calling the "Sustaining Organization" for Tech Mod. The current plan is to have the organization managed from the Offices of the County Executive but staffed with business analysts, subject matter experts, technical, and other resources from various operating departments. The 311/CRM initiative is closest to completion and is ready to begin staffing the Sustaining Organization now. ERP is much larger but has not yet reached a point where the project team can determine the support level required to meet the needs of operations, maintenance, and enhancements. As ERP nears completion, we will have a much clearer picture of Tech Mod support needs and will present them to the GO committee for review and discussion.*

4. Provide an organizational chart for MC311.

This is provided as ©17.

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 FY12 Operating Budget for the Office of Public Information is $4,748,650, a decrease of $211,700 or 4.3 percent from the FY11 Approved Budget of $4,960,350. Personnel Costs comprise 76.4 percent of the budget for 61 full-time positions for 41.7 workyears. Operating Expenses account for the remaining 23.6 percent of the FY12 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 FY11 estimates incorporate the effect of the FY11 savings plan. FY12 and FY13 targets assume the recommended FY12 budget and FY13 funding for comparable service levels.

Measure	Actual FY09	Actual FY10	Estimated FY11	Target FY12	Target FY13
Internal County staff satisfaction with PIO services (scale of 1 [lowest] to 4 [highest])	3.23	3.16	3.16	3.23	3.23

ACCOMPLISHMENTS AND INITIATIVES

❖ **MC311 customer service call center was named the Silver Winner of the 2011 Gartner and 1to1 Media Customer Relationship Management (CRM) Excellence Awards. Montgomery County's Silver Award was in the category of Customer Analytics, Americas Region.**

❖ **Launched the MC311 customer call center to enhance direct services to residents, along with an on line portal to services that are available around the clock. Promoted these new services to residents via free media, social media, traditional brochures and flyers, County website features, cable television shows and public service announcements, messages to email subscription lists, ListServs and other means.**

❖ **Provided more direct communication with residents by creating, developing and maintaining publications such as the County Executive's newsletter; cable television shows such as County Report, One-on-One and the Call-In Show; and social media sites such as YouTube, podcasting, Facebook, Twitter; and expanded email subscription lists and connections to various ListServs.**

❖ **Produced cable television specials, brochures and website features on issues of importance to the County.**

❖ **Worked more closely with departments and agencies on communication strategies in order to ensure that the County Executive's priorities are promoted clearly and accurately.**

❖ **Productivity Improvements**

- **The MC311 Call Center has handled over 417,000 calls since its June 2010 launch. The average speed of answer is 16 seconds and the average call time is approximately three minutes.**

- **Public information officers and graphic designers now handle media relations and marketing requests from departments; this service was formerly contracted out.**

- *The department enhanced 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 the loss of a producer position in FY11.*

PROGRAM CONTACTS

Contact Donna Bigler of the Office of Public Information at 240.777.6537 or John Cuff of the Office of Management and Budget at 240.777.2762 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 and Cable Programming in developing materials for press events and publications.

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, 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.

FY12 Recommended Changes	Expenditures	WYs
FY11 Approved	**84,790**	**1.0**
Reduce: Web Services Contract	-20,000	0.0
Miscellaneous adjustments, including restoration of employee furloughs, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting more than one program	31,870	0.0
FY12 CE Recommended	**96,660**	**1.0**

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 FY09	Actual FY10	Estimated FY11	Target FY12	Target FY13
Percentage of Maryland Public Information Act (MPIA) requests completed within 30 days[1]	95	95	85	90	90
Total utilization of direct resident communication systems - web, YouTube, video, podcasts, Facebook (million)	NA	14.1	14.4	15.0	15.0
Number of press conferences[2]	160	164	157	160	160
Total attendance at press conferences or press events	NA	1,915	3,260	1,900	1,900
Number of press requests under the MPIA	20	29	36	35	35

[1] Although a response goes out within 30 days for each request, extensive requests often take months to complete.
[2] Press conference attendance.

FY12 Recommended Changes	Expenditures	WYs
FY11 Approved	**851,740**	**5.2**

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	Expenditures	WYs
Increase Cost: Restore Personnel Costs - Furloughs	77,230	1.5
Increase Cost: Resident Survey - PIO	29,140	0.0
Decrease Cost: Telephone and Cell Phone Usage	-10,360	0.0
Eliminate: Spanish Language Public Information Officer Contract	-26,500	0.0
Miscellaneous adjustments, including restoration of employee furloughs, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting more than one program	-99,980	-1.3
FY12 CE Recommended	**821,270**	**5.4**

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 will provide the general public with a higher quality of service delivery and accountability, while helping the Government achieve operational efficiencies.

