Request for Information Including Proposal to Provide Services

NC 211: Contact Center Operations

FUNDING AGENCY: United Way of North Carolina/NC 211

ISSUE DATE: February 18, 2021

DEADLINE DATE: March 31, 2021

Respondents are welcomed from any university, non-profit, for profit, or government agency that demonstrates that their agency is qualified, responsible, and capable of conducting the contact center activities described. Eligible entities include any organization, agency, or non-profit demonstrating an expertise in contact center operations.

Private non-profit and for-profit respondents must be registered with the North Carolina Secretary of State to conduct business in North Carolina or be willing to complete the registration process in conjunction with the execution of the contract documents (see www.sosnc.gov/corporations).

Electronic submission to this RFI is required. All submissions must be received by 5:00 pm EST on March 31, 2021.

Direct all inquiries concerning this Request for Information (RFI) and proposal to provide services to:

Physical Address:
United Way of North Carolina
1130 Kildaire Farm Road, Suite 100
Cary, NC 27511
(all responses must be submitted electronically)

Via Email: RFIresponse@unitedwaync.org

Delivery Information:

Respondents for this RFI are required to submit their information electronically. Respondents are responsible for including all required elements in the submission packet. Failure to provide all information requested may result in disqualification from consideration.

Proposed Project Period or Contract Term: December 1, 2021 – December 31, 2024 - 3 years with an automatic renewal option if terms remain aligned.

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I. INTRODUCTION

a. United Way of North Carolina

United Way of North Carolina (UWNC) is a statewide organization representing 51 North Carolina United Way organizations. Major activities include:

- Convening United Way professionals and volunteers for legislative briefings, regional discussions, professional development and statewide "Spirit of NC" annual campaign award recognition.
- Providing technical, consultative, and unified marketing services to member organizations.
- Advocating on behalf of health and human services in the North Carolina General Assembly and shares pertinent legislative news with members.
- Managing NC's statewide 211, health and human services information and referral.

Mission Statement
Increase the capability of the United Way system to improve the quality of human life in North Carolina.

Vision Statement
United Way of North Carolina is recognized as a respected and highly effective organization by its members within the United Way system, and its collaborating partners outside the United Way system. We are known as an instrumental force in ensuring that the United Way system in North Carolina is successful in addressing the essential human needs of our communities.

Equity Statement
United Way of North Carolina recognizes structural racism and other forms of oppression have contributed to persistent disparities which we seek to dismantle. Our United Way network strives to engage and center community members, especially those whose voices have traditionally been marginalized. We work with public and private partners to co-create solutions that ensure everyone has the resources, support, opportunities, and networks they need to thrive. We commit to leveraging all of our assets (convening, strategic investments, awareness building, advocacy, evaluation) to create equitable communities.

For further information on the work of the UWNC and NC 211, please visit:

- https://www.unitedwaync.org/
- https://nc211.org/
- 211counts.org

b. NC 211

NC 211 is an information and referral system administered by UWNC. NC 211 is available in all 100 counties of North Carolina and provides free and confidential information and referral service 24/7/365 in more than 150 languages. The 211 service is delivered by trained call specialists who utilize skills in active listening, data collection, needs assessment, and information delivery on every call. The 211 database includes health and human services resource information for all 100 counties with top needs each year including food, utility assistance, and housing. In 2020, NC 211 call specialists handled more

than 206,000 calls. Additionally, the on-line database, searchable at nc211.org, had more than 727,000 searches for resource information. NC 211 has grown from a $1M organization in 2015 to a $6.2M enterprise in 2020.

Vision Statement
To provide North Carolina communities with free and easy access to health and human services, government services and disaster resources 24/7/365; while providing real time data on community need and vital trend information for community planning, disaster response and that informs funding decisions.

NC 211 assets include:

- partnership in the first statewide care coordination platform in the nation,
- robust data,
- the first community resource repository as a public utility,
- strong relationships with state agencies,
- a public portal for disaster information as a part of the State Emergency Response Team (SERT),
- rich and updated community resource dataset,
- a dedicated team,
- administrative designation for the 3-digit dialing code 2-1-1.

