

Montgomery County Government

# ARTIFICIAL INTELLIGENCE ACTION PLAN

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## MESSAGE FROM THE COUNTY EXECUTIVE MARC ELRICH

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I believe that Artificial Intelligence (AI) has the potential to be revolutionary technology that can assist and improve how we can serve our residents, businesses, and stakeholders.

I have tasked my administration with finding innovative ways to use AI and applaud the Department of Technology & Enterprise Business Solutions (TEBS) for utilizing this technology in recent technological upgrades. I encourage everyone to give us feedback so we can continually learn and improve services that leverage AI.

We know that AI is far from perfect and still evolving. We are aware of the challenges posed by AI and will continue to be careful in constructing solutions to avoid any risks.

A handwritten signature in black ink that reads "Marc Elrich". The signature is written in a cursive, flowing style.

Marc Elrich  
Montgomery County Executive



## MESSAGE FROM THE CHIEF INFORMATION OFFICER GAIL ROPER



I am pleased to share our ongoing commitment to providing the best possible service to our residents. Under County Executive Marc Elrich’s leadership, we have aligned our strategic priorities to focus on innovative business and technology solutions that streamline processes, enhance communication, and ensure our residents’ needs are met efficiently and effectively.

By just completing our first GenAI implementation, we have already made a significant first step forward in enhancing resident-centric services through transformative AI technology. By leveraging AI, we are providing residents with enhanced interaction, information, and support. The success of these efforts will continue to result from collaboration across our technologists, developers, Change Management professionals, project management professionals, leadership, business owners, County residents, and more.

As we continue to innovate and improve, we remain dedicated to serving our residents with excellence and integrity. Thank you for your ongoing support and trust in Montgomery County – we look forward to creating a more connected and efficient community.

A handwritten signature in black ink that reads "Gail M. Roper". The signature is written in a cursive, flowing style.

Gail Roper  
Chief Information Officer



## INTRODUCTION

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As the excitement around recent advancements in Artificial Intelligence (AI) continues to grow, Montgomery County Government is taking proactive measures to ensure our organization adopts new and existing AI technologies in a **responsible, ethical, equitable** and **strategic** manner. We are committed to using AI to enhance County services, always prioritizing the best interests of our residents, businesses, and stakeholders.

Artificial intelligence (AI) refers to a machine's ability to exhibit intelligence and perform tasks commonly associated with human intelligence, such as automating tasks, learning from experience, and making decisions. In government, AI is already being used to improve services and make work more efficient. For instance, chatbots are being used to streamline access to government services, and other AI applications are being used for predictive analytics and more. Ultimately, AI tools will **improve the way we work** and **deliver services to residents**. While these technological advances are beneficial, their heavy reliance on data requires innovators to focus on accuracy, biases, data privacy, and more.





In response to these emerging and complex needs, Montgomery County’s Department of Technology & Enterprise Business Solutions has established an **AI Center of Excellence**, formed valuable partnerships with local universities and with several local jurisdictions, drafted a strategic plan and ethical guidelines, and developed a process for departments to request and receive timely consultation and support. Detailed throughout this Action Plan, you can find more about these initiatives and how TEBS plans to continuously deliver new and enhanced ways to better serve Montgomery County residents.





## FUNDAMENTAL GROUNDWORK

### Paving the Way: Establishing the Artificial Intelligence Center of Excellence (AICOE)

Montgomery County Government has laid the groundwork for the successful evaluation, implementation, and adoption of artificial intelligence solutions within the County's day-to-day business operations via the establishment of the Department of Technology and Enterprise Business Solutions (TEBS) Artificial Intelligence Center of Excellence (AICOE). The AICOE aims to utilize **nascent technologies** to improve service delivery, optimize resource utilization, and ensure a higher quality of experiences for stakeholders and residents, in the name of a more **sustainable, inclusive** and **residence-centric government**. To this end, the AICOE evaluates how investments in artificial intelligence can foster efficiencies, improved decision-making and problem-solving, and enhanced security across the enterprise, and boost resident customer service, expectations, and experiences with government services.





## Foundations for Success: Key Initiatives of the AICOE

The AICOE is working to prioritize the coordination of resources across the organization to **support new artificial intelligence technologies and processes**. This involves:

- Enhancing collaboration and cohesion using customer service governance frameworks
- Forming partnerships with academia, the private sector, and other internal teams for strategic planning, staffing, and development
- Setting benchmarks with other jurisdictions and organizations to share best practices
- Recruiting specialized talent, including AI researchers/scientists, AI engineers, business strategists, ethicists/legal experts, cybersecurity experts, product managers, and others

Additionally, the AICOE is updating and creating **human-centered policies** and guidelines to ensure the safe, ethical, and responsible use of artificial intelligence for non-private government data. This includes:

- Developing and refining AI-related policies and guidelines
- Researching best practices in governance, ethics, and usage
- Collaborating with stakeholders to ensure policies are inclusive and relevant
- Writing clear and enforceable AI policies
- Ensuring AI implementations follow existing policies

Through these efforts, the AICOE aims to guide all AI deployments by the principles of transparency, accountability, equality, data privacy and security, social benefit, public service, and inclusivity.







## STAKEHOLDER ENGAGEMENT

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The AICOE is dedicated to fostering innovation and advancing artificial intelligence initiatives. A key part of this mission is **working closely with** internal teams, external organizations, the public, academia, the private sector, and other governmental agencies. This collaboration ensures that the County's AI initiatives are **inclusive, beneficial** and **well-supported**.

