



City of Santa Fe, New Mexico



SOLE SOURCE REQUEST AND DETERMINATION FORM

This sole source request form **must** be submitted to the City of Santa, Purchasing Division for authorization, determination and processing by the Chief Procurement Officer (CPO).

Please ensure to complete this form in its entirety - () must be completed.*

*Date: 5/3/2021

*Prepared By: Elizabeth Peterson

*Title: Children and Youth Program Manager

*Vendor Name: United Way of Central New Mexico

*Address: 2340 Alamo Ave SE

*City: Albuquerque

*State: NM

*Zip Code: 87106

*Description of Goods/Service to be procured: 2-1-1 Call Center for CONNECT

*Estimated Cost: \$252,478.00

Term of Contract: One (1) to Four (4) year from award 4 year award

*Sole Source Request Justification Questions 1-3.

1. Explain the purpose/need of purchase. Ensure to include a thorough scope of work for the services, construction or items of tangible personal property (if this is an amendment request to an existing contract, attach current contract).

There is no centralized phone number for people needing resources to call either in Santa Fe City or County. CONNECT links people to services and resources via an on-line platform used by navigators at community organizations throughout the City and County, however access to CONNECT is either through self-referrals via the City or County website or by locating a navigator in existing CONNECT network organizations. CONNECT lacks a centralized phone number to serve as the portal to the network for people who can't access the on-line self-referral option. 2-1-1 is a powerful brand and information and referral tool used to connect people with resources and services.

By integrating 2-1-1 with CONNECT, people will have access to consistent, reliable, well-trained staff, appropriate wait- and response-time, an accurate and relevant database of services and contacts based on caller needs. This will promote seamless service access and delivery within the City and County. United Way of Central New Mexico provides operational support for 2-1-1 services in counties south of Santa Fe and has agreed to expand service to Santa Fe City and County.



City of Santa Fe, New Mexico

2. Provide a detailed explanation of the criteria developed and specified by the department as necessary to perform and/or fulfill the contract.

The contractor has affirmed sole source for the services, construction or items of tangible personal property (*Attach memo from vendor*). Provide documentation of due diligence for other possible vendors/contractors to provide the requested services/goods proved unsuccessful; or

Other: explanation of the reasons, qualifications, proprietary rights or unique capabilities (*unique and how this uniqueness is substantially related to the intended purpose of the contract*) of the prospective contractor that makes the prospective contractor *the one source* capable of providing the required professional service, service, construction or item(s) of tangible personal property. (Please do not state the source is the “best” source or the “least costly” source. Those factors do not justify a “sole source.”) *Unique and how this uniqueness is substantially related to the intended purpose of the contract.*

3. Explain why other similar professional services, services, construction or item(s) of tangible personal property *cannot* meet the intended purpose of the contract.

There are no other call centers in our geographic area that can offer this type of service.



City of Santa Fe, New Mexico



***Approvals:**

Based on the above facts, the City of Santa Fe Purchasing Officer has made the determination that the justification for a Sole Source procurement is in accordance with the State Procurement Code, Section 13-1-126 Sole source procurement., NMSA 1978 and shall be posted for a 30-day period prior to award.

Fran Dunaway

Fran Dunaway (May 5, 2021 9:04 MDT)

May 5, 2021

Fran Dunaway, CPO
Purchasing Officer for the
City of Santa Fe

Date

Pursuant to the State Procurement Code, Section 13-1-126 Sole source procurement., NMSA 1978, the 30-day posting period of the Notice of Intent to Award this Sole Source request was met and no obligation to the award to the above referenced contractor were received. *This Sole Source determination will be valid for a period of one (1) year from the date of the award.*

Fran Dunaway, CPO
Purchasing Officer for the
City of Santa Fe

Date

***Required Attachments:**

- *Letter from Contractor acknowledging they are the only source (on their business letterhead and signed by the head of business or financial operations),*
- *Quote from sole source Contractor*
- *Agenda Item to be presented to City Council if over \$60,000 for Professional Services and \$60,000 for Goods and Non-Professional Services*

United Way
of Central New Mexico



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Albuquerque, NM 87106
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Fax (505) 242-3576

www.uwcnm.org
LIVE UNITED™
HELPING OTHERS SINCE 1934

Thank you for your interest in United Way of Central New Mexico 211!

211 is a community referral service that connects community members with needed human and social services. For more than 20 years, United Way of Central New Mexico and 211 have provided connections to local resources within the Central New Mexico area. The 211 service is provided through the United Way of Central New Mexico. As it has been developed and delivered by United Way of Central New Mexico, we are the sole vendor/supplier/distributor/provider of our service.

