

Part XIV Supplemental Information *(continued)*

Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 21 or 22.
 ▶ Attach to Form 990.

Open to Public Inspection

Name of the organization

Employer identification number

Community Voice Mail National Office

Part I	General Information on Grants and Assistance
--------	--

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. See Part IV

Part II	Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered 'Yes' to Form
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990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Community Information & Referral 2200 N Central Ave Suite 601 Phoenix, AZ 85004	86-0374813	501 (c) (3)	20,000.	0.			Community Voice Mail
Info Line Inc 703 South Main St Suite 211 Akron, OH 44311	37-1470391	501 (c) (3)	10,000.	0.			Community Voice Mail
Inspiration Corporation 4554 N. Broadway Suite 207 Chicago, IL 60640	36-3673980	501 (c) (3)	19,250.	0.			Community Voice Mail
Metropolitan Homelessness Proj. POBox 27636 Albuquerque, NM 97107	20-1917517	501 (c) (3)	10,000.	0.			Community Voice Mail
MHSA PO Box 120070 Boston , MA 02112	22-3068653	501 (c) (3)	20,000.	0.			Community Voice Mail
Travelers Aid Society-Pittsburgh 103 Smithfield St. Pittsburgh, PA 15222	25-0965581	501 (c) (3)	20,000.	0.			Community Voice Mail
Weingart Center 506 S Main St Los Angeles, CA 90013	95-6054617	501 (c) (3)	50,500.	0.			Community Voice Mail

2 Enter total number of section 501(c)(3) and government organizations

10

3 Enter total number of other organizations.

10

**SCHEDULE M
(Form 990)**Department of the Treasury
Internal Revenue Service**Noncash Contributions**

► **Complete if the organizations answered 'Yes'**
on Form 990, Part IV, lines 29 or 30.
► **Attach to Form 990.**

OMB No. 1545-0047

2009**Open To Public
Inspection**

Name of the organization

Community Voice Mail National Office

Employer identification number

91-1609789

Part I Types of Property

	(a) Check if applicable	(b) Number of Contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded				
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution— Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► (Hardware/Softwr)	X	49	489,794.	Fair Market V
26 Other ► (.....)				
27 Other ► (.....)				
28 Other ► (.....)				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

Yes

No

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

30a

X

b If 'Yes,' describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

31

X

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

32a

X

b If 'Yes,' describe in Part II.

33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II.

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2009

Part II **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

[illegible]

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No. 1545-0047

2009

**Open to Public
Inspection**

Name of the organization

Community Voice Mail National Office

Employer identification number

91-1609789

Form 990, Part III, Line 1 - Organization Mission

Customization and distribution of voicemail and related technology via our national network of community based services, using our centralized system of communications hardware and software and telecommunications services from national vendors. Grants are only made to 501(c)(3) organizations that apply for assistance in setting up and maintaining Community Voice Mail.

Form 990, Part VI, Line 11 - Form 990 Review Process

The Form 990 is prepared by an independent CPA firm, who is also in charge with auditing the financial statements. The audited financial statements are reviewed, discussed, and approved by the Board of Directors. Form 990 is reviewed, signed, and submitted by the Executive Director.

Form 990, Part VI, Line 12c - Explanation of Monitoring and Enforcement of Conflicts

There is no formal monitoring and enforcing compliance, but it does come up in discussion if it's ever an issue.

Form 990, Part VI, Line 15a - Compensation Review & Approval Process for CEO, Exec. Dir., or Top Mgtment

Determined by a Board of Directors committee.

Form 990, Part VI, Line 15b - Compensation Review & Approval Process for Officers & Key Employees

We determine compensation after evaluating a number of factors and consulting a number of resources. In general, we determine compensation by assessing employee qualifications for the position; seeking advice of similar sized organizations with similar positions; seeking advice of HR specialists; consulting Wage Benefit Survey of King, Pierce and Snohomish County Nonprofit Organizations produced by the United Way of King County and Washington Employers; and/or consulting other wage surveys specific to the field in question (eg. technology and/or fundraising professionals).

We have plans to develop a written compensation structure through formalizing our pay grades and salary ranges during 2010.

Name of the organization

Community Voice Mail National Office

Employer identification number

91-1609789

Form 990, Part VI, Line 19 - Other Organization Documents Publicly Available

All governing documents, policies, and financial statements are made available upon request and by appointment.

Name of the organization

Community Voice Mail National Office

Employer identification number

91-1609789

Tab 6
Documentation Regarding Any Past or Present
CVM Service Provider Experience



Tab 6 Documentation Regarding Any Past or Present CVM Service Provider Experience

In all 20 states, including Ohio, CVMN provides free, personalized voice mail accounts, weekly (or more) broadcast messaging, availability of auto reply for clients to provide feedback, as well as surveys, hotlines, and community blogs. CVMN owns and operates a centralized unified messaging server network and purchases VoIP and telephone numbers from a wholesale telecom provider. Voice mail numbers are then allocated across the network of 44 “host partner” organizations (e.g., First Call for Help and InfoLine). CVMN subsidizes the total cost of operations; partner organizations contribute toward the cost of operations and employ a local manager to perform outreach and enrollment in the community. CVM services have been recognized in media and honored with awards throughout the past two decades. Several such articles follow this section.

The majority of CVM host partners fund local operations with a combination of public and private funding sources. In WA State, CVM is partially funded with state dollars from the WA Telephone Assistance Program (WA-TAP). The state administrator who manages the CVM contracts is Maitri Sojourner, the CSBG Program Manager in the Community Services & Housing Division of the Department of Commerce. Her contact information is: 360/725-2851 and maitri.sojourner@commerce.wa.gov. Ms Sojourner has submitted a letter of reference for this project (see Tab 8). In addition, we have provided a table of CVM Sites and their community-based host agencies operating in other states (see Tab 4).

In all CVM communities, we use the voice mail network to send information to whole or segmented groups of users in a particular region. Host partner agency staff collect and cull local information targeted at the customer population, distributing broadcast email and voice messages. The content of these messages most commonly features job leads, training and employment resources, health alerts, and free community resources.

In 2010, the CVM programs in Cleveland and Summit County sent a total of 490 such broadcast messages, with 250 focused on employment. Following is the script for a sample broadcast message sent in 2010 to CVM clients in Ohio and around the country:

“I’m calling to tell you about a new resource for US Veterans who may be experiencing homelessness. The Department of Veterans Affairs has created a toll-free, national hotline for veterans to provide free, 24-hour access to VA counselors and other resources that might help you. If you call during normal business hours hotline staff will ask you a few questions to figure out what you need, then they will transfer you to a live person at your local VA medical center. If you call outside of business hours, hotline staff will give you a phone number and the address of the facility nearest to you.

To call the Homeless Veteran hotline, dial 1-877-424-3838. Again, this is a toll-free call, and is available 24 hours a day. That number again is 1-877-424-3838.



If you call, please let them know that you heard about the hotline from Community Voice Mail. Please pass the word to any friends or family members who are veterans and may be experiencing homelessness. Thanks!"

Information that we broadcast is based on our knowledge of our client population and supplemented by client feedback that is collected via a voice mail feature. Based on surveys conducted in recent years, we know that CVM clients around the country are most interested in receiving information about employment, housing, healthcare, community events, social services, food and other items. In a 2010 survey, 98% of our clients indicated they liked receiving information from CVM via broadcast messaging, and 66% indicated they had taken action (e.g. applied for a job, etc.) on the information they had received.

In addition to broadcast messaging, our system offers agencies the opportunity to collect instant feedback to broadcast voice messages via a feature called Instant Reply. With Instant Reply, clients simply press 4 on their touch tone phone to leave a response to a broadcast message. Agencies around the country use this feature to collect outcomes for required reporting purposes, and to collect formative feedback to guide adjustments to their program. For example, in Tulsa Oklahoma, Instant Reply was key to the Tulsa Day Center's ability to collect outcomes data from clients for its Homelessness Prevention and Rapid Rehousing (HPRP) program. In Los Angeles, Instant Reply is used to gauge the suitability of job listings and employment resources being broadcast to clients. Client feedback there led to adjusting the types of job opportunities selected for broadcast, and to broadcasting additional employment resources specifically requested by large numbers of clients.

Our centralized database enables us to collect client demographic data that is tied to the voicemail server. From our database we know that the typical CVM user has no financial resources, is using CVM to find employment, and to secure housing. Considerable segments of the user population have experienced domestic violence or are living with a disability; approximately 11% are veterans. We also make every effort to also collect data on client outcomes. Of those who report outcomes, 65-70% report achieving one or more of their goals of employment, housing, healthcare, or services.

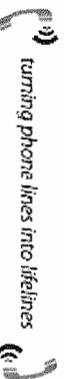
CVMN and our host partners publicize the availability of CVM services via various means. Our web site, www.cvm.org, provides the public with information about the evolution of CVM services and includes a page for each of our host partners so that prospective clients, social workers, volunteers and/or supporters can connect with the direct service providers. In addition, CVM National and its host partners create brochures, flyers, and postcards as well as online collateral to raise visibility of services for both clients and human service providers. More information on outreach and media is provided in those sections of this proposal.

With **16 years of service**, Community Voice Mail helps approximately **40,000 people each year** reclaim their lives.

Since 1991, **over 500,000** people have used CVM to regain stability.

A CVM number is a vital resource that links you, your client, other service agencies and even loved ones via a single reliable phone number.

No other organization does what we do on a national scale.



Community Voice Mail helps people living in poverty, transition and homelessness rebuild their lives by connecting them to jobs, housing, information and hope. CVM does this by customizing and distributing communications technology via a national network of community-based services.

Community Voice Mail is available in both English and Spanish.

CVM NATIONAL OFFICE

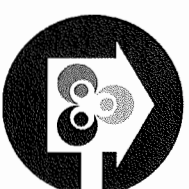
1-206-441-7872

www.cvm.org

**THE RIGHT CALL FOR *you* and
YOUR CLIENTS**

Community Voice Mail National Office is a 501(c)(3)

EIN#91-1609789



**community
voice mail**
reconnect • achieve • results

Community Voice Mail provides **free voice mail** to people in need through case workers, providing them a necessary tool for survival.



**WE CAN HELP YOU
and YOUR CLIENTS**

Community Voice Mail
Turning Phone lines into Life lines

2901 Third Ave. # 100 Seattle, WA 98121 206.441.7872
www.cvm.org

**WATCH OUR VIDEOS
AT WWW.CVM.ORG**

"CVM allows us to leave messages for our clients without undue delays, and for our clients to stay in touch with progress or questions. This allows us to serve more clients in a more efficient manner."

- Sandra Jeffries, PACE Program



Steve

"That's the magic of voicemail. It seems like such a small thing. I can tell you—it's huge."

- Steve, formerly homeless,
now a treatment counselor



Ginny

"Since I got Community Voice Mail, everything changed. Everything became possible. I was able to find work and find a home. It gave me a new start on life."

- Ginny, formerly homeless

**PART OF YOUR COMMUNITY
PLAN TO END HOMELESSNESS**

CVM IS EASY

TO DISTRIBUTE AND USE

You need only a few minutes and a touch-tone phone to issue a CVM number to your client.

1. The client calls their new CVM number
2. Records a simple greeting
3. Creates a secure password



Your client walks out the door with a new phone number and is immediately empowered with the tangible tool they need to succeed.



WHO USES CVM?

Community Voice Mail partners with thousands of agencies across the U.S. to serve those in crisis and transition:

Job Seekers - Homeless
Domestic Violence Survivors - Veterans
Foster Youth - Natural Disaster Victims

SPECIAL FEATURES OF CVM

BROADCAST MESSAGING

Send one message to all CVM users in your region about job fairs, employment opportunities, health screenings, free tax preparation and more.

EMAIL NOTIFICATION

Clients that provide an email address will receive notification messages each time they receive a voice mail in their inbox, thus saving them time and money to find a phone only when they have messages.

INSTANT REPLY

With one key press, clients can instantly reply to their case managers after hearing a broadcast message that interests them.

HOTLINES

Use one of your CVM numbers to create a hotline for daily listings of jobs, shelter bed availability, inclement weather warnings and more.

USAGE REPORTING

Participant agencies can monitor their clients usage patterns via reports made available by the CVM National office.

RESET BY PHONE

When one client has finished using their number, case managers reset the number to the default settings and give the number out to someone new

LIVE TECH SUPPORT

The CVM National office employs a team of technicians to maintain the system and respond to any technical problems that may occur.



Follow us on:

CSR Press Release

PNC Financial, Moody's Corporation, and Community Voice Mail Win Prestigious Corporate Philanthropy Awards

Submitted by: Committee Encouraging Corporate Philanthropy, CECP
Categories: Philanthropy & Corporate Contributions, Philanthropy & Corporate Contributions
Posted: Feb 25, 2008 – 08:00 AM EST



NEW YORK - February 25, 2008 – Today, **The PNC Financial Services Group** and **Moody's Corporation** receive prestigious awards for their corporate philanthropy programs in celebration of National Corporate Philanthropy Day. The winners, both financial firms, focus their efforts on critical education initiatives. In addition, nonprofit organization **Community Voice Mail** (nominated by **Cisco Systems**) receives the CECP Directors Nonprofit Award, including a \$25,000 cash donation, for its integrated corporate partnerships.

PNC is awarded CECP's Large Company Excellence Award. Through the PNC Grow Up Great initiative, the company implemented a 10-year, \$100 million investment to provide underserved children with quality preschool opportunities, preparing them for future success in school and throughout life. Through a holistic effort that involves significant public CEO endorsement, advocacy, funding and employee engagement to educate parents, caregivers, and communities on the importance of pre-K education, PNC has successfully created a model that has the potential to achieve national impact.

"It is an honor to be recognized by the Committee Encouraging Corporate Philanthropy for our work in early childhood education," PNC Chairman and CEO Jim Rohr stated. "The advances we are helping to create in this great cause, combined with the potential for additional successes and the Committee's acknowledgment of our commitment, tells us that we made the right decision."

Moody's Corporation wins the Small Company Award (revenues less than \$3 billion) for the company's sophisticated giving program which encourages students to develop a passion for mathematics, economics and finance. In partnership with the Society for Industrial and Applied Mathematics (SIAM), Moody's Mega Math Challenge offers an Internet-based applied mathematics competition for high school students, exciting students about applying math to solve real-world problems. Proficiency in mathematics is essential for many careers in the 21st century and this program helps build a future talent pipeline for the company.

According to Moody's Chairman and CEO Ray McDaniel, "We looked at our core competencies and where there was an opportunity for Moody's to contribute to the community. Education, particularly financial and economic literacy, was consistent with our role in the marketplace."

Community Voice Mail, nominated by Cisco Systems, Inc., provides the exceptional service of free, personalized telecommunications access to the poor and homeless across the U.S. By partnering with community-based organizations in over 40 cities nationally, 41,000 people were served last year. The simple concept of providing voice mail service to connect individuals to prospective employers, landlords, case managers and family members is a critical step on the road to stability and self-sufficiency. In 2003, the Cisco Foundation awarded CVM a \$2.5 million grant to enhance the organization's service capabilities, centralize the voice mail system, and bring its services to additional cities nationwide. Cisco's investment and the application of its technology and expertise for social good has had a transformative impact on the lives of tens of thousands of people every year.

"The partnership that Community Voice Mail National has with Cisco Systems is one that most nonprofit organizations can only dream of," said CVM Executive Director Jennifer Brandon. "With the depth and breadth of Cisco's contribution, we have been able to thrive instead of just survive. Ours is a situation that I wish more nonprofits could have because the impact would be extraordinary."

The CECP Excellence in Corporate Philanthropy Awards recognize CEO leadership, innovation, measurement practices, and partnerships in philanthropy. Since 2000, the Committee Encouraging Corporate Philanthropy has presented awards annually to companies such as **GlaxoSmithKline**, **GE**, **Novartis**, **Cisco Systems**, **Target**, **IBM**, **Pfizer**, **salesforce.com**, **Hasbro**, **Whole**

government, media, nonprofit, social investing, consulting and academic communities.

The Awards are presented on National Corporate Philanthropy Day, February 25th – celebrating the tremendous opportunity for corporate-community partnerships to advance the social agenda of American communities and inspiring businesses to engage further in philanthropy. The Excellence Awards are presented immediately following CECP's annual CEO roundtable discussion in which 45 top executives debate the timely issue of *The CEO's Challenge: Leading the Company, Shaping Society*. In addition, the Awards presentation will be followed by a special event at the United Nations on the role of corporate philanthropy in advancing the Millennium Development Goals.

Paul Newman and **Ken Derr** are the founding co-chairs of the Committee Encouraging Corporate Philanthropy (CECP), the only international forum of CEOs exclusively focused on corporate philanthropy. CECP's mission is to lead the business community in raising the level and quality of corporate philanthropy. Engaging with the public, private, and independent sectors, CECP's 170 members seek and create opportunities to help advance the case for philanthropy and inspire other business leaders to make a lasting commitment to community giving. www.CorporatePhilanthropy.org.

Lindsay Siegel Committee
Encouraging Corporate Philanthropy
Phone: (212) 825-1256

For more from this organization:

Committee Encouraging Corporate
Philanthropy, CECP

Tara Kozak Lindsay GolinHarris
Phone: (212) 373-6020



Community Voice Mail Honored With CECF Directors Award For Innovative Use of Cisco Technology

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February 25, 2008

By Terry Timm Moos, News@Cisco

When a great idea takes hold, there are no limits to the possibilities. Such is the case with [Community Voice Mail](#), an innovative organization that today received the prestigious Directors Award from the Committee Encouraging Corporate Philanthropy (CECP), the only international forum of business CEOs and Chairpersons pursuing a mission focused exclusively on corporate philanthropy.

Community Voice Mail (CVM) is the only service in the US that provides free, personalized telecommunications access to people in crisis and transition, extending across 420 municipalities to 2,100 community agencies. Its 24-hour voice mail access empowers over 41,000 clients annually to reliably and confidentially communicate with prospective employers, landlords, medical providers, case managers, and family members.

"Cisco is very proud to be a strategic partner with Community Voice Mail, and this award is well-deserved," said Michael Yutzenka, Director, Public Benefit Investment. "Community Voice Mail has been a major social investment for Cisco," he said. "It is perhaps the most extensive investment of Cisco corporate resources ever extended to a nonprofit organization, resulting in tremendous process improvements and increased service offerings—really an extraordinary use of our core competence," said Yutzenka. "Community Voice Mail has demonstrated how they have successfully used Cisco's resources to increase their impact, and we fully expect they will continue to be a model for other non-profit organizations."

Cisco's extensive support has enabled CVM to increase its reach, capacity, and social value. Through funding, hardware and software solutions, office space, and personnel to help with technology and training, Cisco has helped Community Voice Mail achieve its important initiatives of supporting individuals in need.

Technology improvements allowed for more community outreach

Early Community Voice Mail technology included a computer, analog phone lines, and separate databases for each of the 32 CVM sites—but no one with technical expertise. As the systems aged, they were routinely malfunctioning, leaving the site manager little time for community outreach. With no supply of upgraded equipment, CVM faced extinction, despite a growing number of requests from community leaders interested in replicating the program.

When VoIP technology became available, CVM partnered with Cisco to develop its own centralized voicemail system, which reduced costs by 22 percent during the first year alone. VoIP helped CVM extend beyond local calling areas, allowing scaling in large cities and rural areas. Cisco's technology allows CVM to broadcast critical information to all CVM users, including job listings, emergency weather reports, and availability of community resources.