FY12 Recommended Changes	Expenditures	WYs
FY11 Approved	**4,023,820**	**35.3**
Increase Cost: Funding for Subject Matter Expert Previously Charged to CIP	145,000	1.0
Technical Adj: Supervisor Position Added Mid-Year	0	1.0
Decrease Cost: Charges to Health and Human Services for MC311 Customer Service Staff Transfer	-19,300	-0.3
Eliminate: Three Public Safety Telephone Reporting Aide Positions	-258,150	-3.0
Miscellaneous adjustments, including restoration of employee furloughs, employee benefit changes, changes due to staff turnover, reorganizations, and other budget changes affecting more than one program	-60,650	1.3
FY12 CE Recommended	**3,830,720**	**35.3**

BUDGET SUMMARY

	Actual FY10	Budget FY11	Estimated FY11	Recommended FY12	% Chg Bud. Rec
COUNTY GENERAL FUND					
EXPENDITURES					
Salaries and Wages	762,152	2,801,700	2,753,680	2,873,050	2.5%
Employee Benefits	293,067	1,011,760	1,068,720	755,420	-25.3%
County General Fund Personnel Costs	*1,055,219*	*3,813,460*	*3,822,400*	*3,628,470*	*-4.9%*
Operating Expenses	99,173	1,146,890	1,088,350	1,120,180	-2.3%
Capital Outlay	0	0	0	0	—
County General Fund Expenditures	*1,154,392*	*4,960,350*	*4,910,750*	*4,748,650*	*-4.3%*
PERSONNEL					
Full-Time	13	62	62	61	-1.6%
Part-Time	0	0	0	0	—
Workyears	7.9	41.5	41.5	41.7	0.5%

FY12 RECOMMENDED CHANGES

	Expenditures	WYs
COUNTY GENERAL FUND		
FY11 ORIGINAL APPROPRIATION	**4,960,350**	**41.5**
Changes (with service impacts)		
Reduce: Web Services Contract [Web Content and Graphic Management]	-20,000	0.0
Eliminate: Spanish Language Public Information Officer Contract [Public Relations]	-26,500	0.0
Eliminate: Three Public Safety Telephone Reporting Aide Positions [MC311 Customer Service Center]	-258,150	-3.0
Other Adjustments (with no service impacts)		
Increase Cost: Funding for Subject Matter Expert Previously Charged to CIP [MC311 Customer Service Center]	145,000	1.0
Increase Cost: Restore Personnel Costs - Furloughs [Public Relations]	77,230	1.5
Increase Cost: Resident Survey - PIO [Public Relations]	29,140	0.0
Increase Cost: Printing and Mail Adjustment	1,040	0.0
Increase Cost: Help Desk - Desk Side Support	230	0.0
Technical Adj: Supervisor Position Added Mid-Year [MC311 Customer Service Center]	0	1.0
Decrease Cost: Motor Pool Rate Adjustment	-260	0.0
Decrease Cost: Telephone and Cell Phone Usage [Public Relations]	-10,360	0.0
Decrease Cost: Charges to Health and Human Services for MC311 Customer Service Staff Transfer [MC311 Customer Service Center]	-19,300	-0.3
Decrease Cost: Retirement Adjustment	-46,480	0.0
Decrease Cost: Group Insurance Adjustment	-83,290	0.0
FY12 RECOMMENDED:	**4,748,650**	**41.7**

PROGRAM SUMMARY

Program Name	FY11 Approved		FY12 Recommended	
	Expenditures	WYs	Expenditures	WYs
Web Content and Graphic Management	84,790	1.0	96,660	1.0
Public Relations	851,740	5.2	821,270	5.4
MC311 Customer Service Center	4,023,820	35.3	3,830,720	35.3
Total	**4,960,350**	**41.5**	**4,748,650**	**41.7**

CHARGES TO OTHER DEPARTMENTS

Charged Department	Charged Fund	FY11		FY12	
		Total$	WYs	Total$	WYs
COUNTY GENERAL FUND					
Cable Television	Cable Television	704,850	6.6	684,980	6.6
Health and Human Services	County General Fund	26,240	0.4	45,540	0.7
Housing and Community Affairs	Montgomery Housing Initiative	66,060	1.0	63,060	1.0
Permitting Services	Permitting Services	179,030	3.0	178,830	3.0

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Charged Department	Charged Fund	FY11 Total$	WYs	FY12 Total$	WYs
Solid Waste Services	Solid Waste Collection	286,200	5.0	291,500	4.8
Solid Waste Services	Solid Waste Disposal	85,250	1.0	69,540	1.3
Total		**1,347,630**	**17.0**	**1,333,450**	**17.4**

FUTURE FISCAL IMPACTS

	CE REC. FY12	FY13	($000's) FY14	FY15	FY16	FY17
This table is intended to present significant future fiscal impacts of the department's programs.						
COUNTY GENERAL FUND						
Expenditures						
FY12 Recommended	**4,749**	**4,749**	**4,749**	**4,749**	**4,749**	**4,749**
No inflation or compensation change is included in outyear projections.						
Restoration of One-Time Reductions Recommended in FY12	**0**	**57**	**57**	**57**	**57**	**57**
Items recommended for one-time reductions in FY12, including telephone and cell phone usage ($10,360), web services contract ($20,000), and the Spanish language Public Information Officer contract ($26,500), will be restored in the outyears.						
Motor Pool Rate Adjustment	**0**	**3**	**3**	**3**	**3**	**3**
Subtotal Expenditures	**4,749**	**4,808**	**4,808**	**4,808**	**4,808**	**4,808**
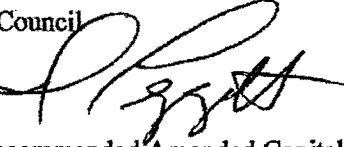
Isiah Leggett
County Executive

MEMORANDUM

March 15, 2011

TO: Valerie Ervin, President, County Council

FROM: Isiah Leggett, County Executive

SUBJECT: Budget Adjustments: FY11-16 Recommended Amended Capital Improvements Program (CIP)

In January 2011, I submitted my recommended FY12 Capital Budget and limited amendments to the FY11-16 Capital Improvements Program (CIP). Since then, I have reviewed a number of CIP issues and proposals relating primarily to our allocation of tax supported current revenue resources. Consequently, I am recommending adjustments to align the CIP and Capital Budget with FY12 Operating Budget recommendations, and to adjust specific projects based on more current information.

