

October 17, 2011

TO: Members of the MAG 3-1-1 Business Plan Committee

FROM: Jane Morris, City of Phoenix, Chair

SUBJECT: MEETING NOTIFICATION AND TRANSMITTAL OF TENTATIVE AGENDA OF THE
MAG 3-1-1 BUSINESS PLAN COMMITTEE

Tuesday, October 25, 2011, 10:30 a.m. - 12:00 p.m.
MAG Office, Suite 200 - Ironwood Room
302 North 1st Avenue, Phoenix

A meeting of the MAG 3-1-1 Business Plan Committee has been scheduled for the time and place noted above. Members of the Committee may attend the meeting either in person or by telephone conference. For those using transit, the Regional Public Transportation Authority will provide transit tickets for your trip.

Please be advised that under procedures approved by the MAG Regional Council on June 26, 1996, all MAG committees need to have a quorum in order to conduct business. A quorum is a simple majority of the membership, or 10 people for the MAG 3-1-1 Business Plan Committee. If you are unable to attend the meeting, please make arrangements for a proxy from your jurisdiction to represent you.

If you have any questions regarding the 3-1-1 Business Plan Committee agenda items, please contact Audrey Skidmore at (602) 254-6300.

3-1-1 BUSINESS PLAN COMMITTEE TENTATIVE AGENDA

COMMITTEE ACTION REQUESTED

1. Call to Order

The meeting of the 3-1-1 Business Plan Committee will be called to order.

2. Call to the Audience

An opportunity will be provided to members of the public to address the MAG 3-1-1 Business Plan Committee on items not scheduled on the agenda that fall under the jurisdiction of MAG, or on items on the agenda for discussion but not for action. Members of the public will be requested not to exceed a three minute time period for their comments. A total of 15 minutes will be provided for the Call to the Audience agenda item, unless the MAG 3-1-1 Business Plan Committee requests an exception to this limit. Please note that those wishing to comment on action agenda items will be given an opportunity at the time the item is heard.

3. Approval of the September 27, 2011 Meeting Minutes

4. Review of 3-1-1 Models

Committee members will review and discuss the merits of various 3-1-1 models.

5. Allocation of 3-1-1

An update on the process for allocating the 3-1-1 number within Arizona will be provided.

6. Overview of the Regional 9-1-1 Model

Representatives from 9-1-1 will give an overview of how the 9-1-1 system is structured and how calls are distributed.

7. Status of 2-1-1 in Arizona

2-1-1 representatives will discuss the state-wide 2-1-1 implementation, its history and challenges.

2. Information and discussion.

3. Review and approve the minutes of the September 27, 2011 meeting.

4. For information and discussion.

5. For information and discussion.

6. For information and discussion.

7. For information and discussion.

8. Agency Call Center Update

Members of the committee will be given a opportunity to discuss what they have determined about their internal call handling as it relates to 3-1-1.

8. For information and discussion.

9. Request for Future Agenda Items

Topics or issues of interest that the 3-1-1 Business Plan Committee would like to have considered for discussion at a future meeting will be requested.

9. For information and discussion.

Adjournment

MINUTES OF THE
MARICOPA ASSOCIATION OF GOVERNMENTS
3-1-1 Business Plan Committee
September 27, 2010
MAG Offices, Ironwood Room
302 N. 1st Avenue, Phoenix, Arizona

MEMBERS ATTENDING

Jane Morris, City of Phoenix, Chair	Shelley Hearn, City of Tempe
David Stevens, Maricopa County, Vice Chair	Paul Luizzi, City of Goodyear
Chad Heinrick for Brenda Buren, 9-1-1 Oversight Team	Carmen Martinez, City of Avondale
Michael Celaya, City of Surprise	Patrick McDermott, City of Chandler
# Michael Ciccarone, Town of Fountain Hills	* Gary Neiss, Town of Carefree
Alex Deshuk, City of Mesa	* Vicky Scott, City of Peoria Police Department
Melanie Dykstra, Town of Gilbert	Brent Stockwell, City of Scottsdale
Diane Goke, City of Glendale	Pat Timlin, City of El Mirage
# Dee Hathaway, Town of Buckeye	# Gino Turrubiarres, Town of Guadalupe

* Not present

Participated by video or telephone conference call

1. Call to Order

The 3-1-1 Business Plan Committee meeting was called to order by Chair Jane Morris at 10:04 a.m. Chair Morris stated that public comment cards were available for those members of the public who wish to comment. Transit tickets were available from Valley Metro for those using transit to come to the meeting. Parking validation was available from MAG staff for those who parked in the parking garage. Chair Morris provided an overview of her experience with and interest in 3-1-1.

2. Call to the Audience

Chair Morris noted that, according to the MAG public comment process, members of the audience who wish to speak are requested to fill out the public comment cards and stated that there is a three-minute time limit. Public comment is provided at the beginning of the meeting for items that are not on the agenda that are within the jurisdiction of MAG, or non-action agenda items that are on the agenda for discussion or information only. Chair Morris noted that no public comment cards had been received.

3. Purpose of the 3-1-1 Business Plan Committee

Audrey Skidmore, MAG Information Technology Manager, provided an overview of 3-1-1 and discuss the formation and purpose of the committee. Ms. Skidmore stated the goals of the

committee are to recommend whether to proceed with a regional implementation, recommend the type of implementation, and to recommend funding options.

Patrick McDermott asked if Maricopa County and Tempe are going ahead with their 3-1-1 system. Shelley Hearn said Tempe is moving forward and has a pilot program whether it is 3-1-1 or a ten digit number. David Stevens reported that Maricopa County is interested in the process and looking for appropriate models for 3-1-1 including governance. Maricopa County is very early in the process and the formation of the committee is very helpful.

Alex Deshuk asked if 3-1-1 can be given by the Corporate Commission to be used per jurisdiction or is it locked in as a County number. Chair Morris suggested this question be examined at a future meeting.

Chair Morris stated that the goals of the committee are very general and there are subsets beyond the goals. She noted questions should be added to future agenda items to help the committee. Chair Morris noted Tempe and Maricopa County as ahead, but invited other committee members to share information on their 3-1-1 plans.

