



Legislation Details (With Text)

File #: 23-0593 **Version:** 1 **Name:**
Type: Investment Memo **Status:** Passed
File created: 1/20/2023 **In control:** Commissioners Court
On agenda: 1/31/2023 **Final action:** 1/31/2023
Title: Request for approval of the Final Investment Memo for 3-1-1 Implementation project, for an additional incremental authorization of \$8,102,511 for a total of \$13,767,511, and additional commercial paper funding in the amount of \$1,785,000 for a total amount of \$7,450,000.

Sponsors:

Indexes:

Code sections:

Attachments:

Date	Ver.	Action By	Action	Result
1/31/2023	1	Commissioners Court		

Department: Universal Services

Department Head: MG Richard Noriega (Ret) - Executive Director

Regular or Supplemental RCA: Regular RCA

Type of Request: Investment Memo

Investment Memo Type: Final Investment Memo

Project Name: 3-1-1 Implementation

Project ID (if applicable): NI033

Vendor Legal Name (if applicable): N/A

MWDBE Contracted Goal (if applicable): N/A

MWDBE Current Achievement (if applicable): N/A

Justification for 0% MWDBE Participation Goal: N/A - Goal not applicable to request

Managing Entity: Universal Services

Incremental Authorization Requested: \$8,102,511

Total Estimated Project Cost: \$13,767,511

Request Summary:

Request for approval of the Final Investment Memo for 3-1-1 Implementation project, for an additional incremental authorization of \$8,102,511 for a total of \$13,767,511, and additional commercial paper funding in the amount of \$1,785,000 for a total amount of \$7,450,000.

Project Description:

Overview

The Harris County 3-1-1 Project seeks to create a central constituent relationship management (CRM) platform solution for Harris County that allows residents to request non-emergency services and enables departments to fulfill them in a “one-stop-shop”. The 3-1-1 Implementation is an umbrella project, with work taking place under multiple vendor contracts working in alignment.

Phase I

From spring 2021 to fall 2022, vendors AT&T, PTG, Servos, Guidehouse, and ConvergeOne assisted Universal Services in the successful completion of the below Phase I deliverables to build out the foundation of the 3-1-1 system:

- **Upgrade of Harris County’s telephony system** to allow residents to simply dial 3-1-1 on both landlines and cellphones to access the Harris County 311 Call Center for assistance (Vendor: AT&T)
- the **upgrade of the 3-1-1 Call Center from basic hardphone technology to the Genesys cloud solution** and its integration with ServiceNow to improve efficiency for call center agent workflows, increase data capabilities, enhanced cybersecurity and resilience for the call center, and provide better service to constituents (Vendor: ConvergeOne)
- the initial **implementation of ServiceNow**, the digital platform by which requests are received from constituents, routed by 311 Call Center agents, and closed out by departments (Vendor: Servos)
- the **creation of the Harris County 311 Online Portal** at www.harriscountytexas.gov/311 <https://gcc02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fwww.harriscountytexas.gov%2F311> . In addition to its online request capability for all Harris County services, the portal includes templated department pages, a service catalogue, and knowledge articles supporting the initial 20 participating departments (Vendor: Servos)
- To support the creation of the 311 platform and public portal, preliminary work was required to **document existing, public-facing, non-emergency constituent services** for the initial 20 departments (Vendors: PTG, Servos, Guidehouse)
- **Change management and department staff training** to support the adoption of the ServiceNow platform (Vendor: Guidehouse)
- **Creation and management of 311@harriscountytexas.gov <<mailto:311@harriscountytexas.gov>>** to receive constituent requests and **@HarrisCounty311** to promote public awareness of the new 3-1-1 system (Universal Services)

The initial 20 Phase I departments included: the 5 Commissioner Court Offices (CJO, P1, P2, P3, P4), Community Services Department (CSD), County Engineer’s Office (OCE), the Domestic Relations Office (DR), the Department of Economic Equity and Opportunity (DEEO), the Fire Marshal’s Office (FMO), the Flood Control District (FCD), the Institute of Forensic Sciences (IFS), the Office of County Administration (OCA), the Office of Justice and Safety (OJS), the Pollution Control Services Department (PCS), the Pretrial Services Department (PTS), the Public Health Services Department (PHS), the Public Library Department (HCPL), the Toll Road Authority (HCTRA), and the Universal Services Department (US).

Work on Phase I was completed on September 27, 2022. The online portal and upgraded call center are live and have

been actively receiving, triaging, and fulfilling constituent requests since that time.

Phase II

The initial implementation of ServiceNow built out each participating department's ability to receive constituent cases, and to close them out once complete.

