

Indiana 211 Partnership – Connect2Help Funding and Working Agreement

January 1, 2007 – December 31, 2007

This agreement is entered into by subcontract between Indiana 211 Partnership, Inc. (hereafter referred to as the “Partnership”) and Information & Referral Network, Inc. doing business as Connect2Help (hereafter referred to as the “subcontractor” or “C2H”). Funding for this agreement is available through a grant to the Partnership from Indiana Association of United Ways. The first related contract between the Partnership and C2H was initiated August 1, 2004. In consideration of those mutual undertakings and covenants, the parties agree as follows:

I. PURPOSE

This funding and working agreement is intended to support C2H in activities related to the 24-hour, 7-day per week operation of 2-1-1 information and referral service for Indiana’s envisioned 2-1-1 system. Specifically, this contract supports the after-hours, weekend, disaster and “default” coverage for non-active areas statewide, as well as related database support services to ensure statewide referrals.

II. GENERAL TERMS

a. Term:

The term of this agreement begins January 1, 2007 and remains in effect through December 31, 2007, with the option to renew for a 12-month period.

b. Funding:

The Partnership shall provide funding to C2H in an amount not less than \$60,000 in support of after-hours, weekend, disaster and “default” coverage for non-active areas statewide, as well as related database support services to ensure statewide referrals.

c. Payment Terms:

All funds shall be paid to the subcontractor as payment for performance objectives described in Section IV of this agreement.

d. Billing Procedure:

The subcontractor will submit an invoice each month indicating the payment owed to the subcontractor according to the schedule noted in Section IV. Additionally, the subcontractor will submit a results-based report reflecting achievement of outcomes and performance objectives as specified in Section IV.

e. Future Funding:

The parties agree that payment for services provided through this agreement is subject to and conditioned upon the funds provided by the Partnership for the purpose of services. Similarly, any extension of the contract to subsequent years is conditional upon availability of funds, positive review and approval by the Partnership Board of Directors.

III. SPECIFIC TERMS

a. **Definitions:**

After-hours, as defined in the IN211 Operations Manual, generally means after 5pm and before 8am, with time zone adjusted for each region. Weekend coverage includes the 24-hour periods on Saturdays and Sundays. Disaster is defined when another Center is unable to provide service due to unanticipated natural or manmade disasters. "Default" coverage is providing 24-hour service to all non-active service areas as required in contracts with telecommunications carriers and other calls arriving to the IN211 network without ANI (automatic number identification) information. Related database support services are described in the addendum. Other definitions and requirements are found in the Addendum to this Agreement, the IN211 Center Agreement and Operations Manual, including the Annual Holiday Plan.

b. **Work Plan:**

C2H and the Partnership mutually agree that the work plan shall be a continuation of the goals and objectives set forth in the 2004 proposal and agreement. Additionally, C2H will provide statewide 2-1-1 call-handling backup and database support services in 2007, as mutually agreed and reflected in the Addendum to this Agreement.

c. **Amended Work Plans:**

Desired amendments affecting results-based performance benchmarks shall be submitted to the Partnership for review, comment and written approval.

IV. SCHEDULE OF RESULTS AND ASSOCIATED PAYMENTS

a. **Outcome/Results Descriptions:**

	Contract Element	Outcome / Result
1	C2H maintains additional I&R Specialists for 24/7 operation.	C2H has the staff needed to ensure 2-1-1 coverage 24 hours per day.
2	C2H provides trainees with 80 hours of classroom and 120 hours of on-line training before promoting them to Specialists and existing Specialists receive additional training related to operation of 2-1-1 under extended hours and statewide referral processes.	Newly hired staff is qualified to take calls in 2-1-1 Center and existing staff is familiar with policies and procedures of 24-hour operation.
3	C2H provides experienced I&R Specialists to cover overnight shifts and provides the Partnership with a description of 24-hour protocols.	Qualified staff with the ability to work independently is on-site and takes 2-1-1 calls during night shifts.
4	C2H provides after-hours, disaster, default and database support services to IN211, as listed on Addendum to this Agreement.	The Partnership has increased capacity to respond to needs and opportunities.
5	C2H provides the Partnership informal monthly updates, a preliminary report with recommendations by September 15, 2007, and a formal final report by January 31, 2008, which includes process and cost data related to 24-hour operation.	The Partnership has increased capacity to evaluate its policies and procedures related to 24-hour operation.