4. Status of the 3-1-1 Systems

Audrey Skidmore, MAG Information Technology Manger, provided an overview of existing 3-1-1 systems, representative call volumes, and alternatives to 3-1-1. Ms. Skidmore noted that contact centers are run by either a County, major city, or a partnership of the two, but all examples she found involved a single entity running the call center. Ms. Skidmore also noted that telephone was still the preferred method for contact, but emerging technologies make up a growing segment of communications.

Gino Turrubiarres asked questions about how non-emergency 911 calls will interact with 3-1-1. Ms. Skidmore stated that the focus of discussions at this point is determining the level of interest in 3-1-1. She also noted that how the interaction would be handled would need to be coordinated with the 911 Committee. Chair Morris asked an update from the 9-1-1 community be brought back as a future agenda item. Chad Heinrick stated that he would follow up with Brenda Buren on what the 911 committee would prefer and follow up at a future meeting.

Gino Turrubiarres asked about what N-1-1 numbers mean and which are currently active in Arizona. Ms. Skidmore stated that 9-1-1 and 5-1-1 are currently live and that 2-1-1, which is currently a seven digit number, will be live on October 3rd, 2011. Ms. Skidmore also stated the N-1-1 numbers are listed in the materials provided with the agenda.

Alex Deshuk stated there are two parts of a 3-1-1 implementation, the number and the call center. He asked if the scope of the group's charter included both areas. Ms. Skidmore replied the focus is on whether to move forward with 3-1-1 as a phone number. She stated if the current proposal is used, the call center would fall outside of the focus of the group. Ms. Skidmore acknowledged that alternate proposals could be considered, but would need to take into account the desire for local control and ability opt-out expressed by member agencies. Chair Morris stated the committee is the portal to the cities and each organization must determine what their thoughts are

and what 3-1-1 means to them. Mr. Deshuk stated that it is up to the committee then to determine the extent of the group's recommendation. .

Melanie Dykstra stated she is unaware of the differences between 2-1-1 and 3-1-1 and would like a presentation on 2-1-1 at a future meeting.

Shelley Hearn of Tempe gave an overview of their call center. Ms. Hearn stated in 2009 Tempe began research on 3-1-1 and call center options. She also stated in June 2010 Tempe chose a vendor for their software and the call center went live in November. Ms. Hearn stated the call center is currently a pilot project for Public Works and will not be rolled out to the public until May 2012. Ms. Hearn noted that efficiencies have been gained from the system including integrating with service ticket software and reduction in calls to departments. Ms. Hearn also noted that 78% of all calls were for information only and Tempe has been building a knowledge base to assist in answering these calls quickly and consistently. Ms. Hearn also stated that Tempe is developing a complimentary Web presence, but currently does not have mobile applications.

Paul Luizzi asked what the call center current hours of operations are and whether Tempe plans to expand them. Ms. Hearn stated that the current call center had 4 operators and one supervisor covering 7:00 AM to 5:00 PM and that Tempe will consider expanding down the road as more departments and staff are added. Paul additionally asked if the system was an Interactive Voice Response (IVR) system. Ms. Hearn replied that the system does not currently have an IVR option, but may be added as use of the call center expands.

Patrick McDermott asked whether the 4 person call center was who Tempe relies on to answer most information requests and whether they forward the service requests on to the appropriate department. Ms. Hearn replied the operators do answer most information request and are able to use the system to send some requests directly to the person in the field using geo-coding. Other requests are forwarded. Ms. Hearn also stated the system could track information on the call to improve efficiencies.

Patrick McDermott asked the name of the software and whether citizens could track the status of service tickets online. Ms. Hearn replied the software is Active Network and citizens can track the tickets. Tempe is developing new web forms to be able to track tickets online.

Chair Morris asked how did Tempe realize the need for the call center. Ms. Hearn replied the initiative came from the City Manager based on his experience in a previous position. The City Manager recognized the value of the system and how it can provide a better service to Tempe residents.

Chair Morris asked if Tempe looked internally at phone usage and if they determined how much call volume was service versus information. Ms. Hearn replied that the information was collected from other cities, but Tempe did not have internal statistics at the beginning of the project due to the diversity of phone systems and procedures..

Alex Deshuk asked if Tempe looked at any other regions that have done this before when evaluating their call center development.. Ms. Hearn replied there are many areas that do a county-wide call center and that Tempe had done some research prior to implementation. Ms. Hearn

pointed to the spreadsheet included in the agenda packet, noting that many cities are included and the contact information is included for those cities. She further indicated that these contacts were a good resource when developing a call center.

Alex Deshuk asked MAG if there are any other regional groups that have tried a multi-jurisdictional 3-1-1 system.. Ms. Skidmore stated there are areas where there multiple jurisdictions participating in a single call center through various types of agreements, but she was unable to locate any places that handle 3-1-1 exactly as currently proposed.

Alex Deshuk asked whether creating a consolidated call center is an option for consideration. Ms. Skidmore replied if there is a way to do that while maintaining the ability to opt-out and local control then it could be a possibility. Chair Morris expressed that committee members should get policy direction from their city concerning a centralized or local knowledge base.

Chair Morris asked if Tempe considers it to be in the best interest of its citizens to continue as an independent call center. Ms. Hearn agreed that Tempe does feel that is in their best interest. She also expressed concern about how a centralized call center would handle the call volume and ensure work orders would be pushed to the right system. Ms. Skidmore noted that smaller agencies could potentially partner with larger agencies. David Stevens noted there is a trend of bringing resources together in many other regions.

David Stevens, Maricopa County, gave an overview of the Maricopa County 3-1-1 STAR Call Center. Mr. Stevens noted Maricopa County became interested around 2007 and sent a team to New York City, which the team came back impressed and overwhelmed. Mr. Stevens also noted that Maricopa County provisioned the 3-1-1 number in 2007 with high hopes of collaborating and finding out what this could mean locally. Mr. Stevens provided statistics on call origination, call jurisdiction, and department calls. Mr. Stevens noted that Maricopa County supports the 3-1-1 initiative and will continue to work with MAG and the various subcommittees.

Alex Deshuk asked if Maricopa County was using any Customer Relationship Management (CRM) software. Mr. Stevens replied Maricopa County is using a service provider, Altivon, which is a sort of CRM light.