I recommend that the County Council consider these adjustments in its final budget worksessions over the next few weeks. As always, Executive Branch staff are available to assist you in your review of the budget

IL:ad

Attachments: • Recommended Budget Adjustments Summary
              • Project Description Forms
              • Tax Supported Current Revenues Adjustment Chart

IL:ad

c: Stephen B. Farber, County Council Staff Director
     Joseph F. Beach, Director, Office of Management and Budget
     Jennifer Barrett, Director, Department of Finance
     Kathleen Boucher, Assistant Chief Administrative Officer
     Uma S. Ahluwalia, Director, Department of Health and Human Services
     Steve Silverman, Director, Department of Economic Development
     Gabriel Albornoz, Director, Department of Recreation
     Arthur Holmes, Jr., Director, Department of Transportation
     Françoise Carrier, Chair, Montgomery County Planning Board

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FY11-16 BIENNIAL RECOMMENDED CIP
BUDGET ADJUSTMENTS ('$000)
MARCH 15, 2011

DEPT	PROJECT NAME	EXPLANATION OF ADJUSTMENT (Note 1)	FY11-16 ($'000)	FUNDING SOURCES
		FY12 ADJUSTMENTS/REDUCTIONS		
DOT	Pkg Silver Spring Fac. Renovations	Reduce project scope	(12,883)	Revenue Bonds
DOT	Montgomery Mall Transit Center	Shift to FY13 to reflect current implementation plan	-	Mass Transit
DOT	Ride On Bus Fleet	Reduce project scope	(1,914)	Mass Transit
DOT	Bus Stop Improvements	Reduce project scope	(400)	Mass Transit
DOT	White Flint District East: Transportation	Add cost of new bridge to project scope	4,500	White Flint - Special Tax District
DOT	Facility Planning-Transportation	Reduce project scope for consultant work (FY11) and Flower Ave (FY16); Increase scope for BRT study	(180) 250	Current Revenue General Land Sale Proceeds
DOT	Flower Avenue Sidewalk	Add new project Payment to City of Takoma Park (FY16)	70	Current Revenue General (FY16)
MCG: GEN REC	Cost Sharing	Increase project scope: Cardinal McCarick ($125k), Ivymount School ($100k), and CHI ($200k)	425	Current Revenue General
MCG: GEN	Technology Modernization	Add project organization sustainability for MC311 ($470k) and project planning for HHS IT ($300k)	770	Current Revenue General
DED	Ag Land Easements	Add planned use of investment income and contributions	90 40	Investment Income Contributions
M-NCPPC	Legacy Open Space	Reduce project scope	(50)	Current Revenue General
M-NCPPC	Planned Lifecycle Replacement (PLAR) Non-Local Parks	Reduce project scope	(100)	Current Revenue General
M-NCPPC	Warner Circle Special Park	Increase project scope	275	State Bonds (P&P Only)

Note (1) See details in attached PDFs

Technology Modernization – MCG – No. 150701

Category	General Government	Date Last Modified	March 11, 2011
Subcategory	County Offices and Other Improvements	Required Adequate Public Facility	No
Administering Agency	County Executive	Relocation Impact	None.
Planning Area	Countywide	Status	On-going

EXPENDITURE SCHEDULE ($000)

Cost Element	Total	Thru FY10	Rem. FY10	Total 6 Years	FY11	FY12	FY13	FY14	FY15	FY16	Beyond 6 Years
Planning, Design, and Supervision	80,979	40,887	11,517	28,575	17,095	11,480	0	0	0	0	0
Land	0	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0	0	0
Total	80,979	40,887	11,517	28,575	17,095	11,480	0	0	0	0	0

FUNDING SCHEDULE ($000)

	Total	Thru FY10	Rem. FY10	Total 6 Years	FY11	FY12	FY13	FY14	FY15	FY16	Beyond 6 Years
Current Revenue: General	42,856	25,234	92	17,530	11,462	6,068	0	0	0	0	0
Land Sale	2,634	2,634	0	0	0	0	0	0	0	0	0
Short-Term Financing	35,489	13,019	11,425	11,045	5,633	5,412	0	0	0	0	0
Total	80,979	40,887	11,517	28,575	17,095	11,480	0	0	0	0	0

OPERATING BUDGET IMPACT ($000)

					FY11	FY12	FY13	FY14	FY15	FY16	
Maintenance				37,573	6,036	8,527	11,336	11,674	0	0	
Productivity Improvements				-20,000	0	0	-5,000	-15,000	0	0	
Net Impact				17,573	6,036	8,527	6,336	-3,326	0	0	

