

COUNTY OF SAN MATEO

OFFICE OF THE DISTRICT ATTORNEY
FAMILY SUPPORT DIVISION

DATE: April 6, 2001

TO: Honorable Board of Supervisors
FROM: James P. Fox, District Attorney *Ms. Jensen for Mr. Fox.*
SUBJECT: Management and Call Center Services Contract for the Family Support Division

RECOMMENDATION

- (1) Adopt a resolution authorizing the execution of a contract with Policy Studies, Inc. to provide call center management, automation enhancements, and call overflow for high volume call periods for the Family Support Division Call Center in an amount not to exceed \$349,000 for the period from April 10, 2001 through and including June 30, 2002.
- (2) Approve an Appropriation Transfer Request in the amount of \$349,000 from Salaries and Benefits to Services and Supplies for the full cost of the contract with Policy Studies, Inc.
- (3) Approve a salary ordinance amendment converting seven existing Family Support Division positions to six newly created Family Support Customer Service Specialists and one newly created Lead Family Support Customer Service Specialist.

BACKGROUND

The Family Support Division (FSD) established a Call Center in 1993. Since the creation of the Call Center, the Division has taken a number of steps to improve response time and customer service. Those steps have included increasing staff, adding a Voice Response Unit (VRU) to automatically answer general and routine payment questions and provide general office and procedural information, installing a new phone system that generates detailed performance statistics relating to call volume, and adding a toll free number for California callers.

With these enhancements, the Division currently responds to over 18,000 calls a month through the VRU. Our operators speak with about 6,000 callers a month. Although the Division responds to a significant number of calls, we have not been satisfied with our call wait time nor our call abandonment rate. Our call wait time averages between 4 and 6 minutes per call and the call abandonment rate fluctuates between 25% and 40 % on average per month.

In November 2000, the California Department of Child Support Services (DCSS) implemented a customer service initiative with \$25 million in new funds. As part of the initiative, DCSS required all Counties to submit a customer service improvement plan. San Mateo County received \$200,000

and our plan, which has been approved by DCSS, included all the improvements to the Call Center that are outlined in this memo.

DISCUSSION

In December of 2000, the Family Support Division issued a formal Request for Proposals for Child Support Call Center Services. The Division received bids from three firms offering complete operation of our child support call center. After extensive consideration and discussion with the County Manager's Office and Service Employees International Union Local 715 it was decided that full contract operation was not a viable option, so we looked at alternative ways to achieve the same performance levels guaranteed by the private vendors.

Our solution was to re-engineer our Child Support Call Center by taking the following steps:

- Contract with Policy Studies, Inc. to provide Call Center Management Services.
- Improve response time through automation enhancements by creating a Graphical User Interface (GUI) front-end to our automated child support system for our Call Center.
- Work with Employee and Public Services to develop new County job classifications for Family Support Call Center staff and establish new performance standards with specific call handling goals relating to quantity and quality of service.
- Establish an incentive pay program for Call Center operators to promote higher quality customer service.
- Contract with Policy Studies, Inc. to handle "overflow" calls at their New Mexico Child Support Call Center to maintain call wait times under two minutes by addressing unpredictable and erratic call volume.
- Create, in conjunction with Employee and Public Services, new county positions for the Family Support Call Center to address the unique and specialized work performed in the center, new job requirements, and enhanced performance standards. The two newly created county classifications are called Family Support Customer Service Specialist and Lead Family Support Customer Service Specialist.

Through this re-engineering effort, the Division expects to reduce the call wait time to no more than two minutes and also significantly reduce the call abandonment rate to less than 10% per month on average. All qualified contractors were ensured an opportunity to respond to the RFP for Child Support Call Center services and through this process Policy Studies, Inc. was selected as the appropriate vendor to provide these unique services.

We have met and conferred with SEIU on this plan and they have no objections. SEIU has also approved the job descriptions, developed in conjunction with Employee and Public Services, for the new positions within the Family Support Call Center. The Division will meet and confer with SEIU once new performance standards are finalized.

COUNTY COUNSEL

County Counsel has reviewed and approved the attached resolution and contract.

FISCAL IMPACT

The proposed contract with Policy Studies includes management services, automation enhancements, and call "overflow" services to their New Mexico Child Support Call Center. The total cost of the contract is \$ 349,000 running from April 10, 2001 through June 30, 2002. The cost of the contract for FY 2000-2001 is \$116,333. Funding for the contract for the remainder of this fiscal year will come from the \$200,000 DCSS customer service allocation and from projected salary savings for FY 2000-2001. The cost of the contract for FY 2001-2002 is \$232,500. Funding for the contract for next fiscal year will come from next year's customer service initiative funds which the state has guaranteed are on-going monies and from budgeted funds which will be set aside in the creation of our FY 2001-2002 budget.

Please find attached an Appropriation Transfer Request in the amount of \$349,000 to transfer funds from Salaries and Benefits to Services and Supplies to cover the full cost of the contract through FY 2001-2002.

The incremental salary and benefit cost of converting seven existing Family Support positions to six Family Support Customer Service Specialists and one Lead Family Support Customer Service Specialist produces an annual salary savings of \$177.00.

The Family Support Division is fully funded through state and federal reimbursement. There is no general fund cost associated with the operation of the Division, the execution of this contract with Policy Studies Inc., or with the creation of the new Family Support Call Center positions.

cc: Peggy Jensen, Family Support Administrator
Ignacio J. Guerrero, Administrative Services Manager

**COUNTY OF SAN MATEO
APPROPRIATION TRANSFER REQUEST**

REQUEST NO
ATRI 089

DEPARTMENT
District Attorney's Office - Family Support Division

DATE
3/27/01

1. REQUEST TRANSFER OF APPROPRIATIONS AS LISTED BELOW

C O D E S		AMOUNT	DESCRIPTION
FUND OR ORG	ACCOUNT		
From	25600 4111	\$349,000 00	Salaries and Benefits - Regular Permanent Hours
To	25600 5847	\$349,000 00	Services & Supplies - Contract Project Management

Justification (Attach Memo if Necessary)

Transfer salary savings from Salaries and Benefits to Services and Supplies - Contract Project Management to fund full PSI contract cost through FY 2001-2002.

DEPARTMENT HEAD

BY *James P. Foy* DATE 3-27-01

2 Board Action Required Four-Fifths Vote Required Board Action Not Required

COUNTY CONTROLLER

BY *[Signature]* DATE 3/28/01

3 Approve as Requested Approve as Revised Disapprove

COUNTY MANAGER

BY _____ DATE _____

DO NOT WRITE BELOW THIS LINE — FOR BOARD OF SUPERVISORS' USE ONLY

BOARD OF SUPERVISORS COUNTY OF SAN MATEO STATE OF CALIFORNIA
RESOLUTION TRANSFERRING FUNDS

RESOLUTION NO. _____

RESOLVED by the Board of Supervisors of the County of San Mateo that

WHEREAS, the Department hereinabove named in the Request for Appropriation Allotment or Transfer of Funds has requested the transfer of certain funds as described in said Request and

WHEREAS the County Controller has approved said Request as to accounting and available balances and the County Manager has recommended the transfer of funds as set forth hereinabove.

NOW THEREFORE IT IS HEREBY ORDERED AND DETERMINED that the recommendations of the County Manager be approved and that the transfer of funds as set forth in said Request be effected

Regularly passed and adopted this _____ day of _____ 19____

Ayes and in favor of said resolution:

Noes and against said resolution:

Vendor Matrix for Original RFP

Issued December 19, 2000

1. General Description of RFP	Child Support Call Center Services for the District Attorney's Office, Family Support Division
2. List key evaluation criteria	<ul style="list-style-type: none"> • Proposal Summary • Experience (including references from past/current clients) • Strategy for staffing, operating, and managing the Call Center • Project Team • Collaboration • Innovation • Cost and Ability to meet specified performance requirements in RFP • Prior experience working with child support agencies, especially in terms of successfully operating a child support call center.
3. Where advertised?	<ul style="list-style-type: none"> • Through notification to other Child Support Agencies – Local and out of state. (New Mexico, Iowa, Tennessee, Texas, etc.)
4. In addition to any advertisement, list others to whom RFP was sent	<ul style="list-style-type: none"> • Intelegy Corporation • Policy Studies, Inc. • Maximus – Child Support Division • GovConnect
5. Total number sent to prospective proposers	4
6. Number of proposals received	3
7. Who evaluated the proposals	<ul style="list-style-type: none"> • Internal RFP Review Committee (4 individuals) comprised of Management staff from the Family Support Division, specifically: the Family Support Administrator, 2 Program Services Managers, and an Administrative Services Manager.
8. In alphabetical order, names of proposers (or finalists, if applicable) and location	<ul style="list-style-type: none"> • Intelegy Corporation, San Ramon, California. • Policy Studies, Inc., Denver, Colorado.

