

United Way of Southwestern Pennsylvania's

**Proposal for After-Hours Services
for PA 211 Southwest, 211 SEPA,
PA 211 Northwest, and PA 211
Central Regions**

February 1, 2018



Background

The United Way of Southwestern Pennsylvania is seeking proposals to contract with a service provider (vendor) for after-hours multi-modal services for four 2-1-1 Regions in Pennsylvania: PA 2-1-1 Southwest, 2-1-1 SEPA, PA 2-1-1 Northwest, and PA 2-1-1 Central. After-hours service includes calls, text and live-chat. These four 2-1-1 regions currently contract with VisionLink for its information and referral software, Prevention Pays for text messaging and Olark for live-chat via the web.

Overview of 211

2-1-1 is the information and referral service that connects individuals in need to the local agencies and critical programs that can best assist them. Utilizing trained and certified Resource Navigators, 2-1-1 “asks the right question at the right time” to assess the holistic needs of their clients and match the need to the available resources. Across Pennsylvania, 2-1-1 service is available and adheres to the United Way Worldwide standards of performance to ensure service excellence. 2-1-1 utilizes multiple mediums such as phone, text, live-chat and web to reach individuals in a manner they are most comfortable with or have access to. Further, 2-1-1 operates 7 days a week, with extended or 24-hour coverage so it is available whenever a person in need can reach out for assistance.

The PA 2-1-1 Southwest Region includes eleven counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Mercer, Washington, and Westmoreland Counties. The 2-1-1 SEPA region includes five counties: Bucks, Chester, Delaware, Montgomery and Philadelphia Counties. The PA 2-1-1 Northwest Region includes twelve counties: Cameron, Crawford, Clarion, Clearfield, Elk, Erie, Forest, Jefferson, McKean, Potter, Venango, and Warren Counties. The PA 2-1-1 Central region includes four counties: Blair, Bedford, Cambria and Somerset Counties

Total estimated contact volume, based upon 2017 actuals, is 9,000 after-hours contacts per year across all four regions. Contacts include phone (91%), text (6%), and live-chat (3%).

After-hours Service Requirements

Requested After-Hours Coverage Schedule:

- Standard Weekly Coverage:
 - Monday 8pm to Tuesday 8am
 - Tuesday 8pm to Wednesday 8am
 - Wednesday 8pm to Thursday 8am
 - Thursday 8pm to Friday 8am
 - Friday 6pm to Monday 8am
- Holiday Coverage*:
 - New Year’s Day
 - Memorial Day
 - Independence Day
 - Labor Day

- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve
- Christmas Day

**Please Note: Holiday Coverage will be determined annually in accordance with United Way of Southwestern PA's office policy regarding when holidays are observed. See below for United Way of Southwestern PA's 2018 Holiday Schedule.*

United Way of Southwestern PA 2018 Holiday Schedule	
Monday, January 1	New Year's Day
Monday, May 28	Memorial Day
Wednesday, July 4	Independence Day
Monday, September 3	Labor Day
Thursday, November 22	Thanksgiving Day
Friday, November 23	Day after Thanksgiving
Monday, December 24	Christmas Eve
Tuesday, December 25	Christmas Day

- Additional Coverage:
 - One Friday in July/August, Date TBD
 - One Friday in December, Date TBD

Vendor Responsibilities:

Vendor must:

- Utilize the information and referral software currently contracted by these regions to capture contacts and make referrals.
- Utilize the texting and live-chat software currently contracted by these regions.
- Answer contacts according to the standards set forth by AIRS, and as specified by the United Way of Southwestern PA as provided in training.
- Utilize the Vision Link database to determine appropriate information and referrals.
- Monitor, record and document all incoming and outgoing contacts.
- Alert appropriate United Way of Southwestern PA staff of any impending emergency or disaster if brought to the vendor's attention. Appropriate after-hours staff contact information will be provided and updated as needed by the United Way of Southwestern PA.
- Have the ability to forward calls and to conference a third party onto a call.
- Access United Way of Southwestern PA's language line interpreter service for the sole purpose of supporting inquiries from clients.
- Meet or exceed quality assurance metrics including average speed of answer of less than 2 minutes and average call times to be between 7 and 9 minutes. Average call time includes the time to complete work directly associated with the contact just completed.

- Provide monthly contact center metric reports including total calls, calls abandoned, calls answered, average speed of answer and abandonment rate. Access to data that would enable the United Way of Southwestern PA to create these reports is also acceptable.
- Communicate biweekly and as needed with the United Way of Southwestern PA to discuss any issues, questions or concerns regarding client inquiries, and or policies/protocols.
- Inform the United Way of Southwestern PA of any substantial threats to qualify service delivery within a reasonable time frame, within 60 minutes.
- Provide the United Way of Southwestern PA with access to a staff person who can remediate any emergency or technical phone issues that occur within the service provision hours.
- Support VITA appointment scheduling that will be completed during the January through April timeframe. Vendor should be able to temporarily scale to meet the needs of the project. United Way of Southwestern PA will provide access and training for the Appointment Plus software.

United Way of Southwestern PA Responsibilities:

United Way of Southwestern PA will:

- Provide and maintain appropriate software licenses and agreements.
- Provide technical assistance necessary to access United Way of Southwestern PA's systems.
- Provide initial training to vendor, as needed training, and annual training updates thereafter.
- Provide updates to protocols and policies as necessary.
- Quality Assurance monitoring and feedback.
- Work cooperatively with the vendor to solve any issues that may arise and identify areas for service improvement.