Paul Luizzi asked the current staff level at Maricopa County and if it was 24 hours a day, 7 days a week. Mr. Stevens replied Maricopa County has 10 agents and they are not twenty-four seven.

Brent Stockwell stated Mr. Stevens provided good information about the out of jurisdiction context and asked Shelley Hearn of Tempe to comment on their out of jurisdiction call volume.. Ms. Hearn replied that Tempe has a fairly small percent, around 7%, of calls out of jurisdiction and that ones they receive commonly are for Maricopa County Animal Control. Ms. Hearn stated the Tempe knowledge base includes phone numbers for common County services so that callers can be directed to the correct agency..

Brent Stockwell stated that the success of a 3-1-1 system in an environment like the MAG region is dependent on the customer knowing what services each jurisdiction supplies. Mr. Stockwell noted that looking at other call centers would give an idea of how successful citizens are at calling the correct agency. Mr. Stockwell added that jurisdictional identification might be made more

challenging region-wide 3-1-1. Mr. Stockwell noted that the disappointment rate could go up if people are calling for something the call center is not equipped to handle. Mr. Stockwell also noted the complexities with services such as solid waste, water, and animal control being outsourced to private sector businesses. Alex Deshuk added that a big overlap is the school systems, which are a separate jurisdiction, are not at the table.

5. Future Agenda Items

The following items were requested by the committee for future agenda items.

1. Visual models of 3-1-1 systems
2. Clarification on how 3-1-1 is allocated
3. Presentation on how 3-1-1 and 9-1-1 would interact
4. Presentation on the differences between 2-1-1 and 3-1-1
5. What other Arizona counties and the state are doing with 3-1-1
6. Information from committee members about current call centers and related plans in their jurisdiction
7. Determination of what is technically and fiscally feasible
8. Presentation by the local exchange carrier on boundary limitations and the business model to support 3-1-1
9. Presentation of the impact of HB1322 on 3-1-1
10. Presentation on whether location tagging is technically and financially feasible for 3-1-1

6. Schedule for Future Meetings

The next meeting of the 3-1-1 Business Plan Committee was tentatively scheduled for October 18, 2011 at 10:30am until 12:00pm with the possibility of rescheduling to the following Tuesday October 25, 2011. The committee agreed to consider whether to schedule future meetings on the third or last Tuesday of each month from 10:30am to 12:00pm.

7. Adjournment

Chair Morris asked for a motion to adjourn the 3-1-1 Business Plan Committee. Pat Timlin motioned to adjourn the 3-1-1 Business Plan Committee. Paul Luizzi seconded the motion and the motion carried unanimously.

211/311: Is There a Case for Consolidation or Collaboration?

AN ICMA WHITE PAPER

David Eichenenthal, The Ochs Center for Metropolitan Studies



June
2010

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Leaders at the Core of Better Communities

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211/311: Is There a Case for Consolidation or Collaboration?
An ICMA White Paper

Prepared by David Eichenthal

June 2010

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About ICMA

ICMA advances professional local government worldwide. Its mission is to create excellence in local governance by developing and advancing professional management of local government. ICMA, the International City/County Management Association, provides member support; publications, data, and information; peer and results-oriented assistance; and training and professional development to more than 9,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect 185 million individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

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About the Author

David Eichenthal is the President and CEO of the Ochs Center for Metropolitan Studies, a Chattanooga, Tennessee based non-profit organization that conducts independent data analysis and policy research to improve the quality of life in the Chattanooga region.

Under Mr. Eichenthal's leadership, the Ochs Center works with local government, foundations and other non-profit organizations on a variety of research projects on education, the environment, the economy, health, public safety and other areas of public policy. The Ochs Center has also consulted with local governments across the nation—including Cleveland, Gary, Milwaukee, New Orleans, Philadelphia, Pittsburgh—on budget and operational issues, including the development and operation of government call centers. Mr. Eichenthal has worked closely with the International City and County Management Association in its efforts to study and report on best practices related to government CRM systems. He also served as a member of the Advisory Committee that supported the launch of Philadelphia's 311 system.

In 2007, Mr. Eichenthal was named a Nonresident Senior Fellow at the Brookings Institution's Metropolitan Policy Program.

Prior to joining the Ochs Center (then the Community Research Council) in 2005, Mr. Eichenthal was the Director of Performance Review and then City Finance Officer for Chattanooga. In that role, he oversaw the development and implementation of Chattanooga's 311 system and a citywide performance initiative, chattanoogaRESULTS.

Before coming to Chattanooga, Mr. Eichenthal spent a dozen years in senior positions in state and local government in New York—including serving as Chief of Staff to New York City's second highest elected official.

Mr. Eichenthal received his J.D. from NYU School of Law and a B.A. in Public Policy Studies from the University of Chicago.

211/311: Is There a Case for Consolidation or Collaboration?¹

David Eichenthal, The Ochs Center for Metropolitan Studies

Local governments across North America are moving forward with the implementation of 311 systems that allow residents to access information and nonemergency city services with one call. Thirteen years after 311's initial adoption in Baltimore, eight out of the ten largest U.S. cities have implemented 311 systems. Major cities in Canada are following the lead of the United States, with similar systems being adopted in the United Kingdom, Germany, Australia, and elsewhere around the globe.

Still, 311 systems remain the exception rather than the rule in all but the largest U.S. cities. As of March 2008, there were 64 U.S. cities and counties with a 311 system—less than 5 percent of the 914 counties and 627 cities in the U.S. with more than 50,000 residents. A 2007 International City/County Management Association (ICMA) survey found that just 15 percent of responding local governments reported having any form of centralized customer service system.²

By comparison, 211 systems—which provide access to information and referrals (I&R) in response to social service needs—are ubiquitous. As of April 2009, more than 240 million Americans have access to 211. There are more than 240 active 211 systems in 46 states, Washington, D.C., and Puerto Rico. In 2008, 211 systems nationwide received more than 13.5 million calls.³

Given the growth of 311 and the prevalence of 211 systems, could there be opportunities for consolidation or coordination between these types of one-call systems?

