

REQUEST FOR PROPOSAL
For a
Comprehensive Business Plan: Ohio Statewide 2-1-1 Program
For
Ohio United Way and Ohio AIRS

Introduction

Ohio United Way (OUW) and the Ohio Alliance of Information and Referral Systems (Ohio AIRS) have joined together to complete a statewide system for public access to health and human services information and referral via the three-digit telephone number 2-1-1. In 2001, Ohio AIRS, in association with its Ohio 2-1-1 Collaborative, successfully petitioned the Public Utilities Commission of Ohio (PUCO) to authorize the exclusive use of the 2-1-1 dialing code for the provision of health and human services information and referral in Ohio. The PUCO granted that petition and authorized Ohio AIRS/2-1-1 Collaborative to establish criteria and application procedures for those community information and referral organizations wanting to use the 2-1-1 dialing code. In addition, the PUCO authorized Ohio AIRS oversight of the implementation of 2-1-1 in the state, including the authority to approve all applications for use of the 2-1-1 dialing code in Ohio. Since 2001, Ohio AIRS and its Ohio 2-1-1 Collaborative have approved information and referral organizations in 38 counties to use the 2-1-1 dialing code. Approximately 8.8 million (76% of the State population) Ohio residents currently have access to high quality information and referral services 24-hours a day simply by dialing 2-1-1.

Ohio United Way (OUW) and Ohio AIRS are committed to completing this statewide system as quickly as possible by expanding coverage to the remaining 50 Ohio counties and creating the technology infrastructure and system coordination necessary to insure an efficient, effective and reliable 2-1-1 service delivery system. The first step in completing this statewide system is to finalize a Comprehensive Statewide 2-1-1 Business Plan as described in the Scope of Work of this Request for Proposal (RFP).

Background

The Mission of Ohio United Way (OUW) is to improve the quality of life for individuals through public policy development, advocacy, and support for United Ways. The vision at OUW is for every individual to be as independent and self-sufficient as possible. OUW is a statewide organization with 84 local United Way member organizations. OUW is part of the national network of United Way organizations under the United Way of America structure.

Ohio United Way acts as an effective advocate for health and human services, ensuring that every Ohioan has access to community, volunteer, health and human service

information and referral for everyday needs and in times of crisis preparedness and response.

OEW endorses statewide coverage of the three-digit telephone number 2-1-1 for information and referral and has joined with Ohio AIRS in the next level of detailed planning and implementation of a statewide 2-1-1 system. OEW endorses 2-1-1 as a public/private partnership, and calls for federal, state, local, non-profit, foundation and business investments to bring 2-1-1 to every community located within Ohio's 88 counties. This partnership is further demonstrated through our Memorandum of Understanding with Ohio AIRS.

The Mission of Ohio AIRS and its Ohio 2-1-1 Collaborative is to promote access to high quality health and human services information and referral. This Mission is advanced through professional training, education and technical support of organizations and individuals engaged in the delivery of information and referral, and by advocating and promoting the use of national professional standards for information and referral service delivery.

OEW, in partnership with Ohio AIRS, has the lead responsibility for working with the State of Ohio to secure funding to support the completion of the Ohio Comprehensive Statewide 2-1-1 Business Plan. OEW, serving as the administrative and fiscal agent for this grant, hired a statewide 2-1-1 Coordinator who will facilitate the efforts of OEW and Ohio AIRS related to the successful completion of the grant deliverables. OEW will provide direct day-to-day oversight of any consulting contract resulting from the attached Request for Proposal. However, both OEW and Ohio AIRS are committed to working in full partnership to insure the success of this grant, including the activities and outcomes as described in this Request for Proposal.

At the time of this RFP's release, Ohio has eighteen operational 211 centers providing I&R to thirty-eight counties (*Appendix A*). Other projects are currently in process to bring additional counties onto the 211 system during the next 9 – 11 months (*Appendix B*).

