

23137

DATE: November 21, 2011

TO: Board of Acquisition and Contract

FROM: Marguerite Beirne  
Chief Information Officer

Kevin McGuire  
Commissioner of Social Services

RE: AUTHORIZATION TO ENTER INTO AN AGREEMENT (IT-1216) WITH CORE BTS, INC., FOR SERVICES TO PROVIDE DESIGN, DEVELOPMENT, IMPLEMENTATION, TESTING, MAINTENANCE AND SUPPORT OF SOFTWARE AND EQUIPMENT FOR AN INTERNET PROTOCOL UNIFIED CONTACT CENTER (IPCC) AND SELF-SERVICE INTEGRATED VOICE RESPONSE (IVR) SOLUTION FOR THE DEPARTMENT OF SOCIAL SERVICES CASE MANAGEMENT INFORMATION CENTER (CMIC), FOR A TWO-YEAR PERIOD COMMENCING DECEMBER 1, 2011 AND TERMINATING NOVEMBER 30, 2013, FOR A TOTAL NOT TO EXCEED AMOUNT OF \$715,000

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BACKGROUND:

- The Westchester County (the "County") Department of Social Services (DSS), in partnership with the Department of Information Technology (DoIT), has developed a pioneering Automated Recertification System (REACH) as a means of transforming the current paper recertification process for Temporary Assistance (TA) customers into an automated process using state-of-the-art information technology and systems. The system was developed in response to growing customer demand; increasing caseloads; and the need for increased efficiency, quality assurance, and cost-effectiveness using the latest available technologies to improve services while containing current costs and recognizing future savings. This innovative process, the first in the state, enables customers to complete their recertification interview independently through the use of a user-friendly in-office kiosk in each of our four (4) district offices. This automated process has reduced the application process to less than 30 minutes. Additionally, the REACH system reduces the potential for errors and helps case workers get more accurate information.
- As part of the continuing initiative to modernize and streamline the delivery system for TA, DSS is implementing a Case Management Information Center (CMIC). The CMIC will offer customers, as well as the general public, a new and efficient way to communicate with DSS. Using a call center model in conjunction with the REACH Case Management System, the CMIC will provide a centralized single point-of-contact where customers may inquire about benefits, get information or report changes on a case already open, or have complaints or other disputes resolved. The CMIC model will track all transactions and display pertinent case information, allowing for increased staff productivity and accountability. The CMIC will also provide a centralized single point-of-contact for the general public to receive general information regarding DSS services.
- The CMIC will be designed, engineered, and developed in a customized manner, in order to allow for the inclusion of a customized Internet Protocol Unified Contact Center (IPCC) and a

customized Integrated Voice Response (IVR) solution to facilitate self-service.

- The CMIC IPCC for DSS will be a customized and integrated solution provided by Core BTS, Inc. and is comprised of multiple components. The main components include a Cisco IPCC application, which is the software that manages the call flow, call queues and call center agents, and an Integrated Voice Response (IVR), which is a specialized solution that provides self-service options to DSS customers. Core BTS, Inc. will provide discovery, design and programming services to configure and integrate the individual components into the resulting IPCC/IVR customized solution. After integration, Core BTS, Inc. will test the individual components and the system as a whole to verify error-free operation and ready the system for production deployment. Once the system is deployed to a production environment, Core BTS, Inc. will provide maintenance and support for the entire solution including software and equipment.
- The public purpose of the proposed agreement is to benefit the public good by providing an efficient CMIC which will provide self service options, as well as excellent customer service by answering inquiries from our customers, community partners and departmental employees on the programs administered by DSS, and processing changes in a timely and accurate manner to ensure the correct level of benefits.
- The goals and objectives of the proposed agreement are efficient, cost effective delivery of DSS customer service to County residents. The utilization of the CMIC IPCC and IVR will allow the Department to handle increased caseloads and customer requests while eliminating the need for additional staff resources.
- The goals and objectives of the proposed agreement are in the best interests of the County in terms of fiscal responsibility, as it will provide efficient, cost effective delivery of DSS customer service to County residents. In addition, as the services are being procured through a New York State Office of General Services ("NYS OGS") contract, the County will benefit from the excellent rates for services that were obtained by NYS OGS, ultimately saving time and taxpayer money.
- The goals and objectives of the proposed agreement will be tracked and monitored by DoIT staff to ensure that the services provided by Core BTS, Inc. meet our standards and expectations.
- The proposed agreement is exempt from the County Procurement Policy pursuant to Section 3(a)(i) thereof, as the County is making this procurement through Core BTS, Inc.'s NYS OGS Contract Numbers PT64525 and CMT262A pursuant to New York General Municipal Law 104.

