

**Project Name:** Tax Branch CalNET II Implementation  
**OCIO Project #:**   
**Department:** Employment Development Department  
**Revision Date:** 9/22/10

## Concept Statement

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### Description

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**Brief description of the proposed project:**

Upgrade the Tax Branch Employment Tax Call Centers (ETCC) Platform and all related Tax customer service areas utilizing the CalNET II, Master Service Agreements (MSAs) 3 & 4. The CalNET II, MSAs 3 & 4, meet the needs of the Tax Branch. The current call center technology is outdated and is no longer effective. The Tax Branch would like to leverage new technologies with additional functionality and features that would enable ETCC to work more efficiently.

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### Need Statement

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**High Level Functional Requirements:**

Tax Branch would be able to replace aging technology with a more reliable call center platform available in the CalNET II contract. This platform would provide increased efficiency, functionality and features. The new technology would include, but not be limited to the following: intelligent call routing management, back-up systems for disaster recovery, automated workforce management tools, and remote call monitoring and recording tools.

**What is Driving This Need?**

The Tax Branch has a business need for a more efficient way to handle the increasing inbound call volumes to the ETCC. The current call center platform is outdated and requires manual processes that hinder the Tax Branch's ability to meet the increased demand. This platform would enable the Tax Branch to achieve efficiency and enhance productivity by providing a more streamlined, real-time call routing process, therefore, improving customer service and achieving significant cost savings.

**Risk to the Organization if This Work is Not Done:**

Without improving the call center platform, Tax Branch is unable to route calls on a real-time basis to the available resources, resulting in inconsistent presentation of calls to the ETCC (agents in one office sitting idle, while another office has callers waiting in queue). As a result, the ETCC is unable to handle the volume of calls from the public. With the increasing call volumes, Tax Branch runs the risk of scrutiny for not responding to the needs of the taxpayers in a timely fashion. In addition to the ETCC system, the Contribution Rage Group (CRG) and eServices IVR stands alone, without an available contingent Business Resumption Plan, if there is a system failure.

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### Benefit Statement

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#### Intangible Benefits

**Process Improvements** (describe the nature of the process improvement):

The new technology would allow Tax Branch to route calls on a real time basis as well as monitor and record inbound calls for training and quality assurance purposes, subsequently improving answering speed. Replacing the current system would allow Tax Branch to train staff and monitor calls to ensure efficiency in responding to claimant calls. A more automated scheduling and forecasting tool would assist Tax Branch in determining effective resource management.

**Other Intangible Benefits:**

None

#### Tangible Benefits

**Revenue Generation** (describe how revenue will be generated):

This is not a revenue generating project.

**Cost Savings** (describe how cost will be reduced):

Cost savings would be achieved by making the system more efficient: 1) Routing calls on a real time basis to available resources utilizing a network skills based routing, 2) Reducing costs incurred for call hold times through more accurate call routing, 3) Eliminating time spent manually calculating call percentages for multiple call centers, and creating monthly schedules, 4) Eliminating time spent manually changing the AT&T Network call routing to the call centers multiple times throughout each month, and 5) Reducing time spent forecasting and scheduling staff.

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**Cost Avoidance** (describe the cost and how avoided):  
 Call wait times will be reduced, and there will be faster access to agents. This will result in fewer customer complaints regarding access to a representative and fewer complaints to the Governor regarding Tax Branch Services.

**Risk Avoidance** (describe the risk and how avoided):

- The risk of not having staff scheduled when they are needed would be greatly reduced.
- The risk of staff giving out misinformation will be greatly reduced.
- The risk of the ETCC/CRG/eServices IVR going down and not having a back up to provide service to customers will be eliminated.
- The risk of sending calls to an office that does not have the resources to answer the calls will be eliminated.

**Improved Services:**  
 The current Tax Branch Call Center Platform is extremely outdated; technology and Industry standards have moved well beyond the current platform. By pursuing the services available through the CalNET II, the Tax Branch would improve multiple layers of the call environment. The Tax Branch would be able to increase the quality and productivity of work in our call centers, improve the speed in which a call is answered, reduce the cost associated with calls holding by real-time call routing, streamline the entire system, and improve the ability to effectively manage the calls during a crisis.