Phase II will focus on the work that takes place between the opening and closing of a case - the actual request fulfillment process - by designing and building out customized digital workflows to migrate each department's services onto one platform.

This creates a unique opportunity for departments to map out existing business processes and identify opportunities for improvements and streamlining as needed. In some cases, departments struggle with a multitude of outdated existing CRMS - the 3-1-1 system will allow them to migrate to one modern platform with abundant data and reporting capabilities. This modernization and automation of services will provide the tools needed to improve efficiency, create better methods of accountability, and provide standardized, better services to constituents.

Future Phases

Future phases will include the opportunity to expand the Phase I and Phase II work to all additional Harris County departments. The scope of work and funding request for future phases will appear at Commissioners Court for consideration following the completion of Phase II (tentatively anticipated late 2023 or early 2024).

When complete, the 3-1-1 system will bring an unprecedented level of transparency and ease to the delivery of services to the constituents of Harris County.

Project Scope:

All Phase I departments will be included in Phase II, with the addition of the Elections Administration Department (EAD) and the Human Resources and Risk Management Department (HRRM).

Phase II will utilize an Agile scope of work, broken into two-week Sprints across 52 total weeks. The length of each department's project segment will vary based on the size and complexity of that department's public-facing services, with the following being an average proposed schedule:

- Requirements Gathering - 4 weeks
- Co-Create Design - 2 weeks
- Co-Create Implementation - 2 weeks
- Testing and Training - 2 weeks each (will take place concurrently)
- Soft Launch - 1 week
- Go Live
- Post-Go Live Support - 1 week

For an average total of 12 weeks per department. Departments will be grouped together to go through this cycle 2 or 3 at once, and we will implement a staggered and Agile approach so that as each of the Project Team subgroups

completes a subsection from one department they can immediately begin work for the next.

The primary focus of work in Phase II will be mapping existing business processes and building out customized digital workflows in the Agent Workspaces and Field Service Agent Modules within the ServiceNow platform for each participating department.

A critical priority in Phase II will be aligning the ServiceNow expansion with the Cartegraph Implementation taking place in all Commissioner Precincts as well as HCTRA, FCD, and OCE. For these departments with “public works” functions, ServiceNow will be integrated with Cartegraph, with Cartegraph providing the internal-facing capabilities and ServiceNow the public-facing side of the 3-1-1 system.

In addition to the above expansion of the platform, Phase II will see the expansion of the Genesys cloud solution to additional call centers throughout Harris County; the addition of a GIS heat map for constituent services on the online portal and additional embedded maps; expanded capabilities to flag HIPPA-related cases and handle sensitive data; the creation of a constituent mobile application; and updates as needed to the online portal to reflect changes in leadership and other department updates. Finally, while in Phase I the portal has relied on browser-based translation, in Phase II, the project team is exploring options to provide enhanced translation of public-facing sites and documents on the 3-1-1 platform to provide better and more diverse service.

Justification:

The benefits of work in Phase I were primarily outward-facing - we provided our constituents with convenient, memorable, easy ways to reach us by dialing 3-1-1 instead of needing to remember a call center number, or online in a central hub instead of disparate department sites. Many Harris County services could not be requested online prior to the introduction of the 3-1-1 Portal. In particular, the 3-1-1 system removes the need for a constituent to be fluent in the labyrinth of local government’s organizational structure - one no longer needs to know which department provides which service to access that service because one can access help through a “one-stop-shop”. In addition, we increased transparency of services through the creation of our online services catalogue, and improved efficiency by creating online knowledge articles that allow constituents in many cases to resolve their own questions without seeking employee assistance.

The benefits of the work in Phase II will be primarily inward-facing. Departments will have the resources they need to map out and make improvements to their business processes (which, in some cases, are not currently documented at all). Each will undergo a review of their existing CRMs and other technology that support their workflows to determine if their needs are being met, or if they can replace any outdated CRMs with the ServiceNow platform. A custom, modern, automated solution will be built for them based on their needs. In most cases we anticipate this to increase efficiency for departments and make work easier for employees by having it take place on one central platform, from which they can communicate with each other and constituents as needed to resolve cases. The platform has robust data capturing capabilities from information volunteered by constituents that they can use to further improve business decisions. The platform also has a plethora of reporting options to further improve business practices based on employee performance.