b. **Payment Schedule:**

Payment	Amount
The subcontractor will submit a claim invoice (for the grant elements 1 through 5 above) for each month at one-twelfth each of the total agreement amount (\$60,000).	\$5,000 x 12
24/7 AGREEMENT TOTAL:	\$60,000

c. **Report Schedule:**

1. **Monthly Claim (for reimbursement).** A monthly invoice shall be submitted to the Partnership by the thirtieth of each month.
2. **Informal updates** C2H should provide at least monthly informal updates to the Partnership about all aspects related to system coverage and/or progress toward the grant element outcomes described above.
3. **Preliminary Report to assist with future contracting.** The subcontractor shall submit a preliminary report to the Partnership by September 15, 2007, summarizing process data, cost data and results over the grant period. The Preliminary Report shall include recommendations for subsequent contractual activities.
4. **Final Report:** The subcontractor shall submit a final report to the Partnership by January 31, 2008, summarizing process data, cost data and results over the grant period.

V. **ADDITIONAL REQUIREMENTS**

Additionally, during the course of the agreement, the subcontractor agrees to:

- a. Abide by terms of "IN211 Center Agreement" and the "IN211 Center Operations Manual."
- b. Be responsible for any debts incurred by the subcontractor as a result of the project except as noted in the Schedule of Results and Associated Payments listed above and/or in the Call Handling and Reporting section of Addendum A
- c. At all times during the term of this agreement, protect, defend, indemnify and hold harmless the Partnership and its agents, officers and employees from all claims and suits including court costs, attorney fees, and other expenses, caused by any act of omission of the subcontractor and/or its employees;
- d. Participate in the Partnership's Public Education activities to assure that printed materials and other public relations activities related to the project are coordinated with the Partnership; and
- e. Be supportive of the annual United Way campaigns by encouraging participation by the subcontractor employees and the collaborators of the project.

VI. NO AUTHORITY TO BIND THE PARTNERSHIP:

This Agreement does not create a partnership or joint venture relationship between the parties. Neither the contractor nor the subcontractor has authority to enter into contracts or agreements or to speak on behalf of the other.

VII. DISCLAIMER / WARRANTIES

C2H obtains information about available human services for its referral database directly from service providers and from other Centers. Consequently, C2H believes that information obtained in the database and used to make referrals is correct at the time it is compiled. However, C2H does not guarantee the accuracy of information given out by 2-1-1 Specialists or other avenues and disclaims any liability for errors or omissions.

VIII. CONFIDENTIALITY

The subcontractor understands that all materials, reports and documents provided by C2H during the course of this project may be shared with the Partnership staff or volunteers with planning or governance responsibilities and with community funding and planning partners. The Partnership will at no time divulge participant-specific information. The Partnership will credit the subcontractor whenever provided data or information is shared.

VIII. MODIFICATION

Notwithstanding any other provisions of this agreement, the parties acknowledge that this contract is subject to modification by mutual agreement of the parties. Such modifications, if any, shall be set forth in writing and shall become a part of this agreement. Nothing in the agreement shall be construed as a commitment to execute future agreements with the subcontractor, or to extend this agreement in any way.

IX. SUSPENSION AND TERMINATION

The subcontractor or the Partnership with thirty (30) days written notice may terminate this agreement. Any notice of termination shall be provided in writing to the other party by registered or certified mail.

SIGNATURE PAGE

IN WITNESS WHEREOF, Connect2Help and Indiana 211 Partnership have, by duly authorized representatives, entered into this agreement.

Connect2Help

By: _____
Scott Bruns, Board Chair

Date: _____

By: _____
Lynn Engel, President/CEO

Indiana 211 Partnership

By: _____
Anthony Dzwonar, Board Chair

Date: _____

By: _____
Lucinda Nord, Executive Director

**ADDENDUM TO THE FUNDING AND WORKING AGREEMENT BETWEEN
INDIANA 211 PARTNERSHIP AND CONNECT2HELP**

**After-hours, Weekend, Default, and Disaster Backup
from other IN211 Center Territories with Database Access Statewide**

Purpose Statement The experience of 2-1-1 service has demonstrated many reasons for IN211 to identify a primary Center for 2-1-1 service backup and database coordination to ensure 24-hour service statewide. Rationale includes:

- Contracts with wireless carriers require IN211 to provide unlimited access for wireless callers, and IN211 and C2H view wireless customer access to 2-1-1 as critical to serving people in need;
- Telecommunications routing of 2-1-1 calls varies among landline, wireless and emerging carriers, with callers not always reaching their "local" 2-1-1 center (through no fault of IN211);
- Efficiencies and cost savings are gained by completing telecommunications provisioning in phases, sometimes before contracts may be executed with Centers or funders for some Territories; and
- Expanding 2-1-1 access to statewide 24/7 service is critical to IN211's success in the future for sustainable funding, and it is not cost effective to require all Centers to operate 24 hours daily; and
- Sharing of human service database information among Centers is critical to success of 2-1-1.