DESCRIPTION

This project provides for the replacement, upgrade, and implementation of IT initiatives that will ensure ongoing viability of key processes, replace outdated and vulnerable systems, and produce a high return in terms of customer service and accountability to our residents. Major new IT systems being launched through this project are Enterprise Resource Planning (ERP), 311/Constituent Relationship Management (CRM), related Business Process Review (BPR) and planning activities for a new Department of Health and Human Services IT system to better support client services . ERP will modernize our Core Business Systems to improve the efficiency, effectiveness, and responsiveness of the County Government. The ERP project will provide needed upgrades to the County's financial, procurement, human resource, and budgeting systems and will streamline existing business processes. Business Process Review is occurring as part of ERP requirements analysis and planning. The first phase of this project, MCtime, the implementation of electronic time reporting, is well underway. A new 311/CRM system will combine advanced telephony, internet, and computer technology with constituent-focused business processes. Residents will ultimately be able to call one number to access County government services and built-in tracking and accountability features will assure that every call receives a timely response. Completion of Phase I of the current MC311 (CRM) will include developing an automated service request processing system for the County's Department of Transportation including converting the systems currently used for leaf pick-up, snow removal, tree issues, and street light outages. A competent application support organization will be included as part of MC311 to maintain the mission-critical application without interruption to business users.

COST CHANGE

Increase due to the addition of planning funds for the Department of Health and Human Services Client Services IT project ($300k) and application support organization for MC311 ($470k).

JUSTIFICATION

According to a 2004 ranking of major existing technology systems based on their current health and relative need for upgrade or replacement, the County's current core business systems (ADPICS, FAMIS, BPREP, and HRMS) were ranked as Priority #1, which means "obsolete or vulnerable critical system in immediate risk of failure." These at-risk systems will be replaced with a state of the art ERP system which will provide a common database supporting financials, procurement, budget, and HR/payroll, and will include system-wide features for security, workflow, and reporting, and up-to-date technology architecture. Montgomery County seeks to set a national standard for accountability and responsiveness in governance and the delivery of services to its residents and businesses. A customer-oriented 311/CRM system is needed as a single one-stop-shop phone number and intake system to meet this growing demand. A competent application support organization is required to maintain the mission-critical application: without interruption to business users; to ensure high-availability to customers; to provide assistance to end-users; and to ensure that desired business process changes to the MC311 solution can be reengineered, implemented and deployed. The current cost estimate is based on detailed review of integrator, staffing, hardware, and software costs.

Information Technology Interagency Funding and Budgeting Committee's report of September 30, 2003.
MCG FY06 IT Budget Overview prepared by DTS.

OTHER

The Technology Modernization - MCG project has been intended to serve as an ongoing resource for future IT modernization to the County Government's

APPROPRIATION AND EXPENDITURE DATA

Date First Appropriation	FY07	($000)
First Cost Estimate Current Scope	FY12	80,979
Last FY's Cost Estimate		80,209
Appropriation Request	FY12	5,308
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		75,671
Expenditures / Encumbrances		59,092
Unencumbered Balance		16,579
Partial Closeout Thru	FY09	0
New Partial Closeout	FY10	0
Total Partial Closeout		0

COORDINATION

MCG efforts must be coordinated with the recent implementation of a new Financial Management System by MCPS and efforts by other agencies to ensure data transportability and satisfy reporting needs between agencies. Project staff are drawing on the implementation experiences of MCPS, WMATA and governments with functions and components similar to MCG during the project planning, requirements gathering, and requests for proposal (RFP) phases.
Offices of the County Executive
Office of the County Council
Department of Finance
Department of Technology Services
Office of Procurement
Office of Human Resources
Office of Management and Budget
Department of Health and Human Services
All MCG Departments and Offices

MAP

County Council
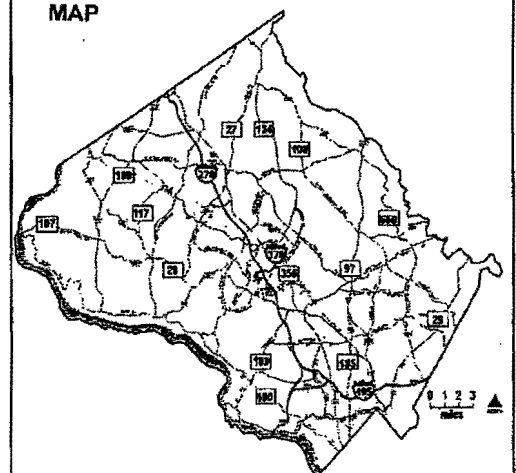
business systems beyond the currently defined project scope. Future projects may include the following:

CRM

Phase II: This initiative will extend the service to municipalities in the County, and other County agencies (e.g. Board of Education, M-NCPPC, Montgomery College). This initiative will proceed based upon interest from these organizations and agreement on funding.

Creation of a Citizen Relationship Management (CRM) program which will develop or convert automated capabilities for all appropriate County services including:

Case Management
Events Management
Field Services
Grants Management
Help Desk Solutions
Point of Sales
Resident Issue Tracking System
Work Order Processing System

ERP

Business Intelligence/Data Warehouse Development
Loan Management
Property Tax Billing and Collection
Public Access to Contractor Payments
Upgrade to Oracle E-Business/Kronos/Siebel
Enhancements to comply with evolving Payment Card Industry (PCI) mandates

FISCAL NOTE

Project funding includes short-term financing for integrator services and software costs. Operating Budget Impact revised in FY13 and FY14 to reflect Council productivity targets.