The AICOE aims to understand diverse perspectives, gain support, and ensure inclusivity. To facilitate this, the AICOE has appointed a **Community Relationship Manager** to oversee partnerships with external organizations, academic institutions, and local governments. This role is crucial for building strong, product relationships that advance the AICOE's mission.

The Community Relationship Manager's responsibilities include:

- Building and maintaining relationships to ensure ongoing engagement and alignment with the AICOE's goals
- Establishing and coordinating cohorts of partners and stakeholders to drive forward joint projects and initiatives
- Acting as a liaison to ensure clear communication between all partners and the AICOE
- Ensuring partnerships and collaboration align with the AICOE's strategic goals
- Facilitating student participation through academic partnerships
- Advancing joining projects by pooling resources and expertise to achieve shared goals





# THE MONTGOMERY COUNTY ACTION PLAN

## Plan Details

The AICOE has developed an action plan to guide the evaluation, approval, deployment, and adoption of artificial intelligence solutions within Montgomery County Government. The Artificial Intelligence Action Plan is divided into four sections: **strategy, structure and staffing, governance** and **partnerships**. Action statements and guiding principles for each plan section are detailed below.



**Strategy**



**Structure & Staffing**



**Governance**



**Partnerships**





**Artificial Intelligence Strategy:**

The AICOE will collaborate to develop an **artificial intelligence strategy framework** that will guide the adoption of artificial intelligence tools for Montgomery County Government. The result of this framework will decrease costs, increase efficiencies, automate redundant processes, and benefit the residents in Montgomery County.



**AICOE Structure and Staffing:**

The AICOE will ensure organizational alignment and necessary staff are dedicated to overseeing and driving artificial intelligence solutions. This means the AICOE will play a role in all artificial intelligence projects. The result of this organizational alignment will be to have clearly defined roles, skillsets, and ownership of artificial intelligence projects, with the end goal of delivering artificial intelligence-enabled products to benefit Montgomery County Government.





### **Artificial Intelligence Governance:**

The AICOE will implement **policies, processes and tools** to govern all artificial intelligence projects. The governance model aims to **raise awareness of risks** and **protect the County, its employees** and **resident data from potential harm**.



### **Artificial Intelligence Partnerships:**

The AICOE will build artificial intelligence solutions utilizing current Montgomery County Government talent and hiring new experts as needed. It will also collaborate with departments to align strategies and support cross-departmental artificial intelligence projects. Finally, in addition to its academic partners, the AICOE will form successful partnerships with vendors to rapidly develop artificial intelligence solutions.

These efforts will ensure that Montgomery County Government follows artificial intelligence policies, processes, and ethical guidelines, and will leverage existing talent to drive innovation while avoiding duplication of efforts.





## Advancing with Execution: Summary of Initiatives and Actions

TEBS and the AICOE are focused on realizing the artificial intelligence action plan via initial proofs of concepts and other tangible use cases. This has included the beta implementation of the new Montgomery County 311 website chatbot, Monty 2.0, the County's **first generative artificial intelligence** deployment. Monty 2.0 uses generative artificial intelligence technologies from Microsoft and Zammo to reason over **3,000 curated 311 knowledge topics** and converse with residents in up to **140 languages**, all in a matter of seconds. This deployment represents an exponential improvement over the previous 311 website chatbot iteration, which was limited to only 20 knowledge topics and two languages, English and Spanish.



Introducing **Monty 2.0**,  
Montgomery County's  
Upgraded 311 Chatbot,  
Now Powered by  
**Artificial Intelligence**





TEBS is also leveraging artificial intelligence solutions to better safeguard sensitive County data through the department's nascent data classification project. The project aims to automatically monitor and restrict the transmission of highly sensitive resident data via the use of Microsoft Purview technology, ensuring that only authorized County employees are able to share personally identifiable information (PII), protected health information (PHI), and payment card information (PCI) with designated recipients. The project is being implemented in conjunction with new County **Administrative Policy 6-12, Data Classification**.

Additionally, TEBS has emphasized **numerous partnerships with academia and other jurisdictions**, both locally and globally. Efforts to date have included:

- Hosting interactive workshops with industry experts from Gartner and Microsoft to discuss the value of artificial intelligence
- Leading sessions with the State of Maryland and the City of Taipei to discuss artificial intelligence initiatives
- Partnering with local college programs to solve pressing governmental challenges
- Conducting routine outreach to engage County leadership, department-level information technology specialists, and the general employee base about artificial intelligence initiatives





## NEXT STEPS

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TEBS and the AICOE aim to utilize the artificial intelligence action plan to evaluate and implement several high-priority artificial intelligence initiatives over the next 12-18 months. These initiatives include:

- Establishing ongoing engagement and transparency with Montgomery County residents
- Evaluating and implementing general-purpose generative artificial intelligence tools for the enterprise workforce
- Updating governance processes to include an artificial intelligence review process
- Establishing an artificial intelligence discovery, education, and awareness plan



- Creating an AICOE project management plan
- Publishing lists of approved artificial intelligence vendors/products
- Establishing an artificial intelligence ethics review board
- Assessing and developing partnership opportunities with existing vendors
- Advertising and staffing TEBS artificial intelligence positions
- Developing an artificial intelligence intranet (internal) and internet (public facing) resource site
- Establishing secure configuration governance for artificial intelligence tools
- Actively monitoring and enforcing artificial intelligence policies
- Developing fiscal strategies for implementing and maintaining AI solutions







## DETAILS

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For more information on the Monty 2.0 311 website chatbot, please visit:

<https://montgomerycountymd.gov/mc311/monty-faqs.html>



