

Request for Proposals
for a
Statewide
Automatic Call Distribution System
Linking 2-1-1 VIRGINIA Call Centers



*Issued by
Council of Community Services
on behalf of 2-1-1 VIRGINIA*

March 22, 2010

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Background

The **Council of Community Services (CCS)**, on behalf of **2-1-1 VIRGINIA**, is seeking proposals so that it might contract with a service provider (vendor) for a statewide Automatic Call Distribution (ACD) system.

Overview of 2-1-1: On July 21, 2000, the Federal Communications Commission (FCC) assigned 2-1-1 as the 3-digit access number for community information and referral nationwide. Information and Referral (I&R) is the free link between people seeking health and human services assistance and the appropriate providers of such services. Currently, 2-1-1 services cover 81 percent of the United States.

In Virginia, development of 2-1-1 was led by the Virginia Department of Social Services (VDSS), in partnership with the Virginia Alliance of Information and Referral Systems (VAIRS), the state I&R professional association. VAIRS and VDSS have adopted a regional approach for the provision of 2-1-1 service with six regional calls centers:

- Council of Community Services, Roanoke
- Family Resource Center, Staunton
- The Planning Council, Norfolk
- United Way of Central Virginia, Lynchburg
- United Way of Greater Richmond and Petersburg, Richmond
- CrisisLink, Arlington

The Council of Community Services (CCS), located in Roanoke, Virginia, is the Virginia Department of Social Services' sole source contractor for 2-1-1 VIRGINIA. CCS is a nonprofit agency whose human service focus includes projects in such various areas as information and referral, child care, services to persons with HIV/AIDS, etc. Five of the 2-1-1 VIRGINIA centers are subcontractors to the CCS. CCS serves the Southwest Virginia region directly. Similar to CCS, each of its five sub-contractors are non-profit agencies that also handle multiple programs.

2-1-1 VIRGINIA is a 24/7 operation. All centers operate from 8:30 a.m. to 5:00 p.m. Monday through Friday. Through Verizon's routing of the toll free telephone number associated with 2-1-1, calls are distributed to six different ACD systems throughout the Commonwealth. All after-hours calls are routed to the Southwest Center as are calls received on weekends and holidays.

Staffing. There are approximately 50 full-time and part-time staff members in the six centers. This includes administrators, database specialists and Community Resource Specialists (agents). Some of the staff share workspace and 2-1-1 VIRGINIA does have Community Resource Specialists who telework. Volunteers are also utilized for various functions at the centers.

Volume of calls. The number of calls to 2-1-1 VIRGINIA has been increasing steadily. In 2008, there were approximately 74,000 calls answered. In 2009, that number increased to more than 109,000 calls answered. That number is expected to increase with the addition of an ACD system, increased awareness of 2-1-1 VIRGINIA and the system's strengthening relationships with other state agencies.

Current Telco Services: Calls to 2-1-1 VIRGINIA are now distributed through a toll-free telephone number provided through Verizon Business systems. Calls are routed to nearest center based on the caller's telephone number (NPA-NXX). Three centers are currently connected with similar Altigen phone systems through Voice Over Internet Protocol (VOIP). Two centers have NEC equipment and one utilizes Cisco equipment.

Overview of the ACD System

Benefits of the ACD system: The ACD system should provide 2-1-1 VIRGINIA with a statewide, distributed, communications system. The system should be able to connect the six independently-operated call centers under one call handling system. The results should be:

- More even distribution of incoming calls to all call centers.
- Improvement in the percentage of calls answered within established criteria.
- Complete system redundancy in case of a disaster or emergency, allowing a center to accept and handle calls for any other center, should one or more centers be forced to close.
- Added flexibility, such as an increased in the number of Community Resource Specialists as teleworkers, dynamic system configuration, and the ability to monitor and record calls for training purposes.

