Michigan 2-1-1

BUSINESS PLAN

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CONTACT
Nancy Lindman
Michigan 2-1-1 Director
Michigan Association of United Ways
1627 Lake Lansing Road, Suite B
Lansing, MI 48912
nlindman@uwmich.org
517 371-4360 x14

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EXECUTIVE SUMMARY

What is 2-1-1?

In July 2000 the Federal Communications Commission assigned the three-digit dialing code 2-1-1 for the exclusive purpose of providing widespread access to community information and referral services. Once described as "elegant in its simplicity," 2-1-1 is an easy to remember phone number linking callers in need to available health and human service programs and providing information important in preparing for and recovering from natural and man-made disasters. In January 2006, there were 171 active 2-1-1 systems operating in all or part of 32 states, the District of Columbia and Puerto Rico, reaching more than 139 million Americans, over 46% of the U.S. population.

2-1-1 in Michigan

This plan proposes creation of an integrated statewide 2-1-1 system, *Michigan 2-1-1*, that will make 2-1-1 services available to everyone in all of Michigan's 83 counties, 24/7/365 via Michigan-based telephone call centers and internet. It will be a public-private partnership embodied in an independent 501(c)3 organization governed by a board of directors representing United Ways and 2-1-1 Call Centers, state government, business, private philanthropy and the community.

Based on national trends and the state's population, the *Michigan 2-1-1* system is projected to be handling almost 800,000 calls in its third full year of operation and over 3.6 million calls over the first five years of operation.

At the heart of the system will be the most comprehensive database of health and human services in the state, including those provided by nonprofit organizations and by government at all levels. Callers will be linked to one of seven regional call centers, staffed by nationally certified specialists prepared to help them define their need and connect them with the community resources available to help. The database also will be publicly accessible through the Internet.

Regional 2-1-1 Centers. There will be seven regional 2-1-1 centers that will combine three functions:

- Serving as the call center for the region;
- Developing and managing the resource database for the region, working in cooperation with sub-regional resource hubs and county contact points; and,
- Acting as the primary focal point for leadership in developing 2-1-1 in the region – serving as the primary public face, managing the collection and analysis of call data, managing regional promotion in support of statewide promotional efforts, building partnerships with funders, governments and nonprofit service providers, etc.

Each Regional 2-1-1 Center will be staffed with trained and certified call specialists and resource specialists.

Resource Hubs. In six of the regions, excluding Southeast, there will be one or more sub-regional resource hubs, a total of ten statewide. Each will be staffed with no more than the equivalent of one full-time staff person who will be trained and certified as a resource specialist. The responsibilities of the resource hubs are to:

- Have primary responsibility for the development and maintenance of the resource database for their portion of the overall region, working in close collaboration and under the supervision of the Regional 2-1-1 Center; and,
- Serving as the "face" of 2-1-1 in their portion of the overall region - in their home counties and, as appropriate, in immediately surrounding counties – promoting 2-1-1, taking the lead in analyzing call data and providing it to

policy makers and funders, building community partnerships in support of 2-1-1, etc.

The locations for the resource hubs will be determined by using such criteria as:

- Location of significant population centers;
- Existence of current capacity and experience in building and maintaining a resource database;
- Demonstrated leadership in I&R and in the development of 2-1-1; and,
- Geographic diversity.

County Contact Points. Ideally, there would be a primary contact point for 2-1-1 in each county not served by a Regional Center or a Resource Hub. This would be a nonprofit service provider, a United Way, a local government agency or even an individual who would work under the general supervision of the Regional Center to serve as the "face" of 2-1-1 in the county – assisting in collecting and updating resource data, representing 2-1-1 in the county, promoting 2-1-1, helping disseminate call data on emerging and unmet needs, etc. We recognize that, at least initially, it may not be possible to recruit contact points in each county, particularly in our less populated and more rural counties.

Systemwide Functions. Resource development (fund-raising, government relations and business development), marketing, database and web management, system development and technical support will be vested in a central office led by a full-time executive director.