Montgomery County 311
Quarterly Performance Review

Patrick Lacefield

Director Public Information Office

March 18th, 2011

CountyStat

MC311 Customer Service Center Performance:
Initial Call Metric Range Findings – Early March

Range of Average Speed to Answer

Seconds	# Calls
Total	13751
0-10	10419
11-25	2703
26-60	486
61-120	99
121-140	7
141-220	21
221-280	5
281-320	1
321-420	0
421+	10

Range of Average Hold Time

Minutes	# Calls
Total	100
0:00 - 0:30	57
0:31 - 1:00	12
1:01 - 1:30	14
1:31 - 2:00	3
2:00 - 2:30	4
2:31 - 3:00	1
3:01 - 3:30	2
3:31 - 4:00	3
4:01 - 4:30	1
4:31 +	3

Range of Average Handle Time

Minutes	# Calls
Total	100
0:00 - 1:00	34
1:01 - 2:00	21
2:01 - 2:30	9
2:31 - 3:00	6
3:01 - 3:30	8
3:31 - 4:00	3
4:01 - 4:30	6
4:31 - 5:00	6
5:31+	7

Range of Average After Call Work

Minutes	# Calls
Total	100
0:00 - 0:30	34
0:31 - 1:00	28
1:01 - 1:30	13
1:31 - 2:00	6
2:01 - 2:30	5
2:31 - 3:00	4
3:01 - 3:30	1
3:31 - 4:00	1
4:01+	8

With the installation of a new system, MC311 can now track call taking metrics by range in order to identify areas for improvement

MC311 Customer Service Center Call Types:
Intake Category Statistics

—◆—General Information   —■—Service Request - Fulfillment   —▲—Referral   —✕—Complaint/Compliment
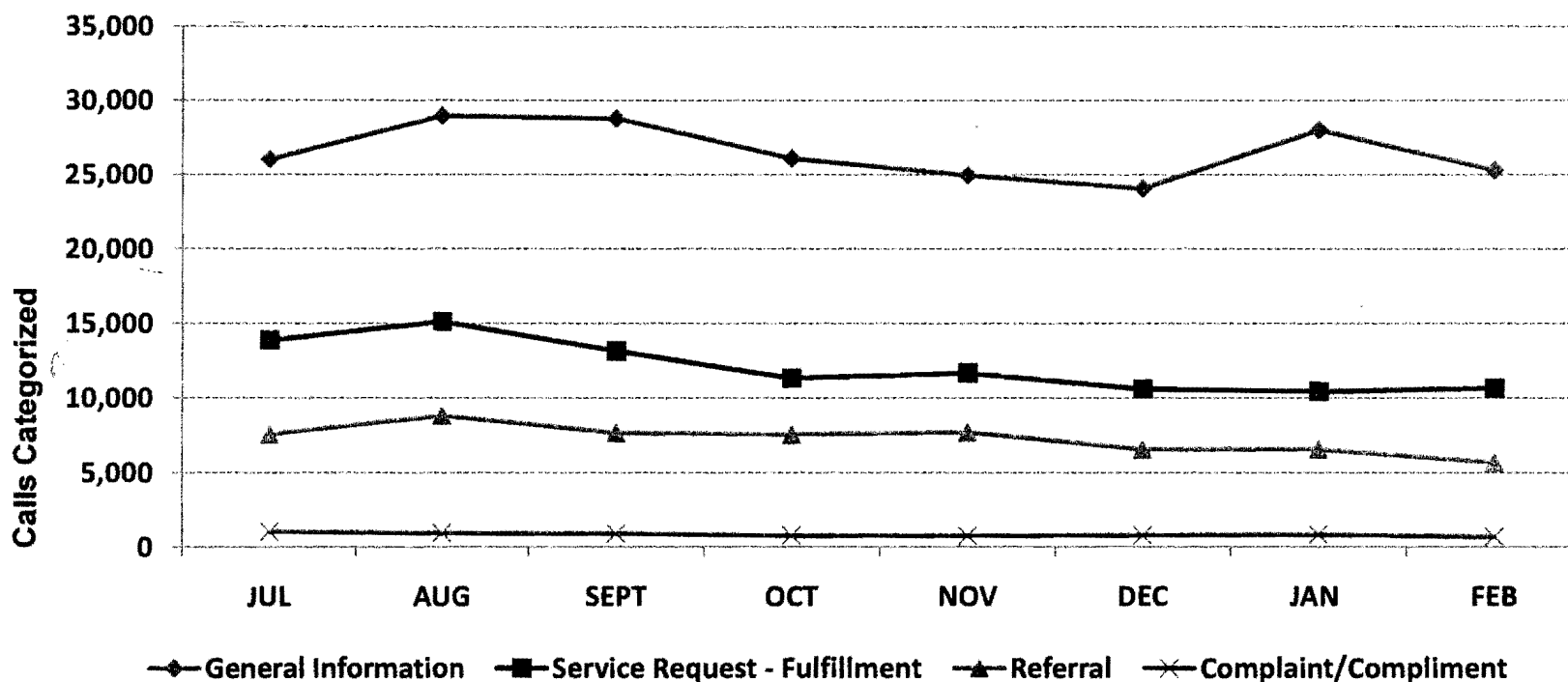
Customer Request Type	JUL	AUG	SEPT	OCT	NOV	DEC	JAN	FEB
General Information	26,039	28,975	28,801	26,099	24,972	24,080	28,017	25,309
Service Request - Fulfillment	13,890	15,144	13,183	11,346	11,703	10,617	10,443	10,672
Referral	7,588	8,850	7,678	7,565	7,732	6,574	6,571	5,706
Complaint/Compliment	1,034	939	897	759	738	778	829	693