This letter is to confirm that United Way of Central New Mexico's 211 is a sole source product created and performed exclusively by United Way of Central New Mexico, 2340 Alamo Ave SE Ste. 200, Albuquerque, NM 87106. If you have any questions, please feel free to call us at (505) 247-3671.

A handwritten signature in black ink that reads "William Newell". The signature is written in a cursive style.

William Newell
Chief Financial Officer
United Way of Central New Mexico



Self Help, Inc.

**City and County of Santa Fe
2-1-1 Proposal--REVISED
May 2, 2021**

2-1-1 is a powerful brand and information and referral tool used to connect people with resources.

What is critical to the success of this tool is:

- consistent, reliable, well-trained staff
- appropriate wait- and response-time
- an accurate and relevant database of services and contacts based on caller needs

The performance of agents who staff the live phone line should be consistently monitored for the quality of interactions and referrals; agents should be given feedback on their performance, and if needed coaching and guidance on how to improve.

Calls should be regularly monitored for metrics such as wait time, call completion, average call time, etc., to determine whether improvement is needed.

Call and website volume and referral data should be reported correctly and monitored for accuracy, and staff should be given timely guidance and feedback to address issues or concerns.

Callers who might benefit from warm hand-offs are transferred to appropriate resources such as Santa Fe CONNECT.

Central New Mexico 2-1-1 is currently staffed with two live agents from Monday through Friday 8:30 a.m. to 4:30 p.m. After hours and on weekends, calls are addressed by UWCNM's call center's automated Interactive Voice Response (IVR) system.

Voicemails are responded to by a live agent the next business day.

Hardware, Telephony and Database

1) Hardware

Each agent must be equipped with a personal computer, headset and needs reliable internet access.

Year One Costs:

	Cost per agent	Recurring Monthly Fee
Verizon Internet Access		\$45.00
TOTAL		\$540.00/year plus tax

2) Telephony

United Way of Central New Mexico has contracted a call center platform through NICE inContact. Agents use CXone to respond to live callers. This software is compatible with and accessible using a PC and USB hardwired headset.

Termination Number for 2-1-1 Santa Fe: NICE inContact would set-up a new termination number specifically for Santa Fe County and UWCNM would work with the NM PRC to assure that 2-1-1 calls in Santa Fe County are routed correctly.

NICE inContact Call Routing for 2-1-1 Santa Fe: CXone is a skills-based call routing system, meaning that calls can be routed to particular skills/agents.

- Santa Fe 2-1-1 calls would be routed to Santa Fe agents
- Santa Fe callers who are Spanish speakers would be routed to bilingual agents if/when available.

Year One Costs:

	One-time fee	Recurring Monthly Fee
CXone Monthly Software Subscription—for 3 agents/concurrent users		\$450.00
CXone Monthly usage (based on an estimate of 1000 calls/monthly*)		\$100.00
TOTAL		\$6,600.00/year plus tax

*Based on UWCNM's average monthly call volume

3) Database*

UWCNM 2-1-1 uses iCarol referral and helpline software.

Local resources for Santa Fe County would be imported into the iCarol database which is integrated with the CXone call center software.

Agents will seamlessly log calls and referrals into iCarol and accurately capture and report call data.

iCarol Costs:

	One-time fee	Recurring Monthly Fee
Resource Data Import to iCarol	\$5,000.00	
Monthly Subscription		\$200.00
TOTAL	\$5,000.00	\$1,200.00 per year

**Database resource import and implementation will take place after initial start up.*

**Hardware, Telephony and Database
Year One Costs**

	One-time fees	Recurring Monthly Fees	Year One Total
Telephony		\$550.00	\$6,600.00
Data Base	\$5,000.00	\$200.00	7,400.00
Verizon Internet		\$45.00	540.00
TOTAL	\$5,000.00 plus tax	\$8,340 per year plus tax	\$14,540.00 plus tax

Staffing

UWCNM 2-1-1 is currently staffed with live agents from Monday through Friday 8:30 a.m. to 4:30 p.m.

After hours and on weekends, calls are addressed by UWCNM's call center's automated Interactive Voice Response (IVR) system.

Voicemails are responded to by a live agent the next business day.

1) Employees

Santa Fe's 2-1-1 would be staffed by a 0.75 FTE 2-1-1 Coordinator (32 hours per week).

The 2-1-1 Coordinator would be tasked with fielding live calls maintaining the database, data reporting, and community outreach (including volunteer recruitment, training, and management).

There is currently no United Way operating specifically within Santa Fe County. The Coordinator would be an employee of United Way of Central New Mexico with a remote-work position "housed" at Self Help. The position will completely transition to United Way of Central New Mexico after the transition period (preliminarily this date is expected to be 12/31/21).

