

GO Committee #1
November 9, 2020

Worksession

MEMORANDUM

November 4, 2020

TO: Government Operations and Fiscal Policy Committee

FROM: Dr. Costis Toregas, Council IT Adviser
Linda McMillan, Senior Legislative Analyst

SUBJECT: MC311 Performance

PURPOSE: No decisions are to be made in this worksession - the Committee will review information regarding factors influencing the performance of the MC311 Customer Service Center and explore alternative actions that can be taken to strengthen it.

The following are expected to attend:

Fariba Kassiri, Deputy Chief Administrative Officer
Barry Hudson, Director, Public Information Office
Brian Roberts, Acting Manager, MC311
Gail Roper, Director, Department of Technology Services (DTS)
Shayna Taqi, DTS Change Management
Dr. Raymond Crowel, Director, Health and Human Services

Summary of Staff Recommendations:

There are no decisions to be made during this worksession. The Committee requested a review of factors that affect the currently poor levels of performance indicators such as abandoned calls and wait times.

Staff suggests the following sequence of presentations:

- Opening comments by DCAO Kassiri
- DTS slides regarding MC311 consulting review of processes
- A look at HHS strategy (including Food Access Call Center)
- Discussion of strategies
 - Staffing at 311
 - Reduction of incoming calls
 - Managing departmental responses
 - Introduction of new technologies
- Suggested actions summary

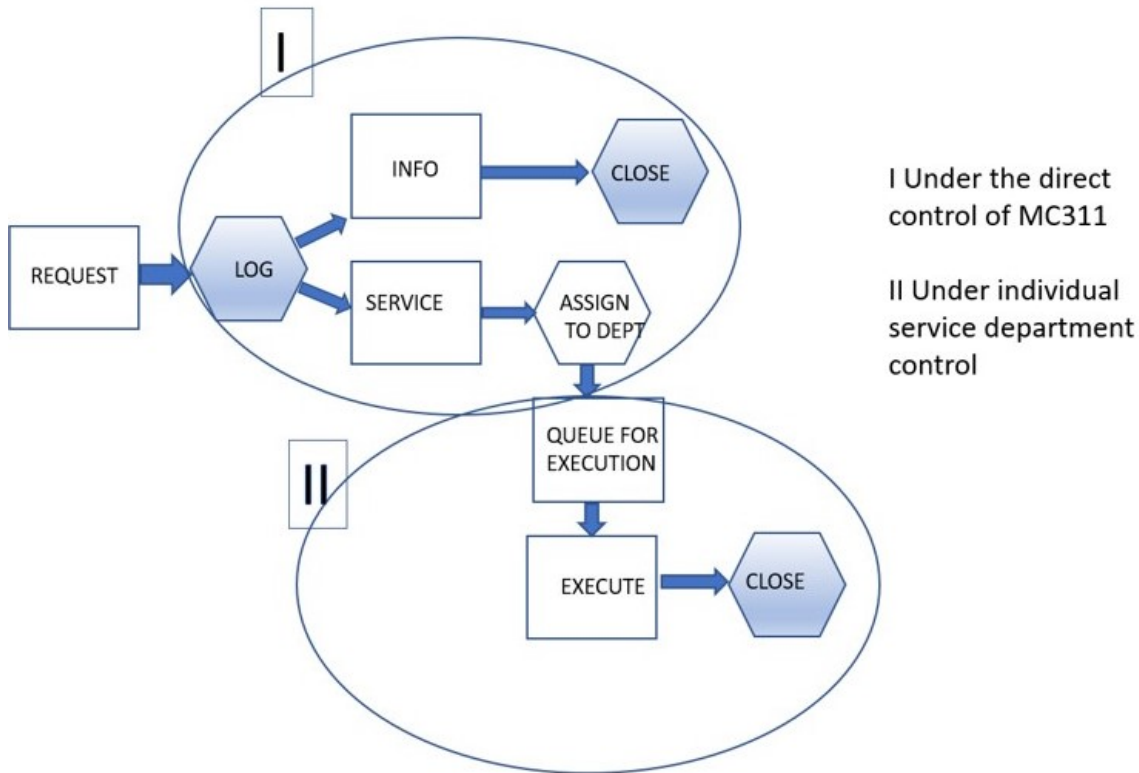
Council staff also requests that Executive staff make clear the timing of change recommendations requiring funding; will there be impacts on this year's budget, and will there be explicit requests in the FY22 budget discussions?