Top 25 Solution Areas From July Through February

Organization Name	Solution Name	# of CR	Rank
DOT	Ride On bus trip planning/location/status/scheduled arrival time	33,779	1
PIO	Directory Assistance	17,826	2
FIN	Requests to discuss property tax bill	17,396	3
DEP	Bulk trash pickup	16,478	4
DEP	Bulk Trash Pick-Up Request	12,036	5
DEP	Scrap Metal Pick-Up Request	12,027	6
DEP	Bin Request - New (Recycling)	10,839	7
PIO	Hang Up or Dropped Call	9,937	8
DEP	Unacceptable for Collection (For Use by SWS Field Staff Only)	5,164	9
Non-MCG	Requests to discuss property tax bill/assessment/credits	4,870	10
DPS	Schedule DPS Building Construction Related Permitting Inspections	4,778	11
Non-MCG	MANNA Food Center Referral	4,241	12
FIN	Information printed on the tax bill	3,935	13

MC311 Areas of Current and Future Focus

Customer Service Center (CSC)

- Continue to streamline CSC operations and capture efficiencies by identifying "broken" business processes, such as Manna referrals and DOT swivels
- Continue to cross train additional CSRs specific systems in order to "flatten" operation
- Continue to work with Departments to adequately status service requests to provide the customer with status update
- Define minimum staffing levels and re-evaluate staffing requirements in order to determine the CSC's ability to consume additional workload, i.e., FIN, OHR, etc.
- Develop a strategic training plan for operations
- Effectively manage a unique, highly structured operation within County Government while maintaining a productive relationship with union membership and leadership
- Ongoing requirement for additional telecom expertise and resourcing

MC311 Areas of Current and Future Focus

Program Management Office (PMO)

- Continue work with using Departments to reengineer broken and inefficient business processes

- Continue work with OHR on business process reengineering and customer intake

- Develop a strategic plan for the consumption of additional numbers and workload

- Launch "Spring" marketing campaign which will advertise contacting 3-1-1 directly

- Rolling-off existing team of contractors. In the process of finalizing task orders for application support to continue system application improvements, break-fixes, and elimination of "swivel", i.e., eProperty, Snow Map, etc.

- Prepare for organizational or structural changes resulting from the passage of new legislation and budget finalization

- Prototype ability to stand-up a "mobile" unit outside the Rockville core

CountyStat Observations on MC311 Data Reporting

- CountyStat continues to work with MC311 to identify opportunities to shape overall ERP performance reporting efforts

- MC311 has replaced numerous legacy systems with integrated CRM systems which will streamline back office processes and performance reporting.
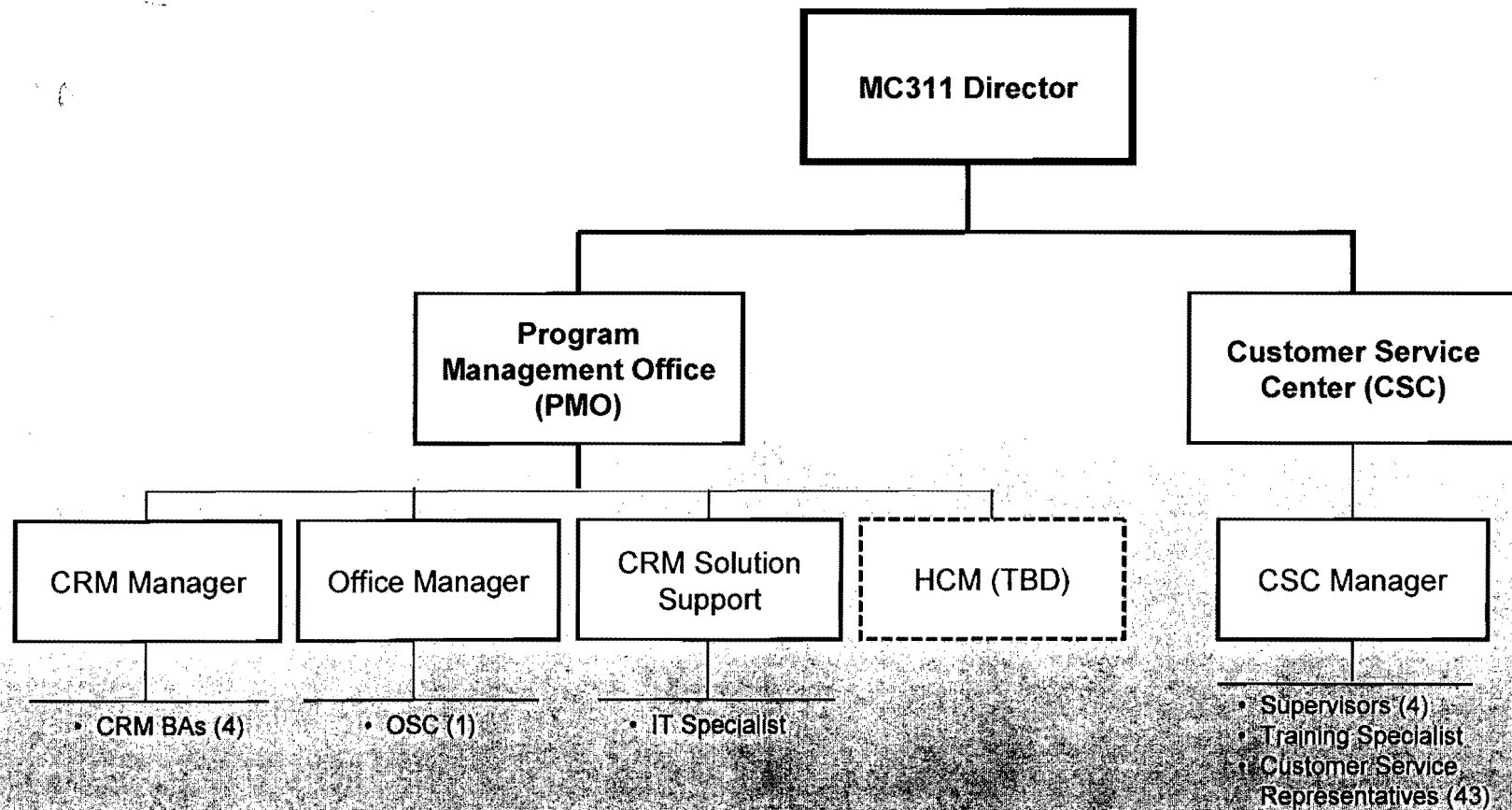
  Examples include:
  - DOT Highway Service Request Application
  - DOT Highway Leaf Application
  - DOT Transit Complaint Database *(After CountyStat Session)*
  - DHCA Online Complaint Intake *(After CountyStat Session)*
  - DEP OSCAR