According to Jennifer Brandon, Executive Director for CVM, headquartered in Seattle, Cisco employees were instrumental in helping the organization move ahead. "Cisco volunteers were unbelievable visionaries in seeing what was possible for us."

Cisco developers and software testers worked with CVM to customize the product, volunteering hundreds of hours to devise solutions for the needs of CVM's unique clients. "Cisco had the ideas and the equipment, and could centralize and customize communications systems for us—which allowed us to focus more on what we do best—community outreach," Brandon added.

Community Voice Mail Expands Swiftly

CVM has recently expanded voice mail access to seven cities, including Washington, D.C., San Antonio, Austin, Ft. Worth, Denver, Orlando, and Tulsa. "In the past, it took at least six months to set up services in a new city," explained Brandon. "We needed to get a system, configure it, order services from the telephone company, deal with limits and restrictions, ship, install, and manage training. "Using centralized Cisco technology, we can cut the time to a little over a month, once we get funding set up in the cities," she said. "And we can use Cisco's meeting place technology to help train people."

"Our partnership with Cisco has enabled us to develop a state-of-the-art telecommunications system that serves our network of over 2,100 social service providers in the US," added Brandon. CVM is developing strategic partnerships to integrate CVM into social service systems to increase their efficiency and effectiveness. This effectiveness was demonstrated after Hurricane Katrina's destruction.

"We learned about the power of focused leadership and corporate leverage to help survivors," noted Brandon. In four days, more than 100 Cisco employees, working with CVM, built, tested and activated thousands of voicemail boxes, which CVM then distributed. This was a collaborative process—AT&T donated toll-free numbers, FedEx/Kinko's reproduced instruction cards, and Red Cross representatives worked to build CVM into future disaster relief efforts.

"We see ourselves as a catalyst for change and progress. CVM has the capacity to serve more people across the US with the potential of growing globally," Brandon said. "Because of the grant, we have achieved so much, and the results have been great."

About the CECF Excellence Awards

CECF created the Directors Award in 2004 to recognize a nonprofit organization that has distinguished itself by building an effective partnership with a company in its community. The Directors Award includes a \$25,000 cash donation made by CECF Directors to the honored nonprofit. In addition to Community Voice Mail's award this year for excellence in corporate partnerships, CECF also recognizes companies demonstrating outstanding CEO leadership, innovation, dedication to measurement, and partnership in corporate philanthropy. Cisco won the prestigious CECF corporate award in 2005.

Terry Timm Moos is a freelance journalist located in Seattle, WA.

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[Print](#)

Community Voice Mail

Link to original ANN story

may be necessary for full page functionality

3/27/2009 2:32:37 PM | Tina Kaufmann

It's difficult to find a place to live or get a job without a way to be contacted. That's why a local tool is available to aid the homeless and low-income families.

It's called Community Voice Mail and it provides 24 hour access to communication for people who are in a crisis. But in order to use it, you have to be involved with a partner agency, like Haven of Rest or the Battered Women's Shelter, among others.

It's an established client-based service where potential employers or landlords can hear your voice recorded in your voicemail, as if they'd called a home phone, and touch base with you. It can help put you in contact with family, friends, health services, housing and jobs.

Users pay nothing, but the partner agency is charged a \$1 monthly fee per voicemail box.

To get started, you fill out an intake/outcome form, then you're provided a phone number the box is connected with, you create a password, record your greeting, then get a brief training course on how to access and use your voice mail box.

Once a client reaches their goal, whether it be finding a job or an apartment, the mailbox is reset and someone else can use it.

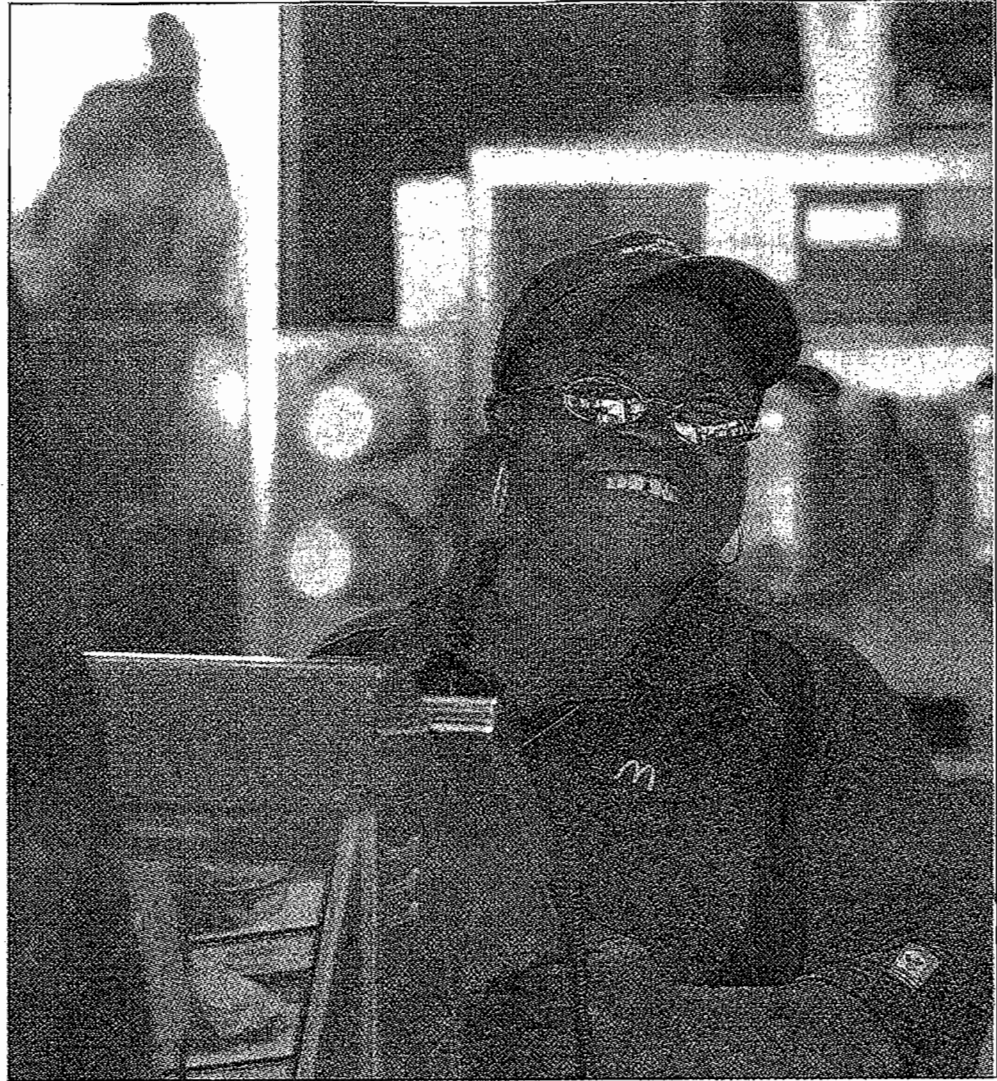
Community Voice Mail in Summit County launched Thursday. It's modeled after the initial program started in Seattle.

On the Web: Community Voice Mail <http://www.cvmsummit.net/>

For current events directed to the homeless and those living in poverty:
<http://cvmsummit.blogspot.com/>

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ABJ APRIL 7, 2021



MIKE CARDEW/Akron Beacon Journal

Tara Strickland waits on a customer at McDonald's on West Market Street in Akron. Community Voice Mail has been crucial in helping her to find both employment and housing.

Voice mail helps find jobs, housing

Program provides valuable point of contact for unemployed, homeless

By Marilyn Miller
Beacon Journal staff writer

Tara Strickland of Akron was homeless, jobless and a single mother.

It was hard to get a job because she didn't have a call-back phone number to give out.

Strickland, 32, and her 12-year-old son lived in a shelter.

Today she has a job and has moved into a new apartment - thanks, in part, to the Community Voice Mail initiative.

Community Voice Mail Summit works with nonprofit partner agencies to provide voice-mail boxes that users can check any time of the day or night.

Strickland said the voice-mail program not only helped her land a job, but also has become a vital part of her life.

"It has helped me out so much," Strickland said. "It helps me with doctor's ap-

Please see **Call, B5**



PAUL TOPLE/Akron Beacon Journal

Cassandra Boston drops off 3-month-old Jaila and another child at the Job Center day care before her GED class. She has been on Community Voice Mail for about three months.

Call

All 500 mail boxes in program are taken

Continued from Page B1

pointments, to keep up with my son in school in case the school needs to get in touch with me, to pass on information from the agency and for work.

"I've been called into work early several times."

Strickland said voice mail also helped her find new housing.

"I needed a way for potential landlords to get ahold of me," she said. "It helped me find an apartment. I just moved."

Strickland was the first one in Summit County to sign up for the program. She was introduced to the service through H.M. Life Opportunity Services, where she first sought help two years ago.

The agency provides housing and teaches life skills, money management and job-seeking skills. The service has had a contract with Community Voice Mail Summit since January.

Cassandra Boston, 36, of Akron, was also homeless and a single mother. She was living in a shelter with her 2-year-old and 9-year-old and was pregnant with a third child.

In December she also went to H.M. Life Opportunity Services.

She has had Community Voice Mail for nearly three months now.

She has a land-line telephone, but can't afford any features.

"It's a life-line phone with

just the basics," she said. "I can't afford any extras, like voice mail or long distance."

The program offers voice mail as a way for those who are homeless or making a low income to get the messages that can lead to a job or apartment.

The caller hears the recorded voice of the applicant, just as if the caller had reached a home phone.

While Strickland has landed a job, Boston is still looking. In the meantime, she is working on her GED, the high school equivalent diploma.

Boston has been unemployed since last April, when the Barberton plant where she had worked for eight months closed. She was unable to pay her rent and utility bills, and she and her children ended up in a shelter.

"I want to complete my GED, get a job and take care of my kids," Boston said. "I hope to further my education by going to Akron U or a community college."

"I have a lot of determination, and when given the tools, I can do the footwork."

To date, there are eight partnerships with Community Voice Mail Summit and all 500 voice-mail boxes are taken, said Mike Gibbs, the program's coordinator.

Gibbs is pushing to add 500 within the next year.

"It's a free service we offer those in crisis and transition," he said. He explained that the partner agencies pick up the \$1 per box per month cost.

The first year's budget of \$91,000 was funded through several sources, including foundations, corporations, government

contracts and the United Way.

Melissa Massey-Flinn, program director at HM Life, said the staff and clients are excited to be part of the new program.

"We know firsthand how important a source of contact can be, especially for single parents," she said. "Without a phone number, it's virtually impossible to find a job."

"The service has helped clients become self-sufficient, linking them directly to callers."

Gibbs said the voice-mail program also is a valuable tool for those coming out of jail.

"It is a tangible tool up front to help remove some of the barriers attached to confinement," Gibbs said.

Oriana House, Summit County's privately run alternative jail program, is the largest partner agency, with 200 of the 500 voice-mail boxes. It signed up with the service in March.

Christine Savage, vice president of services for Oriana House, said the agency hopes to hand out the new voice-mail boxes in the next couple of weeks.

"It's a very easy system to use and will help our clients tremendously," she said.

Gibbs, who helped get a similar program established in Cleveland, said Summit is only the second county in Ohio with the service.

"We are in the planning stages of other counties in Ohio, including Stark," he said. "Our ultimate goal is to go statewide."

Marilyn Miller can be reached at 330-996-3098 or mmiller@thebeaconjournal.com.

Tab 7
Subcontractor Identification
and Participation Information



Tab 7 Subcontractor Identification and Participation Information

If chosen to provide voice mail services for this pilot, Community Voice Mail National plans to subcontract with three different Ohio-based organizations, including First Call for Help/United Way of Cleveland and Cuyahoga County, HandsOn of Central Ohio, Columbus, and InfoLine, Akron.

Each subcontractor is a federally-recognized 501(c)3 nonprofit organization operating in the state of Ohio. Following is an overview of the subcontractors, services they will render, and contact information. Signed letters of commitment with specific information, including federal tax IDs, follow.

	HandsOn of Central Ohio 195 North Grant Ave Columbus, OH 43215 Marilee Chinnici-Zuercher, President & CEO 614.221.6766 Ext 113 marileecz@handsoncentral ohio.org	First Call for Help/United Way 1331 Euclid Ave Cleveland, OH 44115 Stephen Wertheim, Director 216.436.2225 swertheim@unitedwaycleveland .org	InfoLine 703 S. Main Street Suite 211 Akron, OH 44311 Richard Stahl President/CEO rbstahl@infoinc.org (330) 762-5627
Proposed service footprint	Franklin Athens	Cuyahoga Geauga Medina Wayne Holmes	Summit Stark Crawford Richland Ottawa Seneca Sandusky Wyandot Erie Huron Ashland Portage
Proposed # of customers served per year	Year 1: 600 Year 2: 1,000	Year 1: 1,500 Year 2: 1,800	Year 1: 1,200 Year 2: 1,500

CVMN holds a Memorandum of Agreement (MOA) with each of its community partners. Renewed annually on a calendar year basis, the MOA establishes standards of service, roles and responsibilities, and confidentiality assurances. For this project, CVMN will hold an MOA with each of the three subcontractors listed above.

The MOA outlines subcontractor duties that will include but are not limited to the following: outreach & education, client enrollment, customer service, data entry, report compilation, research & recording of weekly broadcast messages, conducting episodic client surveys to gauge customer satisfaction.



A sample MOA and respective letters of commitment from each subcontractor follow.



CVM Site: «CVM_Site»
Host Agency: «Host_Agency»

Community Voice Mail Federation Memorandum of Agreement January – December 2011

Background

Since 1993, Community Voice Mail (CVM) programs have been part of a critical community infrastructure for homeless and low-income individuals and social service providers in communities across the United States and beyond. Community Voice Mail National is a national 501c(3) organization that supports a network of community-based affiliates (CVM Federation) who act as the “hosts” for CVM in their cities and communities. All CVM hosts are required to submit a formal application to the CVM National Office and go through the required vetting process before becoming official members of the Community Voice Mail Federation.

Purpose of this Memorandum of Agreement

The purpose of this Memorandum of Agreement (MOA) is to outline roles and responsibilities and to operate as a contract between Community Voice Mail National and the local CVM affiliate in order to fulfill the CVM mission:

Community Voice Mail helps people living in poverty, transition and homelessness rebuild their lives by connecting them to jobs, housing, information and hope. CVM does this by customizing and distributing communications technology via a national network of community-based services.

The CVM National Office and the CVM hosts are required to sign, implement and uphold the mission, values, model and standards as outlined in the CVM Memorandum of Agreement.

Functions and Responsibilities of local CVM site/Host Agency

CVM Host Agencies are the primary “distribution centers” for CVM telephone numbers available at no cost to the user while s/he participates in a social service agency. (Note: In some instances, the local CVM site and the Host Agency are one and the same, as in the case of a local CVM site being a stand-alone nonprofit organization.) The Community Voice Mail National Office (CVMN) supports local customization of the program to meet the unique needs of individual communities, while maintaining best practices and standards across all CVM sites. **The primary responsibility of the local CVM site/Host Agency is to fulfill the mission of Community Voice Mail through providing high quality, broad-based information and communications technology services to people living in poverty, transition and homelessness for its city and community.** In addition, the functions and responsibilities of the local CVM site/Host Agency include the following central elements of an effective CVM program (subject to availability and/or limits of local resources and funding):

- **Direct and oversee all elements of the Community Voice Mail (CVM) program,** including community organizing, program implementation, financial management, fundraising, promotion, distribution of community resources via broadcast messaging, training of participating agency social and health workers, maintaining relationships with participating agency personnel, and technical maintenance/upgrade of the CVM equipment if necessary.



- **Protect technical integrity of CVM Centralized System (as applicable)** by providing high-speed, broadband connection for web-based administration (PC with Windows 2000 minimum or equivalent).
- **Protect program integrity and data confidentiality through the following:**
 - Signing and upholding *Confidentiality and Database User Agreement* and *Payment Agreement* with CVM National Office as applicable (for Centralized System Users).
 - *Complying with all laws regarding Sensitive Client Information:* Host Agency will comply, and Host Agency will require that any agency participating in the CVM program through the auspices of Host Agency will comply, with all Laws (federal, state, county and municipal laws, regulations, rulings and orders) relating to the collection, handling and protection of Sensitive Client Information or the need or advisability of obtaining client consent relating to any Sensitive Client Information.
 - Signing *Participating Agency Agreements* with each participating agency which outlines roles, responsibilities, liability and confidentiality rules.
 - Requiring each end-user/client to sign a *Statement of Understanding/Client Agreement* (examples available through National Office).
- **Collect, compile, maintain, and report CVM program statistical information**, including user demographics, outcomes, and overall effectiveness of CVM in the community. It is the responsibility of each Host Agency to provide CVM National with statistics and answers to assessment questions upon request regarding CVM usage, demographics, and impact.
- **Hire and sustain qualified CVM Manager** who remains knowledgeable about the CVM system, holds participating agencies to high standards regarding quality of service, and develops wide-reaching city and community awareness of CVM. In order to sustain a strong program over time, the CVM National Office *recommends* .75-1.0 FTE for each CVM program that has an inventory >500 voice mail boxes.
- **Use and protect trademarked name and logo of Community Voice Mail**, including abiding by trademark guidelines while refraining from altering or distorting the logo or name for any purpose. Should the Host Agency and Community Voice Mail National Office sever their relationship, the Host Agency may not continue to use the Community Voice Mail name or trademarked materials for any purposes whatsoever.
- **Identify CVM program as part of the National CVM Federation in all public communications**, including websites, brochures, or other collateral. This requirement can be accomplished by using dual logos and including the following phrase (smaller font permissible):

The «CVM_Site» Community Voice Mail program is part of the CVM national network of sites, helping people living in poverty, transition and homelessness rebuild their lives by connecting them to jobs, housing, information and hope. Headquartered in Seattle, WA, the CVM National Office website is: www.cvm.org.

Additional requirements and suggested language can be found in the document entitled, *Website Protocol for CVM Sites*. In cases where space is at an absolute premium, the phrase, "Member - Community



Voice Mail National Federation” may be used. Each piece of public communication should contain the web address of the CVM National Office: www.cvm.org.

- **Partner with a broad range of community agencies** serving homeless, phoneless, and/or low-income individuals. CVM National assumes that the number of participating agencies includes a majority of the local health and human services sector.
- **Employ a solid strategy for securing diverse sources of program funding** in order to ensure program sustainability including CVM personnel, voice mail capacity, and equipment upgrades (where applicable).
- **Communicate regularly with CVM National Office and CVM Federation** colleagues to leverage the power of CVM nationwide for the purpose of CVM program sustainability within the city and community, including but not limited to **immediately informing the CVM National Office of any major program changes and/or challenges such as the risk of program closure and/or turnover in CVM personnel.**

Functions and Responsibilities of CVM National Office

As the organizational hub of the CVM Federation, the CVM National Office (CVMN) launches CVM sites in new communities, incorporates innovations in technology, conducts public relations and advocacy, and supports all existing CVM programs. The National Office is responsible for ensuring program quality and protecting the identity of CVM while representing CVM to funders, policy makers, service providers and service recipients. In addition, the National Office’s functions and responsibilities are to provide the following services to the CVM Federation (subject to availability and/or limits of National Office resources and funding):

- **Operate and Maintain Centralized Voice mail/Database System**, including hardware and software maintenance and upgrades; management of phone lines, phone numbers and data; protection of sensitive client information; and provision of back-ups, virus protection and tech support.
- **CVM Federation Stewardship**, including leadership, guidance, protection of confidential data (signed Confidentiality and Database User agreements by CVMN staff), networking and knowledge-sharing of best practices through direct contact with each site, listserves, newsletters, forums and the annual CVM Conference.
- **Technical Assistance and Training**, including development of database tools for CVM data collection; ongoing collaboration with CVM technology providers for donation of service and software; ongoing partnership with Cisco Systems for Unity and Call Manager product; ongoing partnerships with telco vendors and other technology vendors for CVM Centralized System; ongoing basic technology support and training for CVM voice mail systems; and ongoing program development, training forums, site visits, evaluation tools and online library resources.
- **Trademarked Name and Logo** to be used by all official Community Voice Mail programs. The CVM National Office grants a non-transferable, royalty-free, non-exclusive, revocable license to use the “Community Voice Mail” name and related



logos during the term of the Memorandum of Agreement (renewable on annual basis).