The performance of the MC311 Center will be discussed from two perspectives:

- The results of a study undertaken by DTS's Change Management team to explore bottlenecks and suggest short- and medium-term fixes; this study was undertaken a few weeks ago and its results will be presented.
- Questions were asked of MC311 management around potential impacts to residents' calls regarding access to health systems and information related to the pandemic; the answers will be reviewed.

Setting the context

To County residents who call MC311 to ask for information or request a County service, their satisfaction is measured by the actual fulfillment of the service and yet, the successful completion of service requests (and sometimes information requests) is not the sole responsibility of the MC311 Customer Service Representatives (CSRs). Many times, that completion is in the hands of the operating department that is resourced to perform the specific, requested task. The figure below shows the two responsibility circles (I and II) for MC311 calls.



This separation of responsibilities brings confusion as to just who is managing the “end to end” experience of the County resident and leads to claims of problematic performance of the MC311 Center when in fact the fault may lie elsewhere. To reduce the confusion and improve accountability, the CountyStat office regularly reports on and reviews departmental performance, comparing service request fulfillment against Service Level Agreements (SLAs) that convey the expectation of how long it should take to complete a given Service Request.

The reality of performance

For November 2 and November 3, 2020, the performance characteristics are as follows

Date	Day	COVID-19 Calls	ACD Calls*	% COVID-19	Abandon Rate** (percent)	Avg Handle Time** (seconds)	Avg Speed of Answer** (seconds)	Web SRs	Spanish language SRs	Spanish language COVID	% Spanish COVID	Page Views**
11/3/2020	Tuesday	216	1,914	11.29%					239	78	32.64%	
11/2/2020	Monday	194	1,621	11.97%	52.46	383	1338.5	445	233	77	33.05%	19,616

*Phone SR Count until next data warehouse update overnight

**Today's results available tomorrow

To summarize, the *abandoned call* rate (people who hang up before they receive service) is 52.46%, and the *average wait time* is 22.1 minutes. The statistics are from a Monday shift, when the calls are at peak and the staffing is many times at a low point. Even so, to a resident in need, these metrics indicate a system that cannot be counted on to provide solid assistance.

1. DTS Change Management study of MC311

The Executive Branch is aware that the needs of our residents necessitate an exceptional level of service and responsiveness.

Actions must be taken to improve our service:

- Realign Service Level Agreements model with centralized ownership and oversight
- Redefine vision, intent, and operations of 311 as we move forward, based on residents’ needs and expectations

Immediate actions are underway:

- The Department of Technology Services has deployed their Change Management team to lead a comprehensive Business Process Re-engineering (BPR) effort focused on short-, mid-, and long-term organizational process and technology change solutions in partnership with the 311 center.
- The DTS/311 workgroup has developed a strategy forward that focuses on completing immediate actions, including redefining the prioritization of resident resolution timeframes towards urgent needs, and implementation of new self-service options enhancing phone and web services.
- 24 MCGEO employees on administrative leave staff have been reassigned to MC311 to handle calls.
- COVID-related efforts initiated by the Department of Health and Human Services.

DTS Change Management study of MC311 highlights, as well as DHHS information, are on ©1-9, attached.