Alternatives and Engagement:

Commissioners Court could choose to stall the work on the 3-1-1 Implementation and not build out each department's workflows on to the central system. However, department processes to fulfill service requests would then remain siloed and varied. We would continue to enjoy the benefits of an online portal and central hub for the 3-1-1 Call Center, but would lose all the potential benefits to our internal processes that are available within the ServiceNow platform. In addition, the Cartegraph Implementation and Genesys expansion would be negatively impacted as both depend on integration with ServiceNow to be fully operational. A continued stalling of the 3-1-1 Implementation in Phases 3 and 4 would result in an incomplete service that only features 20 of Harris County's 72 departments.

Anticipated Project Expenditures and Timeline:

Scope of Work	Estimated Cost	Estimated Completion
Genesys Platform Adoption by ePermits - Can we charge Engineering	\$60,000	2023
ServiceNow Adoption and integration by HC agencies	\$5,815,511	2024
Existing PCNs (18 months)	\$1,137,000	2024
Amendment 3 from phase I	\$30,000	2022
Contractor (18 months)	\$200,000	2024
Contingency (12%)	\$860,000	2024
Total planned expenditures	\$8,102,511	

Alignment with Goal(s):

- ☒ Justice and Safety
- ☒ Economic Opportunity
- ☒ Housing
- ☒ Public Health
- ☒ Transportation
- ☒ Flooding
- ☒ Environment
- ☒ Governance and Customer Service

Previous Court Action:

Date	Agenda Item #	Action Taken
4/30/2019	6.b	Request for approval of commercial paper funding for \$1,420,000
6/30/2020	4.i.4	Request for approval of commercial paper funding for \$4,245,000
4/27/2021	21-1746	Award to AT&T for telephony upgrade (1yr + 4 renewal options) for \$120,915
7/20/2021	21-3556	Award to PTG for ServiceNow platform and change management for \$2,384,755

11/30/2021	21-6591	Award to ConvergeOne for conversion of 311 Call Center to Genesys (1yr +4) for \$1,366,932
4/05/2022	22-2409	Change Order 1 with PTG for \$316,167 for additional work
05/27/2021	22-3073	1st renewal for AT&T for \$85,000
8/23/2022	22-5219	Change Order 2 with PTG for \$374,625 for additional work
9/27/2022	22-5799	Discussion on 311 Online Portal Go-Live and completion of Phase I work
12/13/2022	22-7999	1 st renewal for ConvergeOne for \$120,000

Address: Multiple

Precinct(s): Countywide

Fiscal and Personnel Summary - N/A			
Service Name	Call Center		
	FY 23	FY 24	Next 3 FYs
Incremental Expenditures (do NOT write values in thousands or millions)			
Labor Expenditures	\$266,667	\$	\$
Non-Labor Expenditures	1,518,333	\$	\$
Total Incremental Expenditures	\$1,785,000	\$	\$
Funding Sources (do NOT write values in thousands or millions)			
Existing Budget			
Choose an item.	\$	\$	\$
Choose an item.	\$	\$	\$
Choose an item.	\$	\$	\$
Total Current Budget	\$	\$	\$
Additional Budget Requested			
Commercial Paper	\$1,785,000	\$	\$
Choose an item.	\$	\$	\$
Choose an item.	\$	\$	\$
Total Additional Budget Requested	\$1,785,000	\$	\$
Total Funding Sources	\$1,785,000	\$	\$
Personnel (Fill out section only if requesting new PCNs)			
Current Position Count for Service	-	-	-
Additional Positions Requested	-	-	-
Total Personnel	-	-	-

Anticipated Court Date: 1/31/2023

Anticipated Implementation Date (if different from Court date):

Department Approval by: Rina Fava, Director - Support Services, 12/29/2022

OMB CIP Team Approval by: Amiel Chen, CIP Manager, OMB, 1/20/2023

Commercial Paper Request *(For OMB use only):*

Receiving Department: Universal Services

Project PeopleSoft ID: NI033

CP Series Description: Commercial Paper A-1 is used to (1) pay contractual obligations incurred or to be incurred for the construction of and the purchase of fixtures, equipment and machinery for or in connection with the County's criminal and civil justice centers, the County's firefighter training facility, (2) pay contractual obligations incurred or to be incurred for the purchase of automobiles and other vehicles, equipment and machinery, including computers, materials and supplies for the operations of the County precincts and departments and other authorized needs and purposes including services provided by engineers, architects, attorneys, auditors, financial advisors.

Commercial Paper is being requested for the 3-1-1 Implementation project and is expected to be repaid within the next three fiscal years either through bonds, budgetary means or pay-as-you-go sources.

HB 1869 compliance confirmed by: Michael James, Senior Assistant County Attorney, January 19, 2023

OMB Financial Management contact: Amy Perez, Deputy Executive Director, Office of Management and Budget