

LOS ANGELES UNIFIED SCHOOL DISTRICT

SCHOOL CONSTRUCTION BOND CITIZENS' OVERSIGHT COMMITTEE

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Tenth District PTSA

Bevin Ashenmiller, Vice-Chair

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American Institute of Architects

Margaret Fuentes

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Early Education Coalition

Connie Yee (Alternate)

L.A. Co. Auditor-Controller's Office

Jose Zambrano (Alternate)

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Government Financial Strategies

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Bond Oversight Administrator

Perla Zitle

BOC Staff

RESOLUTION 2019-30

BOARD REPORT NO. 159-19/20

AMENDMENT TO THE INFORMATION TECHNOLOGY DIVISION
STRATEGIC EXECUTION PLAN TO APPROVE THE ENTERPRISE HELP
DESK PROJECT

WHEREAS, District Staff proposes that the Board of Education amend the Information Technology Division (ITD) Strategic Execution Plan (SEP) to approve the definitions, allocate funds, and take the associated action(s) for the Enterprise Help Desk Project as described in Attachments A, B and C.

WHEREAS, District Staff proposes the following actions:

- Move \$3,445,893 from the "Upgrade and Equip with 21st Century Technology" School Upgrade Program (SUP) category of need to the "Technology Infrastructure and System Upgrades" SUP category of need.
- Allocate \$3,445,893 bond funding to complete the Enterprise Help Desk project.
- Approve execution of the Enterprise Help Desk projects; and

WHEREAS, the SUP includes a spending target to address "Technology Infrastructure and System Upgrades"; and

WHEREAS, the Enterprise Help Desk project will implement a new Enterprise Help Desk to improve parents' customer experience when requiring support for their enrolled children; and

WHEREAS, this project is consistent with the District's commitment to address critical technology, communication and safety needs; and

Bond Oversight Committee

RESOLUTION 2019-30

**AMENDMENT TO THE INFORMATION TECHNOLOGY DIVISION STRATEGIC
EXECUTION PLAN TO APPROVE THE ENTERPRISE HELP DESK PROJECT**

WHEREAS, District Staff anticipates that the proposed SEP amendment will facilitate implementation of the ITD SEP, and therefore, it will not adversely affect the District's ability to successfully complete the ITD SEP.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The School Construction Citizens' Bond Oversight Committee recommends that the Board of Education adopt amendment of the Information Technology Division Strategic Execution Plan to approve the Enterprise Help Desk project listed above as described in Board Report 159-19/20, a copy of which is attached hereto in the form it was presented to the BOC and is incorporated herein by reference.
2. This resolution shall be transmitted to the Los Angeles Unified School District Board of Education and posted on the Bond Oversight Committee's website.
3. The District is directed to track the above recommendation and to report on the adoption, rejection, or pending status of the recommendations as provided in section 6.2 of the Charter and Memorandum of Understanding between the Bond Oversight Committee and the District.

ADOPTED on October 24, 2019, by the following vote:

AYES: 7
NAYS: 2

ABSTENTIONS: 1
ABSENCES: 5

Rachel Greene
Chair

Bevin Ashenmiller
Vice-Chair



Board of Education Report

File #: Rep-159-19/20, **Version:** 1

Amendment to the Information Technology Division Strategic Execution Plan to Approve the Enterprise Help Desk Project
November 5, 2019
Information Technology Division

Action Proposed:

Staff proposes that the Board of Education amend the Information Technology Division (ITD) Strategic Execution Plan (SEP) to approve the definitions, allocate funds, and take the associated action for the Enterprise Help Desk Projects, as described in Attachments A, B, C and D.

The proposed actions are as follows:

- Move \$3,445,893 from the "Upgrade and Equip with 21st Century Technology" SUP category of need to the "Technology Infrastructure and System Upgrades" SUP category of need.
- Allocate \$3,445,893 bond funding to complete the Enterprise Help Desk project.
- Approve execution of the Enterprise Help Desk projects.

Background:

On January 14, 2014, the Board of Education approved the establishment of the School Upgrade Program (SUP), the next phase of the District's Bond Program, which will modernize, build and repair school facilities to improve student health, safety and educational quality. The Board's action approved the overarching goals and principles, funding sources, specific categories of need, and spending targets for the SUP. As proposed projects are developed, they are submitted to the Bond Oversight Committee (BOC) for consideration and the Board of Education for approval.

