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September 13, 2016

The Honorable Ernest J. LiCalsi
Presiding Judge
Madera, County Superior Court
200 S. G Street
Madera, CA 93637

Subject: Response to the 2015-16 Grand Jury Report entitled "Madera County 311/CRM System"

Honorable Judge LiCalsi:

Pursuant to the California Penal Code 933.05, the Madera County Board of Supervisors submits this response to the findings and recommendations in the 2015-16 Madera County Grand Jury Report entitled, "Madera County 311/CRM System." See Attachment #1.

The following are the Grand Jury's findings and recommendations and the Board of Supervisors' responses:

Finding 1:

The appreciation of constituents being able to converse with a live operator is difficult to measure, but is highly valued.

Response to Finding 1:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Finding 2:

The Board of Supervisors did not mandate the use of CRM for public interface to all departments.

Response to Finding 2:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Finding 3:

CRM is a robust database application capable of many processes. To utilize CRM a department needs to dedicate the time and effort to work with the Information Technology CRM database manager to develop specific applications for its use.

Response to Finding 3:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) It is unclear what the Grand Jury means by the term “utilize.” If utilize means conversion of a current business process to an electronic format, a department must work with the Information Technology (IT) department to do so. Otherwise, all departments have licensed CRM users (who were selected by the department) who can access CRM to submit internal service requests on behalf of the department.

Finding 4:

Use of the CRM system is lower than it could be because departments were allowed to opt out at the onset. For example the Road Department transfers CRM service requests to the department’s own “GoRequest” system for processing.

Response to Finding 4:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) Creation of a CRM process is dependent upon evaluation of current business processes by the department to determine if CRM can be effectively utilized to meet the department’s need. “Opt out” of participation pertains to the use of the 311 call center as the primary point of contact for a department.

Finding 5:

The Road Department started using the GoRequest system prior to the inception of 311/CRM. GoRequest serves the Road Department and its constituents well. This system is used in many state jurisdictions sending on-line reports of hazardous road conditions to the correct responding agency.

Response to Finding 5:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Finding 6:

Interdepartmental requests for building maintenance, supplies, and job openings are processed through CRM.

Response to Finding 6:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) Supplies are not ordered through CRM. CRM is currently utilized for the following internal processes: Facility Services (Building and Grounds Maintenance, Janitorial, Security), Personnel Requisitions, Requests for County Counsel Assistance and IT Project Requests.

Finding 7:

Requests are delivered to electronic in-boxes of the various departments, addressed by the selection of department at the time of the original report.

Response to Finding 7:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Finding 8:

Department staff training was provided at the onset of 311/CRM, but confusion as to its use and capabilities remain.

Response to Finding 8:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) Training was provided to users at the onset; a CRM user guide is provided to all new users when they are set up in the system. Each department has a designated individual - referred to as "Department Champions" - who are tasked with providing guidance to current and new users within their respective departments.

Finding 9:

Some departments that use their own tracking/ticketing systems immediately close the CRM ticket. Others do not use the ticket numbers until after an investigation verifies the validity of the issue.

Response to Finding 9:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) It is unclear as to which CRM processes the second sentence of the finding is referring.

Finding 10:

The 311 portion that connects the CRM system to the website, must be updated (replaced) to a version that allows continued operation and patching of the software code. This upgrade, to the 2016 version, has already been approved.

Response to Finding 10:

Respondent partially disagrees with the finding. (Penal Code § 933.05 (a)(2).) Based on priorities, the 311 upgrade is not included in the FY 16/17 budget; however, IT is doing preparatory work on the infrastructure to prepare for the upgrade in FY 17/18.

Finding 11:

The biggest departmental user of 311/CRM is the Madera County Animal Shelter, receiving 35% of 311 calls.

Response to Finding 11:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Finding 12:

Calls into 311 are recorded for information and training purposes. The recording stops if the call is transferred.

Response to Finding 12:

Respondent agrees with the finding. (Penal Code § 933.05 (a)(1).)

Recommendation 1:

The Grand Jury recommends that the Board of Supervisors requires the various county departments to work with the Information Technology Department to develop CRM applications that would replace duplicate or redundant systems. This could save the expense of upgrades and maintenance contract for these other systems.

Response to Recommendation 1:

The recommendation will not be implemented because it is not warranted or is not reasonable. The Grand Jury report is silent as to which department(s) it identified as having duplicate or redundant systems. Likewise, there is no discussion as to the nature of these redundancies or duplications. However, as previously discussed, any department that is interested in converting an existing business practice to an electronic format may engage the Information Technology department to do so.

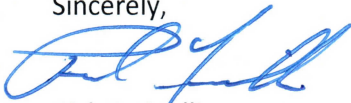
Recommendation 2:

The Grand Jury recommends that more training is conducted throughout county departments now that the system has been implemented and employees have been exposed to its capability and performance.

Response to Recommendation 2:

The recommendation has not yet been implemented, but will be implemented in the future. Staff is beginning a process to work with departments in a "train the trainer" format so that each department has one or two individuals that can assist current and future users in utilizing CRM. It is anticipated that this training will be completed during the current fiscal year.

Sincerely,



Rick Farinelli

Chairman of the Board of Supervisors