The Coordinator will be an hourly non-exempt employee, with compensation commensurate with other Program Coordinator salaries in the Santa Fe area. Depending on start date, health benefits would be available within the first 45 days and the employee would accrue 12 vacation days and 12 sick days each year.

Year-One Costs:

	One-time cost	Recurring annual costs	Year one Total
Salary		\$43,000.00	\$43,000.00
Benefits		\$4,829.00	\$4,829.00
Taxes & Fees		\$4,450.00	\$4,450.00
Supplies & incidentals		\$200.00	\$200.00
Hiring, onboarding, training, HR, & management cost to employer	\$4,742.00 (assuming position is with SH through 12/31/21)		\$4,742.00
TOTAL	\$4,742.00	\$52,479.00	57,221.00

2) Volunteers

Volunteer live agents are necessary for extra coverage for 2-1-1, freeing up the Coordinator's time for outreach, infrastructure, and data management/reporting tasks.

There would ideally be a pool of at least **12** volunteers, each signing up for two 3-hour shifts per month to provide at least half-day coverage for the Coordinator. More volunteers or shifts could be added to provide additional coverage, further reducing call wait times and giving the Coordinator more bandwidth for collaborative tasks with CONNECT.

The 2-1-1 Coordinator would be tasked with recruiting, training, and managing these volunteers. The volunteers would be trained on how to access and use the database, common requests, confidentiality, deescalating triggered callers, etc. Self Help would provide initial training support using their existing 2-1-1 volunteer training materials.

Ideally the pool would have diverse volunteers from a variety of language backgrounds, cultures and ethnicities which would help reduce barriers for 2-1-1 callers to access the resources and supports they need. Volunteers from rural areas and outlying counties might prove especially helpful because of their level of knowledge of their communities.

Promising recruitment bases include Santa Fe Mutual Aid, the AmeriCorps Senior Volunteer program through the City of Santa Fe, workplace campaigns, and higher education (perhaps even via partnerships with programs such as the Human Services department at SFCC).

If a volunteer were unable to complete his/her shift, s/he would be responsible for contacting the volunteer pool to arrange for an alternate.

Volunteer scheduling could be recommended based on call volumes, with shifts scheduled only during hours in which the Coordinator is available to answer questions and troubleshoot if needed.

Volunteers would work remotely from their homes using their own computer and Santa Fe 2-1-1's headsets. Volunteers would sign an agreement and place a deposit on the equipment to prevent loss or theft.

Service Area

While the program above would primarily serve residents of Santa Fe County, the collaboration between Santa Fe City, Santa Fe County, United Way of Central New Mexico, and Self Help presents excellent possibilities for greater regional collaboration.

In addition to Santa Fe, Self Help's current 2-1-1 program serves Taos, Rio Arriba, Los Alamos, Mora, and San Miguel counties; the efficiencies created by the Santa Fe 2-1-1 partnerships would make it possible to affordably improve 2-1-1 service quality to these counties as well.

Such an expansion of the current partnership would lay groundwork for greater regional collaboration between United Ways, local governments, and nonprofits. It would also expand the value proposition and provide a path to implementation for the CONNECT system in other counties.

Expanding the Santa Fe 2-1-1 partnership to encompass the 5 northern counties in Self Help's service area would be a relatively small increase in call volume. Currently approximately half of calls in the area already come from Santa Fe county; an increase in marketing of 2-1-1 in Santa Fe County would be expected to increase that portion significantly such that the other 5 more rural counties would presumably make up a small minority of call volume.

Regardless, due to the efficiencies created by the new partnership, this would create savings for Self Help, allowing Self Help to decrease the administrative cost of hosting the 2-1-1 Coordinator position to offset the slight increase in the Coordinator's call volumes.

Most importantly, this expansion would vastly improve 2-1-1 services across Northern New Mexico, providing huge benefit to residents when they need it most, and paving the way for future partnerships.

City and County of Santa Fe 2-1-1 Budget Summary

Year-One Costs

	One-time fees	Recurring Fees	Year One Total
Data Base	\$5,000.00	\$1,200.00 per year, plus tax	\$12,800.00
Telephony and internet		\$7,140.00	\$7,140.00
Staffing: Salary, Benefits, Taxes, Fees, Hiring, Onboarding and incidentals	\$4,742.00 Second portion	\$52,479.00	\$57,221.00
TOTAL	\$9,742.00 plus tax	\$60,279.00 plus tax	\$70,021.00 plus tax

Recurring Annual Costs

		Recurring Fees	Annual Total
Data Base, Telephony and Internet		\$8,340.00 per year, plus tax	\$8,340.00 plus tax
Staffing: Salary, Benefits, Taxes, Fees, Hiring, Onboarding and incidentals		\$52,479.00	\$57,479.00
TOTAL		\$60,819.00 plus tax	\$60,819.00 plus tax