These assets work together, creating a single point of entry to access health and human services across the state for all North Carolina residents. NC's 211 enterprise is a national leader recognized by other states as a gold star provider of services. NC was the first state to be recognized by AIRS with the inaugural AIRS Innovation Award in 2019. The award recognized the team at NC 211 for its work in the category of Disaster Preparedness. NC 211 had the unique opportunity to provide disaster response services twice in 2 years for Hurricanes Matthew and Florence. After completing the response to Hurricane Matthew, NC 211 Leadership worked with colleagues at NC Emergency Management to further refine a protocol for handling emergency rescue calls received during hurricanes. Having this new protocol in place for Hurricane Florence empowered 211 call specialists to handle rescue calls and provided the specialists with confirmation and closure that the request for rescue assistance was received by the proper partner more efficiently. This is one example of NC 211 leading the way in the national 211 network with experience in disaster response and preparedness.

The existing NC 211 model has central administration through UWNC with long standing contracts with two contact centers. The first center operated and managed by the American Sexual Health Association (ASHA) covers 83 counties and is in Durham, NC. The second covers 17 counties in the western region of the state and sits within the United Way of Asheville Buncombe County (UWABC). After hours (11pm – 7am) is covered through a contract with NJ 211 Partnership. UWNC/ NC 211 provides leadership and funding for general 211 services through a fee support structure supported by 48 local United Ways and state funding. Additional grants, a public private partnership, and contracts provide additional staffing, associated costs, and capacity building.

The NC 211 expansion over the past several years has demanded that United Way of NC review its infrastructure, its ability to provide quality 211 services, and plan for continued growth. To address the many opportunities available to leverage the statewide 211 system, a business plan was developed to

address how to build, price and evaluate 211 solutions that will be sustainable over time. Leveraging the 2-1-1 dialing code does provide NC 211 sole source provider contracting opportunities, but it is also important to maintain a competitive edge for 211 in the bidding process for other state, local, and national contracts and opportunities.

NC 211 plays a vital and critical role in our state due in large part to NC 211 "special projects." State department leaders and state officials (elected and appointed) have come to rely on NC 211 as a resource in times of emergency and high service demand periods. The NC 211 model must be solid yet nimble to be able to manage the service demands of both the expected and unexpected and be one that reflects accountability, responsiveness, and transparency. The UWNC Board has reaffirmed its position specific to the role of NC 211 in serving NC's residents including traditional information & referral, disaster response, and special projects. The Board will determine the depth and scope of additional services for which the NC 211 infrastructure and dialing code can and should be leveraged. Therefore, it is critical that NC 211 infrastructure within UWNC must be comprised of partner agencies capable of managing contact center sites and contractual obligations for all services.

United Way of NC is exploring operational models for the 211 system that will sustain it into the future. Models may include UWNC providing 211 services within their organizational structure, UWNC and and/or vendor(s) providing 211 services.

For the purposes of this RFI, contact center refers to functionality for call, text, chat, and/or email.

The purpose of this RFI is to invite potential vendors interested in partnering to provide 211 contact center services to share their plan regarding how contact center services can best be provided throughout the state 24/7/365.

With this information, UWNC/NC 211 will determine next steps by documenting:

- Existing interest in providing 211 services
- Associated costs and best value for quality 211 service delivery
- Potential 24/7/365 models including geographic coverage options: single contact center model, regional models, and other options
- Best contact center practices across the state
- Opportunities for best value partnerships for sustaining and growing NC 211

For consistency purposes, NC 211 expects that there will be a uniform process among contact centers, to ensure quality service delivery and to track data to ensure benchmark integrity.

NC 211 is currently utilizing the Five9 platform and a specialized information and referral contact management system (iCarol). NC 211 will consider blending platforms or moving to new solutions.

II. REQUEST FOR INFORMATION

a. Intent

UWNC/NC 211 intends to contract with vendor(s) to provide 211 information and referral contact center services throughout NC. All contracted vendors who provide contact center services will be accountable for achieving the standards set forth by UWNC/NC 211 for data management, training, and quality assurance in the contract for quality, value-based services. UWNC/NC 211 will provide each contact

center under contract with a standard operating procedures manual including workflow diagrams as required. Additional workflow diagrams may be added as new lines of business are acquired.

b. Contractor Deliverables and Responsibilities

The vendor(s) chosen by UWNC/NC 211 will be expected to deliver contact center services efficiently and effectively:

- manage NC 211 I&R calls for contracted responsibilities (geography, timeframes, or skill groups) across the state
- meet or exceed contact center call standards/metrics for both quality and quantity
- enter into service line agreements as business needs arise
- increase capacity levels on short notice for disaster response

Shared Measurement and Quality Assurance

Vendors must support established outcome measures, value timely reporting of those measures and be willing to use this information and common indicators for learning and continuous improvement.

