



Memorandum

TO: MassIT
FROM: Tanya Stepasiuk, Edward J. Collins, Jr. Center for Public Management
DATE: June 5, 2017
RE: Haverhill 311

Case Study: Building a 311 System in Haverhill

The GAP Haverhill 311 project kicked off in December, 2015, with an aggressive soft-launch goal of August, 2016 and a final launch at the beginning of 2017.

Haverhill came into the 311 conversation with no constituent or neighborhood services department. Constituent services happened entirely at the department level, or through calls taken in at the Mayor's office. The Mayor's office itself was made up of only a three-person staff, including the Chief of Staff and the Mayor's Executive Assistant. It felt initially like a severely under-resourced environment that wanted to go from zero to comprehensive wrap-around constituent services on short money and in short time.

There was an initial concern with the Mayor's request for a 311 proposal about the funding that was needed to realistically open a 311 Center from scratch. GAP put forward a proposal that was explicit about certain costs that would be required to be able to go live — which felt at the time like it could undermine the contract. Nonetheless, GAP didn't want this contract if there wasn't a legitimate shot at success, and the investment would be critical for that. Upon delivery of the proposal, the Mayor accepted our analysis of the expected costs, and signed the contract once he had confirmation that the Community Compact was paying for our services.

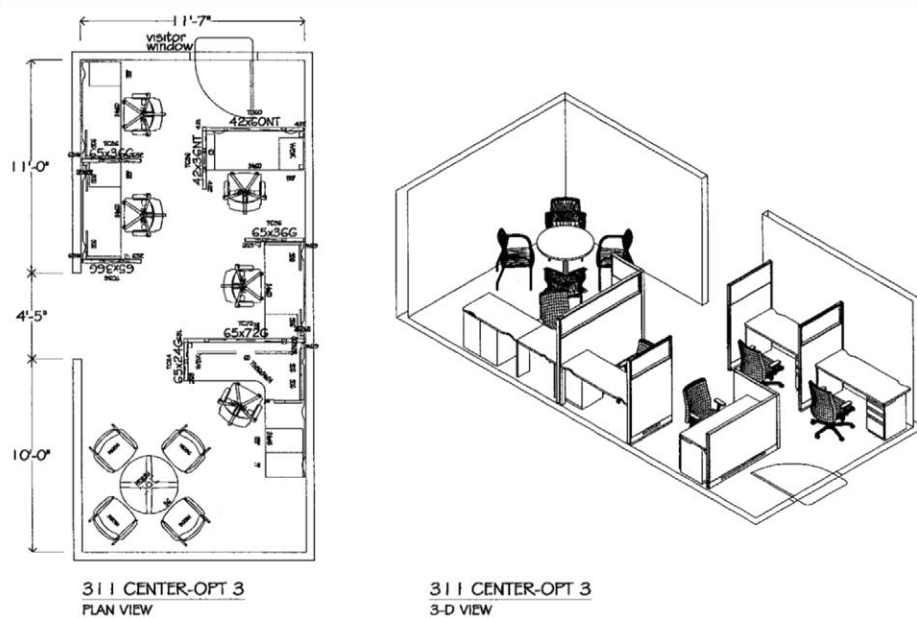
Contract in-hand, initial meetings with the Mayor laid out a proposed aggressive timeline. The Mayor expressed that he had waited long enough to get 311 and didn't want to wait anymore. He was provided a barely-realistic timeline to show it could be done, but barely.

Department Meetings

GAP then started meeting with key department personnel, especially Public Works and Inspectional Services, and learning about existing processes and procedures. In this process, more was learned about Maintstar, the city's Public Works work order and asset management system, and conversations were held with representatives of Maintstar to prepare them for the process of integration with a 311 software package. There was some early reticence from Maintstar in participating in integration, as they are a closed-API product. Ultimately they agreed to come along for a price.

311 Center Location and Staffing

In determining where the 311 Call Center should go, there were a number of options ranging from the DPW offices, Police Station, and a few unused large office spaces around City Hall. In the end, the conference room in the Mayor's office was selected based on proximity to the Mayor, convenience for walk-ins, and the appropriate size of the room, based on the anticipated staff size.



Software

For software GAP tested five different software packages and got quotes for each, and already had in-hand relevant information about two other packages from other 311 work that was being done in Everett. Appendix B shows the software matrix. After initial testing and quotes, focus turned on Accela and QAlert as the most cost-effective and easiest to use. Representatives from both products provided demonstrations to the Mayor and key staff, including the DPW Director and IT Consultant. Ultimately the consensus in the room was to purchase QAlert.

Currently constituents can enter in work orders or get questions answered on Haverhill's website or smartphone app, both elements are included in the QAlert package.

Software Integration

Two main systems are on the table for integration with QAlert: Maintstar and ViewPermit. Maintstar, the DPW's work order and asset management system is working on the integration, and at this writing the system is probably a number of weeks away from going live. QAlert set

up a sandbox for testing and demoing. In the meantime, the DPW staff will be manually shifting work order information from Maintstar to QAlert, to give Maintstar the time to get their system fully functioning. Maintstar will continue to be the backend system for work order management, while QAlert will be the front for all service requests entered by 311 call takers, emailers, and users of the Haverhill 311 web and mobile portals.

ViewPermit has been reticent to get into the integration business. Conversations have initiated on a few fronts, but so far there doesn't appear to be much movement. The hope would be that, much like the Maintstar integration, ViewPermit would continue to be used by the Health Department team for work order management, while QAlert would be the system where requests were entered, and which would allow for communication with the public. In the meantime, this has not significantly hampered the functioning of the department.