Problem/Need

The use of 2-1-1 for accessing health and human services is not new to Ohio. Through the efforts of Ohio AIRS and its Ohio 2-1-1 Collaborative, 18 2-1-1 centers serving residents in 38 Ohio counties have been established. These centers currently provide 2-1-1 coverage to approximately 76% of Ohio residents (*Appendix C*). According to the Ohio Department of Development's 2007 census estimates, 2-1-1 is available to approximately 8.7 million of Ohio's 11,466,917 residents. Nevertheless, more than 2.7 million residents (24% of the State population) in 50 Ohio counties are without access. Ohio needs a plan to bring 211 into all of Ohio's 88 counties.

Many government agencies and community groups spend a great deal of time, energy, and both private and public dollars on outreach and public education regarding their many services. An internet search on the number of service hotlines currently available to Ohio residents on *Yahoo* provides **over** 105,000 different hotline search result possibilities in just a matter of seconds (*“Ohio 24 Hour Hotline Numbers” produces 105,000 search results; “Ohio Hotline Numbers” produces 126,000 search results*). Our goal is for all Ohio 2-1-1 callers to access any and all of the available services in their area using the same three digit number – each and every time.

While state agencies and nonprofits do a great job in our communities promoting their many programs and services, many can not be available 24 hours a day, 365 days a year. 2-1-1 can eliminate this problem.

As of the end of 2007, nationally 2-1-1 serves approximately 219 million Americans – over 72% of the U.S. population – serviced by 238 active 2-1-1 systems covering all or part of 43 states (*including 26 states with at least 90% coverage*) plus Washington, DC and Puerto Rico.

All of our neighboring states have embraced the power and simplicity of 2-1-1:

- Kentucky (over 40% coverage)
- Indiana (over 80% coverage)
- Michigan (over 60% coverage)
- Pennsylvania (in statewide development)
- West Virginia (100% coverage)

Now more than ever, it is important that both government and nonprofits become more efficient due to budget pressures. Studies suggest that for every dollar invested into 2-1-1 services, \$1.35 is returned to the community. In order for Ohio’s vision to move forward, OUW and Ohio AIRS have determined Ohio needs a comprehensive Business Plan as a primary tool to further articulate this vision as well as stimulate the necessary dialogues and discussions from a wide range of organizations and parties who are or will be stakeholders to such a program. **This RFP is requesting the services of a topic relevant, professional firm to develop such a comprehensive plan.**

Scope of Work

The selected contractor will be responsible for the development of a **comprehensive Business Plan** that includes all of the counties throughout Ohio (100% coverage) which would ultimately serve as a fully functional **Statewide Decentralized 2-1-1 Program and System**. The Business Plan is to be based upon current regional data structures that will be shared by a variety of users and stakeholders in a variety of means. This includes, however, is not limited to telephonic (*both traditional POTS and VOIP*), web, touch tone prompts, voice activated, etc., through a shared data protocol that will function as a virtual statewide database. Real time and batch reporting will also be an important component of such a program/system.

The Business Plan must cover the topics listed in the section below and the final product must be submitted to Ohio United Way on or before 5:00 PM, Friday, October 3, 2008. Submitted Plans must include one original and seven (7) hard copies. Additionally, eight (8) soft copies on CD in M/S Word format and PDF format are to be provided.

The work on this plan shall begin on the effective date, hereafter known as the start date of the resulting contract between OUW and the selected contractor. The desired due date for the finished Business Plan will be 90 calendar days after the start date of the contract and shall include 2 milestone review dates with Ohio United Way and Ohio AIRS's Business Plan Steering Committee equally spaced within the 90 day period. The proposed start date must be included in the successful contractor proposal. Any statistical or factual information presented in the final plan must have a valid reference notation and be included in the submitted proposal as an Appendix item.