Michigan 2-1-1 will be a:

- **Simple, quick 24/7/365 link** to connect people efficiently and effectively to appropriate services. An easy number to remember, it will be great for cutting through confusion about complex human services and publicizing, explaining and helping people access new programs;
- **Partner in homeland security and emergency management** to assist with emergency events by providing easy access to information that needs to be communicated to citizens;
- **Partner with state government** in helping create greater efficiencies in the delivery of health and human services; and,
- **Barometer for identifying needs or gaps in service** and communicating them to public and private decision-makers and funders.

Why 2-1-1 Is Important to Michigan Now

Why is 2-1-1 critically important to the people of Michigan?

We are living through a period of economic and social transformation that has touched the lives of virtually everyone – as old jobs disappear before new ones are in place, as we seek to maximize the investment we have made in our public sector through "smart government", as we recognize that we must give increased attention to homeland security and emergency management.

As change affects all of us and as changing economic conditions increase uncertainty and vulnerability, we must seek new ways to connect with one another and with the resources all of us will need at some point in our lives.

It is a major challenge for people to learn about and connect with services that are available. Too often, people looking for help in Michigan do not know where to begin. Locating such basic resources as food, shelter, employment, or health care may mean calling dozens of phone numbers, then struggling through a maze of nonprofit organizations and public agencies, each offering a multitude of services, to make the

right connections. These problems are exacerbated by our high rate of unemployment, our greater mobility, and our increased diversity, all of which increase complexity and erode traditional support systems.

Greater attention is being paid to homeland security and emergency management at both the state and local levels. With our preparation has come the growing recognition that we also must rationalize the way in which people connect with the information they need to take care of themselves during a crisis and connect with those agencies that can help them during recovery. Attention is being given to ways to relieve the burden of inappropriate and misdirected calls on our 911 systems and to plan in advance how best to mobilize and manage our neighbors who want to volunteer their time, talent, energy, and material resources in response to disasters.

The growing need of our population for health and human services has come up against the reality of finite public sector resources, increasing the need to connect people with the broadest possible range of community resources. Michigan is one of seven states with a significant increase in the poverty rate, which rose from 10.5% in 2002 to 11.5% in 2003. Michigan's child poverty rate worsened by twice as much as the national average; it rose from 14 percent in 2000 to 16 percent in 2003. People want to be self-sufficient but to do so, they need additional support through health and human services provided both by government and nonprofit organizations. One of the greatest barriers to receiving this help is the complexity of the service delivery systems.

Michigan state government is committed to becoming smaller and more efficient, while sustaining its commitment to serving the most vulnerable. There is a growing consensus that we must maximize the investment that, together, we make in state and local government. The move toward "smart government" plus the very real limits on resources creates new opportunities for 2-1-1 to support and to be supported by state government

Increasing demand for culturally sensitive social services and the ability to communicate with non-English speaking callers. For immigrants, access to trustworthy information that is culturally sensitive plays an important role in their development into self-supporting citizens.

The Benefits of 2-1-1

2-1-1 will be of immediate added value:

- Providing an easy, visible, timely and non-judgmental universal access point to information and referral from a live referral specialist for people who need to turn outside their families for help that is available;
- Increasing efficiency by helping callers clearly define their needs and pointing them to the best places to seek help, reducing misdirected calls to agencies, and providing a ready resource for service providers to use in referring their current clients to additional services available from other providers and for human resource professionals to assist their organization's employees;
- Relieving some of the burden of misdirected calls to 911 and 311 call centers, particularly after normal business hours, being available as an outlet for statewide dissemination of rumor-controlled information during emergencies, and helping expand the capacity of emergency management agencies by assisting in handling calls from the public;
- Creating new knowledge about needs and gaps in services that can help elected and appointed policy-makers and public and private funders make better decisions and more effectively plan for the future; and,
- Helping people connect with opportunities to give their time and talent as volunteers to community organizations, helping to strengthen the fabric of community life.

As a result of 2-1-1:

- Individuals will be better able to manage their own lives because they have access to the information and tools they require to find and make decisions about the support they need;
- Service providers will have an expanded knowledge of statewide resources to help them better serve their consumers;
- Policy makers and funders – both public and private – will have more complete information about trends in demand for services and early awareness of emerging needs;
- Emergency management will have access to a new statewide infrastructure to help disseminate critical information, assist people through disasters and provide long-term connection to relief and recovery services;
- Businesses will have an additional way to support their employees with their personal needs in an efficient and effective way;
- Government will have access to a proven, 24/7/365, multilingual infrastructure available to help increase its efficiency and effectiveness; and,
- Public officials will be assured that their constituents are better able to get connected with the services they need in cost-effective and responsive ways.