- **Marketing/Public Information Opportunities and Tools**, including local, regional, and national publicity; national online presence including a robust website outlining national strategies and providing contact information for each individual CVM site; ongoing website optimization efforts with contracted web-developers; and marketing tools such as CVM videos, presentations, statistics, posters, and brochures.
- **Funding and Sustainability Resources**, including securing resources from foundations and corporations to strengthen CVM sites; sharing sample grant proposals for use by local sites; collaborative fundraising with CVM sites; and development of strategic partnerships to support the CVM Federation as a whole and to support individual sites.
- **Advocacy and Education**, including education of elected officials, policy regulators, and industry representatives in order to strengthen awareness of CVM in telecommunications, social service, and government sectors.
- **Research and Evaluation**, including research on new technologies and program applications; analysis and recommendations on the legal issues of client privacy, data confidentiality, and agency liability; evaluation of local CVM site strength/best practices and CVM Federation success; and overall assessment of technological and social service trends to ensure CVM's ongoing relevance and sustainability.

Process for upholding and limiting this MOA

The following efforts will be made to uphold and assess the performance and responsibilities of each party:

- **Evaluation of individual CVM Site** -- The National Office will collect and compile statistics, outcomes, and answers to assessment questions across all CVM sites. The National Office will conduct periodic site visits to evaluate site status and provide ongoing support. The National Office will also administer periodic CVM site self-evaluations that will be filled-out by CVM Managers and used to collect formal feedback and reflection on site progress. Results will be reviewed in conjunction with annual program outcomes/statistics and other assessment activities for individual CVM program performance. The National Office will use the *Key Performance Indicators* as a guide for evaluating a CVM site's "success". Individual results will also be aggregated, reported and used as part of on-going program improvement and as part of evaluating Community Voice Mail as a whole.
- **Evaluation of National Office** – Evaluation of the CVM National Office will happen through both informal and formal means. CVM Managers and Host Agency Directors should contact National Office staff at any time to review roles and responsibilities. In addition, periodic questionnaires will be used to collect formal feedback from CVM Managers and Host Agency Directors on the progress of the National Office. Results will be presented to the CVM Board of Directors, the CVM Federation, and others as appropriate.



In the spirit of collaboration and dispute resolution, all efforts should be made by both parties to communicate regularly and directly about the roles and responsibilities outlined in this document. Changes and/or amendments to this MOA must be agreed upon by both parties. Either party to this MOA may cancel this contract and, as a result, cancel the official affiliation between the Host Agency and Community Voice Mail (including CVM National Office and CVM Federation) and ending the official designation of the local site as a Community Voice Mail site.

Notice of Termination: While both parties agree to notify each other immediately should there be any risk of program closure or CVM Manager turnover, a minimum of **thirty days notice should be given prior to cancellation** of this Agreement by either party.

CVM Federation Membership Dues

Historically, it has been important that each site feel that they are part of a strong network of high quality CVM affiliates committed to the overall mission. The CVM National Office raises funds to subsidize its services, which include ongoing technical assistance, training, advocacy, and conferences. In addition to these raised funds, each Community Voice Mail site agrees to pay annual CVM Federation Membership Dues of **\$300.00 USD** to help defray the costs of these services. Please see the attached invoice and remit payment with the signed MOA. Contact the National Office with any questions.



CVM Site: «CVM_Site»
Host Agency: «Host_Agency»

Signature Page

Period of Coverage: Community Voice Mail (CVM) Memorandum of Agreement for the 12-month calendar year 2011. Renewable on annual basis.

CVM Site Name: «CVM_Site»

By signing this agreement the parties listed below, and the agencies they represent, agree to the content outlined within this document and commit to working collaboratively to uphold this agreement.

«CVM_Site»/«Host_Agency»:

CVM National Office:

Name:
CVM Manager

Jennifer Brandon
CVMN Executive Director

Date signed

Date signed

«Executive_Director»
Executive Director,
«Host_Agency»

Larry Sykes
President, CVMN Board of Directors

Date signed

Date signed

INFO LINE

Bringing people and services together since 1975

703 South Main Street # 211 • Akron OH 44311-1019 • 330-762-5627 • 330-253-1137 Fax • www.infolineinc.org

February 2, 2011

Public Utilities Commission of Ohio
189 East Broad Street
Columbus, Ohio 43215-3793

Re: Community Voicemail Service Pilot Program
RFP # CVM 10-27-2767
Docket N. 10-2767-TP-UNC

To Whom It May Concern:

This letter serves as a commitment for Info Line, Inc. to serve as a subcontractor to Community Voicemail National in operating the Community Voicemail Service Pilot Program to be funded by the Public Utilities Commission of Ohio.

Info Line Inc. is a private, not-for-profit 501 (c) (3) agency operating in Akron, Ohio and governed by a twelve (12) member volunteer Board of Trustees. Info Line, Inc.'s federal tax ID number is 34-1170391. Info Line's sole business address is: 703 South Main Street #211

Akron, Ohio 44311
330-762-5627
www.infolineinc.org

I, Richard B. Stahl, am President and CEO of Info Line, Inc. and am authorized by the Board of Trustees to legally bind Info Line, Inc. to contractual obligations. My phone number is 330-762-5627. My email address is rbstahl@infolineinc.org.

Info Line, Inc. will function as a regional hub office employing a Community Voice Mail Manager. This manager will support multiple community-based organizations (referred to in the proposal as "participating agencies") that will provide their clients with enhanced voicemail services. The Manager and other supervisory staff within Info Line, Inc. will; provide outreach and education at a wide variety of community events, manage a bank of voice mail boxes with local phone numbers for appropriate counties, provide program materials and education to participating agencies about how to operate their programs, assist with client enrollments, maintain client confidentiality, customer service, technical support for participating agencies and clients, data entry, report compilation, research and recording of weekly broadcast messages, conduct client and agency satisfaction surveys and other tasks necessary for the successful operation of the program.



United Way
of Summit County



SUMMIT COUNTY
DEPARTMENT OF JOB & FAMILY SERVICES

...building stronger families for a better community




The cost of the work provided by Info Line, Inc. over the two years of the pilot project for Community Voice Mail is \$156,406 of which \$46,461 will be secured through local sources and \$109,945 will be paid by the Public Utilities Commission of Ohio.

If Community Voice Mail National is the successful bidder for the Community Voice Mail Pilot Program Info Line, Inc. will enter into a contractual memorandum of agreement with them to provide Community Voice Mail services as described in this proposal.

I have read and understand the Request for Proposal, the nature of work required by the RFP and the submitted proposal and am prepared to meet the RFP and proposal requirements.

I also certify that Info Line, Inc. does not have any delinquent taxes nor are there any liens against the agency.

Sincerely,

A handwritten signature in cursive script, appearing to read "Richard B. Stahl".

Richard B. Stahl
President and CEO



HandsOn
CENTRAL OHIO

February 1, 2011

Public Utilities Commission of Ohio
180 E Broad St
Columbus, OH 43215-3793

To Whom It May Concern:

This letter serves as a commitment for HandsOn Central Ohio to serve as subcontractor to Community Voice Mail National operating the Community Voicemail Service Pilot Program (#10-2767-TP-UN)funded by the Public Utilities Commission of Ohio.

HandsOn Central Ohio is a federally-recognized 501©(3) nonprofit organization, 31-1084722 governed by a 22 person Board of Directors. HandsOn Central Ohio is located at the following address:

195 North Grant Avenue, Columbus, Ohio 43215

I, Marilee Chinnici-Zuercher is authorized to legally bind the subcontractor to contractual obligations. My contact information is:

Marilee Chinnici-Zuercher, CEO/President
(614) 221-6766 x113
marileecz@handsoncentralohio.org

I have read and understand the Community Voicemail Service Pilot Program RFP (Docket #10-2767-TP-UNC), the nature of the work, and the requirements of the RFP.If awarded, HandsOn Central Ohio is fully committed to carrying out the following: outreach & education, client enrollment, customer service, data entry, report compilation, research & recording of weekly broadcast messages, conduct episodic client surveys to gauge customer satisfaction.

The cost of the work provided by HandsOn Central Ohio over the two years of the pilot project is \$149,000.

I also certify that HandsOn Central Ohio does not have any delinquent taxes nor are there any liens against the agency.

Please feel free to contact me if you have questions or would like to discuss this scope of work further.

Sincerely,

Marilee Chinnici-Zuercher
CEO/President

195 North Grant Avenue • Columbus, Ohio 43215 • T 614.221.6766 • F 614.224.6866 • handsoncentralohio.org

Supported by: AUSAH • Franklin County Commissioners • City of Columbus • United Way of Central Ohio • Columbus Urban Access Fund • Community Action of Columbus • Columbus Job Training Center • County of Franklin • County of Hamilton • County of Licking • County of Madison • County of Pickaway • County of Union • County of Warren • County of Washington • County of Wood • County of Adams • County of Belmont • County of Boone • County of Brown • County of Butler • County of Carroll • County of Cass • County of Champaign • County of Clark • County of Clay • County of Cleveland • County of Columbia • County of Conway • County of Crawford • County of Curry • County of Custer • County of DeKalb • County of Douglas • County of Fannin • County of Fayette • County of Floyd • County of Forsyth • County of Franklin • County of Fulton • County of Gadsden • County of Gilmer • County of Glascock • County of Glynn • County of Grady • County of Grant • County of Greene • County of Griffin • County of Guadalupe • County of Guila...

Call 2-1-1 or visit us online:

211cleveland.org • 211geauga.org • 211medina.org



February 1, 2011

Public Utilities Commission of Ohio
180 E Broad St
Columbus, OH 43215-3793

To Whom It May Concern:

This letter serves as a commitment for United Way of Greater Cleveland's 2-1-1 First Call For Help to serve as subcontractor to Community Voice Mail National operating the Community Voicemail Service Pilot Program (#10-2767-TP-UN) funded by the Public Utilities Commission of Ohio.

United Way of Greater Cleveland's 2-1-1 First Call For Help is a federally-recognized 501c3 nonprofit organization, Federal Tax ID # 34-6516654 governed by a 80 person Board of Directors. United Way of Greater Cleveland is located at the following address:

1331 Euclid Ave.
Cleveland, Ohio, 44108

I, Stephen Wertheim, am authorized to legally bind the subcontractor to contractual obligations. My contact information is:

Stephen Wertheim
Director, 2-1-1/ First Call For Help
(216) 436-2225
swertheim@unitedwaycleveland.org

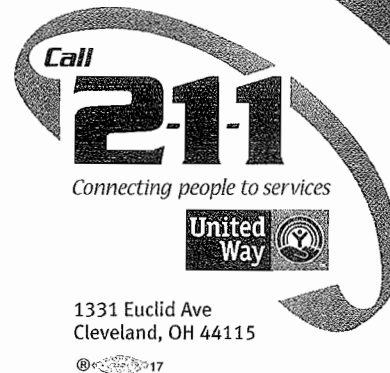
I have read and understand the Community Voicemail Service Pilot Program RFP (Docket #10-2767-TP-UNC), the nature of the work, and the requirements of the RFP. If awarded, United Way of Greater Cleveland's 2-1-1 First Call For Help is fully committed to carrying out the following: outreach & education, client enrollment, customer service, data entry, report compilation, research & recording of weekly broadcast messages, conduct episodic client surveys to gauge customer satisfaction.

The cost of the work provided by United Way of Greater Cleveland's 2-1-1 First Call For Help over the two years of the pilot project is \$109,792.

FREE & CONFIDENTIAL
Information and referral to health and human services
24 Hours a Day Every Day

Call 2-1-1 or visit us online:

211cleveland.org • 211geauga.org • 211medina.org



I also certify that United Way of Greater Cleveland's 2-1-1 First Call For Help does not have any delinquent taxes nor are there any liens against the agency.

Please feel free to contact me if you have questions or would like to discuss this scope of work further.

Sincerely,

A handwritten signature in black ink, appearing to read "Stephen Wertheim".

Stephen Wertheim
Director, 2-1-1/ First Call For Help

FREE & CONFIDENTIAL
Information and referral to health and human services
24 Hours a Day Every Day

Tab 8
Professional References



Tab 8 Professional References

Letters of reference for bidder and each of the three subcontractors follows.



STATE OF WASHINGTON

DEPARTMENT OF COMMERCE

1011 Plum Street SE • PO Box 42525 • Olympia, Washington 98504-2525 • (360) 725-4000

www.commerce.wa.gov

January 24, 2011

TO: Whom It May Concern

FROM: Maitri Sojourner, Program Manager
Community Services Block Grant

SUBJECT: Community Voice Mail National

A handwritten signature in cursive script, appearing to read "Maitri Sojourner".

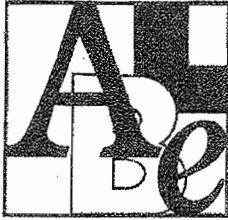
The Washington State Department of Commerce (Commerce) funded a pilot project in 1991 to provide operations for Community Voice Mail (CVM) for people who were homeless so they could receive messages from potential employers and service providers, as well as families and friends. The initial fund source was the Community Services Block Grant (CSBG), funds that pass to the states from the federal Department of Health and Human Services.

In April 2003, the Washington State Legislature created a partnership with the state Department of Social and Health Services and Commerce, by linking the Washington Telephone and Assistance Program and CVM. Funding for the programs is generated from an excise fee placed on "land line" telephones.

Commerce has partnered with Community Voice Mail National since 2003 to provide CVM services. They, along with eleven other grantees statewide, work with over 400 local providers to provide voice mail boxes to low-income and at-risk clients.

CVM National has been an excellent steward of public funds, their services are reputable, and they provide us required reports in a timely fashion. They have been very helpful supplying us with data when we have requested it. More importantly, they are active members of a task force with Commerce and DSHS that is exploring both accurate and efficient reporting, and strategizing about alternate funding sources.

Please feel free to contact me if I can be of further assistance.



**Advocates for Basic
Legal Equality, Inc.**

Dayton Office

333 W. First St.
Suite 500B
Dayton, OH 45402

(937) 228-8104
(866) 837-8832
(937) 535-4600 fax
(888) 545-9497 TTY

www.ablelaw.org

February 4, 2011

Dear Grant Review Committee,

It is with great pleasure that I provide a letter of reference for Jennifer D. Brandon, Executive Director of Community Voice Mail National. I have known Ms. Brandon for 12 years and have had the opportunity to work with her on issues relating to telecommunication services and policies that impact low-income individuals across the country.

In my work with Ms. Brandon, I have found her to be a very capable, experienced, and trustworthy peer. Ms. Brandon has dedicated her professional career to understanding and meeting the communication needs of homeless and low-income individuals, and has done so with perseverance and passion.

For over 15 years Ms. Brandon has led Community Voice Mail National, a nonprofit providing information, education, community tools, and direct telecommunications services. In that capacity, I know that Ms. Brandon has been responsible for administering several million dollars in public and private grants in support of her organization's work. Thus, I have no doubts in her ability to be accountable to the requirements of the RFP No. CVM10-2767 funding – should such funding be awarded.

Sincerely,

Ellis Jacobs
Attorney at Law





H.M. Life Opportunity Services

A Community of Humility Housing Ministry

1815 West Market Street, Suite 102, Akron, Ohio 44313 Phone: 330-376-5600 Fax: 330-376-227

February 1, 2011

Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215-3793

To Whom It May Concern:

I am writing to support Info Line Inc. as one of the collaborative partners to provide Community Voice Mail services under a two-year pilot program funded through the Public Utilities Commission of Ohio.

H.M. Life Opportunities Services was one of the first agencies to become a community partner with Info Line's CVM Summit program. We immediately saw the value of CVM to our clients in transitional housing and staff, and knew that if Info Line was involved in bringing this program to our area, services would be delivered in a professional and customer service oriented manner.

Info Line Inc. has been an integral part of the Summit County community since 1975 and has a long history of collaborative projects. Their administrative staff collectively has over 110 years of experience managing, operating and administrating human and social service programs.

The Akron/Summit/Barberton Continuum of Care for the Homeless asked Info Line to pursue grant funding for CVMS because of their outstanding reputation, ability to deliver quality programming, internal resources for financial control and accounting, and extensive experience operating large technical projects and data bases.

Richard Stahl President and CEO), Sue Pierson (Vice President, Services), and Fred Berry (Housing Services Manager) will assure that the Community Voicemail Service Pilot Program (Docket No. 10-2767-TP-UNC) will be delivered to clients in crisis and transition according to all of the requirements specified in the RFP and submitted proposal.

Please feel free to contact me if you have other questions or would like to discuss further the qualifications of the staff at Info Line Inc. I can be reached at 330-376-5600.

Sincerely,

Melissa Massey-Flinn, MSW
Program Director

Admissions Department:
(330) 535-8116 Phone
(330) 996-2233 Fax

Summit County

Residential Programs:
Summit County Community
Based Correctional Facility
for Men

Cliff Skeen Community
Based Correctional Facility
for Women

Restricted Halfway House
Halfway House

Work Release

Employment Placement

Glenwood Jail

DUI Offender Programs:

3-Day
6-Day
Multiple Offenders

Nonresidential Programs:
Electronic Monitoring

SCRAM

GPS

Reentry Court

Drug Court

Family Violence Court

Day Reporting

Discretionary Rehabilitation

Pretrial Diversion (Felony)

Misdemeanor Diversion

Pretrial Supervision

Chemical Dependency
Treatment

ADM Crisis Center:

Detoxification Unit
Drop-In
Central Assessment

Intensive Outpatient Program

Aftercare

Relapse Prevention

Residential Treatment

Mental Health Treatment
Program

SHARP

Seneca County

Residential Programs:
CROSSWAH Community
Based Correctional Facility

Nonresidential Programs:
Electronic Monitoring

SCRAM

Cuyahoga County

Residential Programs:
Oriana House Community
Corrections and Treatment
Center
Cleveland Transition Center

*Oriana House, Inc. is an affiliate of the
County of Summit*



**Alcohol, Drug Addiction &
Mental Health Services Board**

ORIANA HOUSE, INC.

Administrative Offices

885 East Buchtel Avenue

P.O. Box 1501, Akron, Ohio 44309-1501

Phone (330) 535-8116 • Fax (330) 996-2233 • TTY/TDD (330) 761-3375

www.orianahouse.org



February 1, 2011

Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215-3793

To Whom It May Concern:

I am writing to support Info Line Inc. as one of the collaborative partners to provide Community Voice Mail services under a two-year pilot program funded through the Public Utilities Commission of Ohio.