In its earlier assessments of 311 and other government CRM systems, ICMA noted an interest in just how these two types of call center systems would work together. This white paper offers a set of preliminary answers to the question by examining the history of both 311 and 211 systems, similarities and differences between the systems, opportunities for collaboration where both systems exist, and three case studies of consolidated operations—New York City, Bridgeport, Connecticut, and Halton, Ontario.

Background and History of 211 and 311

To explore whether there are opportunities for 211 and 311 systems to collaborate or consolidate, it is important to understand the respective histories of the two systems.

Development of 211 in North America

211 is a partnership between the United Way of America (United Way) and the Alliance of Information and Referral Systems (AIRS). 211 systems provide those in need of human or social services with I&R to programs that may address their needs.⁴

While the concept of I&R phone lines dates back to the 1950s, the modern history of 211 begins in 1974, with the development of a seven-digit I&R number for social services by the United Way for Metropolitan Atlanta. In 1992, the Whitehead Foundation awarded a grant to United Way to launch First Call for Help, which made the system available seven days per week.⁵ In 1996, the Georgia Public Service Commission approved the use of the 211 number for social service and referral in Atlanta. In 1997, United Way assumed management of the service, thus forming the first United Way 211 service in the nation.

In 1999, United Way of Connecticut implemented the first statewide 211 system.⁶ 211 Connecticut, like Atlanta 211, was built atop an existing statewide I&R system that dated back to 1985. In 2000, the Federal Communications Commission (FCC) approved a petition by United Way—along with the National 211 Collaborative, AIRS, The Florida Alliance of Information and Referral Services (FLAIRS), and Texas Information and Referral Network—to establish 211 as the national standard calling code for social service I&R services.⁷

In 2002, Toronto launched the first 211 system in Canada.⁸

Development of 311 in North America

The development of 311 systems in the United States and Canada coincided with the development of 211

systems. For many years, local governments throughout the United States had maintained seven-digit numbers that frequently functioned as city-wide call or contact centers or switchboards. 311 was created as an easy-to-remember nonemergency municipal service number to complement 911.

311 was initially a response to the high volume of nonemergency calls received by emergency 911 call centers. In 1996, President Clinton called for the establishment of 311:

Today, most calls to 911 are important and serious, but they're not emergencies. . . . We need a new national community policing number that's just as simple and easy to remember as 911, so that if you have a tip for the police, if you see a suspicious activity, [or] if a car alarm is going off, you will still be able to call a community policing number.⁹

Within a year the FCC approved the use of 311 for this purpose, and Baltimore had implemented the beginnings of the first system.¹⁰ In 1998, Chicago became the first city to use 311 for nonpolice and non-emergency services.¹¹

The expansion of 311 was initially aided by the support of the federal government through the Justice Department's COPS program. Between 1996 and 2007, the COPS program provided \$6 million in funds for the development, enhancement, and evaluation of non-emergency 311 numbers in the United States.¹²

In 2004, Canada approved the 311 designation, and Calgary became the first Canadian city to implement a 311 system in 2005.¹³

Comparing 311 and 211

311 systems are designed to provide a single point of entry for individuals seeking nonemergency information or services from their local government. With 311, residents and businesses no longer have to play "blue-pages roulette," where they are forced to guess the correct municipal phone number to address their question or problem. Instead, 311 allows businesses and residents to call one telephone number, where a centralized staff of call-center employees can either provide the information requested or take the information necessary to request a city service. Centralized call-center staff can directly provide that information to the responsible department or departments of city government.

In most cities with 311, the majority of calls are for information (e.g., operating hours of a recreation center, garbage collection days) rather than for service requests (e.g., filling a pothole, pruning a tree).

The effectiveness of a 311 system is dependent on the performance of actual operating departments. Although 311 can function as the "front door" to local government, it does not actually fill potholes, inspect housing, or collect garbage. Software supporting most 311 systems, however, allows local governments to measure the timeliness of municipal response to citizen-based 311 calls.

311 calls requesting services are treated as individual requests for service. In other words, one call about an abandoned vehicle, a pothole, and graffiti is treated as three individual requests for service rather than an

Figure 1 Timeline for development of 211 and 311 systems

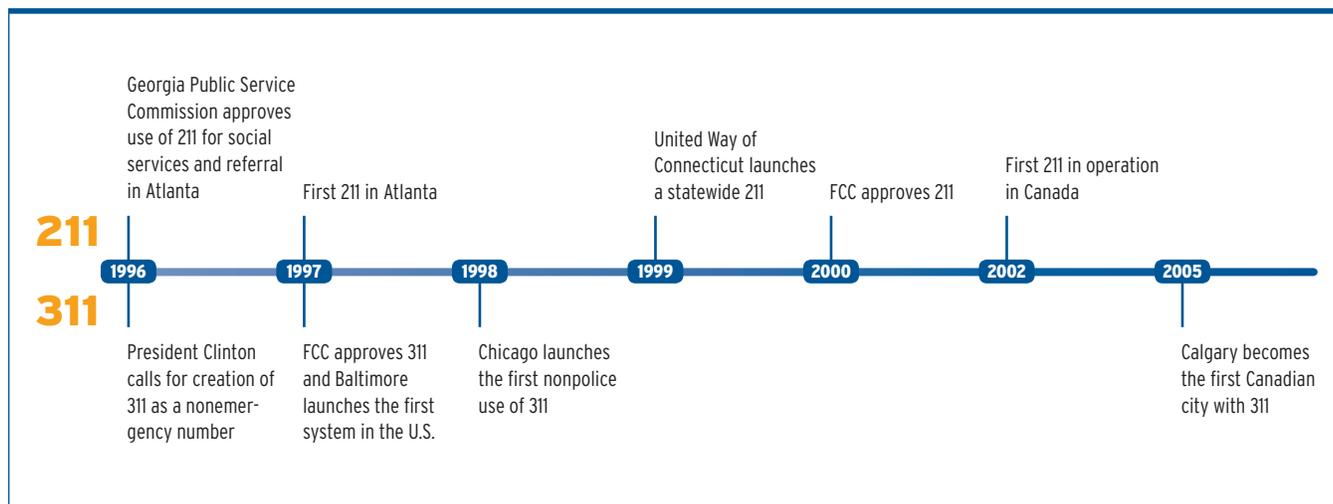


Table 1 Example of types of service requests for Chicago 311¹

Service request	Purpose
Graffiti removal	To request the removal of graffiti on buildings
Pothole in street	To report a street pothole in the surface of the street
Tree trim	To request a tree trim for trees located on a public way
Abandoned vehicle complaint	To report an abandoned vehicle
Dead animal pickup	To request the removal of a dead animal
Weed cutting	To request that high weeds be cut from a public way

¹ City of Chicago, Chicago 311 Service Request Descriptions, <http://www.cityofchicago.org/city/en/svcs/find.html> as of 6/30/2010.

overall complaint about conditions in a specific neighborhood or community.