2. Surge of calls around COVID-19, food and other support services

The following are summary statistics regarding calls for assistance over the last three months:

<i>Solution Topic</i>	<i>August</i>		<i>September</i>		<i>October</i>	
	<i>SRs</i>	<i>%</i>	<i>SRs</i>	<i>%</i>	<i>SRs</i>	<i>%</i>
Food	987	2%	927	2%	1,197	3%
Rental Assistance OR *Homeless* OR *Foreclosure*	521	1%	244	1%	357	1%
Cash Assistance OR *Income Support*	2,946	7%	3,349	8%	3,931	10%
COVID-19 Food Access Call Center	165	0%	128	0%	188	0%
EARP	397	1%	188	0%	812	2%
All Social Services Requests	9,959	25%	8,794	22%	10,819	28%
ACD Calls	40,182		40,718		38,981	

The top twenty categories (totals) and corresponding counts for selected months are as follows:

	March	June	September	October	Grand Total
COVID-19 Emergency Assistance Relief Payment Program (EARP) Phase IV		1855	188	812	9128
COVID-19 Rental Relief Program HHS		1504	1333	1650	7284
Status of Income Support Benefits Case - New Application or Recertification	460	601	983	1149	6151
How to Apply for Public Assistance Programs, and Obtain and Application: Medicaid or Medical Assistance, Food Stamps, Cash Assistance Including Temporary Disability Assistance and Temporary Cash Assistance	493	490	611	771	5088
Contact Income Supports Case Manager Germantown	531	460	710	784	4610
Contact Income Supports Case Manager Rockville	479	314	511	655	3491
State of Maryland Customer Call Center for Department of Human Services	66	431	410	424	3069
COVID-19 Testing for Coronavirus	236	328	309	324	2938
Apply for office of Home Energy Programs or check Status of New Application or Recertification	59	82	592	461	2922
Maryland Health Care Connection	268	282	263	274	2103
Contact Income Supports Case Manager Silver Spring	235	234	327	410	2094
Electronic Benefits Transfer (EBT) Card Information for Public Assistance Benefits	82	296	118	145	1644
MANNA Food Center Referral	117	152	97	103	1368
Aging and Disability Resource Unit (ADRU) of the Department of Health and Human Services (HHS)	213	158	137	130	1291
COVID-19 Health Care Eligibility Units or County Safety Net Programs		179	135	150	1242
COVID-19 Resources for Businesses	137	213	54	76	1201
Missed Appointment Income Supports or Phone Interview All Offices	208	72	70	64	994
COVID-19 Food Access Call Center		186	128	188	809
Public Assistance Programs Change Line	120	110	73		715

With the surge in HHS-related calls, the efficiency of “hot transfers” and the ability to maintain a tracking system that shows completion times and citizen satisfaction are issues for Committee members to discuss with MC311 and HHS management together.

3. Strategic areas for focus

➤ Is it time to rethink MC311?

The original charter for MC311 contained three goals:

- i. streamlining customer access;
- ii. reducing costs through consolidation; and
- iii. collecting data to manage performance of departments.

It is now 10 years later and time to reimagine MC311. Some of the goals have been accomplished (#ii) and new opportunities have come into the picture (cloud technology and widespread use of apps, to name but a few). The Executive has a chance to formulate new goals and drive performance that supports them. PIO, DTS, and CEX have begun the process of thinking through what is next for MC311 and how to get there. The Committee may want to contribute their own ideas to this rethinking process, as MC311 is really the customer-facing portal for all County functions, including those of high concern to Councilmembers. At this time of COVID-19, and with the racial equity law in effect, the Committee can help shape a next-generation system that provides effective and efficient support to all calls for County assistance and information. The MC311 system can become an active part of the Racial Equity initiative by supporting practical, measurable improvements of the indicators of concern and responsiveness through data captured by the system.

➤ Can the volume of calls be reduced?

Ways exist to reduce incoming calls through new technologies such as “chatbots” and smart phone apps. Also, one of the most popular MC311 requests is “arrival time of the next Ride On bus”; many jurisdictions provide this information through automated system displays at the bus stop kiosks or on an app that uses real time data, thus freeing CSRs to focus on requests needing concentrated attention and human interface. Such an app (Transit) exists for Montgomery County and can provide this information at no cost to all users; promoting this over MC311 calls could immediately reduce the number of calls arriving at MC311.