RESOLUTION NO. _____

BOARD OF SUPERVISORS, COUNTY OF SAN MATEO, STATE OF CALIFORNIA

**RESOLUTION AUTHORIZING EXECUTION OF AN AGREEMENT WITH
POLICY STUDIES, INC.**

RESOLVED, by the Board of Supervisors of the County of San Mateo, State of California, that

WHEREAS, on December 19, 2000, the County of San Mateo issued an original Request for Proposals for various Child Support Call Center Services and;

WHEREAS, the Family Support Division received three proposals and interviewed three finalists and;

WHEREAS, Policy Studies, Inc. was selected to perform specific services in the Family Support Call Center based on their experience operating, managing, and staffing child support call centers, client references, and cost, and;

WHEREAS, an Agreement has been presented to this Board of Supervisors for its consideration and acceptance, reference to which is hereby made for further particulars, whereby Policy Studies, Inc. will provide specific Child Support Call Center Services for the Family Support Division for the period commencing April 10, 2001 through and including June 30, 2002 and;

WHEREAS, this Board has been presented with a form of the Agreement and has examined and approved it as to both form and content and desires to enter into the Agreement;

NOW, THEREFORE, it is hereby determined and ordered that the President of this Board of Supervisors be, and is hereby authorized and directed to execute said Agreement for and on behalf of the County of San Mateo, and the Clerk of this Board shall attest his signature thereto.

* * * * *

SAN MATEO COUNTY AGREEMENT NO _____

THIS AGREEMENT, entered into this ___ day of April 2001 by and between the COUNTY OF SAN MATEO, hereinafter referred to as County and POLICY STUDIES, INC. hereinafter referred to as Contractor

WITNESSETH

WHEREAS, pursuant to Government Code Section 53060 the County may contract with and employ persons for the furnishing of special services such as management consulting and technical enhancements, in this case, specifically for the San Mateo County Family Support Division child support call center; and

WHEREAS, the following attachments are attached hereto and incorporated by reference herein:

1. Exhibit A - Service Description and Payment Schedule

WHEREAS, it is necessary and desirable that the Contractor be engaged by the County for the purpose of performing services hereinafter described:

NOW, THEREFORE, IT IS HEREBY AGREED by the parties as follows:

1. Services to be Performed by Contractor.
In consideration of the payment hereinafter set forth, the Contractor shall perform services for County in accordance with the terms, conditions and specifications set forth herein and in Exhibit A attached hereto for the COUNTY OF SAN MATEO, DISTRICT ATTORNEY'S OFFICE, FAMILY SUPPORT DIVISION. Contractor shall ensure compliance with all state, federal and local laws or rules applicable to performance of the work required under this contract.
2. Contract Term.
The term of this agreement shall be from April 10, 2001 through and including June 30, 2002.
3. Payments.
In consideration of the services rendered in accordance with all terms, conditions and specifications set forth herein and in Exhibit A, the County shall make payment to the Contractor in the manner specified in Exhibit A. In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination. The County reserves the right to withhold payment if the County determines that the quantity or quality of the work

performed is unacceptable. In no event shall total payment for services under this Agreement exceed
\$ 349,000.00

4. Relationship of the Parties.

Contractor agrees and understands that the work/services performed under this Agreement are performed as an Independent Contractor and not as an employee of the County and that Contractor acquires none of the rights, privileges, powers or advantages of County employees.

5. Worker's Compensation and Employer Liability Insurance

The Contract shall have in effect, during the entire life of this Agreement, Worker's Compensation and Employer Liability Insurance providing full statutory coverage. In signing this Agreement, the Contractor makes the following certification, required by Section 1861 of the California Labor Code:

I am aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of the Code, and I will comply with such provisions before commencing the performance of this work of the Agreement.

6. Liability Insurance.

The Contractor shall take out and maintain during the life of this Agreement such Bodily Injury Liability and Property Damage Liability Insurance as shall protect him while performing work covered by the Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all operations under this Agreement, whether such operations by himself or by any subcontractor or by anyone directly or indirectly employed by either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall be no less than \$1,000,000 unless another amount is specified below and shows approval by the Risk Management Division of the Department of Employee and Public Services. The Contractor shall not commence work under this Agreement until all insurance required under this section has been obtained. The Contractor shall furnish Risk Management with Certificates of Insurance evidencing the required coverage and there shall be a specific contractual liability endorsement extending the Contractor's coverage to include the contractual liability assumed by the Contractor pursuant to this Agreement. These Certificates shall specify or be endorsed to provide that thirty days notice must be given, in writing, to the Risk Manager of any pending change in the limits of liability or of non-renewal, cancellation, or modification of the policy.

Required insurance shall include

1. General Liability \$1,000,000
2. Workers Compensation Statutory

The County and its officers, agents, employees and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that the insurance afforded thereby to the County, its officers, agents, employees and servants shall be primary insurance to the full limits of liability of the policy and that if the County or its officers and employees have other insurance against a loss covered by such a policy, such other insurance shall be excess insurance only.

After three years from the date this agreement is first executed the County may, at its sole discretion, require an increase in the amount of liability insurance to the level then customary in similar County agreements by giving 60 days notice to the Contractor

In the event of the breach of any provision of this section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, the County, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work pursuant to this Agreement.

7. Hold Harmless.

The Contractor shall indemnify and save harmless the County, its' officers, agents, employees and servants from all claims, suits or action of every name, kind and description, brought for, or on account of (A) injuries to or death of any person, including Contractor, or (B) damage to any property of any kind whatsoever and to whomsoever belonging, or (C) by reason of any failure to withhold and/or pay to the government income and/or employment taxes from earnings under this contract as made necessary by Section 530 of the Revenue Act of 1978 including, but not limited to, the concurrent active or passive negligence of the County, its officers, agents, employees or servants, resulting from the performance of any work required of Contractor or payment made pursuant to this agreement, provided that this shall not apply to injuries or damage for which the County has been found in a court of competent jurisdiction to be solely liable by reason of its own negligence or willful misconduct.

The duty of the Contractor to indemnify and save harmless, as set forth herein, shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

8. Confidentiality
All data produced or compiled by Contractor shall be considered confidential unless it can be obtained as public record and shall not be shared with a third party without the prior written consent of County. All financial, statistical, personal, technical, and other data and information relating to the County's operations which is made available to the Contractor in order to carry out this Agreement shall be presumed to be confidential. Contractor shall protect said data and information from unauthorized use and disclosure by the observance of the same or more effective procedures as the County requires of its own personnel. The Contractor shall not, however, be required by this paragraph to keep confidential any data or information which is or becomes publicly available, is already rightfully in the Contractor's possession, is independently developed by the Contractor outside the scope of the Agreement or is rightfully obtained from third parties.

9. Termination of Agreement
The County may, at any time from execution of Agreement, terminate this Agreement, in whole or in part, for the convenience of the County, by giving written notice specifying the effective date and scope of such termination. Termination shall be effective on a date not less than thirty days from notice. In the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and materials (hereafter referred to as materials) prepared by Contractor under this Agreement shall become the property of the County and shall be promptly delivered to the County. In the event of termination, Contractor shall be paid for all work satisfactorily performed until termination, except where the contracting department determines the quality or quantity of the work performed is unacceptable. Such payment shall be that portion of the full payment, which is determined by comparing the work/services completed to the work/services required by the Agreement.

10. Payment of Permits/Licenses
It shall be the Contractor's responsibility to obtain any license, permit or approval required from any agency for work/services to be performed at his/her own expense, prior to commencement of said work/services or forfeit any right to compensation under this Agreement.

11. Non-Discrimination.
No person shall be excluded from participation in, denied benefits of, or be subject to discrimination under this Agreement on the basis of their race, color, religion, national origin, age, sex/gender, sexual orientation, pregnancy, childbirth or related conditions, medical condition, mental or physical disability or veteran's status. Contractor shall ensure full compliance with federal, state and local laws, directives and executive orders regarding non-discrimination for all employees and Subcontractors under this Agreement.