In the best-run systems, however, calls to 311 can be used to document and diagnose problems at the community- or citywide level. Data about service requests, information requests, and local government response can be incorporated into performance measurement and management systems.

311 systems are typically run by local government and are specific to a single city or single county. There currently are no regional or statewide 311 systems in the United States. Localities that implement 311 develop their own processes for responding to calls, standard procedures, and qualification and training requirements for individuals staffing the call or contact centers.

Additionally, each locality determines which services will be covered by 311. Although 311 was ini-

tially designed for nonemergency police calls, not all localities direct nonemergency police calls to their 311 systems; some localities maintain a separate seven-digit nonemergency police telephone number.

Some 311 systems have also developed a means of requesting city services through the Internet or by e-mail. The hours of service provided by a 311 system are at the discretion of the local government. Larger cities provide 24-hour access to service representatives, seven days per week. Smaller jurisdictions, however, close their 311 centers during all or part of evenings and weekends.

211 is an I&R line that provides callers with information about human services and community information. These systems provide six different types of referral services: (1) human needs, (2) physical and mental health, (3) employment support, (4) support

More Questions than Answers

The ICMA/Ochs Center for Metropolitan Studies white paper on 311 and 211 represents early research and thinking on this topic. Relatively few combined 311-211 systems exist in North America and that dearth of examples itself begs the question “Why aren’t there more?”

Part of the answer may stem from the fact that the focus and orientation of 311 and 211 systems are really quite different—customer service versus social service—though there certainly is overlap. Among the questions that arise when considering this issue are:

- Are the training needs for 311 agents different than those for 211 agents? The customer service skills needed by a 311 call agent are not necessarily the same skills needed by a 211 call agent who often deal with individuals in the midst of a personal crisis.
- How should staffing for the two systems be handled? 311 systems most often have paid staff who handle phone calls whereas a number of 211 systems (New Mexico, Vermont, and Missouri to name a few) use volunteers from the community.
- How should performance metrics be structured for the two systems? While most 311 calls can be answered in a relatively short time period—talk times generally range from 2 to 5 minutes—whereas the length of a call to 211 can take much longer—up to 20 minutes—because agents often need to question and explore with the caller what his/her needs truly are.

Table 2 Information and referral requests for 211¹

Referral category	Type of referrals
Human needs	Food banks, clothing, shelters, rent assistance, utility assistance
Physical and mental health	Medical info lines, crisis intervention, support groups, counseling, drug and alcohol intervention, rehabilitation, health insurance programs, Medicaid and Medicare, maternal health, children's health insurance programs
Employment support	Unemployment benefits, financial assistance, job training, transportation assistance, education programs
Support for older Americans and persons with disabilities	Home health care, adult day care, congregate meals, Meals on Wheels, respite care, transportation, homemaker services
Support for children, youth, and families	Quality childcare, youth programs, after-school programs, Head Start, family resource centers, summer camps, recreation programs, mentoring, tutoring, protective services
Volunteer opportunities and donations	Various community and local organizations

¹ CMAP, *An Overview of 211 Services in the Nation*, October 2008.

for older Americans and persons with disabilities, (5) support for children, youth, and families, and (6) volunteer opportunities and donations.

Unlike 311, 211 in the United States is a national initiative under the leadership of United Way of America and AIRS with individual call centers developed at the local, state, or regional level. In Canada, 211 initiatives are supported by a similar national steering committee and organized by province.¹⁶ As 211 systems have expanded to an increasing number of jurisdictions, two distinct operational models have been developed.

- *Single call center.* Under the administration of a single I&R administrator for an entire state or region, this model is normally used within small states or medium-sized counties or regions. Connecticut, Idaho, New Hampshire, Rhode Island, and Vermont all use this model. There are also single call centers that serve individual communities but are not part of a larger statewide system.
- *Integrated state systems.* More appropriate for larger states and populations, this model requires collaboration among administrative entities that manage local or regional call centers but do not have the capability to implement service over a larger geographic area. Each region or community may have its own presence and local staff, but there is a common telephony, technology, resource database, and reporting system.

211 centers in the United States are generally operated by nonprofit organizations, and approximately 40 percent are operated by affiliates of United Way. United Way funds and coordinates efforts that focus on community social service, health, and other needs. AIRS is a professional association of almost 1,300 I&R providers that sets detailed standards for the operation of 211 centers as well as the training and credentials of 211 call takers.

Also unlike 311, calls to 211 are more frequently treated as cases. The I&R specialists who handle 211 calls are trained to explore the underlying problems and service needs of a caller who might only be seeking information about a shelter or a food pantry. On the other hand, because calls frequently result in a referral to a third-party agency, it is often difficult to track the outcome of a call (i.e., whether a person received the service for which he or she was seeking information).

Reasons for 211/311 Consolidation or Collaboration

The development of both 211 and 311 was based on the notion that individuals in need of assistance should not bear the burden of determining which department of government or nonprofit service provider is best positioned to meet their needs or answer

their questions. Members of the public do not care who provides the service or answers their question; they just want their need met or a service delivered.

Given that premise, there is a strong argument for consolidation or collaboration between 311 and 211 systems. Differences between nonprofit and government service providers are no more relevant to members of the public than whether a service is provided by Public Works or Code Enforcement. In some cities, the case is made clear by the considerable overlap between the services provided by government and accessible through 311 and the services provided by United Way agencies and other nonprofit service providers accessible through 211. Local government human service, employment, health, aging, and other organizations are both municipal and social services.