➤ Can the Service Level Agreement system be improved?

Stepping up the SLA management process that ensures, in a transparent manner, departmental performance against targets can produce quick results. How SLAs are established and how departments meet (or do not meet) those levels can both be powerful ways to impact resident satisfaction.

➤ Quick technology enhancements

Several items in the current system need quick attention while discussions are underway for major improvements; they include:

- enabling the email and SMS notifications in the Siebel/Oracle CRM system;

- configuring the Siebel CRM system to allow photo attachments;
- ensuring that residents see a County label for all incoming calls, even though calls may be made from employee or contractor homes.

➤ Quality of service suggestions from 2019 Office of Legislative Oversight (OLO) Report

Success has been measured in prior discussions by three overarching indicators: attainment of performance goals, continued improvement in SLA completion by departments, and positive internal and external customer feedback.

The OLO report suggested several improvements to the performance indicators; those recommendations should be pursued and implemented in the upcoming budget cycle for FY22.

In addition, new processes to track MC311 users' experiences and perceptions of quality could include:

- using surveys (both current users and open cohorts) to reach a more representative group of customers. These surveys can be specific to MC311 or part of the biannual resident services survey conducted by the Executive;
- using instant-feedback comment boxes on Knowledge Based Articles (KBAs) to solicit immediate feedback on KBA quality from all users;
- translating KBAs into more languages with high quality;
- using focus groups to determine if KBAs are written in language that is understandable and responds to the question raised.

➤ The Council and Executive have launched a year-long Racial Equity initiative. The Committee can engage Executive staff in a discussion around this goal.

➤ Consider moving up the decision to install a “next generation, possibly cloud-based 311 solution” sooner than currently foreseen (beyond 2020) and establish objectives for both departmental performance and customer ease of use and improved experiences regarding information and services.

We must quickly react and realign our processes to resident needs

During the COVID-19 pandemic period, **overall call volume has increased by 15%** and the complexity of resident requests has increased. Additionally, calls from **Spanish-speaking residents have increased from 4% in February 2020 to 12% in October 2020**. As a result of these COVID-19 impacts residents are experiencing:

- **A call handle time increase of 25%**
- **Average wait times as of October 2020 of over 7.5 minutes**
- **An average of nearly 700 calls abandoned per day since May**
- *7,000-8000 Web Service Requests a month are offsetting some abandoned calls*

Tactical Plan forward

The Change Management team within the Department of Technology Services is providing consultative services to the Office of Public Information MC311 Center to identify areas that can be improved immediately to provide a better level of service to our residents.

- Map out organizational, process and technology change opportunities; begin business process re-engineering efforts and a tactical plan forward.
- Prior reports and recommendations from the County Council, the Office of Legislative Oversight, the County Executive's Office, and County Stat were analyzed.
- Benchmarks were conducted with Gartner and other jurisdictions to examine best practices in similarly sized and structured 311 call center models.

Key Findings

The overall resident experience needs to improve NOW

The effort to improve customer experience is critical and requires business process re-engineering, departmental cooperation, technology opportunities and enhancements. These solutions would establish an internal infrastructure that will reduce customer resolution time and improve process alignment with resident expectations.

The resident experience can be overly time-consuming and satisfaction measurements need to be improved

Realigning Service Level Agreements, leveraging functionality within existing technology and introducing new self-service technology can significantly streamline the end-to-end process for residents.

Our population is diverse, and we must meet all our residents needs

Promote racial equity by providing translation services and maintaining a contingent of bilingual staff. Refine departmental response timeframes to address urgent assistance requests.