Payment will be made according to the following schedule:

- 1/3 of the total cost with the completion of Milestone #1
- 1/3 of the total cost with completion of Milestone #2
- 1/3 of the total cost with the completion of the Project and acceptance by OUW

Required Business Plan Elements

The following elements must be developed and presented in the final comprehensive Business Plan document. The order, sequence and layout of the final plan will be up to the discretion of the contractor.

- ✓ Executive Summary
- ✓ History and Current State of 2-1-1 in the US
- ✓ Key Challenges to implementing 2-1-1 in Ohio
- ✓ The Business Case for 2-1-1 in Ohio
 - Public Impact and Value Proposition
 - Statewide system compared to status quo
 - Details and case examples of how 2-1-1 has been used
 - Homeland Security Aspects
 - Data Intelligence Uses
 - Program Operations - internal + human service programs
 - Public Policy Driver
- ✓ Assessment of regional telecommunications needs
- ✓ Regional and Statewide System Design and Underlying Technologies
 - System Architecture
 - Network Design – internal and external
 - Access Methods
 - Telephony
 - Web

- ✓ Stakeholders and Key Relationships
- ✓ Transition Strategy and Marketing
- ✓ Program Design, Organization Structure
- ✓ Implementation Plan
- ✓ Management Plan
- ✓ Financial Projections and 3-5 Year Financial Model
- ✓ Project Timeline

Contractor Qualifications

The selected contractor must meet a majority of the following requirements:

- A professional consulting practice with a demonstrated track record of success in general consulting on government programs.
- Specific expertise in the areas of human service and/or social service programs, particularly at a state level.
- Expertise in the area of system requirements, system design and accompanying policy and procedure.
- Large scale data base design and integration into the overall system technologies including both the systems infrastructure as well as the accompanying telecommunication architecture.
- Letters of Recommendation: Three or more customer references with successful outcomes.
- Recognition and reputation with same or similar business plans from other states and/or from Ohio.

Budget

All proposals must include a detail budget supported by a budget justification. The budget justification must provide a breakdown by elements and/or sections.

Criteria for Selection

All proposals will be scored as follows:

- 1/4 of the total points to Vendor Qualification
- 1/4 of the total points to Understanding the Problem as evidenced by the response to the Required Business Plan Requirements
- 1/4 of the total points to detailed Budget and Budget Justification
- 1/4 of the total points of the Cost Section with the maximum points to the lowest bid from an otherwise qualified bidder and the remaining proposals receiving points calculated according to the following formula:

Lowest Costs

Next Lowest Costs X Total Points Allocated for Cost = Cost Points Awarded

Final Due Date for Submitted Proposals

All copies of contractor proposals are due to be received on or before 5:00 PM the close of business Friday, October 3, 2008. Only proposals which are submitted complete will be reviewed and considered. Submit your proposal via courier to:

Ohio United Way
Attention: Timothy Roe, Statewide 211 Coordinator
88 East Broad Street, Suite 620
Columbus, Ohio 43215-3506

If you have questions or need clarification regarding any portion of this Request For Proposal, please contact Timothy O. Roe, Statewide 2-1-1 Coordinator, Ohio United Way, at 614-224-8146 or troe@ouw.org.