Moreover, some evidence suggests that many individuals calling 311 are the same individuals calling 211. Residents from low- and moderate-income communities are among the most frequent callers of 311 in some cities.¹⁷ These residents are also the most likely to seek social services. It is easy to envision scenarios wherein certain callers might need access to both. For example, in those municipalities that provide utility services, callers to 311 with concerns about their inability to pay utility bills would be natural candidates for referral to 211 programs as well.

Greater consolidation and collaboration through the sharing of data would also allow for a clearer and more comprehensive understanding of a locality's needs. A neighborhood-specific analysis of 311 data on housing complaints and 211 data on requests for shelter would surely be more complete than one that relied on one source of information rather than both.

Certain efficiencies could be achieved as well in the areas of staffing, technology, and training. The same economies of scale available through the consolidation of multiple department call centers into a centralized 311 or unified call center would seem to apply to consolidation or coordination of separate 311 and 211 systems.

Consolidation would eliminate the need for the public to remember when to call 311 as opposed to 211. On the other hand, collaboration would allow for joint marketing efforts to make the differences between two systems clear in the minds of the public, just as many cities have sought to do in advertising campaigns that distinguish when to call 311 and when to call 911.

Last, coordination between social and municipal services would prove essential when communities are

forced to respond to disaster. Disasters can generate calls for shelter, medical assistance, and food as well as downed trees, abandoned vehicles, and nonemergency police response. In many cases, individuals are trying to solve multiple problems—some that require a social service response and some that require a municipal service response. To achieve a coordinated response with one call, rather than many, would save both time and resources.

Case Studies of the Relationship between 311 and 211

311 and 211 have come together in New York City; the Region of Halton in Ontario, Canada; and Bridgeport, Connecticut. Case studies of the ongoing efforts in New York and Halton and the Bridgeport experiment are important to understanding the challenges and opportunities of consolidation. In other cities, steps short of consolidation point to opportunities to better define the relationship between 211 and 311.

New York City¹⁸

New York is the most populous city in the United States, with an estimated 2009 population of 8.39 million residents. New York provides a wide variety of municipal services, including many traditionally associated with county and state governments.

In March 2003, New York City launched the nation's largest 311 system. NYC 311 has a full-time staff of 450 call takers and receives an average of 53,000 calls per day. NYC 311 is operational 24 hours a day, seven days a week.

As New York was launching 311, United Way and local nonprofit agencies were already engaged in ongoing discussions about creating a 211 system for the city. Development of 211 in New York was complicated by several factors. First, a large number of social service programs in the city are wholly or partially funded by government. Second, there were preexisting dedicated hotlines for social services—many of which were also funded by the city or the state. Third, there are approximately 42,428 registered nonprofits in the city, and only some are funded by United Way.

A blueprint developed by United Way envisioned a separate 211 system, but one funded by and housed in the city's Department of Information Technology and Telecommunications. City officials noted that 311 was already processing thousands of 211 calls. Unlike many

Figure 2 New York City 311

The graphic consists of two main sections. On the left, there are seven horizontal bars, each containing the NYC 311 logo and the slogan 'your city. your needs. your number.' in a different language: English, Spanish, Russian, Portuguese, Arabic, Korean, and Chinese. On the right, a large yellow rectangular area lists 15 services provided by 311, such as '311 senior services', '311 your noisy neighbor', '311 graffiti cleanup', etc. At the bottom of the yellow area, there is a smaller NYC 311 logo, the slogan, the NYC Michael R. Bloomberg Mayor logo, and the website nyc.gov.

other local governments, New York City is responsible for direct delivery of numerous social services. In addition to direct-service provision, the city has contracts with more than 2,500 nonprofit social and human service organizations. City officials also believed that having a separate 211 system would be confusing to the public, who were already used to calling 311.

The city began building a nonprofit coalition in support of a joint 311/211 system in early 2006. United Way, the Human Services Council, and the city worked together to develop a common plan. In November, Mayor Michael Bloomberg publicly proposed a consolidated 311 and 211 system. The city worked with United Way to establish a separate organization for the purpose of establishing a 211 number and accessing funding for

211 from the State of New York. In New York State, the Public Service Commission had delegated the approval of 211 to a statewide collaborative co-chaired by AIRS New York and United Way. The organization’s board includes two representatives of the city as well as representatives of United Way, the Human Services Council, FEMA, and the Red Cross.

In March 2007 the collaborative and the city received approval from the state for use of the 211 number, and the blended 311/211 model went into effect later in the spring. Under New York City’s model, individuals can call either 311 or 211 to access I&R services. Calls to 211 or 311 for I&R services are treated in one of three ways:

- In the case of many calls, 311 call takers are able to simply provide basic information to the caller. To

do so, the city added information about some 2,500 services provided through nonprofit providers to its 311 database—including information from databases maintained by United Way and the Greater New York Hospital Association.

- In some cases, 311 call takers refer calls to nonprofit or government entities either through transfers or by providing a telephone number.
- For callers with more complex social service needs, calls are referred to I&R specialists in the 311 center. These call takers have received the standard training for 211 centers, and New York City 311 received AIRS accreditation in December 2009. AIRS training has also been offered to nonprofit service providers that receive telephone transfers from 311.

Like 311 service requests, there are guidelines for response to 211 calls – along with a new “call back” functionality to assess customer satisfaction with the I&R experience. The city and nonprofit agencies are beginning to use both 311 and 211 data to examine trends of requests for service and to identify service gaps. Incorporation of 211 I&R has also provided the city with an opportunity to engage with nonprofit providers that did not have a contractual relationship with the city.

City officials also believe the result of consolidation has been increased efficiency—streamlining access to social services and creating economies of scale related to software and personnel costs.

In April 2008, the city rebranded its 311 service to stress the increased availability of social services (see figure 2). Since launching, the city receives more than 2.7 million calls a year for health and human services, making it the highest volume 211 system in the nation.

In 2009, NYC 311 Online was launched to provide internet access to many of 311’s services. In January of 2010, NYC 311 Online was enhanced with an online Facility Finder to locate Government and Health and Human Services facilities. Callers and web users may also be referred to ACCESS NYC, a website allowing New Yorkers to get information about, screen, and apply for over 35 city, state, and federal benefit programs.