Responding to our resident needs quickly:

Short term action steps:
in progress

HHS	<ul style="list-style-type: none">• Realign SLA process and response time focused on urgent resident requests (food, financial and housing assistance)• Outline calls that necessitate a successful immediate transfer• Identify questions that can be placed on telephone system for self-service (ex how to apply for assistance)
DPS	<ul style="list-style-type: none">• Too many resident call backs: 89 call backs per month, 2 per customer; Highest: 6 call backs• Too long to wait for resolution: Mean time to close SR: 9 days• Work with DPS Land Development division to reduce 59 KBAs to 5<ul style="list-style-type: none">○ Direct customers to DPS website with instructions where possible○ Will monitor to measure impact on response time
OHR	<ul style="list-style-type: none">• Eliminated OHR Tier 2 process in spring 2020, reducing handle time• Continue efforts to streamline KBAs from 72 to 4
DOT	<ul style="list-style-type: none">• Ride On Real Time is a strong a candidate for chatbot
311	<ul style="list-style-type: none">• Continue to identify opportunities to streamline Knowledge Base
DTS	<ul style="list-style-type: none">• Establish self-service options – chatbot, telephony with translation services

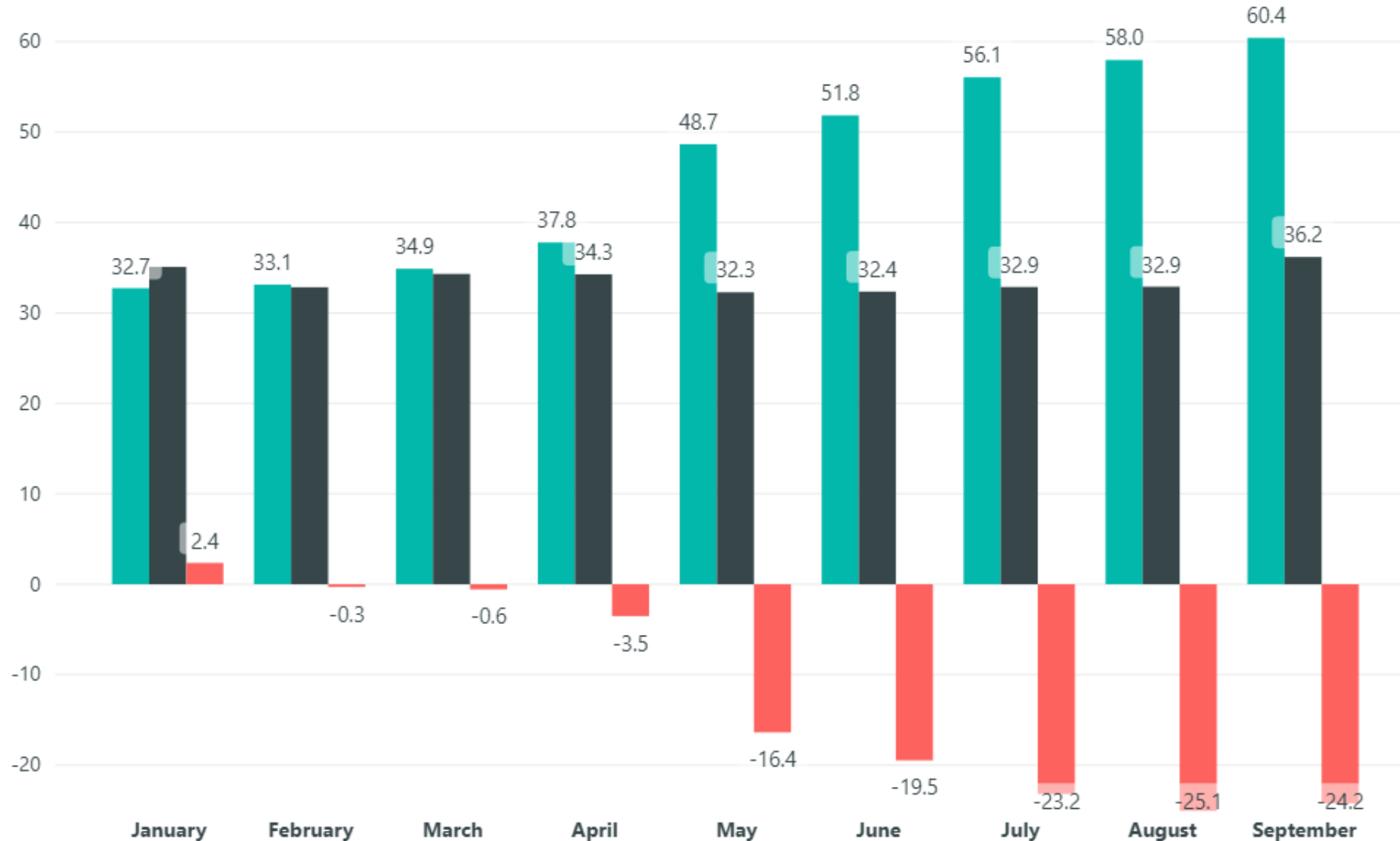
Technology enhancements will be implemented quickly, starting small and continually adding features as business processes and resident needs change⁽⁴⁾