General principles of 2-1-1 access and routing: Generally speaking, 2-1-1 calls are routed by NPA-NXX (area code and prefix) and time of day to 2-1-1 Centers. IN211 manages the routing solution for all IN211 Centers as well as for limited callers in Ohio and Kentucky. Out-of-area calls routed to C2H during the business day primarily consist of wireless customers whose originating telephone number is from an exchange that is not currently "live" with 2-1-1. There may be other telephone customers (i.e. out-of-state originating numbers or other IN211 Center territories) that are routed to C2H by default, depending upon the carrier and the type of routing the nearest wireless tower uses. The ultimate goal is that all 2-1-1 callers will be routed seamlessly to the 2-1-1 Center (in or out of Indiana) best suited to respond to their needs.

General principles of After-hours, Disaster and Default backup from other IN211 Center Territories IN211 established 24/7/365 access as a Standard (01/21/01) and has described "after-hours" service as a "system cost" with an expectation of some re-routing because it is not cost-efficient to require all Centers to provide 24/7 access. Since 1/1/06, C2H receives 2-1-1 calls from other Center territories between the hours of 5pm and 8am weekdays (time zone local to "home" Center) and 24 hours a day on weekends. The Center must answer 95% of its calls with a live, trained I&R Specialist. Therefore, if after-hours access increases the call volume for a Center above the 5% threshold, the Center will be required a) to alter its hours (i.e. open at 7am or extend until 6pm) or b) to pay C2H for the increased calls. Centers re-routing after-hours calls will NOT promote after-hours availability until approved by IN211 and C2H. C2H receives calls from other Center territories when the Center is unable to provide service due to unanticipated natural or manmade disaster. The IN211 Center Roundtable developed a protocol for sharing responsibilities for holidays through the Annual Holiday Plan.

General principles of Database sharing IN211 established a Standard of "access to resource data statewide" (01/21/01). IN211 respects the proprietary rights of each IN211 Center's database. Because all Centers currently use Iris software, IN211 has created a structure for geographical coding with all Indiana zip codes, cities, and counties and all 50 states and has adopted a standardized set of keywords, which—with the geostructure and common data elements—should allow quarterly exports from Centers to C2H. Each Center will continue to be responsible for maintaining updated records with its Site ID. IN211 acknowledges that the protocols in this project are only an interim solution.

Protocols below describe the activities which C2H will begin providing as a part of the funding agreement. Timelines, activities and outcomes may be amended by C2H and IN211, as necessary.

General

1. C2H will maintain a "program" for every Indiana 2-1-1 center with the name, phone number, and hours of operation to give to callers from those counties for future calls.
2. C2H will assist Centers with their import/export procedures. IN211 staff will be responsible for handling issues that are not easily and/or quickly resolved between C2H and the individual Center.

Wireless Access

1. C2H maintains keywords for all 92 counties. Information on FSSA, 911, Child Abuse and Elder Abuse will be entered for all Indiana counties (as well as information exported by other Centers).
2. If determined appropriate by C2H, C2H may add information about resources for domestic abuse services, homeless shelters, emergency mental health and other services for some or all 92 counties.
3. Wireless customers from counties with no 2-1-1 center will be referred to the I&R listed as serving that county (data will be verified and added for every keyword).

Evening, weekend, and overnight calls from other centers

1. Center provides a copy of the full resource database using Standardized Keyword list so that C2H may make referrals to local programs
3. Centers export and provide to C2H via zipped file in e-mail
4. C2H puts the info into its IRis for access by I&R Specialists
5. C2H does a double keyword search for resources (i.e. Allen county & food pantry)
6. C2H will set up a schedule with the other 2-1-1 centers so that data is updated at minimum quarterly, with more frequent updates as applicable.
7. Data that is determined by C2H staff to include too many errors to import into its database will be forwarded to IN211 staff for correction oversight.

Call Handling and Reporting

1. C2H will handle calls by C2H's policies and procedures. If call is determined to need continuation or follow up by "local" Center, call information will be provided back to "home Center" via a phone call or a secure fax.
2. C2H will "own" the call count.
3. C2H will export caller data to the aggregated data repository for reporting purposes.
4. C2H will monitor caller needs and long distance costs for interventions. C2H may request reimbursement from IN211 for long distance charges.