Specifications Chart

Feature	Required	Preferred	Included	Additional Costs
<p>1. The system must be capable of statewide call distribution to multiple answering sites. Specify the maximum number of sites, lines (incoming and outgoing, available queues and maximum stations that can be assigned). Describe all standard system features and those at an optional cost. Describe best routing practices for customer service. Provide a diagram of anticipated call flow.</p> <p>The original ANI/DNIS must be maintained in transfer.</p> <p>For purposes of system sizing, use incoming call volumes averages 12,000 to 15,000 calls each month with about 1,000 to 2,000 outgoing calls for quality and follow-up purposes.</p>	X			
<p>2. The system must be capable of allowing agents to simultaneously register from different locations within the state and having them function as a virtual call center, including agents working from home.</p>	X			
<p>3. The system must be hosted by the vendor with a redundant backup system in a different location that provides equipment and information management.</p>	X			
<p>4. The system must be adaptable to evolving technologies in ACD systems.</p>	X			
<p>5. The ACD system must be available 24/7.</p>	X			
<p>6. Statewide system service level agreement is 99.99% availability 24/7. 2-hour service restoration in the event of service outage.</p> <p>Describe levels of technical support and all associated costs.</p>	X			

Feature	Required	Preferred	Included	Additional Costs
7. Describe the system's diagnostic capabilities and how system faults are detected, alerted, logged, and traced.		X		
8. The system must provide for automatic routing patterns of calls for after hours, holidays, and weekends and programmable, user-defined routing changes as needed	X			
9. The vendor should describe the depth of training to be provided both with installation and as on-going support along with cost. Initial training is to be provided at no cost. Describe training for system administrators, supervisors, and end users, including maximum number of each to be trained and time period in which training will be made available. Training is to be available on-site for each group. Include costs associated with any additional request for training. A training manual is required for each user.	X			
10. The system should allow for the ability to record and change the system's answering, queue, and delay announcements without vendor intervention. Describe all standard recordings, associated intervals and related features.	X			
11. The system should allow each center to do agent monitoring and recording of calls for quality and training purposes.	X			
12. The system should be able to accommodate a queue for Spanish-speaking individuals and connect to Spanish speaking agents who are located in different call centers. There will be times when no Spanish-speaking agents are available. Please describe any solution your system would provide.		X		
13. System should provide users the ability to program changes to call distribution schemes to include off-site telephones. Describe any special needs for off-site telephone connections.	X			

Feature	Required	Preferred	Included	Additional Costs
14. System should provide the ability for user to make changes to queue sizes and agent assignments	X			
15. System should provide the ability to establish additional queue as needed without vendor intervention. Please include line capacity, queue capacity and agent capacity.	X			
16. System should allow the ability to add incoming lines to system provided through local Telco without vendor intervention. Describe this process.	X			
17. The vendor should describe all standard reports available to systems manager(s) and supervisors, both real-time and on demand. Reports should be available at both the center and statewide level.	X			
18. The vendor should describe system management capabilities including the maximum number of management terminals and supervisory consoles with real time reporting of system performance including incoming calls, queue and agent performance.	X			
19. The system should be capable of providing adjustable wrap-time delay, including wrap override, after end of call before agent become available		X		
20. The system should allow for the transferring of calls to other telephones within and outside the system to include E-911 and other 3-digit numbers while keeping the originating ANI.	X			
21. Describe system capability to provide for recordings on specific subjects chosen from menu. For example, information about flu vaccines or tax preparation.		X		

Feature	Required	Preferred	Included	Additional Costs
22. The vendor should describe ability to terminate system lines in existing telephone equipment including impact on system operations and reporting, if any. Vendor should detail cost associated with vendor provided equipment. Use of current telephone equipment is preferred.	X			
23. Describe desktop Computer Telephony Integration (CTI) capabilities. Specify any end-user computer or center-specific Internet capacity needed to efficiently operate the system.		X		
24. The vendor should describe the system's ability to recognize the originating ANI/DNIS and route to specific queues (preferred answering site).	X			
25. The vendor should describe voice recognition features and associated costs. The proposed system must support both dial pulse (rotary) and DTMF transmission.	X			
26. The vendor should describe voicemail options when all lines are busy and how centers will recognize and respond to voicemail.	X			
27. The vendor should describe conference call features within the ACD system. This would be used to connect centers, with a possibility of adding at least eight lines.		X		
28. The vendor should describe the agent console/application for the ACD. It should be quick and simple to use. This means the operator must be able to perform all call processing functions from a single screen. Describe any agent help features.	X			
29. The vendor should describe hold button and display functions. When the agent puts a call on hold, describe how holding calls are displayed and whether a timer is available to show how long they have been holding.	X			