The SUP includes a spending target to address "Technology Infrastructure and System Upgrades." The intended outcomes of Enterprise Help Desk Project to be executed within this spending target are as follows:

- Enterprise Help Desk Project: This project will implement a new Enterprise Help Desk to improve parents' customer experience when requiring support for their enrolled children. \$3,445,893 Bond Funds (98%) and \$54,107 General Funds (2%)

If approved, ITD will provide quarterly updates on the Project.

Expected Outcomes:

Staff anticipates that the Board will amend the ITD SEP to define the new projects described herein and allocate \$3,445,893 of Bond Program funding. This project will help address the critical needs of the District's technology infrastructure and software systems.

Board Options and Consequences:

Failure or delay of approval will postpone the execution and/or implementation of the proposed projects and programs and the associated benefit to the schools and students.

Policy Implications:

This action is consistent with the District's long-term goal to address unmet school needs as described in Proposition BB and Measures K, R, Y and Q.

Budget Impact:

The proposed project has a total budget of \$3,445,893 of Bond Program funding and \$54,107 of General Fund. This funding will be allocated from the "Technology Infrastructure and System Upgrades" SUP category of need in the ITD SEP. A total of \$54,107 in one-time General Fund is needed for non-bond eligible expenses to implement the Enterprise Help Desk project. This need is currently unfunded.

Upon completion of the project \$1,289,043 of ongoing General Fund will be needed for maintenance, future enhancements and support of the Enterprise Help Desk. These General Fund needs are currently unfunded.

Student Impact:

Project enables the District to better engage and more efficiently answer the questions of parents and the community.

Issues and Analysis:

The School Construction Bond Citizens' Oversight Committee (BOC), at its October 24, 2019 meeting, considered this item. Staff has concluded that this proposed SEP Amendment will facilitate the implementation of the ITD SEP, and therefore it will not adversely affect the District's ability to successfully complete the ITD SEP.

Attachments:

Attachment A - Project Definition
Attachment B - Bond Oversight Committee Resolution
Attachment C - Presentation Slide Deck
Attachment D - Improving Family and Community Engagement

Informatives:

None

Submitted:

10/18/19

RESPECTFULLY SUBMITTED,

APPROVED BY:

AUSTIN BEUTNER
Superintendent

MEGAN K. REILLY
Deputy Superintendent, Office of the Deputy
Superintendent

REVIEWED BY:

APPROVED & PRESENTED BY:

DAVID HOLMQUIST
General Counsel
___ Approved as to form.



SOHEIL KATAL
Interim Chief Information Officer

REVIEWED BY:

TONY ATIENZA
Director, Budget Services and Financial Planning
___ Approved as to budget impact statement.



Information Technology Strategic Execution Plan Amendments Project Definitions and Associated Actions Attachment A – BOE #159-19/20

Program: Enterprise Software Systems
Project: Enterprise Help Desk Project
Budget: \$3,445,893 Bond Funds (98%) and \$54,107 General Funds (2%)

Introduction

The Enterprise Help Desk Project is a joint initiative between ITD and the Office of the Superintendent. The project will implement an Enterprise Service Management (ESM). An ESM is a software tool that is used by help desk agents and other support staff to capture, track, manage, and measure service interactions with parents and community members. This system will also give stakeholders the ability to engage in self-service via a virtual assistant, using Artificial Intelligence and a knowledge management database. Additionally, the ESM system will deliver the insights leadership needs to make data-driven decisions across the organization.

Currently, most LA Unified Business Units track parent interactions relevant to District operations using different applications including email, spreadsheets, and other methods. Other interactions occur via phone or chat, and in many cases, those interactions are not documented. These applications or systems collect various levels of detail about stakeholder interactions; however, they do not interact with each other. Since information is stored in a variety of formats, the aggregation of information required to enable effective District oversight is difficult to obtain.

As recommended by two recent District studies, LA Unified should consolidate District Help Desks and leverage Cloud Services to increase service availability, enhance customer service, and improve operational efficiency across the organization.

Implementation of a Unified ESM Portal, deploying a robust knowledge base, and enabling artificial intelligence (virtual agent) will ensure that stakeholders have access to a user-friendly, consistent, and responsive stakeholder experience. These systems will enable stakeholders to have access to the support they need when they need it.