12. Violation of Non-Discrimination Provisions
Violation of the non-discrimination provisions of this Agreement shall be considered a breach of this Agreement and subject the Contractor to penalties, to be determined by the County Manager, including but not limited to
- i.) termination of this Agreement
 - ii.) disqualification of the Contractor from bidding on or being awarded a County contract for a period of up to 3 years;
 - iii.) liquidated damages of \$2,500 per violation;
 - iv.) imposition of other appropriate contractual and civil remedies and sanctions, as determined by the County Manager.
13. Retention and Access to Records.
The County, the Federal grantor agency, the Comptroller General of the United States or any of their duly authorized representatives, shall have access to any books, documents, papers and records of the Contractor which are directly pertinent to this contract for the purpose of making audit, examination, excerpts and transcriptions.
Contractor shall maintain all records related to this Agreement for no less than three years after the County makes final payment or after termination of this contract and all other pending matters are closed.
14. Merger Clause.
This Agreement, including Exhibit "A" attached hereto and incorporated herein by reference, constitutes the sole agreement of the parties hereto and correctly states the rights, duties and obligations of each party as of the date of the document. Any prior agreement, promises, negotiations or representations between the parties not expressly stated in the document are not binding. All subsequent modifications shall be in writing and signed by the District Attorney or his designee. In the event of a conflict between the terms, conditions or specifications set forth herein and those in Exhibit A attached hereto, the terms, conditions or specifications set forth herein shall prevail. This Agreement, or facsimile proposal of the Agreement, constitutes the entire Agreement between County and Contractor. Further, liability referenced to in Section 6 is limited to Contractor's negligence during the Contractor's performance under this contract.
15. Assignments and Subcontracts.
All assignees, subcontractors or consultants working under this Agreement for the Contractor shall be subject to the same terms and conditions applicable to the Contractor under the Agreement, and the Contractor shall be liable for the assignee s, subcontractor s or consultant s acts and/or omissions.

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representative, have affixed their hands on the day and year first written above

COUNTY OF SAN MATEO

By: _____
Michael D Nevin
President, Board of Supervisors

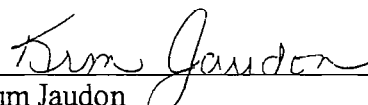
Date: _____

ATTEST.

Clerk of the Board of Supervisors

Date: _____

CONTRACTOR



Kim Jaudon
Policy Studies, Inc

Date March 27, 2001

EXHIBIT A: Service Description and Payment Schedule

Scope of Work for Implementation and Operation of the San Mateo County Family Support Division Child Support Call Center

Deliverables

There are three distinct deliverables that Policy Studies Inc. (PSI) will provide to the San Mateo County Family Support Division, specifically for their Child Support Call Center (Public Service Unit - PSU). Policy Studies Inc. will:

- ✓ Provide a Child Support Customer Service Unit Manager to plan, implement, and manage the newly defined PSU and its day to day operations;
- ✓ Customize and implement PSI Link, the graphical user interface (GUI) application developed specifically for child support customer service support;
- ✓ Provide call overflow coverage for the San Mateo County Family Support Division Call Center by using PSI's existing New Mexico Child Support Call Center staff and resources. PSI will work with San Mateo County staff as desired by the county to plan and implement an overflow call handling plan that will ensure that customers wait a minimal amount of time to speak with a knowledgeable child support customer service professional and that calls that meet an agreed upon call wait threshold be transferred automatically and without noticeable delay to the New Mexico Child Support Call Center for service.

Provide a Child Support Customer Service Unit Manager

PSI believes that the unusual nature of this project structure – a contractor as customer service unit manager who will be responsible for county staff – requires an individual matched to this challenge. Although uncommon, PSI has managed in similar circumstances, and is offering Janet Goode as the on-site Customer Service/Public Service Unit Manager. Goode has experience managing both co-located staff and non-PSI staff. PSI believes she is one of very few individuals in the county whose qualifications include specific child support customer service management experience, as well as this rare supervisory experience. She will provide overall on-site guidance and direction to each phase of the project to assure quality and completion of work. Her duties will include establishing a work plan for each phase of the project; reviewing the status of progress and preparing reports for management; providing technical advice and subject-matter expertise, and assuring quality of work and that project meets its established goals.

Goode was the Operations Manager for Iowa Employers Partnering in Child Support (EPICS), the customer service center dedicated to meeting the needs of Iowa's employers and staffed by State contract employees. She was responsible for meeting the demands and deliverables for EPICS and also acted as the liaison between customers, employees, and the Iowa Department of Human Services. Goode has extensive child support experience. She has been with PSI since 1997 and has served in the positions of Call Center Manager, Team Leader and Lead Specialist.

The elements of PSI's management system and corporate resources are summarized below

Set Desired Goals. The first step PSI's approach is to agree on desired, measurable goals. PSI staff will work closely with San Mateo County Family Support Division key staff to set goals that are attainable and reasonable for county staff. These goals will support the overall improved service goals sought in the RFP – including standards for a two minute hold time and a referral to the case worker rate of no more than 20% (monthly average) of calls that are answered by the Public Service Unit. This translates to an 80% call resolution rate within the Call Center. PSI will set performance goals for all staff that support the overall goals of the project and will clearly communicate the goals so that staff understand their job expectations.

Provide Adequate Training and Tools. For staff members to achieve program goals, they must first understand the goals, recognize how their work affects performance relative to the goals, gain the skills needed to perform the work correctly and efficiently, and receive the tools needed to support their work. PSI believes in open communication with staff at all levels, and explains personal and site performance goals, involving them in developing goals that will contribute to meeting the site goals, and giving them feedback on results. PSI has invested substantial resources in creating a comprehensive, in-depth training program for PSI child support staff that provides them with the skills they need to perform their work well. The PSI training program is unusual in its intensity and sophistication.

Measure Results Systematically. PSI's internal quality assurance program allows PSI to measure the quality of work at PSI call center sites systematically. It is designed to serve as an early warning system for detecting problems. This gives PSI time to take corrective action before problems become serious. PSI will continuously assess the speed, accuracy, and quality of responses in the PSU, as well as appropriate treatment of customer contacts among all the partners supporting the delivery of child support services.

A unique element of PSI's measurement strategy has been the development of PSI's own software, PSI Link, that provides detailed measurements of performance. Not only will this software yield measures of performance at the office, team, and caseworker levels, it will also be used to develop detailed analyses and case listings to target areas needing attention in the Call Center and throughout the Family Support Division.

Maintain Shared Accountability for Performance. PSI will build in accountability for effective performance at the office, team, and individual levels. As discussed above, PSI provides clear guidance to staff at every level concerning performance expectations. PSI will work with the county to determine the most appropriate ways to reinforce good performance with tangible and intangible incentives, including positive management feedback, bonuses, merit increases, and promotions. PSI will identify and work with the county to correct deficient performance through coaching and retraining, withholding of incentives, and, if necessary, discipline and termination. PSI will ensure practices and those of its Child Support Customer Service Unit Manager support county civil service and public employee merit requirements. PSI has found that staff respond positively to a system of clear goals, objective management, and consistent feedback, and anticipate that this will be true for San Mateo County Family Support Division staff as well.

Respond Definitively to Externally Identified Deficiencies. There may be times when San Mateo County Family Support Division staff identify deficiencies that need to be addressed. Once PSI confirms the nature and existence of a problem, PSI will acknowledge their responsibility and prepare a plan that is intended to address it adequately. An important aspect of PSI's partnering philosophy is to own up to PSI's mistakes, take input from San Mateo County Family Support Division staff seriously, and analyze the problem carefully as the basis for an effective internal corrective plan. Any corrective plans will be thoroughly discussed with the appropriate county personnel, specifically San Mateo County Family Support Division designated representatives

PSI will also explore with San Mateo County the acceptability of having county PSU staff participate in PSI's Peer Mentoring program by pairing new San Mateo County Family Support Customer Service Specialists with more experienced child support call center staff in New Mexico. Communication will be through e-mail and will allow new staff to see themselves first as customer service professionals in what PSI believes is a new and exciting area. This will give San Mateo County staff a mentor to help them with any struggles or concerns they may have as they provide high quality service to San Mateo County families through the Public Service Unit.

PSI Vice President Kim Jaudon, will provide direct support to this project, and will assist Goode. Goode and Jaudon will formulate a plan for meeting performance requirements beginning with attention to high-level goals and detailed tasks required to successfully operate the San Mateo County Family Support Public Service Unit. PSI will:

- ✓ Provide a viable and detailed set of procedures for PSU operations;
- ✓ Deliver a comprehensive training plan that prepares PSU staff to deal effectively with complex issues and emotional customers;
- ✓ Offer innovative and proven technical solutions for greater efficiencies;
- ✓ Develop a project management plan and an operation plan for the first months of operations; and
- ✓ Maintain effective, ongoing communications with all entities related to the PSU.