Oriana House was one of the first agencies to become a community partner with Info Line's CVM Summit program. We immediately saw the value of CVM to our clients in chemical dependency treatment and for those in both residential and non-residential community corrections. We had successfully used Community Voice Mail for our clients in another county and knew that if Info Line was involved in bringing this program to our area, services would be delivered in a professional and customer service oriented manner.

Info Line Inc. has been an integral part of the Summit County community since 1975 and has a long history of collaborative projects. Their administrative staff collectively has over 110 years of experience managing, operating and administering human and social service programs.

The Akron/Summit/Barberton Continuum of Care for the Homeless asked Info Line to pursue grant funding for CVMS because of their outstanding reputation, ability to deliver quality programming, internal resources for financial control and accounting, and extensive experience operating large technical projects and data bases.

Richard Stahl President and CEO), Sue Pierson (Vice President, Services), and Fred Berry (Housing Services Manager) will assure that the Community Voicemail Service Pilot Program (Docket No. 10-2767-TP-UNC) will be delivered to clients in crisis and transition according to all of the requirements specified in the RFP and submitted proposal.

Please feel free to contact me if you have other questions or would like to discuss further the qualifications of the staff at Info Line Inc.

Sincerely,

A handwritten signature in black ink, appearing to read 'Anne Connell-Freund'.

Anne Connell-Freund
Executive VP Operations

A NON-PROFIT CHEMICAL DEPENDENCY TREATMENT AND COMMUNITY CORRECTIONS AGENCY



American Red Cross

of Summit and Portage Counties

Summit County Office
501 West Market Street
Akron, OH 44303
330.535.6131
330.535.4330 (fax)
summitcounty.redcross.org

Portage County Office
705 Oakwood Street, Suite 107
Ravenna, OH 44266
330.296.9991
330.296.7966 (fax)
portageoh.redcross.org

February 3, 2011

Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215-3793

To Whom It May Concern:

I am writing on behalf of the American Red Cross of Summit and Portage Counties to express our support of Info Line, Inc.'s proposal for the inclusion and development of Community Voice Mail Ohio. Particularly, this letter of support serves to express my confidence in the Info Line leadership team to implement, perform and sustain the proposal objectives.

I am confident in the skills of the Info Line team, led by President and Chief Executive Officer, Richard Stahl. Richard is a leader who is committed to creating opportunities that encourage and support people in their efforts to fulfill their highest potential. Prior to his position with Akron's Info Line, Richard was the CEO for Info Line of Los Angeles, the nation's largest community services information and access program serving more than 300,000 people per year.

Richard has provided national and statewide leadership for the profession of information and referral by serving multiple terms on the Board of Directors of the international Alliance of Information and Referral Systems (AIRS), the California Alliance of Information and Referral Services (CAIRS), and the Ohio Council of Information and Referral Programs (OCIRP). Richard served in key leadership capacities in the successful petitioning of the Federal Communications Commission (FCC) and subsequent petitioning of Public Utilities Commissions of both California and Ohio to designate the three-digit dialing code – 2-1-1 for the sole use of providing human services information and referral.

In addition to information and referral expertise, Richard Stahl brings thirty-four years experience supervising professional, paraprofessional and clerical employees, as well as graduate intern and volunteer staff. His background also includes thirty years experience in developing, implementing and consulting in the areas of Strategic Planning/Management and Quality Management for community-based human services agencies.

In closing, Richard and his leadership team are recognized in the region as effective collaborative partners who work tirelessly to ensure the success of any project in which they are involved.

Sincerely,

Toby Ann Weber
Chief Executive Officer



CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

1735 MERRIMAN ROAD • AKRON, OHIO 44313-9007 • PH: (330) 864-6661 • FAX: (330) 864-6918 • WWW.BCGCOMPANY.COM

CARING PEOPLE. SHAPING FUTURES.™

February 3, 2011

Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215-3793

To whom it may concern:


I am writing to express my support of Info Line, Inc.'s proposal for the inclusion and development of Community Voice Mail Ohio. Particularly, this letter serves to express my confidence in the Info Line leadership team to successfully implement, perform and sustain the proposal objectives.

As a member of the Board of Trustees of Info Line, I have observed first-hand the skills and commitment of the Info Line team, led by President and Chief Executive Officer, Richard Stahl. Richard is a leader that is committed to creating opportunities that encourage and support people in their efforts to fulfill their highest potential. Prior to his position with Akron's Info Line, Richard was the CEO for Info Line of Los Angeles, the nation's largest community services information and access program serving more than 300,000 people per year. Richard has provided national and statewide leadership for the profession of information and referral by serving multiple terms on the Board of Directors of the international Alliance of Information and Referral Systems (AIRS), the California Alliance of Information and Referral Services (CAIRS), and the Ohio Council of Information and Referral Programs (OCIRP). Richard served in key leadership capacities in the successful petitioning of the Federal Communications Commission (FCC) and subsequent petitioning of Public Utilities Commissions of both California and Ohio to designate the three-digit dialing code – 2-1-1 for the sole use of providing human services information and referral.

In addition to information and referral expertise, Richard Stahl brings thirty-four years experience supervising professional, paraprofessional and clerical employees, as well as graduate intern and volunteer staff. His background also includes thirty years experience in developing, implementing and consulting in the areas of Strategic Planning/Management and Quality Management for community-based human services agencies.

In closing, Richard Stahl and his leadership team are recognized in our community as effective collaborative partners who work tirelessly to ensure the success of any project in which they are involved.

Sincerely,

A handwritten signature in black ink that reads "Thomas Hastings, CPA". The signature is written in a cursive, flowing style.

Thomas Hastings, CPA
BCG & Company



Commissioner John O'Grady • Commissioner Paula Brooks • Commissioner Marilyn Brown
President

Office on Aging
Antonia Carroll, M.A., L.S.W., Director

February 4, 2011

Public Utilities Commission of Ohio
180 E Broad St
Columbus, OH 43215-3793

To Whom It May Concern:

I am writing to support HandsOn Central Ohio as one of the collaborative partners to provide Community Voice Mail services under a two-year pilot program funded through the Public Utilities Commission of Ohio.

The Franklin County Office on Aging has had a long term relationship with HandsOn Central Ohio. Our agencies have worked closely on providing services to local seniors. HandsOn Central Ohio has managed our senior resources for information and referral database for the past several years.

Marilee Chinnici-Zuercher will assure that the Community Voicemail Service Pilot Program (Docket #10-2767-TP-UNC) will be delivered to clients in crisis and transition according to all of the requirements specified in the RFP and submitted proposal.

Please feel free to contact me if you have questions or would like to discuss further qualifications of the staff at the Franklin County Office on Aging I may be reached at (614) 565-6200.

Sincerely,

Antonia M. Carroll, MA, LSW
Director

- NEW HOPE RECOVERY CORPS
- ZELMA GEORGE FAMILY SHELTER
- COMMUNITY CORRECTIONS PROGRAMS
- RAILTON HOUSE
- ALCOHOL & DRUG ADDICTION SERVICES
- PASS TRANSITIONAL LIVING PROGRAM

THE SALVATION ARMY Harbor Light Complex

1710 Prospect Avenue Cleveland, Ohio 44115
Phone (216) 781-3773 Fax (216) 781-9535

STEVEN HEDGREN
TERRITORIAL COMMANDER

ARTHUR B. HILL III - BEAU
EXECUTIVE DIRECTOR



February 2, 2011

Public Utilities Commission of Ohio
180 E Broad St
Columbus, OH 43215-3793

To Whom It May Concern:

I am writing to support United Way of Greater Cleveland's 2-1-1 First Call For Help as one of the collaborative partners to provide Community Voice Mail services under a two-year pilot program funded through the Public Utilities Commission of Ohio.

It gives me great pleasure to recommend 2-1-1 First Call For Help for this pilot program. The Salvation Army has worked with Cleveland's Community Voice Mail at 2-1-1 First Call For Help since 2008. In this time, they have helped us serve over 250 men in transition at three of our programs sites, Harbor Light Complex, PASS and Railton House, with free voice mail numbers. In addition, I would like to commend 2-1-1 for demonstrating their commitment to our community by providing free, accurate information and referrals to social, health and government resources.

Stephen Wertheim, 211's Director, will assure that the Community Voicemail Service Pilot Program (Docket #10-2767-TP-UNC) will be delivered to clients in crisis and transition according to all of the requirements specified in the RFP and submitted proposal.

Please feel free to contact me if you have questions or would like to discuss further qualifications of the staff at 2-1-1 First Call For Help. I may be reached at (216) 781-3773 or deb.winston@use.salvationarmy.org.

Sincerely,

Debra Winston, Director of
Community Corrections Services

HARBOR LIGHT IS FUNDED IN PART BY THE US DEPARTMENT OF HOUSING & URBAN DEVELOPMENT, OHIO DEPARTMENT OF REHABILITATION & CORRECTIONS, OHIO DEPARTMENT OF DEVELOPMENT, ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH SERVICES BOARD OF CUYAHOGA COUNTY, CLEVELAND DEPARTMENT OF COMMUNITY DEVELOPMENT & THE UNITED WAY OF GREATER CLEVELAND

SERVICES ARE AVAILABLE WITHOUT REGARD TO RACE, RELIGION, NATIONAL ORIGIN, DISABILITY, AGE & SEXUAL ORIENTATION
THE SALVATION ARMY IS AN EQUAL OPPORTUNITY EMPLOYER

Tab 9
Documentation Regarding Any Minority
Business Enterprise (MBE) Status



Tab 9 Documentation Regarding Any Minority Business Enterprise (MBE) Status

The bidder and all its subcontractors are nonprofit organizations and as such are not MBE certification eligible.

Tab 10

Attestation that Bidder will Comply with
Executive Order 2010095 Banning the
Expenditure of Public Funds on Off-Shore Services
(Appendix B)



Tab 10 Attestation that Bidder will Comply with Executive Order 201009S Banning the Expenditure of Public Funds on Off-Shore Services (Appendix B)

CVM National attests that no public funds, including those provided by the PUCO to fund this pilot program, will be used to purchase services provided outside the U.S. or to contract with a subcontractor who will use the funds to purchase services outside the U.S.

The completed form verifying this follows.

APPENDIX B

AFFIRMATION AND DISCLOSURE FORM EXECUTIVE ORDER 2010-09S

Banning the Expenditure of Public Funds on Offshore Services

This form must be completed and signed by every bidder responding to the Request for Proposal (RFP) issued by the Public Utilities Commission of Ohio (PUCO) in Case No. 10-2767-TP-UNC.

BIDDER AFFIRMATION AND DISCLOSURE:

By the signature affixed to this response, the bidder affirms, understands, and will abide by the requirements of Executive order 2010-09S issued by Governor Ted Strickland. The bidder hereby affirms that, if its bid proposal is accepted and, as a result, it is awarded a contract as a vendor participant in the CVM pilot program, neither it, as vendor, nor its subcontractors, if any, shall perform any services necessary or incidental to the pilot program outside of the United States. The Executive Order is available at the following website: (<http://www.governor.ohio.gov/Default.aspx?tabid+1495>).

The bidder shall provide in the spaces provided below, or by attachment, all of the names and locations where will be performed the services it proposes to provide as a vendor participant in the CVM pilot program. Failure to provide this information will amount to a failure by the bidder to meet all of the mandatory requirements of the RFP and, as described in Section 2.1 of the RFP, will result in the bid proposal's disqualification from consideration. If the bid proposal does not entail the use of subcontractors, indicate "Not Applicable" in the appropriate spaces.

1. Bidder's principal location of business

2901 Third Ave, Ste 100	Seattle, WA 98121
(Address)	(City, State, Zip)

Name, principal location of business of subcontractor(s)

Public Utilities Commission of Ohio
Community Voicemail Service Pilot Project
Request for Proposal No. CVM 10-2767
Docket No. 10-2767-TP-UNC

<u>First Call for Help/</u>	<u>1331 Euclid Ave</u>
<u>United Way of Cleveland</u>	<u>Cleveland, OH 44115</u>
(Name)	(Address, City, State, Zip)
<u>InfoLine, Inc.</u>	<u>703 South Main Street, Suite 211</u>
(Name)	<u>Akron OH 44311</u>
<u>HandsOn of Central Ohio</u>	<u>(Address, City, State, Zip)</u>
	<u>195 North Grant Avenue</u>
	<u>Columbus, OH 43215</u>

2. Location where services will be performed by bidder:

<u>2901 Third Ave, Ste 100</u>	<u>Seattle, WA 98121</u>
(Address)	(City, State, Zip)

Name/location where services will be performed by subcontractor(s)	
<u>First Call for Help/</u>	<u>1331 Euclid Ave</u>
<u>United Way of Cleveland</u>	<u>Cleveland, OH 44115</u>
(Name)	(Address, City, State, Zip)
<u>InfoLine, Inc.</u>	<u>703 South Main Street, Suite 211</u>
(Name)	<u>Akron OH 44311</u>
<u>HandsOn of Central Ohio</u>	<u>(Address, City, State, Zip)</u>
	<u>195 North Grant Avenue</u>
	<u>Columbus, OH 43215</u>

3. Location where state data will be stored, accessed, tested, maintained, or backed-up by bidder:

<u>1000 Denny Way</u>	<u>Seattle, WA 98109</u>
(Address)	(City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s)	
<u>Community TechKnowledge</u>	<u>701 Brazos St, Ste 1425</u>
(Name)	<u>Austin, TX 78701</u>
<u>Community Voice Mail National</u>	<u>(Address, City, State, Zip)</u>
(Name)	<u>2901 Third Ave, Ste 100</u>
<u>Level 3 Colocation</u>	<u>Seattle, WA 98121</u>
	<u>(Address, City, State, Zip)</u>
	<u>1000 Denny Way</u>
	<u>Seattle, WA 98109</u>

4. Location where services to be performed will be changed or shifted by bidder:

Public Utilities Commission of Ohio
Community Voicemail Service Pilot Project
Request for Proposal No. CVM 10-2767
Docket No. 10-2767-TP-UNC

N/A

(Address)

N/A

(City, State, Zip)

Name/Location(s) where services to be performed will be changed or shifted by subcontractor(s):

N/A

(Address)

N/A

(City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained, or backed-up by subcontractor(s)

Community TechKnowledge

(Name)

Community Voice Mail National

(Name)

Level 3 Colocation

701 Brazos St, Ste 1425

Austin, TX 78701

(Address, City, State, Zip)

2901 Third Ave, Ste 100

Seattle, WA 98121

(Address, City, State, Zip)

1000 Denny Way

Seattle, WA 98109

By signing below, I hereby certify and affirm that I have reviewed, understand, and will abide by the Governor's Executive Order 2010-09S. I attest that no funds provided by the PUCO for this pilot program will be used to fund services provided outside the United States or to contract with a subcontractor who will use the funds to fund services provided outside the United States. I will promptly notify the PUCO if there is a change in the location where any of the services relating to the pilot program will be performed. If I am signing this on behalf of a company, business, or organization, I hereby acknowledge that I have the authority to make this certification on behalf of that entity.

Signature

February 4, 2011

Date

Community Voice Mail National
(Entity Name)

2901 Third Ave, Ste 100
Address (principal place of business),

Jennifer D. Brandon
Printed Name (of above signatory)

Seattle, WA 98121
City, State, Zip

Tab 11

Declaration that Bidder has not Provided Material
Support or Resources to Any Listed Terrorist
Organization (Appendix C)



Tab 11 Declaration that Bidder has not Provided Material Support or Resources to Any Listed Terrorist Organization (Appendix C)

The printed, completed, and signed form providing certification that the Community Voice Mail National has not provided material support or resources to any organization listed on the "Terrorist Exclusion List" (TEL) maintained by the U.S. Department of State follows this statement.



GOVERNMENT BUSINESS AND FUNDING CONTRACTS
In accordance with section 2909.33 of the Ohio Revised Code

DECLARATION REGARDING MATERIAL ASSISTANCE/NONASSISTANCE TO A TERRORIST ORGANIZATION

This form serves as a declaration by an applicant for a government contract or funding of material assistance/nonassistance to an organization on the U.S. Department of State Terrorist Exclusion List ("TEL"). Please see the Ohio Homeland Security Division Web site for a copy of the TEL.

Any answer of "yes" to any question, or the failure to answer "no" to any question on this declaration shall serve as a disclosure that material assistance to an organization identified on the U.S. Department of State Terrorist Exclusion List has been provided. Failure to disclose the provision of material assistance to such an organization or knowingly making false statements regarding material assistance to such an organization is a felony of the fifth degree.

For the purposes of this declaration, "material support or resources" means currency, payment instruments, other financial securities, funds, transfer of funds, financial services, communications, lodging, training, safe houses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials.

COMPLETE THIS SECTION ONLY IF YOU ARE AN INDEPENDENT CONTRACTOR

LAST NAME		FIRST NAME		MI
HOME ADDRESS				
CITY	STATE	ZIP	COUNTY	
HOME PHONE		WORK PHONE		

COMPLETE THIS SECTION ONLY IF YOU ARE A COMPANY, BUSINESS OR ORGANIZATION

BUSINESS/ORGANIZATION NAME Community Voice Mail National Office			PHONE (206) 441-7872	
BUSINESS ADDRESS 2901 Third Ave, Ste 100				
CITY Seattle	STATE WA	ZIP 98121-1037	COUNTY United States of America	
BUSINESS/ORGANIZATION REPRESENTATIVE NAME Jennifer D. Brandon			TITLE Executive Director	

DECLARATION

In accordance with section 2909.32 (A)(2)(b) of the Ohio Revised Code

For each question, indicate either "yes," or "no" in the space provided. Responses must be truthful to the best of your knowledge.

- Are you a member of an organization on the U.S. Department of State Terrorist Exclusion List?
- Have you used any position of prominence you have with any country to persuade others to support an organization on the U.S. Department of State Terrorist Exclusion List?
- Have you knowingly solicited funds or other things of value for an organization on the U.S. Department of State Terrorist Exclusion List?
- Have you solicited any individual for membership in an organization on the U.S. Department of State Terrorist Exclusion List?
- Have you committed an act that you know, or reasonably should have known, affords "material support or resources" to an organization on the U.S. Department of State Terrorist Exclusion List?
- Have you hired or compensated a person you knew to be a member of an organization on the U.S. Department of State Terrorist Exclusion List, or a person you knew to be engaged in planning, assisting, or carrying out an act of terrorism?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

If an applicant is prohibited from receiving a government contract or funding due to a positive indication on this form, the applicant may request the Ohio Department of Public Safety to review the prohibition. Please see the Ohio Homeland Security Web site for information on how to file a request for review.

CERTIFICATION

I hereby certify that the answers I have made to all of the questions on this declaration are true to the best of my knowledge. I understand that if this declaration is not completed in its entirety, it will not be processed and I will be automatically disqualified. I understand that I am responsible for the correctness of this declaration. I understand that failure to disclose the provision of material assistance to an organization identified on the U.S. Department of State Terrorist Exclusion List, or knowingly making false statements regarding material assistance to such an organization is a felony of the fifth degree. I understand that any answer of "yes" to any question, or the failure to answer "no" to any question on this declaration shall serve as a disclosure that material assistance to an organization identified on the U.S. Department of State Terrorist Exclusion List has been provided by myself or my organization. If I am signing this on behalf of a company, business or organization, I hereby acknowledge that I have the authority to make this certification on behalf of the company, business or organization referenced on page 1 of this declaration.