Scope

The Enterprise Help Desk will onboard at least 17 business units that have been identified as primarily serving parents and the community. The work schedule will line up with currently scheduled support hours. Staff, along with an ESM system, will be deployed to the Local District offices. Then, the following business units will be on-boarded:

- Admission Criteria Schools
- CHAMP
- District Service Center



Information Technology Strategic Execution Plan Amendments Project Definitions and Associated Actions Attachment A – BOE #159-19/20

- Dual Language Education
- LA Unified Emergency Hotline
- Office of Data and Accountability
- Office of Parent and Community Services
- Parent Portal
- My LAUSD Mobile App
- Schoology
- Schools for Advanced Studies
- Special Ed Operations
- Student Integration Services
- Student Record
- Student Testing Branch
- Talent Acquisition & Selection Branch
- Transportation

The scope includes all project management processes for multiple business units, including but not limited to process definition, organizational change management, system integration, and training/professional development for the ESM system.

Expected Outcomes

- Deployment of an Enterprise Service Management System to track, manage, and measure stakeholder service interactions.
- Access to information via advanced knowledge-base and a self-service portal with a virtual agent.
- Improvement in parent and community engagement.
- 24/7 self-service and access to information.
- Delivery of the insights leadership needs to make data-driven decisions.
- Simplified and accelerated service delivery
- Unification of stakeholder service workflows.
- Sharing of information across the organization resulting in improvement in efficiency and service delivery.

Schedule

We estimate that the project will be completed by June 2023. A high-level timeline follows.



Proposed IT Strategic Execution Plan Amendment to Add Enterprise Help Desk Project Brd Rpt 159-19/20

Soheil Katal, Interim Chief Information Officer

Board Meeting November 5, 2019



School Upgrade Program Category: Technology Infrastructure and System Upgrades

Enterprise Help Desk

Create a central LAUSD Help Desk, with standardized customer service processes, reports and dashboards to better serve District families and improve community engagement

Estimated completion by June 2023

Budget: \$3,445,893 Bond Funds (98%) and \$54,107 General Funds (2%)

The Work Ahead: Simplifying a complex system for school leaders and families

Proposed Improvements: (✓ = Completed)

1. An upgraded and state-of-the-art Call Center to route calls more efficiently. ✓
2. A streamlined phone menu to help stakeholders connect to the right place much faster. ✓
3. Additional staff to ensure calls are answered in an efficient manner.
4. Propose a systemwide customer relationship management system that measures and resolves complaints received.
5. A targeted emphasis on answering parents' questions on the first call. When call transfers are required, our representatives will stay on the phone to provide direct assistance to the new department rather than an automated answer machine which will ensure that the call is appropriately transferred.
6. New oversight of the 213-241-1000 number within the Information Technology Division, so that one division can more efficiently manage all help desks and reallocate resources quickly during periods of high call volume

What is the Enterprise Help Desk?

What is the Enterprise Help Desk?

It is a **one stop shop** that...

- Is **easy** to use
- Enables **24/7 self-service** and integration with **Parent Portal**
- **Tracks cases** submitted by parents/community members
- Leverages reports and dashboards to measure activity and make **data-driven decisions**
- Utilizes **artificial intelligence (AI)**



Why do we need an Enterprise Help Desk?