### Consistency

"No" Responses →		Rationale	Action Required
Enterprise Architecture	No	Not dependent on UI Call Center Network Platform and Application Upgrade project.	
Business Plan	Yes		
Strategic Plan	Yes		

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### Impact to Other Agencies

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#### Nature of Impact to Other Agencies

<b>Agency:</b>
<i>Describe the nature of the impact:</i>
None

<b>Agency:</b>
<i>Describe the nature of the impact:</i>
None

<b>Agency:</b>
<i>Describe the nature of the impact:</i>
None

<b>Agency:</b>
<i>Describe the nature of the impact:</i>
None

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### Impact to Other Programs

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#### Nature of Impact to Other Programs

<b>Program:</b>
<i>Describe the nature of the impact:</i>
None

<b>Program:</b>
<i>Describe the nature of the impact:</i>
None

<b>Program:</b>
<i>Describe the nature of the impact:</i>
None

<b>Program:</b>
<i>Describe the nature of the impact:</i>
None

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### Solution Alternatives

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<b>Alternative 1:</b>
This solution would utilize the current CalNET II Contract, MSAs 3 & 4 for migration of the Tax Branch call center platform to current technology which will provide a more efficient and effective operating system with increased functionality.

<b>Technical Considerations for Alternative 1:</b>
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ROM Cost: Undetermined	to	<b>Note: high end of range must not exceed 200% of low end of range</b>
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<b>Alternative 2:</b>
Wait to migrate to the Unemployment Insurance CCNPAU platform.

<b>Technical Considerations for Alternative 2:</b>
This does not meet the business needs of the Tax Branch. Tax Branch would need to wait to move to this platform after UI Branch has completed their migration and post implementation reviews. Due to the complexity of the UI project, the expected date of completion could continue to be delayed past the CalNET II contract expiration date. If Tax Branch waits to move to the CCNPAU platform, the Tax Branch would not realize call routing efficiencies as well as significant cost savings associated with a new platform under the CalNET II contract.

ROM Cost:	to	<b>Note: high end of range must not exceed 200% of low end of range</b>
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<b>Alternative 3:</b>
None

<b>Technical Considerations for Alternative 3:</b>
ROM Cost: _____ to _____ <span style="float: right;">Note: high end of range must not exceed 200% of low end of range</span>

### Recommendation

**Comparison:**

Alternative 1	ROM Cost	Risk
	Undetermined - \$0	
Alternative 2	ROM Cost	Risk
	\$0 - \$0	
Alternative 3	ROM Cost	Risk
	\$0 - \$0	

**Conclusions:**

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**Recommendation:**

To migrate to a new call center platform using CalNET II, MSA 3 & 4.

### Project Approach (if known)

<b>System Complexity:</b>		System Business Hours: (e.g., 24x7, 9am-5pm):	
Architecture	<input type="checkbox"/> Mainframe <input type="checkbox"/> Client Server <input type="checkbox"/> Web Based	Num. of New Databases:	
Technology	<input type="checkbox"/> New <input type="checkbox"/> New to Staff <input type="checkbox"/> In-House Experience	Interfaces:	
Implementation	<input type="checkbox"/> Central Site <input type="checkbox"/> Phased Roll-out	Num. of Sites:	
M & O Support	<input type="checkbox"/> Contractor <input type="checkbox"/> Data Center <input type="checkbox"/> Project <input type="checkbox"/> Returned to Sponsor		
Procurement Approach: (consult with OSI Procurement Center)			Number of Procurements:
Open Procurement?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Delegated Procurement?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Scope of Contract	<input type="checkbox"/> Development <input type="checkbox"/> Implementation <input type="checkbox"/> M & O <input type="checkbox"/> Other:		
Anticipated Length of Contract:	_____ Years /	_____ extensions for	_____ years