APPLICANT SIGNATURE X	DATE 2/4/2011
--------------------------	------------------

Tab 12
Documentation that Bidder Has Adequate
Insurance



Tab 12 Documentation that Bidder Has Adequate Insurance

Community Voice Mail National holds a certificate of insurance with one million dollars combined single limit coverage for general liability. Documentation follows this page.

Community Voice Mail National is willing and able to self-insure a performance bond of one percent of final contract price identified in Tab 31 – Cost Proposal.



CERTIFICATE OF LIABILITY INSURANCE

OP ID: TO

DATE (MM/DD/YYYY)

02/03/11

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MHT Insurance 1904 Third Ave Suite 714 Seattle, WA 98101 Thomas E. Odell		206-622-5505 206-622-9727	CONTACT NAME: PHONE (A/C, No, Ext): E-MAIL ADDRESS: PRODUCER CUSTOMER ID #: COMMU-8	FAX (A/C, No):
INSURED Community Voice Mail National 2901 Third Ave Ste 100 Seattle, WA 98121		INSURER(S) AFFORDING COVERAGE		NAIC #
		INSURER A: Great American Ins Co. A XII		26344
		INSURER B: The Ohio Casualty Group		41939
		INSURER C:		
		INSURER D:		
		INSURER E:		
		INSURER F:		

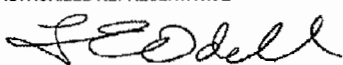
COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY			PAC 5603207	02/01/11	02/01/12	EACH OCCURRENCE \$ 1,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY	X					DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person) \$ 5,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						PRODUCTS - COMP/OP AGG \$ 2,000,000
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						\$
A	AUTOMOBILE LIABILITY			PAC 5603207	02/01/11	02/01/12	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input checked="" type="checkbox"/> HIRED AUTOS						\$
<input checked="" type="checkbox"/> NON-OWNED AUTOS			\$				
A	UMBRELLA LIAB			UMB 5603208	02/01/11	02/01/12	EACH OCCURRENCE \$ 4,000,000
	EXCESS LIAB						AGGREGATE \$ 4,000,000
	<input type="checkbox"/> DEDUCTIBLE						\$
	<input checked="" type="checkbox"/> RETENTION \$ 10,000						\$
							\$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			PAC 5603207	02/01/11	02/01/12	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N	N/A				E.L. EACH ACCIDENT \$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Property Section			BMO (08) 53594845	02/01/11	02/01/12	Computers 1,141,885 Deductibl 500

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
Certificate holder is named additional insured per CG8224 attached.

CERTIFICATE HOLDER**CANCELLATION**

ALLOTH1 Public Utilities Commission of Ohio 180 E Broad St Columbus, OH 43215	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
--	---

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Tab 13

Explanation of Bidder's CVM Eligibility Criteria



Tab 13 Explanation of Bidder's CVM Eligibility Criteria

CVM National works with each of our host partners to determine an appropriate inventory of local voice mail numbers for each region to be served. These numbers are assigned to a corresponding voice mail box in the centralized system by CVM National staff. Once assigned, each subcontractor only has access to its own inventory of numbers. Access is permitted via a centralized database.

Host partners then distribute their inventory throughout the community's participating agencies. The following procedures are followed to vet and enroll clients for our voice mail services:

1. Clients will obtain a CVM number from a Participating Agency that has been authorized and trained to provide this service, and is already providing other social & health services to individuals in a designated area. Each Participating Agency will serve the designated urban or rural area in which the CVM service is being provided, so the area in which the phone number will be used is known. This fulfills the first eligibility criteria described in the RFP ("located within one of the urban or rural areas of Ohio included in the bid proposal"). A copy of the Participating Agency Agreement can be found under Tab 16.
2. By default, each Participating Agency provides services to a local population that meets the eligibility criteria as described in the RFP. By virtue of the fact that the individual is a client of the Participating Agency, he/she has met the second criteria for eligibility ("in a state of transition").
3. Prior to the intake process with the Participating Agency, the client will be screened to determine if they have a need for the CVM voice mail service. If the answer is yes, the third criteria for eligibility has been met, and the Client will be offered a CVM number.
4. The client will be asked to fill out a Client Intake/Outcome Form, which asks for basic contact, demographic and life data as well information about their goals in using the CVM service. The "CVM Client Understanding of Agreement" section of the intake form sets the terms under which the CVM number is provided and can be used by the Client.
5. Once the Intake form is signed or otherwise agreed to, the Client will receive a local ten-digit CVM number, and be assisted with the enrollment process by the Participating Agency representative. The enrollment process consists of a.) recording the client name, b.) recording an outgoing greeting, and c.) entering a passcode to ensure the privacy of the box. Once enrollment is complete, the Client will be given a wallet card with his/her CVM number on it, as well as basic instructions for using the CVM voice mail box.
6. A copy of the Client Agreement & Intake form can be found behind Tab 14.

Tab 14
Explanation of Bidder's CVM
Customer Enrollment Process

Tab 14 Explanation of Bidder's CVM Customer Enrollment Process

Following is the process by which a Client will receive CVM voice mail service:

1. Clients will obtain a CVM number from a Participating Agency that has been authorized and trained to provide this service. Each Participating Agency will serve the designated urban or rural area in which the CVM service is being provided, so that the area in which the phone number will be used is documented. This fulfills the first eligibility criteria described in the RFP ("located within one of the urban or rural areas of Ohio included in the bid proposal"). A copy of the Participating Agency Agreement can be found under Tab 16.
2. By default, each Participating Agency provides services to a local population that meets the eligibility criteria as described in the RFP. By virtue of the fact that the individual is a client of the Participating Agency, he/she has met the second criteria for eligibility ("in a state of transition").
3. Prior to the intake process with the Participating Agency, the client will be screened to determine if they have a need for the CVM voice mail service. If the answer is yes, the third criterion for eligibility has been met, and the Client will be offered a CVM number.
4. The client will be asked to fill out a Client Intake/Outcome Form (see below), which asks for basic contact, demographic and life data, as well as information about their goals in using the CVM service. The "CVM Client Understanding of Agreement" section of the intake form sets the terms under which the CVM number is provided and can be used by the Client, and includes notice of when the pilot project ends and that the service is not to be used for any illegal purposes.
5. Once the Intake form is signed or otherwise agreed to, the Client will receive a local ten-digit CVM number, and be assisted with the enrollment process by the Participating Agency representative. The enrollment process consists of a) recording the client name, b) recording an outgoing greeting, and c) entering a passcode to ensure the privacy of the box. Once enrollment is complete, the Client will be given a wallet card with his/her CVM number on it, as well as basic instructions for using the CVM voice mail box.
6. A copy of the Client Agreement & Intake form can be found behind Tab 14.

CVM Ohio Client Intake/Outcome Form

Please Fax to:

CVM Client Agreement of Understanding

I understand that I have the temporary use of a Community Voice Mail phone number to use ONLY for the purposes and length of time agreed upon by me and the service provider who is giving me this number. I agree to contact the service provider to let him/her know my outcome, whether the voicemail service was helpful, and/or whether I no longer need the voicemail box. I understand that the information in this form will be kept confidential and used only to keep track of CVM services and/or to check CVM eligibility by service providers or funders who have agreed to confidentiality. I understand that periodically I may receive broadcast voice messages from my case manager, the CVM Program Manager and/or the CVM national office containing information about additional resources. If I give my email address, I understand that it may be used to notify me if/when I have messages and/or may be used to send me information about additional resources. I understand that the service provider will receive a regular printout on the usage of this voice mail box. This will assist CVM in evaluating the overall effectiveness of the program. The voice mail service may not be used for any illegal purpose or activity; the service will not be offered, or may be terminated, in the event that it is, or appears that, any use, or attempted use of the service is being made for any illegal purpose or activity. **This service is being provided as part of a pilot program; service is scheduled to cease on _____, but may continue beyond this date at the discretion of CVM Ohio.**

Client Signature: _____ Date: _____ Password (optional) _____

Enrollment Date: _____ Voice Mail Box # Assigned _____

Participating Agency Name _____ Agency Contact Name _____

Client's Reported First Name _____ Middle Initial _____ Last Name _____ Suffix (eg, Jr.) _____

Client Email Address _____ @ _____

SPANISH PROMPTS? ☐ YES ☐ NO RUSSIAN PROMPTS? ☐ YES ☐ NO

CLIENT GOALS (circle all that apply)

/M START DATE: _____	
Goal: Employment	Yes No
Goal: Housing	Yes No
Goal: Income Related (e.g. applying for SSI)	Yes No
Goal: Health Care	Yes No
Goal: Social Services	Yes No

OUTCOMES FOR CVM (circle all that apply)

CVM EXIT DATE: _____	
Outcome: Client Obtained Employment?	Yes No Unknown
Outcome: Client Obtained Housing?	Yes No Unknown
Outcome: Increased Income?	Yes No Unknown
Exit Monthly Income →	Exit Income \$ _____
Outcome: Health Care	Yes No Unknown
Outcome: Received Social Services?	Yes No Unknown

Please describe "other social services(s)": _____

Goal: Other Reason(s)	Yes No	Outcome: Achieved Other Outcomes?	Yes No Unknown
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Please describe "other reason(s)": _____

Following Goal is for Domestic Violence Clients Only

Goal: Safe Communications	Yes No	Outcome: Had Safe Communications?	Yes No Unknown
---------------------------	--------	-----------------------------------	----------------

Exit Reason - If goal was not met (no outcome), what was the primary reason for ending usage/exit? (mark one)

☐ Client abandoned voicemail box ☐ Client left agency program/service area ☐ Client reached max. time limit
☐ Box reassigned – no info/no outcome ☐ Other reason: _____

Exit Question: "How helpful was CVM in achieving the outcome(s)?"

☐ Very helpful ☐ Somewhat helpful ☐ Not very helpful ☐ Not at all helpful ☐ No information/data available

Age Range (mark one):

- ☐ under 18
☐ 18-25
☐ 26-44
☐ 45-59
☐ 60 and up
☐ unknown

Date of Birth _____**Ethnicity** (mark one):

- ☐ Non-Hispanic/Non Latino
☐ Hispanic/Latino
☐ Unknown

Race (mark ALL that apply):

- ☐ American Indian/Alaska Native
☐ Asian
☐ Black/African American
☐ Native Hawaiian/Other Pacific Islander
☐ White
☐ Unknown

Gender: ☐ Male ☐ Female
☐ Transgender**Intake Monthly Income**

\$ _____

Income Sources (mark ALL that apply):

- ☐ Earned Income
☐ Unemployment Insurance
☐ SSI
☐ SSDI
☐ Other Disability Income
☐ TANF (or local equivalent)
☐ General Assistance (or local equivalent)
☐ Pension/Retirement Income
☐ Child Support
☐ Food Stamps
☐ Other Source
☐ No financial resources

Other Characteristics/Situations:(mark ALL that apply)

- ☐ Homeless
☐ At Risk of Homelessness
☐ Unemployed
☐ Limited English Skills
☐ Victim of Domestic Violence
☐ Foster Care participant (recent)
☐ Parolee/Prisoner Re-entry Program
☐ In-housing – phone disconnect

Veteran Status? ☐ Yes ☐ No**Disabling Condition?** ☐ Yes ☐ No**Head of Household?** ☐ Yes ☐ No

of Dependent Children _____

of Dependent Adults _____

If Homeless (mark one):

- ☐ Living in Emergency Shelter
☐ Living on Streets
☐ Living in Transitional Housing

Tab 15
Explanation of Bidder's CVM
Customer Service Disconnection



Tab 15 Explanation of Bidder's CVM Customer Service Disconnection

"Service Disconnection" means that the voice mail box will be reset, with all existing voice messages, outgoing greetings and personal passcodes deleted. The Client will no longer be able to access messages left in this voice mail box, and the number will be provided to another client.

Service will be disconnected under the following circumstances:

1. The Client self-reports that he no longer needs the service, either because he has accomplished his stated goals and/or has secured a reliable phone number. The service will be disconnected upon receipt of this notification by the Client, or by the case manager at the participating agency that provided the clients with his CVM number.
2. The Client has not checked their voice mail box within the preceding 90 days. Once a month, a broadcast voice message will be sent to all clients on the system notifying them that if they don't check their voice mail at least once in a three month period, the service will be disconnected. CVM will monitor this using monthly usage reports.
3. It is determined that the Client has used or attempted to use the service for any illegal purpose or activity. In this circumstance, the service will be disconnected immediately and without warning to the Client.

As indicated above, notification (where applicable) will be sent to the Client's voice mail box, and the Client will be given the opportunity to leave a message in response by using the CVM voice response system. We will not accept direct calls from the Client regarding disconnection because we cannot verify the identity of the caller. We will accept communication from a representative of the Client's social service agency as proof of request.

Tab 16

Documentation Showing Bidder Has a Policy and Established Procedures for Avoiding the Provision of CVM Service Under the Pilot Program to Non-Eligible Individuals



Tab 16 Documentation Showing Bidder Has a Policy and Established Procedures for Avoiding the Provision of CVM Service Under the Pilot Program to Non-Eligible Individuals

It is CVM's policy that Clients will only receive the voice mail service from Participating Agencies that have been authorized to do so by CVMN. All of these Participating Agencies serve individuals who are in a state of transition, and many of these clients do not have access to traditional telephone exchange service or readily available alternatives. We rely on these Participating Agencies to identify those of their clients who meet the eligibility criteria set forth in the RFP, and notify CVMN when a Client is either no longer associated with the Agency (no longer receiving services) or no longer needs the CVM service because they are no longer in transition or have secured other phone service. We also train all partners in best practices of program management, which includes review of monthly "subscriber reports" which allows CVM to visually monitor the inventory and assess ongoing client need.

This policy will be enforced through training of staff at Participating Agencies, and through reiteration of this policy via routine communication by the local manager of the CVM program.

Below is the agreement every Participating Agency signs before they can provide the CVM service. This document covers eligibility, and the need to collect outcomes data once a Client leaves the system. These two aspects are reinforced during training.



CVM Agreement for Participating Agencies

Purpose

Community Voice Mail (CVM), a program of the _____ (host agency) and Community Voice Mail National, provides voicemail technology to help people in transition and crisis receive messages from potential employers, landlords, health care providers, child care providers, case managers and providers of critical human services. **The purpose of this CVM Agreement is to outline requirements and to operate as a contract between _____ (host agency) and _____ (participating agency) in order to fulfill the ultimate mission of Community Voice Mail.**

Fees

The _____ (city/region) Community Voice Mail program is a collaborative effort between _____ (participating agency) and _____ (host agency). This participating agency has requested and been assigned _____ CVM voice mailboxes for a period of one year at a cost of \$_____ per box per month (\$_____ per month). **Please provide a signed copy of this agreement to your agency's financial director.** NOTE: fees may not be extended to client as would be a violation of CVM mission.

Roles & Responsibilities

The success of this program depends on the cooperation of the above participating agency and the host agency to work together in the following ways:

Requirements of Staff at Participating Agencies

1. Protect the integrity of the Community Voice Mail (CVM) program by determining eligible clients, assign them a CVM voice mailbox, assist them in recording a greeting, setting a security code and train them to retrieve their messages.
2. Obtain client signature on all CVM forms (see Client Agreement of Understanding on Intake/Outcome Form).
3. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
4. When a CVM client completes use of CVM, complete the "Exit & Outcomes" sections of the original CVM Intake/Outcome sheet, a client survey (if applicable), and reset the appropriate voice mailbox with your agency security code to protect the vacant CVM number.
5. Notify the CVM office of new or closed clients by completing all the necessary forms for each CVM client. Fax the forms within 24 business hours to the CVM System Manager at _____.
6. Upon need, request additional telephone numbers and retraining from the CVM System Manager.

Requirements of Host Agency - CVM Staff

1. Provide excellent customer service and technical assistance to the local CVM network of participating agencies and clients.
2. Train and retrain participating agency staff.
3. Provide participating agencies with a CVM monthly report showing system activity to promote consistent record keeping among participating agencies.
4. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
5. Update materials, policies, and procedures with feedback from the CVM Participating Agencies and Clients.

Failure to comply with requirements by either party may result in termination of this agreement. Either party may cancel this agreement and, as a result, cancel the official affiliation between the Participating Agency and the Community Voice Mail program.

Participating Agency Name

Signed: Participating Agency Director, Date

Signed: CVM System Manager, Date

Signed: Participating Agency CVM Representative, Date

Tab 17

Documentation Showing that Bidder will Comply
with the RFP's Requirements Pertaining to How
CVM Customers will be Notified Regarding the
Termination of the Pilot Program



Tab 17 Documentation Showing that Bidder will Comply with the RFP's Requirements Pertaining to How CVM Customers will be Notified Regarding the Termination of the Pilot Program

CVM will notify Clients regarding the termination of the pilot program in the following ways:

1. At enrollment, the Agreement signed by the Client at the point of enrollment will stipulate the end-date of the pilot program.
2. Broadcast voice messages will be delivered to the voice mail boxes of all Clients using the service on the four appointed deadlines before the end of the pilot (end of first year, and then six, three and one month before the end deadline).

CVM will forward to PUCO copies (WAV files) of these notification messages on the day they are sent to Clients using the system.

Tab 18

Documentation Showing Bidder will Comply with
RFP's Requirements Pertaining to Protecting the
Privacy of CVM Service Customers



Tab 18 Documentation Showing Bidder will Comply with RFP's Requirements Pertaining to Protecting the Privacy of CVM Service Customers

Ohio CVM will protect the privacy of its Clients through the following means, which are currently in place with the existing Cleveland and Summit County CVM programs as well as 41 other programs in the U.S. (and Vancouver, Canada):

Client information taken from the Client intake/outcomes form (see Tab 14) is entered into a centralized database accessible via the Web and managed by Community TechKnowledge (<http://www.communitytech.net/>). Only authorized CVM Managers and their designees are provided with access to this system, which is protected by industry-standard login/password authentication (passwords are only provided by Community Voice Mail National Staff). Prior to receiving access to the CVM data on the Community TechKnowledge database, each Host Agency must sign a Centralized System Database User Agreement (included in this section). Also included in this section is a description of the security protection provided by Community TechKnowledge.

All CVM National and subcontractor staff who have access to client forms and the centralized database are required to sign a Data Confidentiality and Security Agreement (included in this section), and all Staff and subcontractors are required to follow all applicable federal, state, county and municipal laws re: Sensitive Information and perform best practices of file management.

All agencies that provide the CVM service directly to Clients must sign a CVM Agreement for Participating Agencies (included in this section), which stipulates that they "maintain strict confidentiality and privacy regarding CVM clients and the messages they receive." Staff at these agencies are also usually bound by the agreements they must sign to provide social services to their own clients.

Clients are required to sign the CVM Client Agreement of Understanding, which informs the client how the data he/she provides will and will not be used by Community Voice Mail. Specifically, this document states: "I understand that the information in this form will be kept confidential and used only to keep track of CVM services and/or to check CVM eligibility by service providers or funders who have agreed to confidentiality."

Finally, CVM Host Agencies (the "contractors" in this proposal) must annually sign a Memorandum of Agreement with the CVM National Office to begin providing the service in a given geography. This document includes the following section regarding security and confidentiality:

- **Protect program integrity and data confidentiality through the following:**
 - Signing and upholding *Confidentiality and Database User Agreement* and *Payment Agreement* with CVM National Office as applicable (for Centralized System Users).
 - *Complying with all laws regarding Sensitive Client Information:* Host Agency will comply, and Host Agency will require that any agency participating in the CVM program through the auspices of Host Agency will comply, with all Laws (federal,

state, county and municipal laws, regulations, rulings and orders) relating to the collection, handling and protection of Sensitive Client Information or the need or advisability of obtaining client consent relating to any Sensitive Client Information.