- Montgomery County has existing "canned" reporting functionality but lacks the long-term technical support, at the enterprise level, for the ongoing creation, utilization, and maintenance of departmental performance dashboards
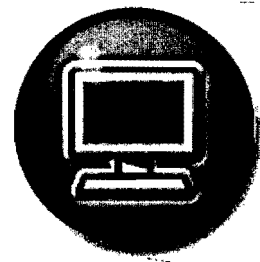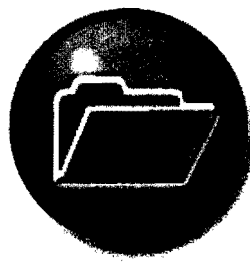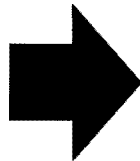
MC311 Organization Chart

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                          ┌─────────────────┐
                          │  MC311 Director  │
                          └─────────────────┘
                                   │
              ┌────────────────────┴────────────────────┐
     ┌──────────────────┐                      ┌──────────────────┐
     │     Program       │                      │ Customer Service  │
     │ Management Office  │                      │   Center (CSC)    │
     │      (PMO)         │                      └──────────────────┘
     └──────────────────┘                                │
    ┌────────┬────────┬────────┬──────────┐              │
┌────────┐┌────────┐┌────────┐┌─────────┐        ┌──────────────┐
│  CRM   ││ Office ││  CRM   ││  HCM    │        │     CSC      │
│Manager ││Manager ││Solution││ (TBD)   │        │   Manager    │
│        ││        ││Support ││         │        │              │
└────────┘└────────┘└────────┘└─────────┘        └──────────────┘
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- CRM BAs (4)
- OSC (1)
- IT Specialist

- Supervisors (4)
- Training Specialist
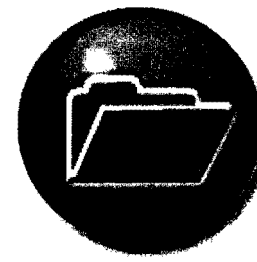- Customer Service Representatives (43)

Current Pothole Service Request DOT Back-Office Process

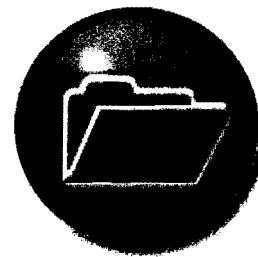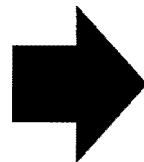**Receive and Review Siebel Request**