Anticipated After-Hours Call Volume

*Estimates are based upon 2017 actual volumes.

After-Hours Holiday Contact Volume Detail:

Holiday:	Expected Contact Volume:
New Year's Day	95
Memorial Day	70
Independence Day	60
Labor Day	70
Thanksgiving Day	40
Day after Thanksgiving	85
Day before Christmas holiday (observed)	45
Christmas (observed)	65
One Friday in July/August	252
One Friday in December	180

After-Hours Contact Volume by Month:

Month:	Total Contacts:	2-1-1 Contacts:	VITA Contacts:
January	1,100	700	400
February	960	450	510
March	815	500	315
April	765	525	240
May	575	575	0
June	680	680	0
July	780	780	0
August	660	660	0
September	710	710	0
October	650	650	0
November	725	725	0
December	580	580	0
Total	9,000	7,535	1,465

After-Hours Contact Volume by Type:

- 91% of contacts are completed via inbound phone, 6% by text and 3% by chat.

After-Hours Contact Volume by Day of the Week:

- 64% of contact volume occurs during Saturday and Sunday

Day of Week:	Total Volume:
Sunday	2,380
Monday	860
Tuesday	550
Wednesday	530
Thursday	570
Friday	760
Saturday	3,350
Total	9,000

After-Hours Contact Volume by Time of Day:

Time of Day:	Total Volume:
Midnight to 1am	435
1am to 2am	260
2am to 3am	205
3am to 4am	160
4am to 5am	150
5am to 6am	185
6am to 7am	350
7am to 8am	940
8am to 9am	255

9am to 10am	375
10am to 11am	425
11am to noon	485
Noon to 1pm	465
1pm to 2pm	435
2pm to 3pm	450
3pm to 4pm	460
4pm to 5pm	410
5pm to 6pm	350
6pm to 7pm	400
7pm to 8pm	320
8pm to 9pm	555
9pm to 10pm	380
10pm to 11pm	290
11pm to midnight	260

Contract Details

- Initial contract is for a one-year period with an option to extend annually for two years.
- Initial contract implementation is April 1, 2018.
- Proposals that include either a fixed price for service or a set cost per call answer by an agent will be accepted.

Proposal Submission Guidelines

- Preference will be given to qualified AIRS accredited agencies.
- Proposals and other materials submitted in response to this RFP become the property of the United Way of Southwestern PA and will not be returned. All costs associated with preparing proposals and presentations are the responsibility of the vendor.
- The United Way of Southwestern PA reserves the right to reject any or all proposals, if such a rejection is in the best interest of the United Way of Southwestern PA. The RFP is a solicitation for offers and is not to be construed as any offer, guarantee, or promise that the solicited services will be purchased. The United Way of Southwestern PA may withdraw this request for any proposals at any time and for any reason without liability for damages, including but not limited to, bid preparation costs.

Letter of Intent

- A brief email of intent to provide a proposal is requested by **February 14, 2018**.
 - Please email: Michele.sandoe@unitedwayswpa.org and Caitlin.skaff@unitedwayswpa.org.

Questions?

- Vendors are welcome to submit questions until **February 16, 2018**.
 - Questions can be emailed to Michele.sandoe@unitedwayswpa.org.
 - Questions and answers will be sent to all vendors who have provided notice of intent to submit a proposal.
 - Questions received after February 16, 2018 may not be responded to in time for vendor submission.

Proposal

- To be considered, full proposals must be received no later than **February 21, 2018**.
- Proposals should be emailed as an attachment to Caitlin Skaff at caitlin.skaff@unitedwayswpa.org.
 - PDF preferred.

Proposal Requirements

All proposals should include:

A. Organizational Profile

1. List your organization's legal name, address, telephone number and organizational website. Include parent organization information if applicable. Please include RFP Point of Contact Name, Title, Email, Phone Number.
2. Indicate how long your organization has been in business/providing contact center services.
3. Provide the number of employees your organization has dedicated to 2-1-1 and/or I&R services.
4. Number of AIRS certified Information and Referral Specialists.
5. If applicable, please indicate the date (month/year) when your organization became AIRS accredited. If your organization is not currently AIRS accredited, please indicate if/when you anticipate becoming accredited.

B. Budget Proposal – to include the following components:

1. Staffing costs.
2. Training costs.
3. Administrative costs.
4. Any additional costs for implementation and/or maintenance not otherwise addressed in the budget.

Evaluation Process

The United Way of Southwestern PA will independently evaluate and rate each proposal. Required information submitted in the proposal must be current, complete, and accurate. United Way of Southwestern PA reserves the right to require more information and clarification of information submitted in the proposal in order to complete the evaluation.

Selection Process

The United Way of Southwestern PA will make its final recommendations by March 2, 2018 and any contract negotiations will follow.

Commented [CS1]: I borrowed this from an RFP that Indiana did last year and made a few tweaks. Feel free to edit if there is additional info you want to see or if there is something on this list that is not relevant.

I was feeling like at a minimum providing some guidelines/direction would be beneficial in making sure we get useful info. At the very least, the A1 information.

(FYI - Here's the link in case you want to look at their full posting:

<https://www.in211.org/2017/01/indiana-211-issues-request-for-proposal-for-statewide-after-hours-services/>)

Implementation

The After-Hours Coverage implementation is anticipated to be completed by 12:01AM on Sunday, April 1, 2018. Training, technical set up and any other pre-launch items will be completed in March 2018.