Customize and Implement PSI Link for San Mateo County

PSI will customize PSI's Graphical User Interface (GUI), PSI Link, for the San Mateo County Family Support Call Center environment. This software will display data from the San Mateo County child support mainframe system, known as CHASER, in a user-friendly, customer-focused format. Designed to work with advanced Computer Telephony Interface (CTI) technology that gathers the case number from the caller, PSI Link is a Windows-based application that serves as a gateway to state mainframe-based child support systems. Since PSI Link does not interface directly with any system, it will not affect existing CHASER programming. PSI Link is a user-friendly, intuitive screen display of child support information necessary to respond to approximately 80 percent of customer requests. The application consists of a single main screen with a series of tabs each containing payee information, payor information, children, payor employers, income withholding, payment receipts, and court orders.

Retrieval of system-supplied information is customized to the needs of each particular site. PSI and the San Mateo County Family Support Division will identify data elements that should be incorporated into PSI Link and determine the most efficient way to transfer the information from the mainframe to PSI Link. In some cases, middleware can be used to provide a bridge between the customer service site and the mainframe computer. In other instances, it may be more efficient to “read” the information as displayed on the mainframe system screens and re-display it in PSI Link. Typically, between eight and twelve mainframe screens are used to provide information to PSI Link

PSI Link also contains “buttons” that provide a short cut to the corresponding mainframe system screen. Family Support Division staff familiar with the CHASER system will need to provide insight to PSI into the screens receiving the highest level of use. Shortcuts are then developed to go directly to those screens already populated with information for the current case.

Commercially available telephone software, while sufficient for typical “call center” operations, is not adequate for child support customer service operations. A significant feature of PSI Link is the ability for workers to log information regarding each of their customer requests. A single screen allows the worker to indicate the type of caller (i.e., custodial parent, employer); the reason for the call (e.g., obtain information); an indicator that the issue requires referral to the field; and a space for comments regarding the call. Managers have access to a tool, PSI Link Administrator that is designed to produce a wide variety of reports based on the call summary information. These reports are customized to support the requirements in the particular site. For example, New Mexico needed to report the numbers of calls for each of the nine regions in the state, and PSI Link was customized to support these reporting requirements. PSI will customize PSI Link to the San Mateo County Family Support Division call center environment.

PSI Link is configured to integrate with IVR and ACD call handling systems. PSI will work with San Mateo County to ensure that the call handling and CTI technology chosen by the County will be compatible with PSI Link. Extensive testing indicates that the data displayed on PSI’s front-end screens will answer 75 to 80 percent of all customer inquiries without additional system research, leading to reduced call times.

The use of PSI Link is intended solely for San Mateo County Family Support Division staff and will not be extended to include other vendors.

Overflow Call Handling

This component of PSI's teaming arrangement is perhaps the most innovative and unique. PSI believes that one viable solution for peak call time, or unanticipated staffing difficulties is to have a back-up group of trained child support professionals. PSI will use the facility and staff in the New Mexico Child Support Customer Service Center for this purpose. To accomplish this, PSI would establish a link to the San Mateo County child support mainframe (CHASER), using PSI Link, through the existing server. The best method for accomplishing this depends upon anticipated volume and existing hardware. PSI technical staff, including Cathy Watterson and Pam Ferguson, will work with San Mateo staff to determine the most cost-effective and efficient approach.

One approach may be the re-direction of call from an existing 800 number. Another would be the addition of a dedication line between San Mateo County and Santa Fe, New Mexico. PSI equipment in New Mexico is state-of-the-art, and contains the capacity required to receive these incoming calls, direct the calls to specified, trained staff, and report the details of the call to San Mateo County. This will require co-ordination with county staff to finalize the planning and implementation of this interesting option.

Work Plan

The PSI work plan assumes an April 10, 2001, start date. If this start date is pushed over, then the corresponding due dates for each following task will also be pushed over to correspond with the new start date. PSI will:

- ✓ Develop a viable and detailed set of procedures for PSU operations;
- ✓ Assist with the recruiting and hiring of a well qualified staff, and
- ✓ Maintain effective ongoing communications with the Division and all other entities related to the PSU.

To meet these complex responsibilities, PSI has assembled a management and support team with a wide range of experience and talent. The successful implementation of child support customer service units depend upon experienced management staff. Initial day-to-day responsibility for developing the PSU will rest with Janet Goode, Unit Manager, who will work in conjunction with Kim Jaudon, Contract Executive. Goode served as Operations Manager in Iowa's Employer's Partnering in Child Support (EPICS) unit, as Call Center Manager in Iowa's Specialized Customer Service Unit. She is currently performing consulting assistance in other child support areas.

Jaudon is well acquainted with IV-D operations and brings perhaps the most extensive background in large IV-D customer services operations offered by anyone in the country. Jaudon and Goode bring an in-depth understanding of operating a child support customer service unit and will provide insight and support in this environment. PSI is proud to offer San Mateo County a management team with exceptional experience and understanding of the child support customer service environment.

The development and operation of the PSU will take place in the three phases discussed below

Phase I: Design and Development Phase I encompasses each task up to the start of operations
Tasks include:

- ✓ Finalizing management plans and establishing and maintaining communication with the Division;
- ✓ Specifying detailed operational plans and procedures;
- ✓ Recruiting, selecting, and allowing time for training staff; and
- ✓ Preparing for operations.

During the development phase, PSI anticipates that Goode and/or Jaudon will have contact with the San Mateo County Contract Administrator several times each week, and PSI will ensure that they touch base at least weekly if there has been no other contact. PSI will freely exchange information on progress, impediments, and issues, and PSI will solicit suggestions on PSU development as PSI proceeds. In coordination with the San Mateo County Contract Administrator, PSI will work closely with other key San Mateo County staff as PSI designs and implements the PSU. These will include key staff in the policy, fiscal, and systems groups

PSI recommends that San Mateo County establish an Advisory Panel, which is discussed in more detail below. PSI will help coordinate, staff, and facilitate Advisory Panel meetings. San Mateo County would determine the meeting schedule, but PSI suggests that the initial meeting be face-to-face, with subsequent meetings held by teleconference. PSI suggests that the meetings be held twice monthly during the development phase and during the first three months of initial operations. After operations stabilize, meetings should be phased down to monthly, and ultimately, to quarterly as issues arise less frequently.

Phase II: Initial Operations. This phase, which PSI has defined as the first three months of operations, involves augmented support for the staff, intensive interaction with affected entities, and fine-tuning of operational procedures. In this phase, PSI will also thoroughly train new employees on procedures, policies, and elements of their jobs. This training will supplement the initial training conducted prior to the onset of initial operations and will promote continuous improvement throughout the contract.

Phase III: Ongoing Operations. This phase entails operations for the remainder of the contract period. After the Initial Operations Phase, PSI expects that the PSU will have reached a steady state. Interactions with San Mateo County, local offices, and other entities will become routine. At this point, PSI will review existing procedures. This review will ensure that procedures are complete and address all requisite issues. After a comprehensive review, PSI will revise the procedures as necessary and communicate the changes to all staff members. PSI is set up specifically to support privatization start-ups. PSI Human Resources, Facilities, Technologies, and Privatization teams each contribute staff to a Start-up Team who is experienced in their subject areas and have worked together for many years. They will function under the overall direction of the Contract Executive, Kim Jaudon, and in close coordination with the Call Center Unit Manager, Janet Goode. Jaudon and Goode will closely track progress

against the implementation schedule. The Contract Executive and Call Center Unit Manager will also maintain close and frequent contact with the San Mateo County Contract Administrator to report progress, identify implementation issues, and resolve concerns that require San Mateo County assistance. PSI is committed to frequent and open communication with PSI clients. PSI will work with San Mateo County to form the type of effective partnership that is required for the success of a complex project.

Below, PSI provides detail of all of the tasks necessary to provide customer service to case parties, employers, and the general public of San Mateo County.

Major Implementation Milestones and Deliverables.

In this section, milestones are described which are to be met throughout the implementation of the PSU. These tasks are grouped in logical associations to allow the responsible individuals to track each milestone.

Task Group 1: Project Management

This set of tasks describes the activities PSI will perform to finalize the contract and formalize project plans, maintain effective communications with San Mateo County and other entities affected by PSU operations, and provide structured periodic reports.

