United Way Worldwide
Topical Overview
AIRS Conference 2015

Lisa Bullen-Austin
United Way Worldwide - 2-1-1 National Director

May 27, 2015
United Way CEO 211 Workgroup

Compact Descriptions and Update

Lisa Austin – United Way Worldwide

May 27, 2015
2-1-1 Business Plan

United Way Worldwide will need to engage a consulting firm on a fee-for-service or pro-bono basis to conduct market research, interview experts and design a strategy based on the business case for 211 expansion and enhancements.
2-1-1 Business Plan

This effort will require:

· Identifying a firm who is willing to commit to the business plan engagement.

· Secure funding or pro-bono commitment to resource the development of the business plan.

· Engaging the 211s and United Ways to undertake the activities of the plan
Quality Assurance and Performance

Goals and Objectives:
- Define overall 2-1-1 Performance and Quality
- Ensure Alignment within UW 211 network
  - Provide Tools and Resources
- Implement Transparency and Consistency of Reporting
- Establish and Implement UW Identified Best Practices
- Position 2-1-1 to better support United Way E/I/H Mission and Goals

- *Baseline - to be established with scorecard
Quality Assurance and Performance

To help define 2-1-1 Quality: (in the process)

- Specialist compliance with center-defined component actions, behaviors, characteristics (skills)

To define a 2-1-1 Performance Measurement:

- To gauge the efficiency and effectiveness of the call center operation in relation to Key Performance Indicators (KPI).

To develop National KPI and Metric standards for all 2-1-1s
Linked Data and National Dashboard

UW CEO 2-1-1 Workgroup will continue to work with AIRS and partners on the linked data project (resource and client data) within the UW/211 network. Ensuring this work continue to support the strategic long term goals of United Way while benefiting the work of the LUW and 2-1-1s.

Goals and Objectives:

- For I&R human services/client data to have the ability to be accessed through a variety of systems without the need for uploading/downloading (e.g. through one or more APIs).
Goals and Objectives

Å For I&R providers, either individually or in various combinations (e.g. all 211s or all 211s in a certain state), to have the ability to exercise choice in controlling the access to all or some of their resource database records (e.g. potentially if desired free under agreed 'fair use' criteria or if desired escalating paywalls for certain clients with certain requirements).

Å To ensure, as far as possible, that resource records cannot be changed or re-engineered by other entities and that the data ownership/stewardship is clearly acknowledged/recognized.
Mission United/Veteran Affairs

Through MISSION UNITED, United Way is aligning existing services and creating solutions where there are gaps in support while leveraging the local 2-1-1 infrastructure and platform.

Mission - To unite our community to create a comprehensive system of care that positively impacts the lives of veterans and their families.

Goal of the UW CEO 211 Compact - To expand Mission United nationally.
United Way CEO 2-1-1 Summit
2016 – Denver Colorado
2-1-1 Summit 2016

Denver, Colorado • March 29-31
Â Evening Reception/Tour of 2-1-1 (Mile High United Way 2-1-1)
Â Day One • Main Event with Speakers (Hotel Meeting Space)
Â Day Two • Director/VP intensive and workshop (Hotel Meeting Space)

Same format as last year • TED Talk
More time to network between sessions.
Summit Theme?
Suggested Speakers?
National Projects
Flu on Call participating 2-1-1 sites

- UW NJ 2-1-1 Partnership
- WIN 2-1-1
- 2-1-1 Virginia
- 2-1-1 Los Angeles
- United Way of Northeast Louisiana 2-1-1
- United Way Association of South Carolina 2-1-1
- 2-1-1 Cleveland
- Texas 2-1-1
- Mile High United Way 2-1-1
- 2-1-1 Palm Beach/Treasure Coast
- United Way of Greater Atlanta 2-1-1
- United Way of Greater St. Louis 2-1-1
- United Way of Connecticut 2-1-1
- 2-1-1 San Diego
CDC – Flu on Call

6 site visits planned through September 30th
NACCHO Preparedness Summit
Contract Extension
5 New Centers
Activation in key regions (2015 ï 2016)
United Way Worldwide
InContact Master Agreement - Update

April 28, 2015
MASTER AGREEMENT – FAST FACTS

Â Originally signed in December 2013
Â Agent count is based concurrent agents licenses
Â UWW investment is $180,000 over 3 years
Â AIRS adopted the UWW Master Agreement and is promoting it to all information and referral centers (N4A - National Association of Area Agencies on Aging, Disability and Military)
CURRENT 2-1-1 INCONTACT CUSTOMERS
HOW HAS THE OVERALL DISCOUNT INCREASED