**ACTION REQUESTED:**

- Authorization to enter into an agreement (IT-1216) with Core BTS, Inc., having a place of business located at 201 W 103<sup>rd</sup> Street, Suite 240, Indianapolis, Indiana, 46290, for services to provide design, development, implementation, testing, maintenance and support of software and equipment for an Internet Protocol Unified Contact Center (IPCC) and Self-Service Integrated Voice Response (IVR) solution, for a two year term commencing December 1, 2011 and terminating November 30, 2013, utilizing the terms and conditions of NYS OGS Contracts PT64525 and CMT262A, for a total not to exceed contract amount of \$715,000, pursuant to an approved budget, subject to County appropriations.

A resolution authorizing the above agreement is submitted herewith for your approval.

## RESOLUTION

UPON A COMMUNICATION FROM THE CHIEF INFORMATION OFFICER, DEPARTMENT OF INFORMATION TECHNOLOGY, and THE COMMISSIONER, DEPARTMENT OF SOCIAL SERVICES, BE IT HEREBY

RESOLVED, that the County of Westchester (the "County") is authorized to enter into an agreement (IT-1216) with Core BTS, Inc., having a place of business located at 201 W 103<sup>rd</sup> Street, Suite 240, Indianapolis, Indiana, 46290, for services to provide design, development, implementation, testing, maintenance and support of software and equipment for an Internet Protocol Unified Contact Center (IPCC) and Self-Service Integrated Voice Response (IVR) solution, for a two year term commencing December 1, 2011 and terminating November 30, 2013, utilizing the terms and conditions of New York State Office of General Services Contracts PT64525 and CMT262A, for a total not to exceed contract amount of \$715,000, pursuant to an approved budget, subject to County appropriations; and be it further

RESOLVED, that this Agreement is subject to County appropriations; and be it further

RESOLVED, that this Agreement is also subject to further financial analysis of the impact of any New York State Budget (the "State Budget") proposed and adopted during the term of this Agreement. The County shall retain the right, upon the occurrence of any release by the Governor of a proposed State Budget and/or the adoption of a State Budget or any amendments thereto, and for a reasonable period of time after such release(s) or adoption(s), to conduct an analysis of the impacts of any such State Budget on County finances. After such analysis, the County shall retain the right to either terminate this Agreement or to renegotiate the amounts and rates approved herein. If the County subsequently offers to pay a reduced amount to the Contractor, then the Contractor shall have the right to terminate this Agreement upon reasonable prior written notice; and be it further

RESOLVED, that the County Executive or his duly authorized designee is hereby authorized and empowered to execute any and all documents necessary to effectuate the purposes hereof.

Account to be charged/credited:

IT-1216

Year	Fund	Dept	Major Program, Program & Phase Or Unit	Object/ Sub- Object	Trust Account	Dollars
2011	101	22	4000	4420-99		\$715,000
2012	101	22	4000	4420-99		N/A
2013	101	22	4000	4420-99		N/A

Budget Funding Year(s): 2011      Start Date: December 1, 2011      End Date: November 30, 2013

Funding Source:              Tax Dollars: 50%  
   State Aid:  
\$715,000                      Federal Aid: 50%  
(must match resolution)      Other:

APPROVED BOARD OF ACQUISITION & CONTRACT - 12/22/2011 - JOMARY VIEIRA, SECRETARY