Task 1.1. Contract Signing

Following contract award, PSI will arrange a meeting between San Mateo County representatives and PSI executives. At a minimum, this meeting will include Mike Henry, President of PSI's Privatization Partnerships Division; Kim Jaudon, Vice President and Contract Executive for this project, and Janet Goode, Call Center Unit Manager. PSI will want to clarify PSI's mutual understanding of certain key issues. These include a precise agreement on the scope of PSI's responsibilities, the relationship between PSI's functions and those of other County and local entities, and the exact meaning of each performance standard.

Milestone:	Contract Signing
Tasks:	Initial meeting with key San Mateo County and PSI staff
Deliverables:	Signed Contract
Start Date:	April 1, 2001
Completion Date:	April 10, 2001

Task 1.2. Finalize Project Management Plans

Immediately after contract signing, PSI will meet with senior-level San Mateo County Family Support Division Managers to review the overall project management approach and discuss any refinement to the proposed work plan. This meeting will help ensure the San Mateo County and PSI management teams share the same expectation for the scope of the deliverables and the overall management of the project. Following this meeting, PSI will produce a revised San

Mateo County Family Support Division Public Service Unit Project Management Plan and submit it to the San Mateo County Family Support Division Contract Administrator or designated representative. The revised plan will include the project schedule and tasks, dependencies between tasks, and completion dates for tasks and activities. PSI recommends that the project management plan contain the commitments of both San Mateo County Family Support and PSI. PSI will use Microsoft Project as PSI's project management tool.

During the project initiation phase, PSI will prepare a series of project planning and control documents. These documents will define the procedures that will be used during the development and implementation phases of the project. The list of the planning documents that PSI will develop include:

- ✓ *Project Controls, Standards, and Procedures.* Project controls, standards, and procedures are necessary to ensure appropriate levels of control and consistency within key project activities. During project initiation, Kim Jaudon, PSI Contract Executive, will define and document the management controls, standards, and procedures associated with administrative, management, and technical aspects of the San Mateo County Family Support Division PSU project. This document will address: (1) standards and processes associated with project documentation, including handling and archiving multiple versions of project reports, deliverables, meeting minutes, and other documentation; (2) records maintenance and retention procedures, (3) timekeeping procedures; and (4) meeting procedures.
- ✓ *Problem and Issue Management Plan.* At the start of the project, PSI will define and document a structured process for identifying and achieving timely resolution of issues. The Problem and Issue Management Plan will document the procedures to be established for monitoring problems and issues that may arise during the project. Each member of the PSI team and designated San Mateo County Family Support Division counterparts will have a role and specific responsibilities associated with the problem and issue management process.
- ✓ *Quality Control Plan.* The final Quality Control Plan will be used to set expectations and clarify individual and joint responsibilities. PSI will work with the Division to define all required performance measures, including those detailed in the RFP.

Milestone:	Finalize Project Management Plans
Tasks:	Establish Project Controls, Standards and Procedures Develop Problem and Issue Management Plan Maintain Quality Control Plan
Deliverables:	Project Management Plan
Start Date:	April 10, 2001
Completion Date:	April 15, 2001

Task 1.3: Project Initiation

PSI will conduct a project kick-off meeting to mark the official beginning of the project and introduce all of the key players. PSI will focus on defining roles and responsibilities for the project. Jointly, PSI will define the working relationships and interactions between PSI and San Mateo County Family Support personnel, and discuss the proposed Management Plan and Schedule. This initial meeting will lay the groundwork for the development of the San Mateo County Family Support PSU Project Team and assist in creating coordinated, focused, and comfortable working relationships between all parties.

Milestone:	Conduct Project Kick-Off Meeting
Tasks:	Schedule and Plan Project Kick-off Meeting
Deliverables:	Meeting
Start Date:	April 10, 2001
Completion Date:	April 15, 2001

Task 1.4: Assist the Family Support Division in Forming Optional Advisory Panel

If the Family Support Division concurs, PSI will establish an Advisory Panel with representatives possibly drawn from different levels of staff within the Division.

These meetings will enable PSI to efficiently gather input and build relationships with key stakeholders; identify concerns; establish communication links, and initiate the problem solving, customer, and results-focused dialogue that will guide the Public Service Unit. PSI suggests holding these meetings twice monthly during the development phase and at least through the first three months of initial operations. After operations stabilize, meetings should be phased down to monthly, and, ultimately, to quarterly as issues arise with less frequency.

PSI will work with Family Support Division staff to identify Panel participants. PSI will ensure that everyone's voice is heard and that solutions dovetail effectively to serve families. Through PSI's experience in other states, PSI has learned that such a Panel can be an efficient and systematic mechanism for gathering the input of affected entities. It also provides an effective means of discovering and resolving operational and policy interpretation issues quickly. This forum promotes buy-in among the group members and creates a seamless system for serving the external customers of San Mateo County and the PSU. In PSI's development of the New Mexico Child Support Information Center, for example, an Advisory Panel proved invaluable in developing an effective organizational structure and enhancing the Unit's procedures once operations were underway.

PSI understands that the staff participating in this Panel may face many competing demands. PSI will ensure that all meetings are productive and results-oriented.

Milestone:	Assist in Forming Optional Advisory Panel
Tasks:	Obtain Approval for Formation of Panel Identify Members of the Advisory Panel Set Initial Agenda Schedule Meeting Conduct Initial Meeting Agree on Initial Unit Protocol
Deliverable:	Designation of Advisory Panel
Start Date:	April 10, 2001
Completion Date:	April 15, 2001

Task 1.5: Ongoing Consultation

Frequent, close collaboration between PSI management staff and San Mateo County Family Support project management staff is critical to the success of the PSU. PSI places a high value on developing and maintaining strong, informal communications channels. As a leading provider of privatized child support services, PSI intimately understands IV-D program operations on a broader scale, and how a customer service unit fits into the big picture. In this sense, the foremost customers of the PSU are the employees of San Mateo County. As PSI provides information and support to the Unit's callers, San Mateo County Family Support Division staff members are free to perform the tasks they perform best: establishing and enforcing orders for medical and child support. The extent to which the PSU supports San Mateo County Family Support staff will determine the support PSI receives from San Mateo County. PSI will achieve success by building a team dedicated to improving the delivery of services to San Mateo County families.

To create positive relationships, PSI will actively solicit input and feedback from San Mateo County Family Support staff on operational issues. Many vendors make this assertion, but few consistently deliver. In Iowa and in New Mexico, during the implementation of the Specialized Customer Services Unit and Child Support Information Center, casework staff was invited to help support the new Unit during implementation. Casework staff spent the day answering questions about specific case handling, providing on-the-spot training for handling complex cases, and gaining insight into the challenges the Unit faced. Caseworkers gained a first-hand understanding of work performed by each person in the Unit and became convinced that PSI specialists were well trained and able to provide a high level of service to callers. This same process will be used in within the San Mateo County Family Support Division PSU project.

Child support staff may resist the introduction of a vendor until they learn how the vendor provides a tangible benefit to them. In studies conducted to review the quality of service in other states and countries, PSI has learned that the greatest fear that child support staff expresses is that new initiatives may create more, not less, work. By giving child support staff opportunities to submit ideas for the operation, problem-solve tough issues, and get to know the staff with whom they will be working, PSI is able to work through these fears and gain not just acceptance but generate excitement.

Milestone.	Ongoing Consultation
Tasks	Designate contact individuals Designation communication methodology
Deliverable:	None
Start Date.	May 1, 2001
Completion Date	Ongoing through project

Task 1.6: Progress Reports

Project reporting provides an opportunity for San Mateo County Family Support to compare the status of implementation activities to the detailed project management plan and contract specifications. This tool will allow PSI and San Mateo County Family Support to make adjustments to ensure that desired outcomes are being met.

Project status will be reported throughout the project life cycle. Status reports will be prepared and delivered to the San Mateo County Contract Administrator both weekly and monthly. These reports will contain the appropriate level of detail agreed upon by San Mateo County Family Support and PSI. They will serve as a mechanism to report on progress relative to the work plan, as well as provide statistical data that allow San Mateo County Family Support to appraise the value and success of the Unit

Milestone:	Weekly/Monthly Progress Reports
Tasks:	Provide Initial Report Layouts to the Division for Approval Determine Needs Beyond Those Specified in the RFP (if any) Determine Reporting Mechanism (e-mail; paper, etc.)
Deliverables:	Weekly/Monthly Progress Reports
Start Date:	May 1, 2001
Completion Dates:	Ongoing through contract end

Task 1 7: Customize PSI Link for the San Mateo County Family Support Environment

PSI has developed specialized customer service software, PSI Link, which interacts with a child support agency's mainframe system to streamline screen navigation and simplify staff training and job performance. PSI knows the questions that different parties ask, and PSI is able to anticipate the order of the data needed to answer these questions and to display the needed data logically. Data is drawn from San Mateo County's relational database; however, data updates occur on-line in CHASER. Hot buttons automatically direct the customer service specialist to the correct CHASER screen to record new infoake case notes. After this is completed, the Specialist is able to toggle back to PSI Link. PSI Link also captures extensive data to help manage the PSU, and to provide San Mateo with a complete and accurate picture of the customers the Unit serves. PSI Link will not interfere with San Mateo County Family Support Division's automation.