Print Siebel Request

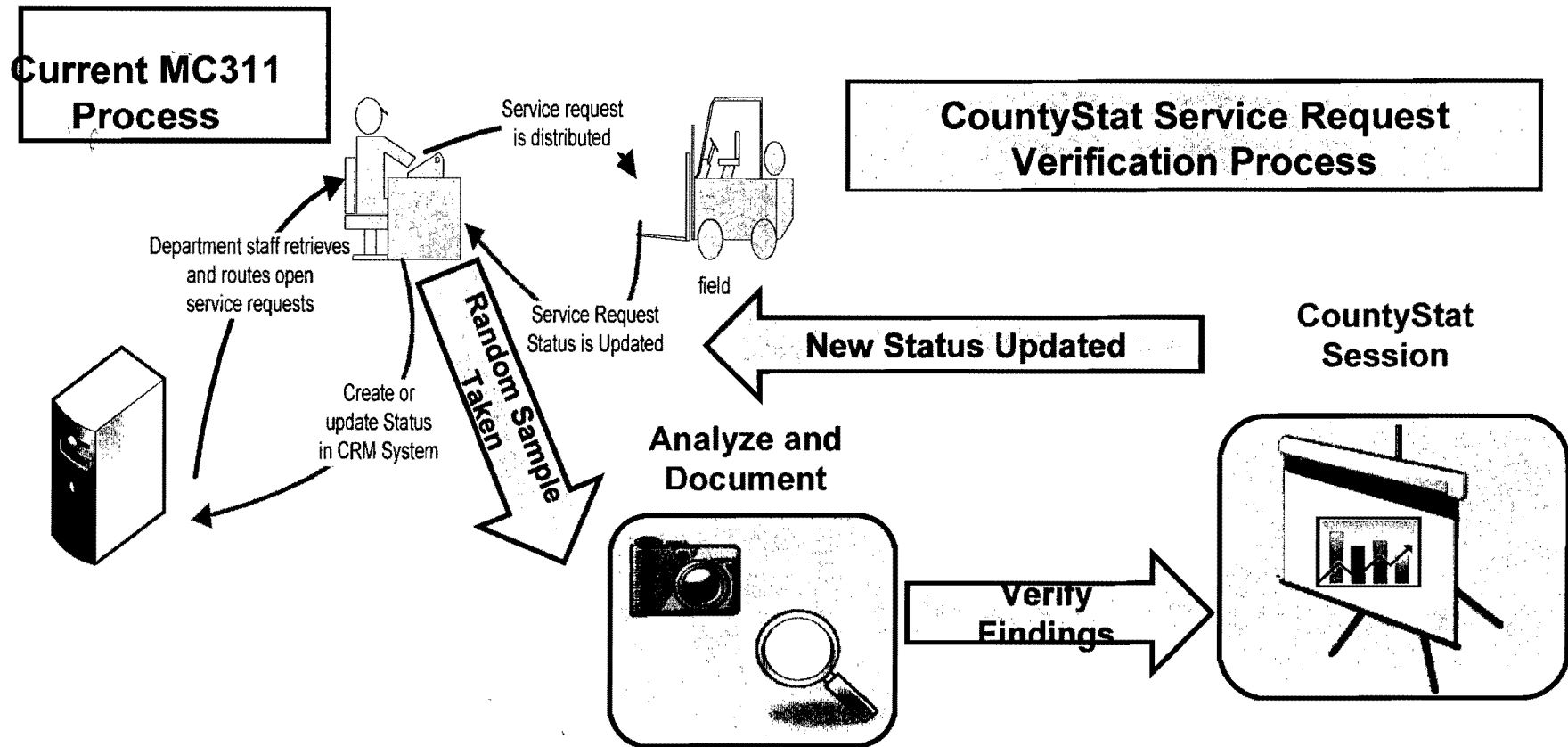**File Printed Siebel Request For Work Dispatch**

Repair Pothole

Note Completed Work on Printed Request

Close out Siebel Request

CountyStat Performance Auditing Process

CountyStat conducts a random sampling of completed service requests, manually verifies that request is completed, and holds CountyStat session with representative department(s) to discuss results of the analysis

Current MC311 Process

Service request is distributed

CountyStat Service Request Verification Process

Department staff retrieves and routes open service requests

field

Service Request Status is Updated

New Status Updated

CountyStat Session

Create or update Status in CRM System

Random Sample Taken

Analyze and Document

Verify Findings

Solid Waste Top 5 Sub Areas: Current and Future Processes

Bulk Trash and Scrap Metal Request

Current Process: MC311 intake via phone; service request received and reviewed for accuracy by DSWS staff. Service requests containing errors are returned to MC311 for correction; correction made and returned to DSWS. Contractor notified and service is scheduled for next collection day.

Tracking System: Siebel

Service Request Closure: Upon verification that collection is complete, Field Inspector closes service request. This is a new task for Inspectors. 13 Service Areas = 500 Service Requests for bulk trash each week.

Future Changes: Will test feasibility of online scheduling of bulk trash

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Total
Bulk Trash Request	2,395	2,902	2,287	2,001	2,154	1,949	1,444	1,110	16,242
Scrap Metal Request	2,238	2,504	1,950	1,864	1,929	1,493	1,144	926	14,048

Note: This data draws from the legacy system, which might not match exactly with DEP internal figures. With the retiring of the OSCAR system, there should be no discrepancies.

CountyStat

Solid Waste Top 5 Sub Areas: Current and Future Processes

Field Check/Complaint

Current Process: MC311 intake via phone; service request received and reviewed for accuracy by DSWS staff. Service requests containing errors are returned to MC311 for correction; correction made and returned to DSWS. DSWS dispatches via Nextel or the Field Inspector receives copy of SR, conducts inspection, customer contacted, service provided. Contractor notified and service is scheduled if needed.

Tracking System: Siebel

Service Request Closure: Field Inspector closes SR.

Future Changes:

1. Look into feasibility of adding GPS feature to produce maps and directions for field personnel. Will increase efficiency, and save time and fuel.

2. Hand held printers to produce Notice of Violations, Citations, and notices to customers from SRs. These are currently done by hand.

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Total
Field Check	223	213	191	179	138	125	101	221	1,391

Note: This data draws from the legacy system, which might not match exactly with DEP internal figures. With the retiring of the OSCAR system, there should be no discrepancies.

CountyStat