- Signing *Participating Agency Agreements* with each participating agency which outlines roles, responsibilities, liability and confidentiality rules.
- Requiring each end-user/client to sign a *Statement of Understanding/Client Agreement* (examples available through National Office).

Through these overlapping agreements and technical safeguards, Community Voice Mail is making a reasonable and sufficient effort to maintain client confidentiality and privacy.



Exhibit B

Community Voice Mail Centralized System Database User Agreement

As an individual who enters data or runs reports (“user/users”) on the CVM Centralized System, I understand and agree to the following:

1. “CVM Centralized System” refers to all components of the web-based CVM Voicemail System, including Cisco Unity and the Community TechKnowledge Online Data Manager.
2. “Client” refers to the end-user/recipient of the voicemail service.
3. The CVM Host Agency and its Participating Agencies are bound by various restrictions regarding sensitive client information. The undersigned User is aware of and agrees to abide by all applicable federal, state, county and municipal laws, regulations, rulings and orders (collectively, “Laws”) regarding the protection and/or disclosure of sensitive Client information.
4. That the Community Voice Mail National Office (CVMN) recommends that a *Client Agreement of Understanding*, in the form prescribed by CVMN from time to time, be signed by all end-users/clients who receive a CVM voicemail box, and that if CVMN determines it to be appropriate, CVMN may require the use of such agreements.
5. The undersigned User agrees to respect Client preferences with regard to the entry and sharing of Client information.
6. Users have primary responsibility for entry of Client information. The undersigned User agrees to use his/her best efforts to assure that Client information is entered in a truthful, accurate and complete manner.
7. The undersigned User agrees not to use the CVM Centralized System, including its web-based database, in a manner that would violate any law, defraud any person or entity or that would otherwise result in the conduct of any illegal activity.
8. The undersigned User agrees to maintain the confidentiality of Client information in the Centralized CVM Voicemail System in the following manner:
 - User will not share his/her username or password with anyone.

- User will not use the browser capacity to remember his/her password: User will enter the password each time he or she logs on to the web-based, Centralized CVM Voicemail System.
 - User will use reasonable means to keep his/her password physically secure.
 - User will only view, obtain, disclose, or use the database information that is necessary to perform his/her job and in a way that is permitted by applicable laws.
 - User understands that the only individuals who may directly access the CVM Centralized System are authorized Users, and User will take these steps to prevent casual observers from seeing or hearing CVM Client information.
 - User will log off the CVM Centralized System before leaving his/her work area, or make sure that the database has "timed out" before leaving his/her work area.
 - User will not leave unattended any computer that has the CVM Centralized System "open and running."
 - User will store hard copies of CVM information in a secure file and not leave such hard copy information in public view.
 - User will destroy paper copies of client information when they are no longer needed unless they are required to be retained in accordance with applicable law.
 - User will not discuss or share CVM confidential or sensitive Client information with staff, Clients, or Client family members in a public area, on a phone or on messages where the public or unauthorized persons might overhear the information.
9. User understands that a failure to follow these security steps may result in a breach of CVM Client confidentiality and data security. If such a breach occurs, User's access to the CVM Centralized System may be terminated and User may be subject to further disciplinary action as defined in the applicable CVM Host Agency's or Participating Agency's personnel policy.
10. If User notices or suspects a security breach, User will immediately notify the Director of his/her Agency and the CVM Manager. The CVM Host Agency will notify the CVM National Office.

I understand and agree to comply with all the statements listed above.

Centralized CVM Voicemail System User Signature

Date

Centralized CVM Voicemail System User Signature (*please print*)

CVM Host or Participating Agency

Community TechKnowledge Statement on Security

As taken from <http://www.communitytech.net/products> on 2/3/11.

At CTK, the security of your database is our top priority. CTK uses state-of-the-art equipment and technology to safeguard the confidential nature of your data. Your data is automatically encrypted while in transit between your computer and our servers. The technology that makes this possible is the Secure Sockets Layer protocol- SSL. CTK uses the largest commercially available cipher key size of 128 bits, providing the best protection against Internet eaves-droppers who may attempt to intercept your data. This tried-and-true technology is used world-wide to protect information that is sent across the Internet.

When your data reaches the servers, it is heavily secured both physically and electronically. Internet traffic that is sent to and from our servers is electronically monitored. Each server is individually governed by a system that prevents unexpected Internet data from being processed by our server software. Intrusion Detection Systems, virus scanning, automated system checks, remote logging, and other measures guard against unauthorized access. These steps to assure security combined with regular system maintenance and audits assure that your database is kept safe.

- The ODM servers are secured in an Internet datacenter facility protected by CCTV surveillance cameras, advanced access control, and 24×7 manned security.
- Electricity for the servers is provided by parallel and redundant UPS systems, Caterpillar diesel generators with 6,000 gallons of fuel, 3,000 Amp 480 Volt parallel Automatic Transfer Switches, and infrastructure lightning protection systems.
- Fire suppression is provided by a non-water based FM-200 system and a dual interlock, dry pipe, pre-action sprinkler system.
- Our ODM servers are connected to the Internet by quadruple-redundant OC-48 connections to Time Warner, El Paso Global Networks, Qwest, and Grande Communications, as well as an OC-12 to Southwestern Bell.

CTK's corporate office sits behind custom-built network hardware which extensively controls, tracks, and reports access to our internal infrastructure.

Our technical staff exclusively use encrypted technologies to communicate with ODM servers and work with your database.

CTK stores data using redundant hardware technologies, fault tolerant software, real-time mirrored database infrastructure, and fault tolerant journaling file systems.

Your database is backed up in three separate physical locations – in both the US and the UK, by means of two separate mechanisms. Backups are stored on two different types of media. With CTK, you can be sure your data will never be lost.

Our security measures facilitate compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the UK Data Protection Act of 1998. CTK is a Safe Harbor certified service provider.

Click here to see our [Safe Harbor Certification](#).



Community Voice Mail Data Confidentiality and Security Agreement

This Community Voice Mail Data Confidentiality and Security Agreement (this "Agreement") is dated and effective as of _____, (the "Effective Date") and is entered into by and between Community Voice Mail National Office, a not-for-profit corporation ("CVMN") and the undersigned host agency (the "Host Agency") for CVMN's Community Voice Mail program ("CVM"), in light of the following:

Background

A. CVMN and Host Agency are parties to a Memorandum of Agreement and other agreements pursuant to which CVMN has agreed to provide Host Agency with access to CVMN's Community Voice Mail Centralized System (the "CVM Centralized System").

B. The CVM Centralized System allows CVM Federation members (CVM Host Agencies and their CVM managers) to track voicemail box usage and client enrollments. It also allows CVMN to obtain and compile the information needed for aggregate reporting at the local, regional and national levels.

C. To protect the integrity of the CVM Centralized System and the confidentiality of sensitive client data that the CVM Centralized System may contain ("Sensitive Information"), CVMN requires that each Host Agency sign this Agreement and agree to follow CVMN's *Data Confidentiality and Security Policy*, a copy of which is attached hereto and incorporated herein as Exhibit A (as amended from time to time, the "Policy").

Agreements

1. The Policy. Host Agency acknowledges receipt of the Policy and agrees that at all times it will comply with the Policy.

2. Understand all applicable laws. Host Agency agrees that, before utilizing the CVM Centralized System, one or more members of its staff and one or more members of the staff at each agency participating in the CVM program through the auspices of Host Agency will be trained in and understand all applicable federal, state, county and municipal laws, regulations, rulings and orders (collectively, "Laws") that relate to the protection of Sensitive Information and/or the need or advisability of obtaining client consent relating to any Sensitive Information.

3. Comply with all applicable Laws. Host Agency will comply, and Host Agency will require that any agency participating in the CVM program through the auspices of Host Agency will comply, with all Laws relating to the collection, handling and protection of Sensitive Information or the need or advisability of obtaining client consent relating to any Sensitive Information.

4. Monitor and train staff regarding Sensitive Information. Host Agency will train and monitor its staff participating in the CVM program, and Host Agency will train and monitor or confirm that others have trained and will monitor the staff participating in the CVM program from all agencies participating in the CVM program under Host Agency's auspices concerning (i) all Laws applicable to the collection, handling and protection of Sensitive Information, (ii) the need to obtain client consent to collect, retain, disclose or otherwise use any Sensitive Information, and (iii) the necessity of strictly complying with documented policies and procedures of Host Agency that are designed to insure that there is no unintended loss, disclosure, duplication or use of any Sensitive Information. Such training will include, without limit, a requirement that as a prerequisite to accessing data in the CVM Centralized System, each potential user of the CVM Centralized System sign and agree to comply with CVMN's *Database User Agreement*, as in force from time to time. Host Agency agrees to retain all signed copies of the *Database User Agreement* for all persons accessing data in the CVM Centralized System under the auspices of Host Agency.

5. Handling Sensitive Information outside the CVM Centralized System. Before allowing any person to access the CVM Centralized System, Host Agency will develop, implement and, upon request, provide CVMN with a copy of a written policy regarding the collection, maintenance and use of Sensitive Information that Host Agency elects not to enter into the centralized CVM Voicemail System.

- As an example of such a policy, a Host Agency's CVM manager could maintain a cross-referenced list of date/DID/client name/SSN/DOB on a local computer server so that the information is available as required by funders or the Host Agency, but is not entered directly into the CVM centralized database.

6. Agreement to Comply with additional CVMN Policies. Host Agency is aware of and agrees to comply with the following CVMN policies regarding data confidentiality and security, and any other policies related to the CVM Centralized System delivered to Host Agency by CVMN:

- That before access will be granted to the CVM Centralized System's online database, one or more members of its staff and one or more members of the staff at each agency participating in the CVM program through the auspices of Host Agency must sign a *Database User Agreement*, in the form prescribed by CVMN from time to time, a copy of which is attached hereto and incorporated herein as Exhibit B.
- That CVMN recommends that a *Participating Agency Agreement*, in the form prescribed by CVMN from time to time, be signed by all participating agencies who receive CVM voicemail boxes to distribute, and that if CVMN determines it to be appropriate, CVMN may require the use of such agreements.
- That CVMN recommends that a *Client Agreement of Understanding*, in the form prescribed by CVMN from time to time, be signed by all end-users/clients who receive a CVM voicemail box, and that if CVMN determines it to be appropriate, CVMN may require the use of such agreements.
- That CVMN recommends that the Host Agency including one or more members of its staff and one or more members of the staff at each agency participating in the CVM program through the auspices of Host Agency, not enter identifying information such as name, SSN or DOB for victims of domestic violence and/or any client who does not provide written consent. Relevant demographics, objectives and outcomes should still be entered into the system.
- That Host Agency is aware that the database vendor for the centralized CVM Centralized System is Community TechKnowledge ("CTK"), that CTK has agreed

to protect the confidentiality and security of Sensitive Information on the CVMN servers but that this assurance is not absolute. (For a summary of Community TechKnowledge's security practices for the centralized CVM database see: <http://www.communitytech.net/solutions/117/>).

7. Confidentiality Agreement. Host Agency shall treat all nonpublic information regarding the CVM Centralized System and its use ("CVM Confidential Information") as the confidential and proprietary information of CVMN. Host Agency will not at any time during or after the term of this Agreement directly or indirectly disclose, use, reproduce or publish any CVM Confidential Information, unless Host Agency first secures the written permission of CVMN to make such disclosure, use, reproduction or publication. The foregoing obligation shall not include data or information which is now in the public domain or which becomes part of the public domain through no fault of Host Agency prior to the date of any disclosure. Upon termination of this Agreement, Host Agency will deliver to CVMN all originals and copies in Host Agency's control or possession of any and all objects, materials, devices or substances which come into Host Agency's possession, including any writings, records, journals, data, drawings, samples, prototype models or photographs which describe, depict, contain or record any CVM Confidential Information. Host Agency shall insure that all persons accessing the CVM Centralized System through the auspices of Host Agency will comply with the terms of this Paragraph.

8. Miscellaneous. This Agreement is the entire agreement of the parties with respect to the subject matter hereof and may not be amended or superseded by any prior or contemporaneous oral or written agreement or understanding. Agency's confidentiality obligations under this Agreement will survive the termination of its participation in the CVM Centralized System.

Local CVM Site/Host Agency:

CVM System Manager

Date

Print Name: _____
:

Executive Director, CVM Host Agency

Date

Print Name: _____

CVM National Office:

Jennifer Brandon
CVMN Executive Director

Date



Exhibit A

Data Confidentiality & Security Policy

Community Voice Mail National Office (CVMN) is the custodian of the CVM Centralized System, which includes a voicemail system and a web-based client database. CVMN will protect the security of the database and the sensitive client information it may contain by doing the following:

1. Work with established vendors who uphold confidentiality and privacy laws and who implement standard security practices as part of contracted services. For a summary of the security practices for the centralized CVM database adopted by Community TechKnowledge, see: <http://www.communitytech.net/solutions/117/>.
2. Attempt to design and implement systems which limit the ability of CVM sites/affiliates to access each others' data through appropriate access controls, permissions & report filters.
3. Limit access by CVM staff and tech support personnel to such access as is necessary or appropriate to administer the system, monitor for abuse (visual only) and conduct analysis for aggregate reporting.
4. Sign and uphold a *Data Confidentiality & Security Agreement* with all CVM Host Agencies who are participating in the CVM Centralized System which includes the requirement that all Host Agencies, and relevant staff, agree to comply to all applicable federal, state, county and municipal laws, regulations, rulings and orders (collectively, "Laws") that relate to the protection of sensitive client information ("Sensitive Information") and/or the need or advisability of obtaining client consent relating to any Sensitive Information.
5. Require that before access will be granted to the CVM Centralized System's online database, one or more members of its staff and one or more members of the staff at each agency participating in the CVM program through the auspices of Host Agency must sign a *Database User Agreement*.
6. Recommend that a *Participating Agency Agreement* be signed by all participating agencies who receive CVM voicemail boxes to distribute, and require the use of such agreements if deemed appropriate.
7. Recommend that a *Client Agreement of Understanding*, be signed by all end-users/clients who receive a CVM voicemail box, and require the use of such agreements if deemed appropriate.
8. Recommend that the Host Agency, including one or more members of its staff and one or more members of the staff at each agency participating in the CVM program through the auspices of Host Agency, not enter identifying information such as name, SSN or DOB for victims of domestic violence and/or any client who does not provide written consent. Relevant demographics, objectives and outcomes should still be entered into the system.



CVM Agreement for Participating Agencies

Purpose

Community Voice Mail (CVM), a program of the _____ (host agency) and Community Voice Mail National, provides voicemail technology to help people in transition and crisis receive messages from potential employers, landlords, health care providers, child care providers, case managers and providers of critical human services. **The purpose of this CVM Agreement is to outline requirements and to operate as a contract between _____ (host agency) and _____ (participating agency) in order to fulfill the ultimate mission of Community Voice Mail.**

Fees

The _____ (city/region) Community Voice Mail program is a collaborative effort between _____ (participating agency) and _____ (host agency). This participating agency has requested and been assigned _____ CVM voice mailboxes for a period of one year at a cost of \$ _____ per box per month (\$ _____ per month). ***Please provide a signed copy of this agreement to your agency's financial director.*** NOTE: fees may not be extended to client as would be a violation of CVM mission.

Roles & Responsibilities

The success of this program depends on the cooperation of the above participating agency and the host agency to work together in the following ways:

Requirements of Staff at Participating Agencies

1. Protect the integrity of the Community Voice Mail (CVM) program by determining eligible clients, assign them a CVM voice mailbox, assist them in recording a greeting, setting a security code and train them to retrieve their messages.
2. Obtain client signature on all CVM forms (see Client Agreement of Understanding on Intake/Outcome Form).
3. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
4. When a CVM client completes use of CVM, complete the "Exit & Outcomes" sections of the original CVM Intake/Outcome sheet, a client survey (if applicable), and reset the appropriate voice mailbox with your agency security code to protect the vacant CVM number.
5. Notify the CVM office of new or closed clients by completing all the necessary forms for each CVM client. Fax the forms within 24 business hours to the CVM System Manager at _____.
6. Upon need, request additional telephone numbers and retraining from the CVM System Manager.

Requirements of Host Agency - CVM Staff

1. Provide excellent customer service and technical assistance to the local CVM network of participating agencies and clients.
2. Train and retrain participating agency staff.
3. Provide participating agencies with a CVM monthly report showing system activity to promote consistent record keeping among participating agencies.
4. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
5. Update materials, policies, and procedures with feedback from the CVM Participating Agencies and Clients.

Failure to comply with requirements by either party may result in termination of this agreement. Either party may cancel this agreement and, as a result, cancel the official affiliation between the Participating Agency and the Community Voice Mail program.

Participating Agency Name

Signed: Participating Agency Director, Date

Signed: CVM System Manager, Date

Signed: Participating Agency CVM Representative, Date

Tab 19
Description of Outreach

Tab 19 Description of Outreach

The partners in this project will conduct outreach in three primary ways:

1. **Community agency training:** Approximately 50% of each CVM Manager's time at the host partner agency is allocated to community outreach and support. The CVM Manager will conduct regular outreach visits and trainings at community agencies, which will be given blocks of phone numbers to distribute to their clients, or establish the agency as a formal referring agency that vets client eligibility and then sends the client directly to the CVM Manager for voicemail enrollment. The CVM Manager also provides flyers and brochures to community agencies. This outreach method is successful because these agencies already serve the target population; because clients receive help on-site while enrolling; and because the CVM Manager acts like an account manager for each agency, providing customer support and refresher training.
2. **211 as referral:** 211s are community call centers that answer thousands of calls a month from people in need who request information about rent assistance, food banks, and emergency shelter. Since each host partner is a 211 agency, they will train operators to recommend CVM as a resource for callers who lack reliable phone service.
3. **Direct Outreach:** CVM Managers also attend community functions where the client population might congregate, including Veteran StandDowns, Homeless Connect events, and Job Clubs established at faith-based and other community institutions. For more information, see Tab 23 for Media Strategy.