Vendor(s) selected will be expected to establish and operationalize statewide system deliverables and outcomes into their internal work procedures to ensure compliance.

UWNC/NC 211 will work with vendor(s) to update the Quality Assurance Plan to reflect contracted responsibilities and to ensure alignment of staff development and coaching opportunities. At contract award, vendors will be required to agree to negotiated mandatory quality assurance metrics.

To meet the requirements of UWNC/NC 211, any selected vendor must collaborate with UWNC/NC 211 staff to:

- Participate in trainings and meetings
- Submit monthly expense report in the specified format for reimbursement
- Submit performance reports quarterly or biannually according to contract terms
- Participate in contact center operations evaluation including a quality service review
- Participate in UWNC/NC 211 Periodic Performance Review
- Participate in other required activities identified or conducted by UWNC/NC 211

Performance and quality assurance of this contract:

- UWNC/NC 211 will monitor compliance activities during each contract period.
- The vendor must submit monthly expenditure reports and back-up documentation within given timeframes.
- The vendor may be required to submit a quarterly progress/compliance report regarding call metrics, staff training, quality assurance and data management as outlined in the contract and/or UWNC/NC 211 program plans.
- The vendor must submit an End of Year Annual Audit.
- The vendor must be available to present at governing board and/or committee meetings.

These requirements may vary based on service level agreements and if so, those variances will be spelled out in the service level agreement.

Common Agenda

Vendor(s) must share the vision of UWNC/NC 211 of connecting North Carolinians to health and human resources. This is best achieved by vendor(s) with an existing understanding of the delivery of health and human services in North Carolina.

Contact center database records must be housed on the UWNC/NC 211 system of record. Vendors must be willing to support staff AIRS (CIRS) certification and have each staff member AIRS CIRS certified upon eligibility. Vendors must be willing to support AIRS Standards. For more information visit AIRS Standards - Alliance of Information and Referral Systems.

A key role and value of UWNC/NC 211 is the support of NC's residents during critical disaster response activities. Vendor(s) must share that same agenda and ensure adequate staffing during disaster response. It is expected vendor(s) will establish this commitment and expectation with staff during the hiring process.

Communication

Vendors must commit to frequent and structured open communications to promote trust, assure mutual objectives, and create common motivation.

Vendor must use the contracted translation service provide by UWNC/NC 211 and agree to hire Spanish speaking staff to meet contract requirements. All translation costs will be assumed by the Vendor.

Vendors must maintain an up-to-date comprehensive Business Continuity Plan (BCP) for restoring the business functions that support critical services during and after an emergency. Services may become unavailable due to a major widespread disaster, or a local incident such as a power failure, fire, or some other problem with the building or the systems. The BCP must describe at a minimum how services will be provided when systems are down and how services will be restored following an emergency. The BCP must be reviewed on an annual basis and updated as necessary and must be made available for review by United Way of NC staff upon request.

Infrastructure Support

UWNC/NC 211 staff provide ongoing support by guiding the NC 211 vision and strategy, supporting aligned activities, establishing shared measurement practices, building public will, advancing NC 211, and mobilizing resources. Vendor(s) engaged in this work must be willing to support this team and their work.

d. Financial

Contract Management

As a recipient of federal and state funding there is a growing need to demonstrate and document the value of services provided. UWNC/NC 211 must be able to demonstrate its effectiveness through outcomes. Both federal and state grants involve significant reporting requirements and a demonstration

of accountability to the outcomes associated with the funding. It is imperative that any recipient of these funds adhere to timely reporting of all requirements.

Vendors will be responsible for meeting base contractual expectations for core NC 211 I&R services including performance expectations that establish clear accountability based on call and operational standards, quality metrics, and outcomes identified in the quality assurance plan.

