

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF THE COUNTY OF SAN BERNARDINO
AND RECORD OF ACTION**

October 27, 2020

FROM

GILBERT RAMOS, Director, Transitional Assistance Department

SUBJECT

California Statewide Automated Welfare System Consortium IV Purchase of Interactive Voice Response Bots Authentication Enhancements Pilot

RECOMMENDATION(S)

1. Approve purchase of California Statewide Automated Welfare System Consortium IV Interactive Voice Response Bots Authentication Enhancements Pilot, in an amount not to exceed \$469,974, for the period of October 31, 2020 through September 30, 2021.
2. Authorize the Purchasing Agent to sign the California Statewide Automated Welfare System Consortium IV Interactive Voice Response Bots Authentication Enhancements Pilot document (County Purchase SB-05-2020).
(Presenter: Gilbert Ramos, Director, 388-0245)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Provide for the Safety, Health and Social Service Needs of County Residents.

FINANCIAL IMPACT

This item does not require additional Discretionary General Funding (Net County Cost). The California Statewide Automated Welfare System (CalSAWS) Consortium IV (C-IV) purchase of Interactive Voice Response (IVR) Bots Authentication Enhancements Pilot will not exceed \$469,974. The cost will be funded with 95% (\$446,475) state and federal funds made available through the California Work Opportunity and Responsibility to Kids, Medi-Cal and CalFresh allocations, and 5% (\$23,499) Net County Cost. Adequate appropriation and revenue have been included in the Human Services Administrative Claim 2020-21 budget and will be included in the 2021-22 recommended budget.

BACKGROUND INFORMATION

The Transitional Assistance Department (TAD) is mandated and responsible to administer public assistance programs for eligible San Bernardino County residents in need of financial, nutritional and/or medical assistance, as well as providing Foster Care, Child Care and Welfare-to-Work services. Since 1996, the County has been a member of the CalSAWS Consortium, which consists of 58 counties operating under a Joint Powers Authority and responsible for CalSAWS development and maintaining the statewide C-IV System.

TAD was selected by the CalSAWS Consortium to pilot the implementation of virtual assistance robots (bots) to provide additional self-service functionality for the County's C-IV Interactive Voice Response (IVR) system utilized by customers. Virtual assistance robot enhancements to the County's C-IV IVR will include authentication of a customer who calls the IVR; customer

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“push” notification options based on benefit information and case status (CalWORKs, CalFresh, and/or Medi-Cal) based on the customer’s submitted and/or requested C-IV documents; and natural language “welcome” processing to enable open-ended questions in order to capture caller intent. After completion of the pilot, the County will work with the consortium to assess the results and provide recommendations for the long-term statewide solution.

The goal of the enhancements is to improve the customer experience with Customer Service Center (CSC) staff. TAD customers calling into the CSC typically do not authenticate, requiring staff to spend time to verify identity. A primary reason customers call is to inquire about their benefit(s) amounts and receipt of submitted documents. Upon approval, TAD will implement an Authentication Bot, Push Notification Bot, and Welcome Bot within the C-IV System. In addition, the scope of work includes the development of reports to measure the data/metrics of the piloted enhancements expected to result in significant operational efficiencies and reduced hold times for customers calling the CSC.

PROCUREMENT

As a member of the Consortium, the County does not separately solicit for these services and is bound to utilize the software system and vendor that was selected through a competitive process by the Consortium.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Adam Ebright, Deputy County Counsel, 387-5455) on October 5, 2020; Human Services Information, Technology and Support Division (Danny Tillman, Departmental Information Services Administrator, 386-3765) on October 13, 2020; Purchasing (Bruce Cole, Supervising Buyer, 387-2148) on October 5, 2020; Finance (John Hallen, Administrative Analyst, 388-0208) on October 7, 2020; and County Finance and Administration (Tanya Bratton, Deputy Executive Officer, 388-0332) on October 7, 2020.

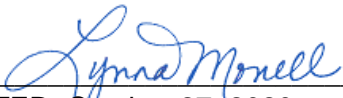
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Record of Action of the Board of Supervisors
County of San Bernardino

APPROVED (CONSENT CALENDAR)

Moved: Robert A. Lovingood Seconded: Josie Gonzales
Ayes: Robert A. Lovingood, Janice Rutherford, Dawn Rowe, Curt Hagman, Josie Gonzales

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: October 27, 2020



cc: File- Transitional Assistance Department w/attach
LA 10/30/2020