City officials and the nonprofit sector continue to build a comprehensive knowledge base for 211. Nonprofits under contract with the city are included in 311 only if their services are available on an open basis. If there are eligibility requirements for a service, 311 routes callers to the agency that handles the case management function. To avoid the potential of preferring a particular provider where there are multiple

nonprofits providing the same service, 311 call takers are trained to provide information on three nonprofits that provide the requested service.

Halton, Ontario²⁰

The Regional Municipality of Halton was incorporated in 1974 within the Province of Ontario. Halton has a population of 467,200 and includes the municipalities of Burlington, Halton Hills, Milton, and Oakville. The regional municipality provides government services such as public works as well as those that had previously been provided by the province, such as health, social, and community services.

In June 2007, a 211 service was launched in Halton. Like its counterpart in the United States, 211 in Canada functions as an I&R service, providing access to social services. Canadian 211 is often funded by United Way and provincial governments, and 211 systems across Canada conform to InformCanada standards, which mirror the AIRS standards in the United States.

The Regional Municipality of Halton is responsible for the governance and operation of 211, with the advice and assistance of a citizens advisory committee. The citizens advisory committee includes members of the Regional Council, the Halton Information Providers, and United Way agencies in Halton. The Regional Municipality of Halton also has an agreement with the Oakville Public Library, which acts as the lead agency for the Halton Information Providers and both develops and maintains a community services database.

In March 2008, Halton launched 311 to provide access to local government services in Halton and participating municipalities and other local government entities. The 311 initiative is governed by an implementation agreement between 311 members (Burlington, Halton Hills, Milton, Oakville, Halton District School Board, Halton District Catholic School Board, and Halton Regional Police Service) and the Regional Municipality of Halton. In the case of some municipalities, the consolidated call center transfers calls to a single municipality contact number. In other cases, integration ranges from e-mail transmittal of service requests to full integration at a municipal level with the Customer Relationship Management (CRM) system in use at the consolidated call center. Individual 311 members provide information for the system-wide knowledge base. Halton provides regularly reports to each of the 311 members.

The implementation agreement also creates a 311 Steering Committee and a 311 Operations Committee, with representation of the Regional Municipality of Halton and the members of 311.

By April 2009, the consolidated call center in Halton was receiving approximately 24,000 calls per month. More than 90 percent of calls handled in the contact center were to ten-digit numbers for Halton government agencies. Upon implementation, three dozen ten-digit numbers were eliminated. The call center is open from 7 a.m. to 9 p.m. on weekdays and 8 a.m. to 4:30 p.m. on weekends. Outside these times, calls are answered by external parties on behalf of Halton. A total of 18 call takers staff the call center, with an average of 11 call takers working during a typical weekday shift.

Halton's consolidated call center predates both 211 and 311. Access Halton provided access to government agencies, had a dedicated staff, and was supported by a customer relationship management or CRM system, a software application that enables the effective management of large volumes of data including a knowledgebase of frequently asked questions.

The process for the development of 211 in Halton occurred over an eight-year period. Four Halton Information Providers—Information Oakville (the public library), Information Burlington (the public library), Information Milton (a joint service of United Way and the Town of Milton) and Information Halton Hills (the public library)—led the effort to bring 211 to the region. Halton Region was invited to participate in the planning process because it already not only provided certain social and health services but also had the centralized contact center in place.

The decision to consolidate 211 into the region's call center came after considerable deliberation and initial opposition to allowing a local government to deliver 211 services. Halton Region was the first municipality to deliver 211 services in Canada. After comparing different approaches and models and examining costs and benefits, the local stakeholder committee endorsed the decision to consolidate 211 and the existing call center. The Regional Council subsequently approved the plan.

The decision to consolidate was driven by some of the same factors as the decision to consolidate 311 and 211 in New York. Access Halton already had infrastructure and staff in place. Also, prior to 211, approximately two-thirds of calls to the contact center were inquiries about Halton Region human and social services. In addition, the decision to have the region provide 211 was widely viewed as the most sustainable means of implementation. Two additional staff were hired to support the additional calls for 211, but Halton

employs a universal agent model so that all call takers can handle initial intake on both 211 and 311 calls.

Call takers in the call center do not counsel callers. If a person is calling about regional programs and services (e.g., child development), the call taker directs the call to an intake case worker, who provides counseling. In other cases, 211 calls generate a service request to a back-office specialist, who will then return the call.

The consolidation of Access Halton, 211, and 311 has produced a series of benefits. Additional training and the rigor of the accreditation process has benefited all call takers. The perceived advantages of efficiency and sustainability are apparently being achieved.

Consolidation of 211 and 311 in Halton, however, is still a work in progress. Halton is working to develop a means of better categorizing calls to measure the value of 311 and 211. The consolidation also requires the call center to meet goals and act consistently with values of a larger group of stakeholders than was required when it was solely a government call center. Halton is also seeking to increase awareness of 211 and 311 and the distinction between the two services, which has proven to be a challenge.

Bridgeport, Connecticut²¹

United Way of Connecticut has the oldest statewide 211 system in the nation. It has a long history of working with state government to provide information related to state health insurance programs and other state-provided child services. Moreover, Connecticut is unique because of its lack of a county-level of government.

In 2005, Michael Meotti became the President of United Way of Connecticut. Meotti had previously led the Connecticut Policy and Economic Council, where he had spearheaded an effort to develop an online citizen request project for municipalities throughout the state. At the United Way, Meotti recognized the opportunity for using the existing 211 system to begin to handle municipal service calls as well. In fact, for years, Connecticut residents had already called 211 for municipal requests when they were unable to determine the right entry point for their local government.

In 2007, United Way and the City of Bridgeport entered into a formal agreement whereby 211 would take calls for municipal service from Bridgeport residents. Meotti convinced Bridgeport's mayor that United Way—which already had significant telephony and other infrastructure in place—could provide the service

better and at a lower cost than the city could itself. Bridgeport initially provided the United Way with funding to hire three new staff to enable 211 to handle municipal calls from Bridgeport, but in the second year of the agreement, funding was reduced to support only two call takers. The United Way also developed a web-based workflow-management system in which requests for service were sent to city departments.