Vendor(s) will be required to enter into service level agreements (contract addendums) when specific programs are not addressed in the base contract but do not warrant a full contract re-negotiation. The service level agreement(s) will include a statement of objectives, a list of the services to be covered by the agreement, specific performance standards, and will define the responsibilities of the vendor and UWNC/NC 211.

Use of Funds

Contract funds may be used to support personnel services, operating expenses, and contracted services.

The line-item budget and scope of work for each contract are reviewed annually.

Funds may not support efforts to engage in any political activities or lobbying.

Reimbursement Schedules

Reimbursement service occurs upon the receipt of invoices and are paid within 30 days of accepting the invoice for payment. Timely submission of invoices is required within 45 days after the end of each month.

III. REVIEW PROCESS AND PROCUREMENT

Priority will be given to vendors that offer:

- Clear evidence of their capacity to carry out the activities outlined in the RFI.
- Evidence of a history of providing contact center services that are demonstrated to be efficient and effective.
- Documentation of collaborative relationships in the Health and Human Services field, clearly reflected in reference letters from partnering organizations and other collaborating agencies.
- Demonstration of a clear understanding of UWNC/NC 211 vision, strategy, and goals.

If vendor(s) are selected, the RFI award will be made annually, at the agreed upon annual fixed budget; Year One beginning 2022 and ending 2024. There is an optional December 1, 2021 start date to assist with transition. Within these parameters, vendor shall propose a two-year contact center services plan clearly identifying the outputs for each year along with a proposed budget (based on the template provided). Continuation of contract and payment for services after each year depends on contractor's performance, Board approval, and continued funding supporting NC 211 services. Upon approval for continuation, an initial contract will be drawn up prior to renewal. It is possible the contract may be amended to reflect new business opportunities or circumstances prior to initiation.

The following is a general description of the process by which a chosen vendor will be selected to perform contact center activities.

- RFI announcements are sent to prospective agencies and organizations, via email, and/or posted on the NC 211 website, the NC211 social media pages, and additional mediums identified by UWNC/NC 211.
- Written questions concerning the specifications in this RFI will be received until March 1**, 2021** via email at RFIresponse@unitedwaync.org. A summary of all questions and answers will be posted on the NC211 website within 2 business days after close date.
- Responses are due by 5:00 PM Eastern Standard Time on **March 31, 2021**. Electronic submission is required, except as otherwise noted. Complete application and attach/upload all necessary documents required. The complete RFI package and instructions are available at (website)
- Responses will be evaluated by an RFI Review Committee. The recommendations of this committee will be reviewed by the UWNC governing board, which reserves the right to accept or reject the Review Committee's recommendations. Final recommendations of the UWNC governing board are anticipated no later than May 1, 2021.
- Contract negotiations are anticipated to occur over a 60 period and be final no later than August 30, 2021. The following 90-day period will allow vendor(s) to complete readiness activities. United Way of NC expects all vendors to on-board staff 30 days prior to go-live January 1, 2022. During the 30-day period prior to go-live vendor's contact center staff will be required to participate in training and other readiness activities required by UWNC/NC 211.
- Agencies and organizations are cautioned that this is a Request for Information, and UWNC/NC 211 reserves the unqualified right to reject all applications when such rejections are deemed to be in the best interest of the funding agency.