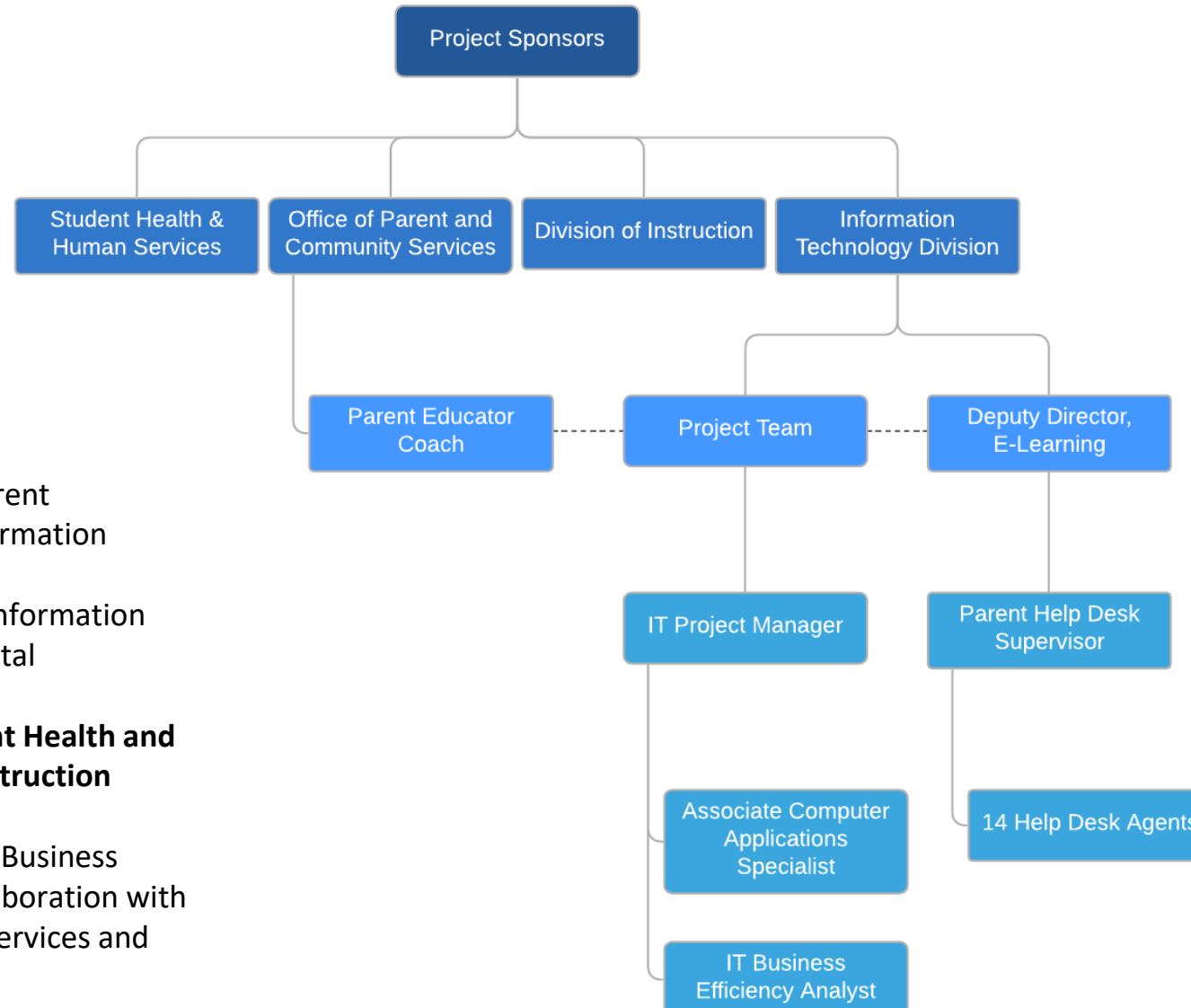
- LA Unified does not have a system to track and ensure case resolution for complaints received
 - An average of **9,800 calls per month** come in and aren't being tracked
- Inability to make **data-driven** decisions to measure the types of concerns being raised by parents
- Increase student retention by **improving relationships** with parents in an **efficient** manner

How can we fix our needs and how will we benefit?

- Implement case management practices to ensure proper resolution for parents in an **efficient** manner
- Implement **datafication** practices to leverage **reports** to proactively make data-driven decisions to address concerns of parents
- Improve the **relationship** of LA Unified and parents/community members by providing a dedicated line of support for their needs
- Leverage technology to allow **self-service**, and avoid costs associated with having a live agent answer common questions



Project Org Chart



Phase 1: Soft Launch

- Beginning with Office and Parent Community Services and Information Technology Division
- Infrastructure building with information that is available in Parent Portal

Phase 2: Collaboration with Student Health and Human Services and Division of Instruction

- Refining phase 1 efforts with Business Services Operations and collaboration with Student Health and Human Services and Division of Instruction

Project Budget

Category	Amount
Project Team – LAUSD Personnel	\$ 1,429,401
Equipment Purchases	\$ 59,205
Professional Services	\$ 378,060
Software Licensing	\$ 1,050,000
Project Subtotal	\$ 2,916,667
Project Administration (10%)	\$ 291,667
Contingency (10%)	\$ 291,667
GRAND TOTAL	\$ 3,500,000

\$3,445,893 Bond Funds (98%); \$54,107 General Funds (2%)

Ongoing Budget

Labor Costs		Annual Cost
Deputy Director, E-learning		\$ 199,657
Associate Computer Applications Specialist		\$ 155,375
Customer Services Center Supervisor		\$ 83,130
Customer Services Center Representative (9)		\$ 662,868
Customer Services Center Representative (5)		\$ 368,261
Parent Educator Coach		\$ 143,045
Sub-Total		\$ 889,043
Other Costs		
Software Maintenance		\$ 400,000
Sub-Total		\$ 400,000
Total Project Cost (Estimated)		\$ 1,289,043

Conclusion: Proposed Customer Service Delivery Model



Single enterprise
service management
portal



Create a bridge of
communication and build
stronger partnerships with
families



Effective District
oversight and
centralized reporting



Improved customer service
experience



Questions?

[illegible]