PSI proposes to modify this system for the San Mateo County Family Support PSU to ensure the greatest possible staff efficiencies and the highest quality customer interactions. Although customization and implementation of this software may not be completed prior to the April 1, 2001, start date, PSI is confident that it can be implemented early in the unit's operation.

Milestone:	PSI Link is operational
Tasks:	Meet with Division Staff to Determine Approach Develop Design Document Complete Programming Conduct System Testing
	Deliverables: PSI Link (Proprietary software) Train Staff on System
Start Date:	April 10, 2001
Completion Dates:	May 30, 2001

Task 1.8: Prepare phone system and computer access for off-site support.

PSI will work with San Mateo County Family Support Division staff to develop the connectivity and interfaces required for connectivity to the New Mexico Call Center for call overflow coverage as determined and defined by Family Support staff.

Milestone:	Phone and computer linkages established
Tasks:	Meet with Division Staff to Determine Approach Develop Design Document Secure needed hardware/software enhancements (San Mateo responsibly in California; PSI responsibility in New Mexico). Complete Programming Conduct System Testing
Start Date:	April 10, 2001
Completion Dates:	May 30, 2001

Task Group 2: Develop Operational Plans and Procedures

The most critical set of tasks during the start-up period involves establishing a sound structural and procedural framework for the PSU. To ensure that the PSU operates efficiently from opening day and relates effectively to other relevant organizations, PSI will develop thorough job responsibilities and operating procedures. PSI will collaborate closely with San Mateo County staff to ensure that the PSI plan and procedures are fully consistent with the contract requirements and San Mateo County Family Support Division's needs.

Task 2.1: Review and Analyze Existing Operations and Procedures

In this task, PSI will review existing customer service manuals and operations to assess the range of customer inquiries and determine how they are currently handled.

Milestone	Review and Analyze Existing Operations and Procedures
Tasks	Discuss Approach with Contract Manager
Deliverables	None
Start Date:	April 10, 2001
Completion Date.	April 30, 2001

Task 2.2: Define Organizational Roles and Linkages

The purpose of his task is to clearly delineate roles, responsibilities, and relationships. In PSI's experience, defining expectations for each organization will be critical to the success of the PSU.

This task will involve extensive collaboration with the San Mateo County Contract Administrator and, if formed, the optional Advisory Panel. If the Advisory Panel is not formed, PSI will work with affected entities individually.

Milestone	Define Organizational Roles and Linkages
Tasks:	Communicate Methodology to all Partners Obtain Division Approval of Final Document Containing Definitions and Agreements
Deliverables:	None
Start Date:	April 10, 2001
Completion Date	April 16, 2001

Task 2.3: Develop Operational Procedures

The procedures to be used to operate the PSU will be drawn from the specific requirements defined in the RFP, as well as PSI's existing child support customer service materials, and the results of PSI's research on San Mateo County Family Support Division procedures. PSI will develop two procedure guides, *The Playbook* and *First Aid Manual*, which provide direction to managers and staff on meeting all of the contractual requirements for the PSU.

These guides will also ensure that staff can easily identify all relevant Federal, State, and County policies, understand the needs of the customers and the specific strategies developed to meet those needs, and coordinate their work with that of the other partners in the child support services delivery system. The guides will provide guidance on the specific issues of child support, including responding to questions about:

- ✓ General child support issues;
- ✓ Paternity and establishment,
- ✓ Case status,
- ✓ Payments and disbursements,
- ✓ Distribution;
- ✓ Medical support and insurance;
- ✓ Income withholding,
- ✓ Review and modification;
- ✓ Interstate questions;
- ✓ License suspension;
- ✓ Internal Revenue offset;
- ✓ Passport denial;
- ✓ Consumer credit reporting;
- ✓ Liens;
- ✓ New hire;
- ✓ Financial Institution Data Match (FIDM);
- ✓ Location;
- ✓ Daycare;
- ✓ Emancipation; and
- ✓ Other general questions.

Both guides will be provided to Family Support Customer Service Specialists in a paper format during their training period and will also be maintained in an automated format with easy-to-use search functions. The automated version allows for easy updating and ongoing reference. Originally developed to support PSI's Georgia Child Support Customer Service Unit, and modified for PSI's Iowa Specialized Child Support Unit and New Mexico Child Support Information Center, these proven tools will be custom-fit to the San Mateo County Family Support Division environment after a review of Division and County policy and procedures, laws, and system information.

Milestone:	Develop Operational Procedures
Tasks:	Modify Existing Procedures for San Mateo County PSU
Deliverable:	Procedures Guide, <i>The First Aid Manual</i>
Start Date:	April 10, 2001
Completion Date:	April 30, 2001

Task 2.4: Develop Reporting Formats

PSI will develop formats for reports to be delivered to San Mateo County Family Support Division staff and formats for more detailed internal reports. Most of the data for the reports will be produced from the extensive reporting capabilities of the ACD software. Additional reports from PSI Link will provide a clear and complete picture of customer needs and unit responsiveness in San Mateo County. PSI will work with San Mateo County Family Support

Division staff to determine the information most helpful to the County when responding to legislative, Governor's Office, and other high-level inquiries that inevitably arise concerning providing services to constituents. PSI will bring in-depth knowledge of how this information can be used to positively impact the perception of these stakeholders, as well as the general public

Milestone	Develop Reporting Formats
Tasks:	Obtain Approval on Draft Format Agree On Reporting Mechanism
Deliverable:	Formats for Required Management Reports
Start Date	April 10, 2001
Completion Date:	April 30, 2001

Task Group 3: Human Resources

PSI will work with San Mateo County Family Support to assist in recruiting and hiring that will be most likely to excel in the child support customer service environment.

PSI has identified the minimum qualifications, anticipated duties, and minimum education/experience required for each position within the PSU. PSI's training and management support will help offer very broad assistance with recruitment strategies. PSI's local management staff will work with San Mateo County Family Support to review job descriptions.

Task 3 1: Recruit Staff

- ✓ PSI will assist in the recruitment of County staff to the extent desired by the San Mateo County Family Support Division. PSI would like to use some of PSI's existing testing, however, PSI will defer to the Family Support's desires.

Milestone	Recruit Staff
Tasks.	None
Deliverable:	None
Start Date.	April 10, 2001
Completion Date:	April 30, 2001

Task 3.2: Deliver Training

PSI will coordinate hiring with the dates for this training and will work closely with the Division to ensure that PSI will have adequate information and knowledge to provide high-quality training to new staff and augment training for more experienced staff.

Milestone	Deliver Training
Tasks:	Start-up Staff Attend Training
Deliverable:	All staff trained
Start Date	May 14, 2001

Completion Date June 1, 2001

Task Group 4: Operations

This task group includes key tasks and milestones for the first three months of operations and for ongoing operations throughout the life of the contract. PSI's approach to this task group includes providing support for local staff, communicating with stakeholders, and fine-tuning operational procedures. After the Initial Operations Phase (the first three months of operations), operating procedures will be refined, and interactions with San Mateo County Family Support, local offices, Contracting Officials, and other entities will become routine.

Task 4.1: Initiate Operations

PSI staff will test all systems and hold a project kick-off meeting for PSU staff. During the launch of initial operations, PSI may augment the local staff with a group of PSI experts that will trouble-shoot any problems and provide leadership and consultation to the local management team. These leaders have direct customer service management experience and will share that knowledge with local staff. This assistance will be provided through in-person visits, with subsequent follow up through e-mail and conference calls.

Milestone	Fully operational PSU on June 4, 2001
Tasks:	Conduct Testing of All Systems Kick-Off Meeting with PSU Staff
Deliverables:	None
Start Date:	April 10, 2001
Completion Date:	June 4, 2001

Task 4.2: Review/Revise Procedures

After the initial three months of operations, PSI will review existing procedures. This step ensures that procedures are complete and that PSI will address all requisite issues. PSI will revise the procedures as necessary and communicate the changes to all staff members.