Appendix

Appendix A: 211 Ohio Operational Site List

Appendix B: Ohio's Current 211 Project List

Appendix C: Ohio 2-1-1 Coverage Map

Appendix D: Proposal Review Process

Appendix A



Fully Operational 211 Programs in Ohio

- **211 Ashtabula County** (Ashtabula County Community Action Agency)
Area Served: Ashtabula County
- **2-1-1 Lake County** (United Way of Lake County)
Area Served: Lake County
- **Butler County 2-1-1** (Community Counseling and Crisis Center)
Area Served: Butler County
- **First Call for Help Northwest Ohio**
Area Served: Defiance, Fulton, Henry, and Williams Counties
- **FirstLink**
Area Served: Franklin County
- **Help Hotline Crisis Center**
Area Served: Mahoning and Columbiana Counties
- **HelpLine of Delaware & Morrow Counties, Inc.**
Area Served: Delaware and Morrow Counties
- **HelpLink Dayton**
Area Served: Montgomery, Greene, Preble County
- **Info Line, Inc. 2-1-1 Summit**
Area Served: Summit County
- **Pathways of Central Ohio**
Area Served: Licking and Knox Counties
- **Scioto Paint Valley Mental Health Center**
Area Served: Fayette, Highland, Pickaway, Pike and Ross Counties
- **United Way 2-1-1 First Call for Help** (Cleveland)
Area Served: Cuyahoga, Medina, & Geauga Counties
- **United Way 2-1-1 Portage**
Area Served: Portage County
- **United Way of Greater Cincinnati/United Way 2-1-1**
Area Served: Clermont, Hamilton & Brown Counties

- **United Way of Greater Lorain County's First Call For Help**
Area Served: Lorain County
- **United Way of Greater Stark County's 211**
Area Served: Stark County
- **United Way of Greater Toledo 2-1-1**
Area Served: Lucas, Ottawa, Wood & Erie Counties
- **Trumbull 2-1-1, Community Solutions**
Area Served: Trumbull County
- **Behavioral Connection of Wood County**
Area Served: Wood County
- **United Way of Clark, Champaign, and Madison Counties**
Area Served: Clark and Champaign Counties

Appendix B

Ohio's Current 211 Projects

In Development:

United Way of Bluffton, Beaverton and Richland Township

Area to be served: Hancock County

Contracting Services: In contract negotiations

United Way of Muskingum, Perry and Morgan Counties

and United Appeal for Athens County

Area to be served: Athens, Morgan, Muskingum, and Perry counties

New Call Center: Zanesville (Muskingum County)

In Discussion and/or Planning Stages:

United Way of Greater Lima, Inc.

United Way of Auglaize County Ohio, Inc.

United Way of Clinton County

United Way of Fairfield County

United Way of Hardin County, Inc.

United Way of Putnam County

United Way of Van Wert County

Warren County United Way

Appendix D

Proposal Review Process

Each proposal will be presented for review and scoring by a 7 member review team. The review team is comprised as follows:

- 2 Representatives from Ohio United Way
- 2 Representatives from Ohio AIRS
- 1 Representatives appointed by Ohio United Way
- 1 Representative appointed by Ohio AIRS
- 1 Support Staff – Statewide 2-1-1 Coordinator

All submitted proposals will be scored based upon a total of 200 possible points. Each of the submitted proposals will be scored as follows:

- | | |
|---|----------------------------|
| ➤ Vendor Qualification | 50 Points Possible |
| ➤ Understanding the Problem / Evidence / Response | 50 Points Possible |
| ➤ Budget / Budget Justification | 50 Points Possible |
| ➤ Cost of Submitted Proposal | <u>50 Points Possible</u> |
| ➤ Total | 200 Points Possible |

#1: Vendor Qualifications (50 Points):

Professional Consulting Practice

- Success in general consulting / government programs
- Expertise in human service and/or social service programs
- Expertise in system requirements & system design
- Knowledge and experience in large scale data base design (*system infrastructure & accompanying telecommunication architecture*)
- Successful outcome customer references / 3 Letters of Recommendation

#2 Understanding the Program/Need (50 Points):

How well does the...

- contractor effectively communicate their understanding of Ohio's current status and need
- proposal cover all of Ohio's statewide 2-1-1 system needs
- proposal document statewide 2-1-1 system requirements

- Is the timeline one that is both detail specific and attainable?

#3 Budget (50 Points):

- Is the budget complete?
- Is the budget detail specific?
- Is the budget justification clear and concise?

#4 **Projects Cost (50 Points):**

- Proposal submitted with the lowest project cost will receive all 50 points.
- Subsequent proposals will receive project cost points as follows:

Lowest Cost

Next Lowest Cost X Total Points Allocated for Cost = Cost Points Awarded