CVM Community Partner Agencies (partial list)

- 2100 Lakeside
- Bridging the Gap
- Brookside Center
- Care Alliance
- Cleveland Mediation
- Cleveland Stand Down
- Employ Alliance
- Greater Cleveland ReEntry Project
- Harbor Light Complex
- IHN Greater Cleveland
- Josephs Home
- LEAP
- NEOCH
- North Point Transitional Housing
- Oriana House
- Pass Program
- Providence House
- Railton House
- Reentry Resource
- Towards Employment
- Transitional Housing



- Voc Guidance Svcs
- Volunteers of America
- Westside Catholic Center
- YHaven
- ACCESS Inc
- Crisis Center of Akron
- Akron Urban League
- AMHA
- Comm Services of Stark County
- Community Services of Stark Shelter Program
- Community Support Services
- Family and Community Services
- Goodyear Heights Pres Church
- Haven of Rest
- HM Life Copley
- HM Life Northfield
- HM Life Treeside
- HM Life TAG
- Info Line
- Oriana House Non Res Svcs
- Oriana Hse Employ Prgm
- Project Homeless Connect
- Safe Landing Youth Shelter
- Stark County TASC
- Summit Consumer Peer Support

Tab 20

Explanation of Staffing; Description of Personnel

Tab 20 Explanation of Staffing; Description of Personnel

In more than 40 communities around the country, Community Voice Mail has become a critical part of the social services safety net, enabling thousands of people in distress to stay connected to vital information, support, and opportunities to find work, housing, and safety. The program achieves this level of value via the following staffing design:

Job Title	Role & Responsibilities	Estimated % of FTE
CVM Manager employed by local partner (subcontractor)	Community outreach, customer enrollment & support; local PR; data compilation; reporting	1.0 FTE per OH partner/subcontractor
Local partner Supervision	Oversee CVM manager; attest that eligibility, reporting, confidentiality procedures are fulfilled to standard.	Estimated .1 FTE per OH partner/subcontractor
CVM National Program Manager	Training, orientation, and ongoing support of CVM managers including monthly cohort calls and annual site visit; content expertise for broadcasting campaigns; annual conference; program measurement and evaluation.	Estimated .12 FTE CVM National (bidder)
CVM National Tech Team	Tech system maintenance, upgrades, and report creation; tech support and troubleshooting; vendor relations.	Aggregate of .09 FTE across 2.6 FTE tech team CVM National (bidder)
CVM National Finance Manager	Manage project accounting, record-keeping, and subcontractor payments; contract management.	Estimated .08 FTE at CVM National
CVM National Director	Oversight of system and program operations; contract management and project coordination.	Estimated .06 FTE CVM National (bidder)

In order to serve the projected number of clients, each subcontractor is expected to employ a CVM Manager at a minimum of .75FTE for the extent of the pilot program. A job description of the CVM Manager follows this section.

In some cases, personnel is in place; in others, personnel will be hired upon notification that our bid has been selected. The following personnel are currently in place:

Site and Position	Personnel
Cleveland CVM Manager	KariNoir Mallory KariNoir Mallory has held the position of part-time CVM Manager for nearly two years, supporting more than 2,000 clients in her tenure. In addition to providing CVM services, she coordinates the NVEN project, a voter awareness initiative. She is employed by First Call for Help and serves on the CVMN Board of

	Directors.
Cleveland Director	Stephen Wertheim Stephen Wertheim is the Director of First Call for Help, United Way of Greater Cleveland's 211 call center. He has held this position for more than ten years and has an extensive background in nonprofit management, human services, and advocacy.
Akron CVM Manager	To Be Hired. Fred Berry will provide support to the hired CVM Manager. Fred holds the position of Housing Services Manager at InfoLine, Inc. and works extensively with community partner agencies to ensure the of community data and to coordinate housing services across Summit County.
Akron Director	Richard Stahl Richard Stahl is the President and CEO of InfoLine, Inc. Info Line is fully accredited by the Alliance of Information and Referral Systems , the international professional organization for the field of information and referral. This accreditation provides objective evidence of achievement in the areas of service quality and effectiveness, community involvement and organizational stability.
Columbus CVM Manager	To Be Hired. HandsOn of Central Ohio will work with CVM National to screen candidates for the CVM Manager position. See job description below.
Columbus Director	Marilee Chinnici-Zuercher Since 1991, Marilee Chinnici-Zuercher has directed the operations and policy management for HandsOn Central Ohio. HandsOn Central Ohio is a nonprofit organization dedicated to inspiring, equipping and mobilizing people to take action that change themselves and the world. HandsOn Central Ohio benefits from her lifelong dedication to civic engagement at all levels, locally, nationally and internationally. Prior to joining HandsOn Central Ohio, she served as Deputy Director of the Ohio Department of Youth Services, Correctional Services Division, where she managed seven juvenile parole offices and ten juvenile institutions.
CVMN Program Manager	Anna Landa Anna Landa has provided direct program support to CVM Managers for five years. She

	conducts on-site and remote trainings, develops curricula and maintains the library, coordinates monthly cohort conference calls and manager forums; analyzes program data and assesses program impact.
CVMN Tech Team	The CVMN Tech team comprises two network administrators and a HelpDesk technician. Collectively, the team has more than 15 years of IT support, system administration, and tech support.
CVMN Finance	Kathy Lynn, MBA, has been the Finance Manager at CVMN for ten years. Under her leadership, CVMN has received clean audits annually. She is experienced in fund accounting for both private and public funding sources and has a background in telecommunications.
CVMN Director	Jennifer Brandon has been the Executive Director at CVMN for thirteen years. During her tenure the organization has evolved into a telecommunications provider to a federation of community-based agencies that collectively connect more than 43,000 people annually. Steve Albertson, New Initiatives Director, has worked at CVMN for seven years. Steve researches, designs, and tests technology solutions to meet the needs of low-income and homeless people in the U.S. Steve and Jennifer will both contribute to the project.



SAMPLE CVM MANAGER JOB DESCRIPTION

The following description will give you an idea about the qualifications and responsibilities of a local CVM Manager located at the Host Agency:

This is normally a **full time professional position**. The CVM Manager will direct and oversee various elements of the CVM program, including but not limited to:

- Marketing
- Community organizing
- Public Speaking
- Program design & implementation
- Broadcasting important community information out to CVM users and partners
- Training
- Management of lead contacts in area non-profit organizations/participating agencies
- Financial management
- Fundraising
- Data Entry

Qualifications:

Individual should have proven community organizing and/or marketing ability, including ability to work with diverse groups of people, leadership and marketing skills, solid knowledge of local community service organizations, strong written and oral communication skills, demonstrated sensitivity to low-income people and to staff at participating agencies. Individual should be comfortable with computers and learning new technologies, be organized, highly motivated, comfortable speaking publicly, and able to work independently. Previous experience in human services is preferred. Bachelors degree.

Core Responsibilities:

- Market CVM Program to local social service and health agencies, and recruit them for participation; act as ongoing liaison with agencies through extensive field and telephone work. Train agency social and health workers to manage a bank of voicemail numbers, enrolling and closing out clients' usage. Collect, compile, and maintain program measurements, including demographic and outcome data. Respond to agency and client user problems. Work with CVMN on technical troubleshooting when problems arise within CVM system.
- Gather timely information on employment related opportunities, community events, civic engagement opportunities, health care, weather alerts and in order to broadcast messages to CVM users.
- Work with Host Agency supervisor, Board of Directors, and/or Community Advisory Board to prepare an annual marketing and fundraising plan. (If appropriate) Identify funding sources, write and submit grant proposals. Develop and maintain contacts with potential funding sources.
- Generate and provide statistical data to CVM National Office and funding organizations.
- Market CVM to all public and media sources. Provide program updates to CVMN for CVM Web Site. Participate in national CVM Federation, including attendance at annual CVM Federation conference.

Tab 21
Explanation of Functionalities
of Proposed CVM Service



Tab 21 Explanation of Functionalities of Proposed CVM Service

Following is an overview of the functionality of the CVM voice mail boxes, focusing on what the user will experience as a client of this system:

- **Maximum Messages:** There is no maximum number of new or listened-to voice mail messages the client can store in his/her box. The voicemail box capacity is only limited by the number of days a voice mail message can stay in the box. Because there is no limit on the number of voice mail messages that can be left in a box, there is no notification necessary for when the box is “full.”
- **Message Storage:** A voice mail message can be stored for a maximum of 90 days from the date it is first received. This applies to both new messages that have not yet been retrieved, and messages that have already been listened to. Any message older than 90 days will automatically be deleted from the system. Upon login, clients will receive a voice mail message 7 days prior to this 90 day deadline informing them that these messages will be automatically deleted. This policy will also be described in the Client Agreement of Understanding and the Administrator (aka: CVM Host Partner) Handbook.
- **Message Length:** Voice messages can be a maximum of 90 seconds in length (the caller will be cut-off after 90 seconds).
- **Message Access via Internet:** At this time, clients cannot retrieve voice mail messages via the Internet. However, any client that provides CVM with his/her email address will automatically receive a brief email message whenever a voice mail message is waiting for them. This message includes the phone number of the caller that left a message. This is a useful signal to online clients that they should locate a phone and listen to their voice mail messages.
- **“Robocalls”:** We do not have a way to prevent “robocalls” to CVM voice mail boxes, but this has not proven to be a significant issue in the past. It is not possible to add (in bulk) all CVM numbers to the National Do Not Call registry.
- **Number Acquisition & Recycling:** Working with a national telecommunications company, local phone numbers are purchased by the CVM National Office for a given city or territory, and that inventory of numbers is provided to the CVM Host Partner in that area. The Host Partner in turn distributes numbers to the Participating Agencies who in turn provide them directly to their clients. The CVM National Office maintains the relationship with the telecommunications vendor, and increases or decreases the inventory of numbers as necessary based on the demand for the service. When a client no longer needs or is no longer eligible for the service, the phone number is reset and made available (“recycled”) for other clients.

The CVM system offers the following additional features:

- **Broadcast Voice Messaging:** Local CVM managers and/or service providers will have the ability to record a single message and automatically have it delivered into the voice mail box of all CVM clients in the area. Since 2008, CVM sites around the country (including the two Ohio sites) have used this feature extensively to provide clients with information about jobs, housing, healthcare, local events and resources, and a wide range of other important information.
- **Email Broadcast Messaging:** Any CVM client who provides an email address at intake is automatically added to an email list for that CVM site. The local CVM Manager sends

messages to this list that generally mirror the information sent via broadcast voice messaging (about jobs, housing, etc.). Email messages are often more detailed than the voice messages, and include links to web site and email addresses.

- **Reply to Messages:** Clients have the ability to press the 4 key on their phone and respond to any voice message they receive from the local CVM Manager or their Case Manager, provided the message was generated within the system. In other words, if a CVM Manager creates and sends a broadcast voice message asking a question or requesting an RSVP for an event, the client can press 4 and leave a reply message for the CVM Manager immediately after listening to the message, and without having to make an additional phone call. CVM has used this message reply system to gather data and feedback from clients all over the U.S., and it greatly enhances the communication process with this normally hard-to-reach population.
- **Email Notification:** As described above, any client who provides an email address at intake automatically receives an email message whenever there is a new voice mail message waiting for them in their box. This service helps clients learn when they should seek out a phone to check their messages, and the message most often includes the phone number of the caller that left the message.
- **Hotlines:** CVM Managers can request that a hotline be created to service their program or social service providers in their city. A local phone number is designated, and the message “tree” is defined by the CVM Manager, who is also responsible for updating the information heard on the hotline. For example, the Cleveland CVM site has established a hotline for one of their agencies (Joseph’s Home, 216-635-7873), and Summit County has done the same for one of their agencies (Goodyear Heights Presbyterian Church, 3305721626).
- **Voice Surveys:** As indicated above, using the Message Reply feature, CVM is able to conduct surveys to gather valuable data from Clients about their use of CVM or any other information. The system also has a survey tool that allows clients to dial-in to take multi-question, narrative surveys. These survey tools have been used to quantify how clients access their voice mail, what kind of information they want to receive via broadcast messaging, how much they value broadcast messaging (and how they use the information), and a range of other topics.

Other services that some CVM sites are providing:

- **Blogs:** CVM sites around the country have established blogs as another vehicle for distributing information to clients, their agencies, and anyone else who may need help. These blogs become the repositories for the information sent to clients via broadcast voice and email messaging. Both existing Ohio sites maintain blogs; see <http://clevelandcommunityvoicemail.blogspot.com/> for Cleveland CVM, and <http://cvmsummit.blogspot.com/> for Summit County CVM.
- **Social Media** (Facebook, Twitter, YouTube, etc.): Some CVM sites around the country are experimenting with social media technologies as yet another avenue of doing outreach to prospective clients/agencies, and providing information about available services.
- **Disaster Response for Social Service Agencies:** Some CVM sites around the country have provided social service agencies their own CVM number to be used in case of emergencies or disasters. A Disaster Voice Mail Box for staff can be set up for situations when their own local phone systems/infrastructure may be compromised.



Outgoing greetings can be changed telling staff the status of the office and instructions re: next steps.

Tab 22
Identification of Proposed Service Area(s)

Tab 22 Identification of Proposed Service Area(s)

We have chosen to provide service to agencies located in the following counties.

Counties	Primary Designation
Cuyahoga	Urban
Geauga	Rural
Medina	Rural
Wayne	Rural
Holmes	Rural
Summit	Urban
Stark	Urban
Crawford	Rural
Richland	Rural
Ottawa	Rural
Seneca	Rural
Sandusky	Rural
Wyandot	Rural
Erie	Rural
Ashland	Rural
Huron	Rural
Portage	Rural
Franklin	Urban
Athens	Rural

Tab 23

Explanation of Advertising Plan and Media
Strategy to Promote Usage



Tab 23 Explanation of Advertising Plan and Media Strategy to Promote Usage

The Community Voice Mail pilot program will be promoted through the following channels:

- **Social Service Agencies:** Most clients will hear about the program through social service agencies from which they are seeking services. We have found that providing voice mail in the context of case management and other direct services, clients have the greatest opportunity for achieving their goals. Outreach to social service agencies and other entities (Veterans Administration, Public Health, etc.) will be conducted through direct one-on-one communication (incl. office visits), attendance and presentations at community events (United Way and homeless coalition meetings, etc.), and through word-of-mouth generated by other marketing materials and information resources (see below).
- **Direct Outreach to Clients:** Clients will learn about the service directly through our participation in community outreach events like Project Homeless Connect (see www.infolineinc.org/index.php?option=com_content&view=article&id=93&Itemid=122 for a recent event in Summit County) and Veterans Stand Downs (see www.centralohiostanddown.com for a recent event in Columbus), where large numbers of people in crisis and transition come to learn about services. At these events, clients can sign up for voice mail numbers, and other service providers can learn about the program.
- **Online Outreach:** The current CVM sites in Cleveland and Summit County pursue a range of online outreach and marketing tactics to educate potential clients and social service agencies about the voice mail program. Below are some of the ways we use Internet technologies in this regard (the Columbus CVM program that is described in this proposal will also use these tactics):
 - **Web sites:** Each program will have a web site dedicated to the voice mail service providing an overview of the service and how clients and agencies can access it. Example: Cleveland CVM site (www.clevelandcvm.org), which also includes training documents for clients and agencies. Included in this section are some of the training materials used in Ohio to help agencies and clients use the service.
 - **Blogs:** As indicated elsewhere in this proposal, blogs are used by Ohio CVM programs as repositories for information sent to clients using broadcast voice and email messaging. They also serve as an additional point-of-presence for describing the voice mail program.
 - Community Voice Mail National Blog – communityvoicemail.blogspot.com
 - Cleveland Blog – clevelandcommunityvoicemail.blogspot.com
 - Summit County Blog – cvmsummit.blogspot.com
 - **Video and Other Media:** The CVM National Office regularly create videos, animations and other media pieces about the CVM service, and makes these available to all local programs for inclusion on their web sites and blogs. Examples of these materials can be found on the CVM National web site (see www.cvm.org/videos.cfm). Many local sites also have their own YouTube channels (outwww.youtube.com/user/cvmnational) for publishing locally-created videos.



- **Google Maps:** All CVM sites can establish Google Maps showing the location and contact information for agencies providing the service. See list.cvm.org/mapping/Cleveland.html (Cleveland map) as an example.
- **Social Media:** CVM sites are trained and encouraged to use social media tools like Facebook and Twitter as other means of reaching clients and agencies.

Training: Extensive training and support is provided to program managers, participating agencies and the individuals receiving the service. The CVM National Office provides extensive training and ongoing support to new program managers, usually including a visit by National Office staff to the local program. Materials covering management of the program, best practices and outreach materials are provided. These local managers in turn provide training to the representatives at social service agencies who will provide the voice mail numbers to clients. The clients themselves receive hands-on assistance with setting up their voice mail box, recording outgoing greetings, and setting a passcode. They leave with a wallet card that provides additional information about how to use the voice mail service.

Training materials will be submitted to PUCO for review upon acceptance of this proposal.

Tab 24
Minimum Service Requirement



Tab 24 Minimum Service Requirement

The CVM system meets all the Minimum Service Requirements outlined in the RFP:

- The voice mail number provided to all clients will be a local number, within the local service exchange area in which the agency providing the service is located.
- The voice mail boxes do not have any message limits, and therefore store more than the required twenty voice messages described in the RFP.
- Messages are stored for a maximum of 90 days, regardless of whether they have been heard or unheard. Any message older than 90 days is automatically removed from the system. Clients will be notified by voice message 7 days in advance of deleting any message older than 90 days.

See Tab 21 for additional information about the functionality/features of the CVM system.

Tab 25
Monthly Reporting Requirements

Tab 25 Monthly Reporting Requirements

Community Voice Mail will provide the following reports to PUCO on a monthly basis, by the second Friday of each month following the reported month:

- Reported number of persons enrolled on the first day of the reported period, as well as on the last day of the reported period.
- Total number of persons enrolled during the reported period broken out by Urban and Rural service areas. As described in Tab 16 ("Eligibility"), the reports will be segmented into Rural and Urban based on the designation of the area in which each Participating Agency is located. In other words, agencies providing CVM in designated Urban areas will count toward the Urban tally, and agencies in Rural areas will count towards the Rural tally.
- Total new enrollees in the program during the reported period, segmented by the number who fit into the eligibility categories outlined in the RFP ("homeless persons," "clients of battered-spouse programs," "displaced and returning veterans.") We will also provide additional aggregate data based on information provided by the Client during intake, including such categories as age, ethnicity, race, gender, income sources, employment status, and number of dependent children/adults. (Note: we do not have the ability to differentiate between "displaced" and "returning" veterans, but will instead provide data about the total number of qualifying clients who self-identify as having served in the military).
- Total number of enrollees who discontinued service during the reported period. This data will be provided based on program "exit" information collected by case managers at the social service agencies distributing CVM numbers. We can provide data in the following categories for reasons why clients have discontinued the service (these are organized around the specific goals for which the clients indicated they were using the service):
 - Client obtained employment
 - Client obtained housing
 - Client increased income
 - Client gained access to health care
 - Client received social services
 - Client attained safe communications (for victims of domestic violence)
 - Other reasons: Client abandoned box; client left program or service area; client reached maximum time limit; other reason; no information or outcome
- Nature, description and CVM response to any complaints received about the program during the period covered by the report.

Tab 26
Annual Reporting Requirements

Tab 26 Annual Reporting Requirements

Community Voice Mail Ohio will provide PUCO with the following annual reports, the first of which will be submitted by February 1, 2012 covering the period of initial operation through the end of the 2011 calendar year:

- Report showing the same usage criteria outlined in the Monthly Reporting Requirement (Tab 25), but for the annual reporting period (start date through the end of 2011, and then 2012).
- Report summarizing the nature and number of complaints received during the period, as well as the action taken to address the complaint.
- Proposed recommendations for improving the provision of service at the current time or in the future.
- Detailed financial information showing actual spending by Ohio CVM during the reporting period as compared to the budget submitted to PUCO as part of the bidding process.

Tab 27

Duty to Keep PUCO Apprised of Operational
Situations



Tab 27 Duty to Keep PUCO Apprised of Operational Situations

CVM National will keep the PUCO staff apprised of any situations that could potentially have a significant adverse impact of the overall service quality of the program. We will plan to communicate with staff via email unless PUCO staff wishes to use an alternative mode of communication.