Despite apparent efficiencies, obstacles to success included:

- Some of the existing 211 staff resisted the idea of taking municipal service calls as well as social service calls. Municipal service requests were considered a distraction. In many cases, 211 staff used to providing crisis-level assistance were now being asked to take calls related to missed trash pickups.
- Bridgeport was a very small part of the total statewide 211 calling area. Approximately 350,000 calls to 211 were made statewide annually, and Bridgeport was expected to generate only 10,000 to 15,000 municipal calls per year. There was a need to identify calls from Bridgeport and determine which calls were for 211 and which were for municipal services. 211 set up an Interactive Voice Response (IVR) system to try to screen municipal service calls from Bridgeport, but the result was that callers frequently had to be transferred to 211 specialists. The additional staff hired to handle municipal service calls were not trained to handle 211 calls.
- Before implementing the 211 system, the City of Bridgeport did not analyze workflow or departmental outcomes. None of the city departments had a well-established work order system. Calls to 211 for municipal services generated an e-mail to the appropriate department, but there was no way to track resolution. Department employees would frequently close out requests without acting on them.
- 211 service was provided 24 hours per day, seven days a week, but it was unclear that a similar level of service was needed for 311 calls.
- Minimal effort was made to link 211 service to performance management or measurement.

With a change in administration, the contract between United Way and Bridgeport ended on December 31, 2008. Bridgeport's interest in citizen access and performance measurement continued beyond the experiment with using 211 for municipal services. In mid-2008 the new Mayor of Bridgeport, Bill Finch, launched a CitiStat program led by the city's deputy

chief administrative officer. In early 2009, the city announced plans to create its own call center to take requests for service.²² The Mayor's 2009–10 budget proposal included a call to “grow and develop Bridgeport's new CitiStat program to improve efficiency and accountability throughout Bridgeport City Government . . . [and] increase use of the City's 576-1311 call center and bi-weekly accountability meetings with all city department heads.”²³

311 and 211: Opportunities for Coordination and Collaboration

Even where consolidation may be impractical, 311 and 211 leaders in other localities acknowledge that there are opportunities for coordination and collaboration. In most cities and counties that have 311, call volume is greater than 211. As a result, 311 and 211 may frequently refer calls to each other.

In Minneapolis,²⁴ as the city was moving to implement 311, it worked with the state, county, and 211 to clarify where social service calls would best be handled. The result was an informal understanding that with few exceptions, all social service calls to 311 should be transferred to 211. 311 staff view 211 staff as better trained and better prepared to handle social service calls that may require heightened levels of awareness and the ability to identify issues beyond those that are the initial reason for the call. At the same time, 311 and 211 staff communicate on occasion to ensure that 211 is fully aware of city programs related to social services, such as employment and job training.

In Kansas City,²⁵ 211 played an important role in the development of the 311 system. Along with a representative of 911, 211 participated in a committee that helped to oversee the deployment of 311. All three systems frequently communicate, and both 211 and 311 participate in a community-wide response to heat conditions. [In at least two cases, the result of this history of close cooperation and communication allowed 311 call takers to identify individuals requesting municipal services as potentially suicidal and to quickly connect those individuals to 211.]

Most 311 systems make an effort to distinguish between the types of service that they provide and the types of service provided by 911. In Minneapolis²⁶ and Hartford,²⁷ there was no effort to distinguish between 311 and 211; apparently there was no resulting confusion on the part of residents. But in Kansas City there have been joint marketing efforts to ensure public understanding of how the systems differ.

Conclusion

By providing greater public access to essential services delivered by local government and nonprofit organizations, both 311 and 211 systems increase the efficiency and effectiveness of the delivery of those services. Despite the obstacles, the opportunity for consolidation and the need for collaboration are clear.

Opportunity for Consolidation

New York City's operation of 311 and 211 may be a model for localities that currently lack either service. There are, however, relatively few locations in which a 311 system preceded 211 as it did in New York.

The greater potential may lie in the ability to have 211 systems provide the platform for the development of 311 systems. With the majority of the nation covered by 211, efficiency would suggest that 211 should assume the role of providing for municipal as well as social services. The lessons of the Bridgeport experiment, however, suggest the need for caution. Although integration of 311 into an existing 211 system may spare some local governments the expense of recreating a call-center infrastructure, cities must prepare to invest in the workflow systems that are critical to the effectiveness of 311. Whether a local government is looking to develop its own 311 system or partner with 211, leadership commitment to the effort—accompanied by adequate resources—is essential.

Use of 211 for municipal systems may also lead to the development of more regional 311 systems. Many 211 systems already operate at a regional level. The example of Bridgeport suggests that a regional 311 system being operated by a regional 211 system may result in a better fit for consolidation.

Consolidation of existing 311 and 211 initiatives may be harder to achieve. Many 211 initiatives are regional or statewide, but few 311 systems are. If a 311 system were to take over 211 calls for a specific city or county, 211 would still need to exist for those parts of a region or state not currently served by 311.

Need for Collaboration

With fewer obstacles to success, there is a clearer need for 311 and 211 systems to closely collaborate even

where they remain separate.

- Both 211 and 311 systems play critical roles in a local area response to a disaster, natural or otherwise. Close collaboration should be commemorated through formal disaster response agreements.
- 211 and 311 organizations can learn from each other with regard to best practices in the operation of public-interest call centers. Common best practices in telephony and training are feasible first steps for collaboration.
- Both 311 and 211 systems are important sources of data for comprehensive community indicators. By studying data from both systems, local governments can achieve a much clearer picture of community needs.
- Joint marketing efforts would clarify the respective roles of the two systems.

The federal government can and should play a role in ensuring greater collaboration between these two systems wherever possible. Potential Department of Homeland Security funding for 211 could be linked to parallel funding efforts by the Justice Department for the development and deployment of 311 systems. Similarly, Community Development Block Grant (CDBG) funds—which currently can be used for development of a 211 system—should also be permitted for use for the development of a 311 system.²⁸

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Notes

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ICMA National Study of 311 and Customer Service Technology

With funding from the Alfred P. Sloan Foundation, ICMA is conducting research and developing new resources and tools for jurisdictions considering implementation of 311/CRM systems. Working with the Ochs Center for Metropolitan Studies, ICMA's research focuses on overall system management, including organizational issues as staff training as well as citizen engagement and performance measurement and management.

For more information on the study, contact Cory Fleming, project director, at cfleming@icma.org or 207-854-1083.

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