Hiring

Conversations got started regarding staff hiring. It was determined that Haverhill would hire a 311 Director to manage the office, and it soon became clear that Allison Heartquist, the Mayor's Executive Assistant, was an ideal candidate. It was decided, after some back and forth, that she would hire 1.5 new FTEs for the call center, and that two clerks in DPW would be used as backup 311 call-takers. Allison's replacement in the Executive Assistant for the Mayor would also be trained to assist in taking calls as needed. To summarize: 2.5 full time 311 staff, with the ability to pull in 3 others as needed. While not the ideal setup for a 311 center, it allowed the City to put something in place within its tight budget for the short term, with expandability a strong possibility. Based upon the call volume, this staffing structure has been appropriate to date.

Phone System

Also during this time GAP worked with the IT Consultant on purchasing a phone system. The phones had several key requirements:

- Calls had to be able to be put in a queue and taken in order.
- There had to be an intro message that provided both the 911 number for emergencies, and could provide other information if needed.
- A simple tree was necessary for Spanish speakers.
- The system had to allow for 311 calls to be taken from multiple locations (311 Center and DPW Office) easily.
- System had to create good reporting and data to look at performance metrics.
- It had to be affordable.

RingCentral — an Internet-based phone system that routes calls through a hard line — was selected as both the best quality and most affordable option. In some sense RingCentral was a bit of overkill in terms of the services it provided. It is a system designed for dozens or hundreds of call takers. But at the price, it couldn't be beat, and it looks like it will be a very strong system for taking incoming and making outgoing calls and tracking key information along the way.

Training

There are a number of areas that new staff were trained in:

- Phone System Training. This incorporates a few hours of online videos, and at least two 2-hour sessions with the RingCentral training team.
- QAlert Training. This involved an all-day training, including 311 staff, administrators, and department staff that is responding to 311 requests.
- Customer Service Training.
- Department Trainings. Key departments will require multiple visits and several hours of work. Departments that may require less direct connection with 311 are more likely to be 60-90 minute presentations.

Soft Launch

For the soft launch, it was determined that three departments would have their public lines forwarded automatically to the 311 center (a 10-digit number at the moment). The Highway/Parks division of the DPW, the Health Department side of ISD, and the Assessor’s office. These divisions were chosen based on the number of calls received, the need to generate service requests for the Highway and Health sides. Once we have a chance to test out these three departments during the soft launch, we’ll be able to determine which other departments should get moved in similarly — either during the soft launch or after the official 311 goes live.

Another soft launch piloting involves getting some of the Maintstar mobile app users switch over to a temporary QAlert phone app for entering service requests. As things go we’ll want to incorporate new departments.

Budget

Ongoing Costs	\$	Funded	One-Time Costs	\$	Funded
311 Director	\$69,699	City Budget	QAlert Implementation	\$4,950	IT Grant
1.5 FTE	\$59,000	City Budget	QAlert Training	\$2,250	IT Grant
QAlert	\$8,400	IT Grant (Year 1 only)	RingCentral implementation	\$2,750	IT Grant
RingCentral	\$7,799	IT Grant (Year 1 only)	Maintstar integration	\$13,000	IT Grant
Total Operating	\$144,898		Computers, phones, headsets	\$7,000	IT Grant
			311 Office Build and desks	\$7,500	IT Grant
			Phone lines and other wiring	\$1,500	IT Grant
			Collins Center services	\$15,000	A&F Grant

Collins Center post- implementation extension	\$7,500	TBD
Total One-time	\$ 61,450	

Shortcuts and Cost Savings

- Mayoral Executive Assistant and DPW Clerical staff as call taker backups.
- RingCentral low-cost phone option.
- Minimal buildout needed for office.
- QAlert a less expensive option than some others.
- Soft launch will incorporate only three departments to start.
- Only a single day of QAlert training purchased.
- May share ViewPermit integration cost with another city.
- Collins Center conserved its hours for key functions that were necessary.
- Mayor’s Executive Assistant chosen to be 311 Director, was able to take on many key tasks in the interim, such as building out much of the Knowledge Base.

Biggest Challenges

- Truly understanding how departments got their work accomplished, and ensuring that 311 was a benefit, not a hindrance to that.
- Integration between QAlert and DPW Work Order/Asset Management system, Maintstar.
- Staffing size, and using current department staff as backup... including how that connects to union issues.
- Some departmental reticence — a natural concern about change.
- Technical challenges related to implementing the phone system.
- Technical challenges related to turning on the 311 phone number.

Vendors and Products

- Implementation Consultant: UMass Boston Collins Center
- 311 Service Request Software: QAlert by QScend Technologies
- Phone System: RingCentral

Timeline

- December, 2015.
 - Kickoff
- January-March, 2016
 - Understanding Haverhill needs
 - Software testing and quotes
 - Hiring discussions
 - Call Center location decisions

- April, 2016
 - Software decisions
 - 311 manager selected
- May, 2016
 - 311 Software kickoff
 - Phone software selection and 10-digit 311 number chosen
- June, 2016
 - Phone software kickoff
 - City Council passes budget
- July, 2016
 - Staff hiring process initiated
 - Service request list built
 - Knowledge base started
- August, 2016
 - Knowledge base completed
 - Phone software goes live
 - 311 software goes live
 - Staff hired
 - Training begins
 - Soft Launch
- September – December, 2016
 - Evaluation of processes, fixing of technical issues
- January, 2017
 - Full Launch
 - Publicity (mailers, signs, press releases)