Tab 28
Complaints and Inquiries Procedures



Tab 28 Complaints and Inquiries Procedures

Ohio CVM commits to comply with the requirements of Section 4.4 of the RFP, which proscribes how complaints and inquiries are to be accepted and processed. Specifically, we will establish the following mechanisms and procedures to meet this obligation:

CVM Ohio will provide toll-free phone numbers to be used by clients and other members of the public to submit complaints or to ask for general information about the service. The three CVM Ohio host agencies (Contractors) will use either their existing 211 phone number (a toll-free call) or the underlying 1-800 number for 211 as a contact point for both complaints and inquiries. Providing the underlying 1-800 number will enable clients in areas not served by 211 to still make a toll-free call. The specific process is as follows:

Program Inquiries: Call center staff at each of the three 211s managed by the Host Agencies (Contractors) will be trained to provide callers with basic information about the Ohio CVM program, and provide referral information to social service agencies in the area that provide CVM numbers. We anticipate that some callers will be representatives of agencies interested in offering the service; these callers will be provided with the contact information for the CVM Manager for that geography.

Complaints: Callers to 211 or to the toll-free (1-800) number provided by 211 who wish to submit a complaint will be transferred to a voice mail box managed by the CVM National Office in Seattle. The caller will be asked to leave his/her name, phone number, email address and/or mailing address, as well as a description of the complaint. The CVM National office will refer complainants back to the local CVM Managers for resolution, and track the actions taken by the local program (ensure that the complaint has been professionally and successfully resolved). Per the RFP, if the complaint cannot be resolved by either the local CVM Manager or the CVM National Staff, it will be referred to PUCO's Service Monitoring and Enforcement Department's Investigation and Audit Division.

The CVM National Office will be responsible for tracking all complaints received, and will maintain a log of the date of the date the complaint was filed, the nature of the complaint, the date of resolution, and an explanation of the resolution. As indicated in Tab 25, the updated complaint log will be provided to PUCO as part of the monthly reporting requirement.

All individuals submitting a complaint will receive a response within 10 business days of first receipt of the voice mail message. In reply communication to the complainant, a direct dial phone number of the CVM National Office in Seattle will be provided so that a live conversation can take place if necessary.

The CVM National Office will also create an email address (e.g. cvmohio@cvm.org) to which complaints and inquiries can be submitted, and the mailing address of the CVM National Office will also be included on materials provided to clients, as well as to agencies providing the service. The web sites of the three CVM Ohio host agencies will also include a section on their program web sites describing the complaint procedure and ways to contact the CVM National Office. Following is the contact information to which complaints can be submitted:

Ohio CVM Complaint Resolution
Attn: Jennifer Brandon



CVM National Office
2901 3rd Avenue, Suite 100
Seattle, WA 98121
(206) 441-7872
ohiocvm@cvm.org

The toll free numbers for the inquiry/complaint line for each CVM Ohio territory will be provided on the Client Wallet Card (provided to each client upon enrollment), or otherwise made known to the client when they sign up for the service.

Tab 29

Documentation Showing System Design and
Explanation of How CVM Will Be Provided

Tab 29 Documentation Showing System Design and Explanation of How CVM Will Be Provided

A) Client Scenario: The following scenario is a complete description of our system and illustrates the power of Community Voice Mail as an integrated *information network*, making it possible for clients, case managers and others to seamlessly communicate and share information. This Client Scenario is based on a true composite of real client stories and service delivery.

A client (John) comes to the Columbus Workforce Development's One-Stop Center seeking employment and job training. He is living in a shelter, and does not have a phone number, although he does have an email account that he checks every other day at the local public library. At the One-Stop center, he goes through the intake process with a case manager (Jane). During intake, Jane asks if John would like a Community Voice Mail number, and he says yes. She provides him with a local, dialable number that he can put on job applications. Because John has an email address, she also signs him up for email notification, which means that he'll automatically receive a brief email message whenever a new CVM voice mail message is waiting for him. Jane tells John he'll also receive voice messages about new job and training opportunities at least twice a week, as well as other information that may benefit him via broadcast messaging.

During the next week, John applies for two jobs, listing his CVM phone number on the applications. On Thursday, he's in the library using a free computer and receives an email indicating that he has a new voice mail message waiting for him. He uses the library payphone (or a free phone at a nearby agency) to check his messages, and hears a broadcast voice message that Jane has sent to all of her clients, notifying them that The Home Depot is having an open hiring event on the following Friday (Jane had heard about this through a local network of companies seeking employees and from a fellow case manager). At the end of the message, Jane asks that those interested in attending the event RSVP to her by return voice mail. John is interested, so after listening to the message, he presses the 4 key and leaves Jane a message (with no need to hang up and pay for another call).

Back at the One-Stop agency, Jane receives a text message in her work email indicating that a client has left her a message (she, too, has email notification turned on). She connects to her CVM voice mail box, and hears John's RSVP for The Home Depot Event. She, too, presses 4 to reply, thanking John for his RSVP and wishing him luck, and then notifies her contact at The Home Depot that John will attend.

After this, she sends another broadcast message describing a free workshop for people who need help creating or polishing their resume, taking place next Wednesday at a local Community College. John hears Jane's message about the resume workshop, decides to attend, and calls that agency separately to RSVP.

The following Friday, resume in hand, he attends the The Home Depot event, and applies for employment listing his CVM number on the application. A week later, The Home Depot leaves him a message indicating that they'd like to interview him. Two weeks after the interview, John is offered a part-time job in the lumber department at the store, but he continues to receive voice mail messages from Jane about other employment possibilities. Several months later,



while still living in the shelter, John is offered a full-time job at The Home Depot. This enables him to rent a small apartment, and to afford a pay-as-you-go mobile phone, which makes accessing his CVM voice mail easier. Finally, after 6 months of stability in his job and in his new home, John calls Jane to say that he no longer needs his CVM voice mail number, and that it should go to someone else who does.

Jane is thrilled about John's success. She enters his outcome of employment and housing in the centralized CVM database and then resets John's voicemail number by calling it and entering a code. The voicemail is now clean—the greeting, security code, and any remaining messages are deleted—and available for the next person who comes to Jane for help.

B) Facilities and Equipment: The diagram below illustrates a high-level design of the CVM voicemail system.

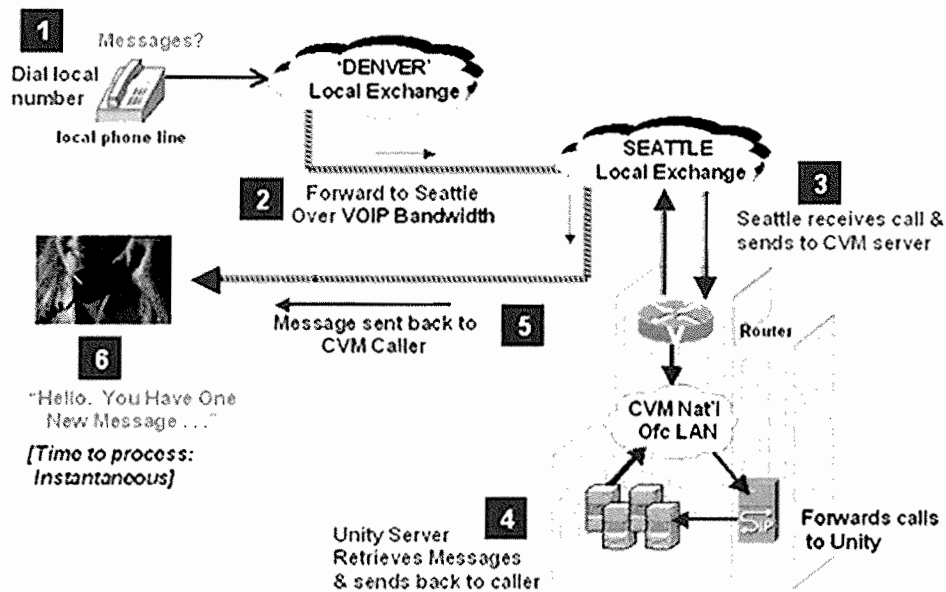
CVM National owns and operates the server network, consisting of Cisco Systems unified messaging software and hardware. Cisco Systems donates Unity and Call Manager software as well as all required hardware. (The in-kind value of this donation is approximately \$5M.) The CVM server is located in leased collocation space in a professional hosting facility located in Seattle, WA. CVMN professional offices are located nearby in downtown Seattle and are donated to us. For this reason, we have not included a budget request for occupancy.

CVMN purchases VoIP services and an inventory of approximately 29,000 TNs (Telephone numbers) from a telecommunications service provider. For this proposed project, approximately 3,000 – 5,000 TNs reflecting Ohio exchanges will be purchased and allocated to Host Partners & Participating Agencies according to geography.

CVMN also purchases database services from a third party vendor, which stores the data in its secure facility in Austin, TX. The centralized database is accessible to CVMN and Host Partner staff via a web interface.

Each Host Partner named in this proposal operates out of existing office space in Cleveland, Akron, and Columbus, respectively. The only equipment necessary for Host Partners to provide CVM services to clients is a computer with Internet connection and a telephone.

CVM "Single Server Model" Using VOIP (Voice Over Internet Protocol)



C) Personnel and Training:

Host Partner Personnel:

- **CVM Manager:** Each Host Partner will employ a CVM Manager to coordinate outreach and enrollment efforts in their respective geographic area. These employees are frontline staff who handle customer inquiries and complaints, manage local inventories of voicemail numbers, produce project reports, and deliver broadcast messages.
- **Supervision/Management:** Local accountability for the project will be ensured via principals from each Host Agency, named in Tab 7.

Bidder Personnel: CVMN will employ Program Management, Technical Maintenance and Support, Administration/Oversight, and Fiscal Management services.

- **Program:** CVMN program staff provide both on-site and remote in-depth training to Host Partner staff, as well as on-demand customer support regarding all elements of the voicemail, database, and service delivery systems; monthly cohort conference calls; creation and coordination of library resources; and program evaluation services.
- **Technical:** CVMN employs a 2.6FTE network administration team, which primarily accesses the servers located at the data center remotely but are also badged for onsite access as necessary. Tech personnel are responsible for maintaining server uptime, ensuring redundancy systems, troubleshooting database issues, engaging with telecommunications vendors, and customizing reports for subcontractors as necessary.



- Administration/Financial Oversight: CVMN's Executive and New Initiatives Directors and Finance Manager ensure that fiscal and contractual standards are met. As a team they will provide account support to each Host Partner and to the project's designated manager at PUCO.

D) Records Management:

CVMN's accounting system will be maintained in accordance with GAAP as applicable. Accounting documentation will be kept for six years after the expiration/termination of the CVM pilot program. Records involving matters in litigation will be kept for one year following the termination of litigation and associated appeals if the litigation has terminated within six years.

E) Timeline

CVMN and its Host Partners (subcontractors) are established human services organizations with expertise and infrastructure necessary to provide voicemail and information services to people in distress and transition. CVMN and its Host Partners are committed to implementing the pilot project as put forth in this proposal.

While we intend to comply with the service commencement requirements set forth in Paragraph (A) of Section 6 of Sub S.B. 162, as a not-for-profit organization, we are not in a financial position to begin providing services under the pilot program within 60 days unless and until PUCO can assure us that a minimum of \$65,000 CVM pilot program assessment payments have been collected and are available for reimbursement prior to the 60-day period. If this balance is not on hand when we are officially notified of our selection as a vendor, we respectfully request and expect to be granted an extension of the 60-day time period until a minimum \$65,000 balance on hand is secured. We also require that PUCO notify us if and when the CVM pilot program assessment payments on hand fall below \$65,000 during the CVM pilot program unless the amount left to be reimbursed under the program is less than \$65,000 and funds available are equal to the funds left to be reimbursed.

	Major Activities
Award Announcement Year 1 Qtr 1	Release job opening announcements for open CVM Manager positions Determine number of TNs needed for first six months of project Establish accounting and reporting systems
Within 60 days of announcement	Conduct interviews for open CVM Manager positions Place TNs orders with vendor; create vmail and data accounts Site visit by CVMN to orient new staff and kick-off project
Ongoing	Recruit community agency partners Conduct other outreach and marketing activities Enroll clients on CVM; provide regular information broadcasts Compile monthly reports (client, system, financial) Monitor and service voicemail server Provide training, customer support, and program development
Quarterly	Hold Ohio cohort conference call to share best practices, troubleshoot challenges, set goals for next quarter.
Semi-Annually	Assess inventory needs and order new TNs as appropriate.
Annually	CVMN conducts site visits

	CVM National Federation conference is held in Seattle Annual report submitted to PUCO
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Tab 30
Projected Budget



Tab 30 Projected Budget

The following budget is indicative of the twenty-four month pilot period. The voicemail inventory will grow over the course of the project, increasing from an estimated 2,160 voicemail numbers to 3,580 voicemail numbers, distributed across the geographies previously described in this proposal.

In the following budget you will note that several line items assume funding sources other than PUCO. (Most notably, CVMN's equipment costs are not charged to PUCO: those costs have been donated to CVMN by Cisco Systems Foundation.) The total cost of the pilot charged to PUCO for two years of service with an estimated total of 7,000 people served, is \$500,000. This represents voicemail accessibility for people receiving services from agencies in 19 counties that are designated as urban, rural and urban/rural. The average unit cost is \$7.06 and includes the voicemail number, broadcast messaging, auto reply, email notification, and surveys.

Please note:

- The total inventory of voicemail numbers will grow from an estimated 2,160 to 3,580 over the course of the project period
- Typical CVM users require use of their CVM number for eight months
- Upon exit of a client, the same voicemail number can be recycled and re-assigned via telephone reset procedure
- Capitol costs of equipment and occupancy would not be charged to PUCO

Please contact CVMN personnel for any questions you may have about the following budget.

PUCO RFP-CVM 10-2767

Ohio 2 Year Community Voicemail Service Pilot Program

Est # vmail boxes to be made available in Ohio over the 2 year term

Avg cost to be reimbursed by PUCO per vmail box estimated to be made available in Ohio *

	1	2	3	4	5	6	7	8	9	10	11	12
	2,163	2,233	2,303	2,373	2,443	2,513	2,583	2,653	2,723	2,793	2,863	2,933
70,863												
\$ 7.06												

Full 2 Year
Budget of
CVMN and 3
Subcontractors
PUCO 2
Year
Budget

Pilot Program Payroll Costs

CVM Ohio Managers 100% of 3 FTEs	\$ 268,429	\$ 219,000	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125
CVM Ohio Supervision 25% of 3 FTE	\$ 60,000	\$ 39,500	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646
CVMN Pilot Program 12% of 2 FTE	\$ 321,358	\$ 38,563	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607
CVMN Pilot National Supervision 6% of 2 FTE	\$ 406,750	\$ 24,405	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017
CVMN Pilot VMail Tech 9% of 2.6 FTE	\$ 362,010	\$ 32,581	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358
Pilot Program Other Costs												
Direct Expense - Vmail Vendor Costs (Ohio only)	\$ 105,000	\$ 88,500	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688
Travel Costs	\$ 88,299	\$ 19,200	1,600	1,600	400	400	1,400	400	400	400	3,500	400
Training, Orientation, Admin/Audit/Billing, Cohort Calls	\$ 265,000	\$ 29,000	2,180	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166
Materials & Supplies Cost (Ohio only)	\$ 10,366	\$ 5,037	2,400	100	100	100	100	100	100	100	100	100
Advertising/Media/Community Outreach	\$ 5,612	\$ 4,214	600	200	200	200	200	200	200	200	200	200
Occupancy and Other Expenses	\$ 3,806,107	0										
	\$ 5,698,931	\$ 500,000	25,220	20,706	20,306	21,506	20,306	20,306	20,306	20,306	23,406	20,306

* this does not reflect the full cost of the vmail boxes available in Ohio, there are costs that are being covered by other funders.

PUCO RFP-CVM 10-2767

Ohio 2 Year Community Voicemail Service Pilot Program

	13	14	15	16	17	18	19	20	21	22	23	24
Est # vmail boxes to be made available in Ohio over the 2 year term												
Avg cost to be reimbursed by PUCO per vmail box estimated to be made available in Ohio *	3,003	3,073	3,143	3,213	3,283	3,353	3,423	3,493	3,563	3,580	3,580	3,580

Pilot Program Payroll Costs

CVM Ohio Managers 100% of 3 FTEs	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125	9,125
CVM Ohio Supervision 25% of 3 FTE	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646	1,646
CVMN Pilot Program 12% of 2 FTE	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607	1,607
CVMN Pilot National Supervision 6% of 2 FTE	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017	1,017
CVMN Pilot VMail Tech 9% of 2.6 FTE	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358	1,358
Pilot Program Other Costs												
Direct Expense - Vmail Vendor Costs (Ohio only)	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688	3,688
Travel Costs	400	400	400	400	400	400	400	400	400	400	400	400
Training, Orientation, Admin/Audit/Billing, Cohort Calls	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166	1,166
Materials & Supplies Cost (Ohio only)	100	100	100	100	100	100	100	100	100	100	100	37
Advertising/Media/ Community Outreach	150	150	150	150	150	150	100	100	100	100	100	14
Occupancy and Other Expenses												
	20,256	20,256	20,256	20,256	20,256	20,256	20,206	20,206	20,206	20,206	23,306	20,057

* this does not reflect the full cost of the vmail boxes available in Ohio, there are costs that are being covered by other funders.



2901 Third Avenue #100, Seattle, WA 98121-1037

PUCO RFP-Community Voice Mail 2yr Pilot Program

office (206) 441-7872

fax 206-443-3755

Kathy Lynn, Finance Manager

Email: klynn@cvm.org

Billed To:

Public Utilities Commission of Ohio

180 East Broad Street

Columbus, OH 43215-3793

Invoice for Month of:

Due upon Receipt

	Total Contract to be Billed a	Amounts Billed for Prior Period b	Amounts Billed for Current Period c	Cummulative Amounts Billed b + c	Balance of Contract to be billed in future Periods a-b-c
Pilot Program Payroll Costs					
CVM Ohio Managers	\$ 219,000			\$ -	\$ 219,000
CVM Ohio Supervision	\$ 39,500			\$ -	\$ 39,500
CVMN Pilot Program	\$ 38,563			\$ -	\$ 38,563
CVMN Pilot National Supervision	\$ 24,405			\$ -	\$ 24,405
CVMN Pilot VMail Tech	\$ 32,581			\$ -	\$ 32,581
Pilot Program Other Costs					
Direct Expense - Vmail Vendor	\$ 88,500			\$ -	\$ 88,500
Travel Costs	\$ 19,200			\$ -	\$ 19,200
Training, Orientation, Admin/Audit/Billing, Cohort Calls	\$ 29,000			\$ -	\$ 29,000
Materials & Supplies Cost	\$ 5,037			\$ -	\$ 5,037
Advertising/Media/ Community	\$ 4,214			\$ -	\$ 4,214
	<u>\$ 500,000</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 500,000</u>

Please pay this amount ----->

Please make payable to:

Community Voice Mail National Office

2901 Third Avenue #100

Seattle, WA 98121-1037

Tab 31
Cost Proposal



Tab 31 Cost Proposal

Final Contract Offer:

Community Voice Mail National submits this bid to provide voicemail and information services to people in distress, per the RFP numbered CVM 10-2767.

The total request for this bid is \$500,000 for the full two-year project period. CVMN and its subcontractors would deliver voicemail services to approximately 7,000 people who receive services from agencies in the 19 Ohio counties named throughout the proposal.

This contract price includes all items of work defined in the proposal.

This foregoing document was electronically filed with the Public Utilities

Commission of Ohio Docketing Information System on

2/7/2011 4:00:38 PM

in

Case No(s). 10-2767-TP-UNC

Summary: Response Proposal (Part 2 of 2) from Community Voice Mail National re: 10-2767-TP-UNC electronically filed by Mr. Daniel O Cheever on behalf of Community Voice Mail National and Ms. Jennifer D Brandon