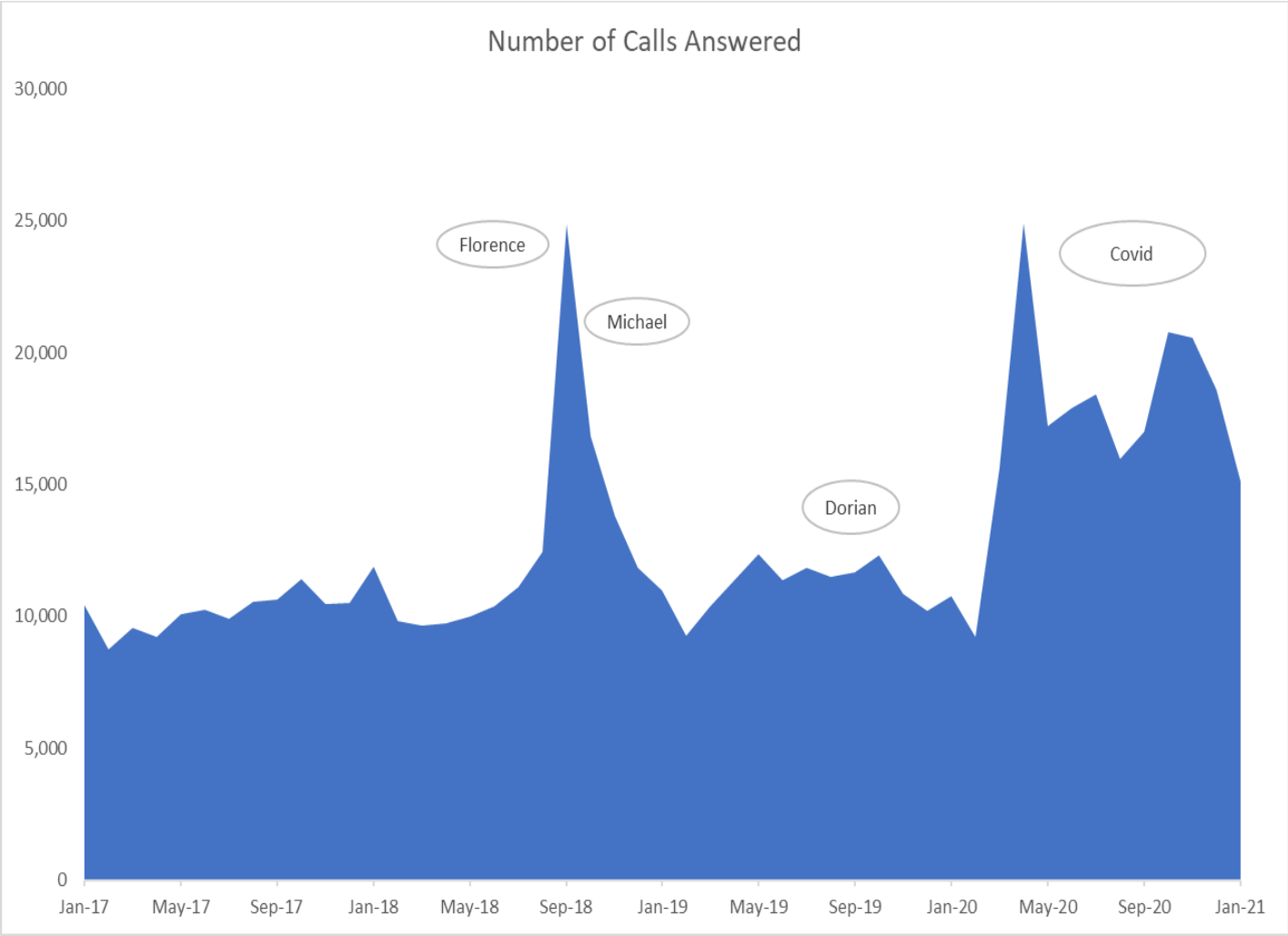
IV. ATTACHMENTS TO BE COMPLETED UPON AWARD

The following documents must be completed if you are awarded a contract for this RFI prior to the execution of the contract. UWNC/NC 211 will not execute a contract until it is in receipt of all required attachments. Failure to provide these timely may result in disqualification.