Milestone	Review/Revise Procedures
Tasks:	Review Policy and Procedure Documents Determine Necessary Changes Communicate Changes to Staff
Deliverables:	Procedures Revised
Start Date:	October 1, 2001
Completion Date	Ongoing through contract end

Task 4.3: Monitor Program Changes and Update Staff

PSI will maintain a continuous exchange of information with key San Mateo County Family Support Division Managers regarding policy and systems changes affecting the Public Service

Unit. PSI will also meet with the San Mateo County Contract Administrator to discuss any policy and systems issues that might affect customer contacts and update PSI staff members.

Milestone	Monitor Program Changes and Update Staff
Tasks	Review Federal Changes Via OCSE Web Site Review San Mateo County-initiated Changes
Deliverables:	Weekly Meetings with San Mateo County Contract Administrator
Start Date.	April 10, 2001
Completion Date	Ongoing through contract end

Task 4 4: Meetings with Advisory Panel (optional)

If San Mateo County Family Support elects to form an Advisory Panel, PSI will facilitate meetings with the Panel during the first three months of the contract. After the initial three months, PSI will phase the Panel meetings to a monthly schedule and then to a quarterly schedule as the contract continues

Milestone:	Meeting with Advisory Panel (optional)
Tasks	Determine Communication Methodology Among Panel Members Schedule Periodic Meetings Communicate Meeting Schedule
Deliverables:	Semi-monthly, Monthly, and Quarterly Advisory Panel Meetings
Start Date:	April 10, 2001
Completion Date:	Ongoing through contract end

Task 4.5: Submit Management Reports

PSI will create and submit management reports to the San Mateo County Family Support Division with information gleaned from the extensive reporting capabilities built into the telephony system and database, and if necessary, manually produced statistics.

Milestone	Submit Management Reports
Tasks:	Determine Reporting Format Determine Communication Mechanism
Deliverables:	Management Report Narrative
Start Date	April 10, 2001
Completion Date:	Ongoing through contract end

Costs and Payment Schedule

The costs detailed below take into serious consideration both the San Mateo County Family Support Division's needs in the modified requirements of the procurement and PSI's desire to provide substantial expertise in the call center management as well as the best service possible for San Mateo County's IV-D clients.

Cost for Child Support Customer Service Unit/Call Center Manager

The costs covered under the Customer Service Unit/Call Center Manager include one Call Center Manager's salary and benefits and any executive corporate support from Kim Jaudon and other PSI senior executives as needed to support the project successfully.

The monthly costs and Total Fiscal Year costs for the full-time, on-site Call Center Manager are detailed below:

For the period from April 11, 2001 through and including April 30, 2001:	\$8,333
For the period from May 1, 2001 through and including May 31, 2001:	\$12,500
For te period from June 1, 2001 through and including June 30,2001:	<u>\$12,500</u>
Total Cost for FY 2000-2001	\$33,333
For the period from July 1, 2001 through and including December 31, 2001: (\$12,500/per month x 6 months = \$75,000)	\$75,000
From the period from January 1, 2001 through and including June 30, 2002: (\$11,250/per month x 6 months = \$67,500)	<u>\$67,500</u>
Total Cost for FY 2001-2002:	\$142,500

The fixed monthly costs for the Customer Service Unit/Call Center Manager, as detailed above, will be invoiced to the San Mateo County Family Support Division on a monthly basis. Payment of the invoice will be due 30 days after the invoice is received by the Division and after final approval by the San Mateo County Family Support Division Contract Administrator. If the San Mateo County Family Support Division Contract Administrator does not approve payment of the invoice, Policy Studies Inc. will be contacted as soon as possible to be advised why the invoice was not approved and to discuss what conditions or terms must be met before the invoice is paid by the Division.

Cost for Call Overflow Coverage by PSI's New Mexico Child Support Call Center

The costs per call quoted below are fixed for the term of the contract and take into consideration the full cost of the personal computers, furniture, training, and oversight PSI's New Mexico Child Support Call Center staff will require to successfully provide excellent customer service to San Mateo County Family Support Division clients whether one call or 2,000 calls a month are received by the New Mexico Call Center.

Volume Pricing

- For 1 to 1,200 calls per month received by PSI's New Mexico Call Center: *\$5 per each call received

For each call after 1,200 calls per month received by PSI's New Mexico Call Center: *\$5.75 per each call received

Estimated Monthly Cost

- It is estimated that the San Mateo County Family Support Division will not use the New Mexico Call Center for call overflow coverage for more than 1,200 calls per month.

1,200 calls per month x \$5.00 per call = \$6,000/monthly cost.

Total Est. Cost for FY 2000-2001: \$6,000/month x 3 mos (April 2001 - June 2001) = \$18,000

Total Est. Cost for FY 2001-2002: \$6,000/month x 12 mos (July 2001 - June 2002) = \$72,000

*Each call must be answered by a live customer service representative within 2 minutes. If the call is not answered within a 2 minute customer wait time, then there will be no charge for the call. The San Mateo County Family Support Division will only pay for calls answered by a live customer service representative within a 2 minute wait time, thus guaranteeing each customer that PSI's New Mexico Child Support Call Center will provide the same or better level of service provided by San Mateo County Family Support Division's Call Center.

PSI will provide a detailed monthly report tracking the wait time for each San Mateo County Family Support Division call received by the New Mexico Call Center. PSI will include this report with their monthly invoice for payment by the Division. Payment of the invoice will be due 30 days after the invoice is received by the Division and after final approval by the San Mateo County Family Support Division Contract Administrator. If the San Mateo County Family Support Division Contract Administrator does not approve payment of the invoice, Policy Studies Inc. will be contacted as soon as possible to be advised why the invoice was not approved and to discuss what conditions or terms must be met before the invoice is paid by the Division.

Cost for PSI Link and Maintenance of PSI Link

The fixed cost for the purchase of PSI Link front end operational within San Mateo County Family Support Division's existing IV-D automated system, known as CHASER, is \$65,000. This includes the cost to make PSI Link fully functional and integrated with CHASER to the satisfaction and approval of the San Mateo County Family Support Division Contract Administrator. This cost does not include the cost for on-going maintenance of PSI Link. An hourly fee of \$150.00 per hour will be applied to any needed maintenance or modifications once the system is fully operational to the satisfaction and approval of the Division Contract Administrator with the following exceptions: Any PSI initiated upgrade or PSI initiated modification to PSI Link will not be subject to the \$150/per hour rate and will be provided to the

San Mateo County Family Support Division free of charge. Also, any PSI Link maintenance or modifications required because of any bugs or problems with the functionality of the PSI Link system itself will also not be subject to the \$150/per hour rate and will be provided to the San Mateo County Family Support Division free of charge. If any upgrades are determined to be necessary or requested by the Family Support Division, the Division and PSI will enter into a separate contract for any and all subsequent upgrades.

The time frame to install and make PSI Link fully operational and integrated with the Division's CHASER system will be four to six weeks depending upon San Mateo County Family Support Division's system configuration and capabilities. Once PSI's technical staff has accessed the time frame needed to make PSI Link fully operational within the San Mateo County Family Support Division's system, the Contract Administrator will be notified immediately.

Total Fixed Cost for PSI Link for FY 2000-2001:	\$65,000
Total Est. Cost for PSI Link Maintenance for FY 2001-2002:	\$18,000
<i>(Est. cost based on \$150/per hour rate x Est. 10 hours a month = Est. \$1,500/month)</i>	

Half of the fixed cost for PSI Link or \$32,500 will be due and payable to PSI upon execution of this contract and receipt of an invoice by the San Mateo County Family Support Division and after final approval by the San Mateo County Family Support Division Contract Administrator. Payment of this invoice will be due 30 days from receipt by the Family Support Division. The 2nd half of the fixed cost for PSI Link or \$32,500 will be due and payable once PSI Link is fully operational and integrated with the CHASER system to the satisfaction and approval of the San Mateo County Family Support Division and by receipt of an invoice at that time. Payment of this invoice will be due 30 days from receipt by the Division.

Summary: Total Est. Cost of Contract with PSI for Management and Call Center Services	
\$ 33,333	Call Center Manager FY 2000-2001
\$142,500	Call Center Manager FY 2001-2002
\$ 18,000	Est. Call Overflow Cost for FY 2000-2001
\$ 72,000	Est. Call Overflow Cost for FY 2001-2002
\$ 65,000	Fixed Cost for PSI Link for FY 2000-2001
\$ 18,000	Est. Cost for PSI Link Maintenance for FY 2001-2002
\$ 348,833	Est. Total Cost for Contract with PSI

**SAN MATEO COUNTY
MEMORANDUM**

DATE: 3/26/01
TO: Priscilla Harris Morse
FROM: Ignacio (Name) FAX _____ PONY _____
SUBJECT: Contract Insurance Approval

The following is to be completed by the department before submission to Risk Management:

CONTRACTOR NAME Policy Studies

DOES THE CONTRACTOR TRAVEL AS A PART OF THE CONTRACT SERVICES?