Â Prior to UWWMA Concurrent Agent license=$150
Â Tier 1 $109.20 January 2014-December 2014
   Â 48% Discount
Â Tier 2 – 201+ Agents $100.80 January 2015-Current
   Â 52% Discount
Â Tier 3 – 450+ Agents $84.00 Scheduled for July 2015
   Â 60% Discount
Â Additional Ports (lines) decreased from $90 to $50
Â Chat/Email decreased from $10.00 to Tier 3 $4.00
Â Customer Success Package (dedicated account rep) decreased from a flat fee of $1500 - $5000/month to a per agent fee of $25.00/agent
Â Overall pricing has decreased for the 2-1-1 Network as the agent count has increased.
United Way Worldwide Master Agreement Signed December 2013
Agent count billed at 12 in January 2014

- September 2014 the count reach the target count of 201 and maintained the agent count to meet the requirements for Tier 2 pricing.
- January 2015 agent count of 401 was reached and will meet Tier 3 target for the mid year review in June 2015.

*Agent count is reviewed in January and June of each year.
WHAT NEW CENTERS BECAME CUSTOMER OF INCONTACT SINCE THE MASTER AGREEMENT WAS SIGNED IN 2013?

1. Emergency Food and Shelter Program
2. United Way of Larimer County
3. Ontario 2-1-1
4. Mile High United Way (Colorado) 2-1-1
5. United Way of Greater St Louis 2-1-1
EXISTING INCONTACT 2-1-1 CENTERS THAT HELPED
US REACH TIER 3 PRICING

1. United Way Association of South Carolina 2-1-1 (177 agents)
2. 2-1-1 Los Angeles (83 agents)
3. Michigan State 2-1-1 (53 agents)
4. Washington Informational Network WIN 2-1-1 (34 agents)
5. United Way of Connecticut (40 agents)
6. 2-1-1 San Diego (57 agents)
7. Oregon 2-1-1 (19 agents)

Plus many others...

Total concurrent agent count as of April 2015 is 560
PROJECTED 2-1-1 NETWORK SAVINGS AT TIER 3 PRICING UNDER THE UNITED WAY WORLDWIDE MASTER AGREEMENT WITH INCONTACT

Monthly Network Savings
$66,640.00

Yearly Network Savings
$799,680.00

*Projected savings based on inContact retail price.
NEXT STEPS

- Increase UW, 2-1-1 and other I&Rs participation in the program
- Master Agreement contract ends December 2016
  - RFP June 2016
- Collect requirements from the field for other needed services such as WFM, WFO, Survey Tool etc.
- Create an UW inContact Community of Practice to share ideas, provide support to new 2-1-1s joining inContact, help UWW understand additional needs and support the platform may require.
United Way 2-1-1 Performance Index (Detailed)
United Way 2-1-1 Performance Index

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Implement: UW 2-1-1 Best Practices Processes

211 Contact Center Management Certification Training: RCCSP
   - Foundational Processes

UW 211 Tools
   - Onboarding
   - Hiring
   - Quality Assurance: Independent Third Party (Mystery Calling Program)

Best Practices/Recommendations
   - Minimum Technology and Channels Requirements
   - Consistent Demographics Collection
   - Consistent Customer Satisfaction Criteria
   - KPI - Key Performance Indicators

June 3, 2015
Use|Measure|Share:
Balanced Performance Scorecard (211 Center)

Primary Scorecard
- **ASA** - Average Speed of Answer (Capacity)
- **AHT** - Average Handle Time (Efficiency) **Basic I&R call**
- **QA** - Quality Assurance Scores (Effectiveness)
- **CSAT** - Customer Satisfaction (Effectiveness)
- **Schedule Adherence** (Utilization)
Use|Measure|Share: Balanced Performance Scorecard (211 Center)

Secondary Scorecard
- Demographic collection
- Internal QA, Coaching and Training
- Meet Technical Minimum Requirements
- Multi-channel operations
- Attrition
- Occupancy
- Follow up calls
  - Offered to >10%
Demographic Collection

Service, Funding and Data:
- Zip code
- Age (exact)
- Gender of person in need
- Household composition
- Veterans
- Ethnicity
- Highest Level of Education (E)
- Income Bracket (I)
- Health Insurance** (H)
- Assistance ï SNAP, WIC, TANF, Section 8
Achieve

Primary Targets:

• ASA — Average Speed of Answer: <90 Seconds
• AHT — Average Handle Time: 5-7 minutes
• QA — Quality Assurance: 75% minimum
• CSAT — Customer Satisfaction: 90-95%
• Schedule Adherence: 85-90%
Exceed

**HAVE**: AIRS Accreditation

**IMPLEMENT**: All UW 211 Tools and Best Practices*
- 2+ staff are UW 211 CCM Certified by RCCSP

**USE, MEASURE, SHARE**: Performance Score Card

**ACHIEVE**: Primary and Secondary Performance Targets.

**EXCEED**: Attain all of the above and out perform Key Performance Indicators on both primary scorecards

Need more info? Go to: www.211dreamunited.org or Text dreamunited to TXT211