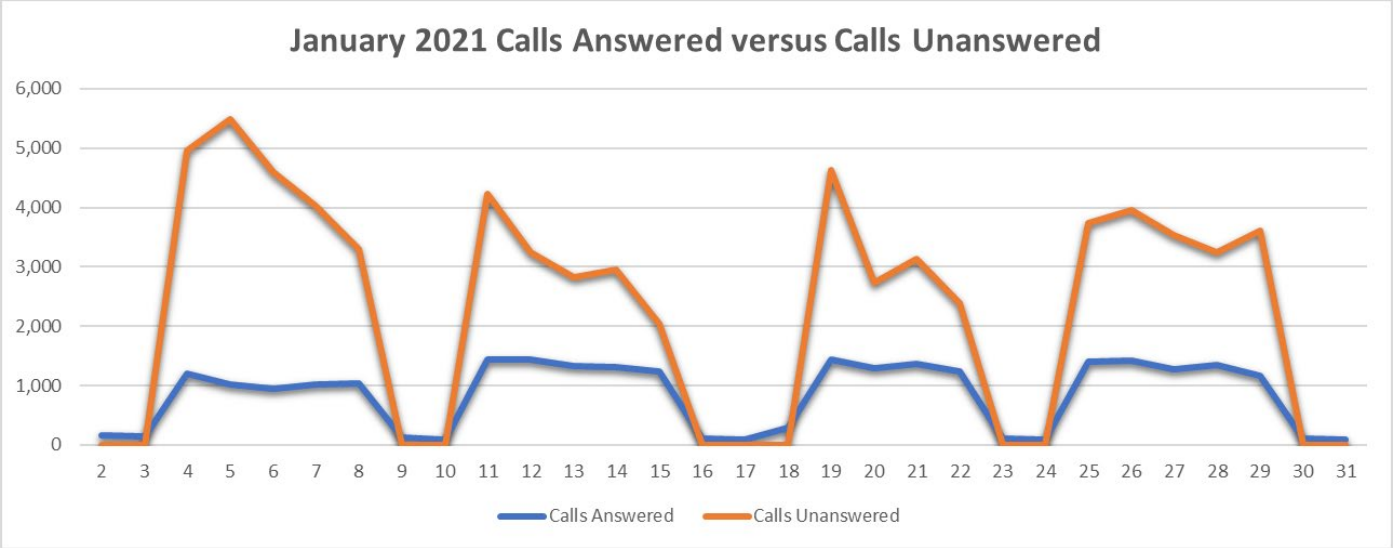
- Assurances
- Notice of Certain Reporting and Audit Requirements
- Conflict of Interest Policy/Letter (Contractor's COI)
- Conflict of Interest Verification – Annual
- Indirect Cost Rate Letter – if applicable
- 501(c)(3) Status Determination Letter/Form (private non-profit agencies) (Note: Public organizations shall submit a document verifying their legal name and tax identification number.)
- IRS Tax Letter
- Annual IRS Tax Exemption Verification Form (private non-profit agencies)
- Any State or Federal Certifications
- DUNS Letter
- Completed Letter to Identify Individual to Sign Contracts
- Completed Letter to Identify Individual to Sign Expenditure Reports
- Certification of No Overdue Taxes (applies to non-governmental entities)
- Proof of Insurances

V. ADDENDUMS

Call Volume - Number of Calls Answered



Call Volume - Calls Answered Compared to Unanswered Calls



Daily/Monthly/Yearly Report Example

SKILL	CALL TYPE	CALLS	AGENT count	ABANDONED count	Average ABANDON RATE	Average TIME TO ABANDON
DATE: 2020/10/02 (673 records)						
211 Coordinated Entry English Skill	Inbound	80	73	6	7.50%	00:02:05
211 Coordinated Spanish Skill	Inbound	1	1	0	0.00%	-
211 English Skill	Inbound	220	202	18	8.18%	00:02:13
211 Spanish Skill	Inbound	21	20	1	4.76%	00:08:34
211 UWABC English 252-Help	Inbound	4	3	1	25.00%	00:07:11
211 UWABC English Skill	Inbound	40	37	3	7.50%	00:05:43
211 UWABC Spanish Skill	Inbound	1	1	0	0.00%	-
Back_@_Home_English	Inbound	203	174	29	14.29%	00:03:04
COVID-19 English Skill	Inbound	81	77	4	4.94%	00:02:15
COVID-19 Spanish Skill	Inbound	3	2	1	33.33%	00:00:13
Cybercrime English Skill	Inbound	1	0	1	100.00%	00:01:02
UWABC Back@Home English	Inbound	15	12	3	20.00%	00:01:36
UWABC Covid-19 English	Inbound	3	3	0	0.00%	-
		673	**605**	**67**	**Avg: 9.96%**	**Avg: 00:02:49**