NUMBER OF EMPLOYEES WORKING FOR CONTRACTOR:

DUTIES TO BE PERFORMED BY CONTRACTOR FOR COUNTY

Provide a manager to manage the call center.

The following will be completed by Risk Management:

INSURANCE COVERAGE.	Amount	Approve	Waive	Modify
Comprehensive General Liability	<u>\$1m</u>	<u>✓</u>	_____	_____
Motor Vehicle Liability	_____	_____	<u>✓</u>	_____
Professional Liability	_____	_____	<u>✓</u>	_____
Workers' Compensation	<u>statutory</u>	<u>✓</u>	_____	_____

REMARKS/COMMENTS

Priscilla Morse 3-26-01
 Risk Management Signature Date

PONY IPS-163

**SUBMIT TO RISK MANAGEMENT
~OR~**

FAX 363-4864

ACORD CERTIFICATE OF LIABILITY INSURANCE

OP ID ZC
POLST01

DATE (MM/DD/YY)
03/27/01

PRODUCER
Lexington Companies of Colorado
4500 Cherry Creek Dr. S., #400
Denver CO 80246-1532
Phone: 303-753-2000 Fax: 303-753-2099

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER THIS CERTIFICATE DOES NOT AMEND EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW

INSURERS AFFORD'NG COVERAGE

INSURED

Policy Studies, Inc. M3
999 18th St., Suite 1000
Denver, CO 80202

INSURER A **LEXINGTON INSURANCE COMPANY**
INSURER B
INSURER C
INSURER D
INSURER E

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

NSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUP GEN'L AGGREGATE LIMIT APPLIES PER <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC				EACH OCCURRENCE \$ FPE DAMAGE Any one fire \$ AED EXP Any one person \$ PERSONAL & AD JURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIREN AUTOS <input type="checkbox"/> LOANED AUTOS				COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY EA ACCIDENT \$ OTHER THAN AUTO ONLY EA ACC \$ AGG \$
	EXCESS LIABILITY <input type="checkbox"/> OCCUP <input type="checkbox"/> CLAIMS MADE DEDUCTIBLE RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$
	EMPLOYERS LIABILITY				WC STATE UNK LMS \$ OTH EMP \$ EL EACH OCCURRENCE \$ EL DEDUCTIBLE EXEMPTED \$ EL DISEASE BENEFIT \$
A	Professional Liability	6471221	08/01/00	08/01/01	Annual Ag \$3 000 000 Ea Claim \$3,000,000

DESIGNATED OPERATING SUBJECTS AND/OR DESIGNATED ISSUES ARE ISSUED TO THE INSURED BY SPECIAL PROVISIONS
 San Mateo County, its officers, employees, and servants shall be named as Additional Insured as their interests appear in a call center contract and this insurance shall be primary insurance to the full limits of liability of the policy.

CERTIFICATE HOLDER Y ADDITIONAL INSURED INSURER LETTER SANMA08 San Mateo County Family Support Division Attn: Ignacio J. Carrero 555 County Center, 2nd Floor San Mateo City CA 94065	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER'S AGENTS OR REPRESENTATIVES William M. [Signature]
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ACORD CERTIFICATE OF LIABILITY INSURANCE		OPID ZC POLST01	DATE (MM/DD/YY) 03/27/01
PRODUCER Lockton Companies of Colorado 4500 Cherry Creek Dr S., #400 Denver CO 80246-1532 Phone: 303-753-2000 Fax: 303-753-2099		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER THIS CERTIFICATE DOES NOT AMEND EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW	
		INSURERS AFFORDING COVERAGE	
INSURED Policy Studies, Inc. M1 999 18th St., Suite 1000 Denver, CO 80202		NSUREPA	HARTFORD FIRE INSURANCE CO.
		NSUREPB	HARTFORD CASUALTY INS. CO.
		NSUREPC	TWIN CITY FIRE INSURANCE
		FSUREPD	
		NSURERE	

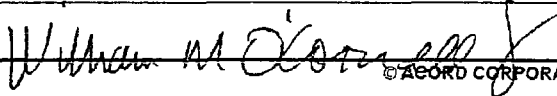
COVERAGES

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NSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS	
A	GENERAL LIABILITY	34UUNE9644	08/01/00	08/01/01	EACH OCCURRENCE	\$ 1,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY				FIRE DAMAGE (Any one fire)	\$ 300,000
	<input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUP				MED EXP (Any one person)	\$ 10,000
					PERSONAL & ADV INJURY	\$ 1,000,000
					GENERAL AGGREGATE	\$ 2,000,000
					PRCD JCTS - COMP/OP AGG	\$ 2,000,000
A	AUTOMOBILE LIABILITY	34UUNE9644	08/01/00	08/01/01	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
	<input type="checkbox"/> ANY AUTO				BODILY INJURY (Per person)	\$
	<input type="checkbox"/> ALL OWNED AUTOS				BODILY INJURY (Per accident)	\$
	<input type="checkbox"/> SCHEDULED AUTOS				PROPERTY DAMAGE (Per accident)	\$
	<input checked="" type="checkbox"/> HIRED AUTOS					
	<input checked="" type="checkbox"/> NON OWNED AUTOS					
	GARAGE LIABILITY				AUTO ONLY - EA ACCIDENT	\$
	<input type="checkbox"/> ANY AUTO				OTHER THAN AUTO ONLY - EA ACC	\$
					AGG	\$
B	EXCESS LIABILITY	34RHUEX0144	08/01/00	08/01/01	EACH OCCURRENCE	\$ 10,000,000
	<input type="checkbox"/> OCCUP <input type="checkbox"/> CLAIMS MADE				AGGREGATE	\$ 10,000,000
						\$
	<input type="checkbox"/> DEDUCTIBLE					\$
	<input checked="" type="checkbox"/> RETENTION \$ 10,000				\$	
C	WORKERS COMPENSATION AND EMPLOYERS LIABILITY	34WEJJ8972	08/01/00	08/01/01	<input checked="" type="checkbox"/> W/C STATE - TOP LIMITS <input type="checkbox"/> OTHER	
					EL EACH ACCIDENT	\$ 100,000
					EL DISEASE - EA EMPLOYEE	\$ 100,000
				EL DISEASE - POLICY LIMIT	\$ 500,000	
A	OTHER	34UUNE9644	08/01/00	08/01/01	Blkt. \$2,440,712 \$1000 Ded \$3,600,724	

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENTS/SPECIAL PROVISIONS

San Mateo County, its officers, employees, and servants shall be named as Additional Insured as their interests appear in a call center contract and this insurance shall be primary insurance to the full limits of liability of the policy

CERTIFICATE HOLDER I Y ADDITIONAL INSURED INSURER LETTER SANMA08 San Mateo County Family Support Division Attn: Ignacio J. Gerrero 555 County Center, 2nd Floor Redwood City, CA 94063	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER'S AGENTS OR REPRESENTATIVES REPRESENTATIVE YES 
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ORDINANCE NO. _____
BOARD OF SUPERVISORS, COUNTY OF SAN MATEO,
STATE OF CALIFORNIA

* * * * *

AN ORDINANCE AMENDING FISCAL YEAR 2000-2001
SALARY ORDINANCE ADOPTED AUGUST 8, 2000

The Board of Supervisors of the County of San Mateo, State of California, ordains as follows:

SECTION 1. Part 12 of the Ordinance 03987 is amended as indicated:

ORGANIZATION 25000 DISTRICT ATTORNEY'S OFFICE

1. Item E434, Family Support Supervisor, is decreased by 1 position for a new total of 11 positions.
2. Item E432, Family Support Technician, is decreased by 3 positions for a new total of 20 positions.
3. Item E355, Legal Word Processor, is decreased by 1 position for a new total of 0 positions.
4. Item E334S, Office Assistant series, is decreased by 1 position for a new total of 12 positions.
5. Item E368, Public Services Specialist, is decreased by 1 position for a new total of 8 positions.
6. Item E431, Family Support Customer Service Specialist, is increased by 6 positions for a new total of 6 positions.
7. Item E438, Lead Family Support Customer Service Specialist, is increased by 1 position for new total of 1 position.

SECTION 2. This ordinance is designated as an urgency amendment, and, following adoption, shall be effective on April 29, 2001.