Feature	Required	Preferred	Included	Additional Costs
30. The vendor should describe on-going support and associated costs, if any.	X			
31. The vendor should describe experience with Information and Referral Systems including 2-1-1 systems.		X		
32. The vendor should provide an implementation plan and time line from signing of contract to full system implementation.	X			

Qualifications of the Vendor

The vendor will provide information on company financials, a resume of qualifications for staff assigned to the implementation phase of the project, and contacts for three references from previous or current clients using the same or similar ACD systems. If selected as a finalist, the vendor will be willing and able to demonstrate the proposed solution during an onsite visit to the evaluation committee.

Proposal Procedures

A. Deadline for Submittal - To be considered, proposals must be received no later than 12:00 p.m. EST on Friday, April 16, 2010 at the address shown below:

Barb Putney
 2-1-1 VIRGINIA Statewide Coordinator
 Council of Community Services
 502 W. Campbell Ave, SW
 Roanoke, VA 24016

A formal letter of intent is requested by March 30, 2010. The letter must be on the vendor's letterhead and can be attached via email to barbp@councilofcommunityservices.org or faxed to 540-982-2935.

Vendors are welcome to submit questions until April 9, 2010 at 4:30 p.m. EST regarding this RFP in writing to barbp@councilofcommunityservices.org. Questions and answers will be sent to all vendors who provide a letter of intent.

- B. Copies of Proposal** - Vendors must submit one electronic copy and seven hard copies of their complete proposal. Proposals and other materials submitted in response to this RFP become the property of the Council of Community Services and will not be returned. All costs associated with preparing proposals and presentations are the responsibility of the vendor.
- C. Right to Reject, Negotiate and/or Cancel** – The Council of Community Services reserves the right to reject any or all proposals if such a rejection is in the best interest of 2-1-1 VIRGINIA. This RFP is a solicitation for offers and is not to be construed as an offer, guarantee or a promise that the solicited services will be purchased. The Council of Community Services may withdraw this request for proposals at any time and for any reason without liability for damages, including, but not limited to, bid preparation costs.
- D. Evaluation Process** – The 2-1-1 VIRGINIA ACD Proposal Evaluation Committee members will independently evaluate and rate each proposal. The committee will convene for the purpose of review and scoring of each proposal.
- E. Site Visit** – The finalist(s) in this RFP will make an on-site presentation to members of the 2-1-1 VIRGINIA ACD Proposal Evaluation Committee prior to May 14, 2010.
- F. Selection Process** – The 2-1-1 VIRGINIA ACD Proposal Evaluation Committee will make its final recommendation to the Council of Community Services by June 4, 2010 and any negotiations of the contract will follow.
- G. Contract Award** – It is anticipated that the contract will be formally awarded July 1, 2010.
- H. Implementation** – The implementation is anticipated to be completed by October 1, 2010.

Proposal Requirements

- A. Proposal Content** - Proposals must be typewritten, in no less than a 12-point font, using white, 8 1/2 by 11 inch paper. Please do not submit any two-sided copies. Each page of the proposal must be numbered.
- B. Company Profile**
1. List your company's legal name, address, and telephone number. Include parent company information if applicable.
 2. Indicate how long your company has been in business.
 3. Indicate how long your company has been providing ACD systems.
 4. Provide the number of employees you have.
 5. Number of technicians certified on the proposed equipment.

6. Indicate the date (month/year) when models of ACD system you are proposing were first installed at customer sites.

C. Hardware Specifications Proposed, including Network Costs and Transition Costs

D. Diagram of Proposed Statewide Network

E. Budget Proposal – To include the following components:

1. Hardware – one-time costs, system up-grades and service maintenance
2. Software – licensing costs, support, upgrades, service contract
3. Training costs
4. Project management costs
5. Any additional costs for implementation and maintenance not otherwise addressed in the budget