SKILL	Average SPEED OF ANSWER	Average HANDLE TIME	Average HOLD TIME	SERVICE LEVEL count	SERVICE LEVEL (%rec)
DATE: 2020/10/02 (673 records)					
211 Coordinated Entry English Skill	00:00:51	00:08:22	00:00:02	60	75.00%
211 Coordinated Spanish Skill	00:00:02	00:17:01	00:00:00	1	100.00%
211 English Skill	00:00:33	00:05:29	00:00:01	176	80.00%
211 Spanish Skill	00:00:48	00:08:34	00:00:00	15	71.43%
211 UWABC English 252-Help	00:00:47	00:01:48	00:00:00	2	50.00%
211 UWABC English Skill	00:00:53	00:05:36	00:00:03	26	65.00%
211 UWABC Spanish Skill	00:00:02	00:19:14	00:00:00	1	100.00%
Back_@_Home_English	00:01:07	00:06:23	00:00:01	134	66.01%
COVID-19 English Skill	00:00:21	00:06:55	00:00:00	67	82.72%
COVID-19 Spanish Skill	00:00:08	00:05:36	00:00:00	2	66.67%
Cybercrime English Skill	-	00:00:00	00:00:00	0	0.00%
UWABC Back@Home English	00:00:42	00:04:25	00:00:22	9	60.00%
UWABC Covid-19 English	00:01:43	00:09:57	00:00:00	1	33.33%
	Avg: 00:00:45	**Avg: 00:06:23**	**Avg: 00:00:01**	**494**	**%rec: 73.40%**

Queue Report Example

DATE	CALL TYPE	CALLS	AGENT count	Max QUEUE WAIT TIME	Min QUEUE WAIT TIME	Average QUEUE WAIT TIME	ABANDONED count	Average ABANDON RATE	Average TIME TO ABANDON
2020/11/02	Inbound	1385	369	01:54:03	00:00:09	00:44:49	1015	73.29%	00:34:05
2020/11/03	Inbound	1415	372	01:58:13	00:00:08	00:41:03	1042	73.64%	00:31:01
2020/11/04	Inbound	1322	319	02:00:00	00:00:09	00:44:13	1002	75.79%	00:35:54
2020/11/05	Inbound	1453	427	01:43:34	00:00:10	00:40:13	1024	70.47%	00:30:06
2020/11/06	Inbound	1330	336	01:31:47	00:00:03	00:38:47	994	74.74%	00:29:17
2020/11/09	Inbound	1312	291	01:51:41	00:00:02	00:26:09	1020	77.74%	00:16:51
2020/11/10	Inbound	1362	284	01:38:07	00:00:01	00:26:15	1075	78.93%	00:16:42
2020/11/11	Inbound	1	0	00:00:09	00:00:09	00:00:09	1	100.00%	00:00:09
2020/11/12	Inbound	2087	582	01:27:28	00:00:02	00:32:24	1500	71.87%	00:20:42
2020/11/13	Inbound	1700	487	01:24:51	00:00:02	00:30:11	1211	71.24%	00:18:35
2020/11/16	Inbound	2086	514	01:31:28	00:00:02	00:32:51	1567	75.12%	00:21:34
2020/11/17	Inbound	1766	621	01:23:00	00:00:01	00:28:47	1140	64.55%	00:14:54
2020/11/18	Inbound	1495	563	01:10:20	00:00:02	00:25:40	930	62.21%	00:12:30
2020/11/19	Inbound	1279	591	00:56:30	00:00:02	00:20:57	687	53.71%	00:08:38
2020/11/20	Inbound	1085	472	00:53:12	00:00:02	00:18:47	612	56.41%	00:08:04
2020/11/23	Inbound	1348	545	01:10:38	00:00:02	00:25:47	801	59.42%	00:12:06
2020/11/24	Inbound	933	484	02:00:01	00:00:02	00:14:41	447	47.91%	00:09:44
2020/11/25	Inbound	552	432	02:00:00	00:00:01	00:04:52	117	21.20%	00:04:53
2020/11/26	Inbound	3	0	00:06:06	00:00:18	00:02:16	3	100.00%	00:02:16
2020/11/27	Inbound	56	0	02:00:00	00:00:05	00:22:23	56	100.00%	00:22:23
2020/11/30	Inbound	1805	366	02:00:04	00:00:02	00:44:11	1437	79.61%	00:38:30
		25775	**8055**	**Max: 02:00:04**	**Min: 00:00:01**	**Avg: 00:31:36**	**17681**	**Avg: 68.60%**	**Avg: 00:22:24**