Transformation is not slow

- *Complete short-term goals – within 3 months*
 - Telephony broadcast channel – Nov 20, 2020
 - Chatbot pilot – implementation within 2 months
 - Streamline knowledge base articles – underway
 - Discuss and re-align urgent Service Level Agreements – immediately
 - Assess, refine and measure success
- *Mid/long term goals – 6-24 months*
 - Utilize Artificial Intelligence phone functionality to provide additional self service channels
 - Expand chatbot functionality
 - Establish memorandum of understanding with departments to better align with resident expectations, now and in the future
 - Explore new, comprehensive ways to engage residents in measuring satisfaction and needs

2020 By Month

● Erlang Staff ● Max CSRs ● Difference



Assumption: Answering 80% of calls w/in 20 seconds. Note: reducing service level does not significantly reduce the need for CSRs in the Erlang model.

Analysis: The number of available CSRs has fallen significantly below the Erlang figure since May, despite an increase over time in the number of available CSRs because of the huge increase in calls and handle time.

Short term solution: Training 24 reassigned MCGEO employees.

DHHS COVID Response Actions

Food Access Call Center (FACC)

- Administered in partnership with OEMHS
- 1700+ food access calls resolved
- Supported by County personnel (7 Recreation, 13 Libraries, and 1 Corrections employees)
 - Bilingual call takers recruited. Access to Language Line provided.
- Call takers also support residents seeking COVID rental assistance resources (within SEPH)

CYF / Office of Eligibility and Support Services

- Additional resources established to assist new and existing clients with enrollment & redetermination efforts
- Brokers added to OESS for COVID Related supports.
- Customer Service Assistance Center

	March	April	May	June	July	August	September	Total
240-777-1003	157	1265	1415	1885	2340	3076	3529	13,667
OESS Email Acct	22	157	329	498	565	919	962	3,452
MC311 Service Requests	2909	4099	3222	2818	3369	3372	3732	23,521
DHS Call Center	223	245	229	314	331	392	592	2,326
							Total	42,966

DHHS COVID Response Actions

Emergency Assistance Relief Program (EARP)

- Phase IV: applications processed and approved by DHHS
 - Phase I, II, and III: supported by partner agencies
- Across all EARP phases:
- 5,450 households approved (as of 10/30/20)
 - \$7.74m in assistance provided to Montgomery County residents (as of 10/30/20)
- Ongoing coordination with MC311 to respond to questions/inquiries

Services to End of Prevent Homelessness

- COVID Rent Relief Program initiated in addition to existing housing programs/resources
- 40 individuals within SEPH supporting the program
 - Combination of 28 County personnel and 12 brokers
- Online application process
- Leverage capacity within the FACC to gather required household information
- Ongoing coordination with MC311 to respond to questions/inquiries

DHHS COVID Next Steps

Coordination with MC311/DTS

- Analysis and adjustment of Service Level Agreements
- Environmental Scan

Evaluate options to expand existing COVID -initiated responses

- FACC Call Center/DHHS Call Center
 - Staffing and Resources Required
 - Process and Technology Modifications

Leverage technology to enhance customer service

- On-line Access
- eICM
- QLess
- UNQORK
- UniteUs