Rollout Strategy

Since the formation of the Michigan 2-1-1 Collaborative in 1999, we have made steady progress in building needed relationships and developing our strategic and operational plans. Now, we are prepared to move forward aggressively to bring 2-1-1 to life statewide by October 2007.

Our strategy will be executed in six phases. The first three phases have already been completed. Full execution of Phase 4 and beyond, beginning January 1, 2006, is fully contingent on the availability of resources and on commitment by state government for sustained operational funding for the system. Thus, dates for those phases appear in brackets to reflect that contingency. We believe that once funding is committed, we can complete the full build-out of the system within 24 months, achieving coverage of 75% of the state population within 12 months and 100% coverage within 24 months.

FINANCIAL SUMMARY

The estimated operating cost of *Michigan 2-1-1* over its first five years as a fully integrated statewide system is $44.8 million – or an average of 90 cents per year for each person in Michigan – less than the cost of a single bottle of soda. This is better than the generally accepted rule of thumb for 2-1-1s nationwide of $1.00 - $1.50 per person per year.

This reflects the cost efficiencies realized because we are building primarily on the infrastructure of existing information and referral agencies. As a result, start-up costs are limited to immediate needs to enhance the telecommunications and technology capacity of the regional centers and to put in place the systemwide functions to be performed centrally. By year 3, we anticipate making a major investment in a new integrated telephone system. All of these capital costs will total approximately $2.9 million over four years.

We have projected that over the first five years the system will handle some 3.9 million calls. The per call cost of $11.49 also compares very favorably with other states.

Our goal is to build sustained, predictable funding for the entire *Michigan 2-1-1* system that will grow as the demands on the system grow. That requires a significant long-term commitment from state government to pay at least 50% of the total annual operating support as well as ongoing support from a broad mix of private sources – United Ways, private foundations and business – and local funding obtained by the regional call centers from local government and other sources. A coordinated effort of all of the stakeholders working with the Office of the Governor and the Michigan Legislature can result in the commitment for core funding from state government that, in turn, will leverage the private sector support needed.

	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Total**
Regional 2-1-1 Centers						
Southeast	1,874,498	2,182,991	2,532,281	2,645,875	2,774,426	12,010,071
Central	1,026,373	1,179,695	1,315,298	1,406,832	1,454,169	6,382,367
Southwest	690,604	783,902	858,383	885,968	937,089	4,155,946
West	631,420	700,048	779,660	803,914	841,960	3,757,002
West Central	802,809	865,561	915,417	945,542	996,189	4,525,518
Northeast	676,368	772,503	837,579	863,828	916,867	4,067,145
Upper Peninsula	447,349	482,327	506,078	520,741	535,909	2,492,405
Resource Hubs	500,000	500,000	500,000	500,000	500,000	2,500,000
Total, Regional Centers	6,649,421	7,467,027	8,244,697	8,572,700	8,956,609	39,890,454
State Office	454,850	582,465	616,561	627,575	639,012	2,920,463
Telecommunications	250,000	250,000	500,000	500,000	500,000	2,000,000
Total Operating Costs	**7,354,271**	**8,299,492**	**9,361,258**	**9,700,275**	**10,095,621**	**44,810,917**

2-1-1 FOR MICHIGAN

Background

"2-1-1" is the three digit dialing code designated in 2000 by the Federal Communications Commission to provide widespread public access to community information and referral services. In response, there has been a widespread effort nationally to develop statewide "2-1-1 systems" that will ensure that 2-1-1 becomes as ubiquitous as 911 and 411.

In Michigan, that system is envisioned as a:

- **Simple, quick 24/7/365 link** to connect people efficiently and effectively to appropriate services and to opportunities to give help through volunteering. An easy number to remember, it will be great for cutting through confusion about complex human services and publicizing, explaining and helping people with new programs;
- **Partner in homeland security and emergency management** to assist with natural and man-made disasters by providing easy access to information that needs to be communicated to our residents and ongoing connection to needed services;
- **Partner with state government** in helping create greater efficiencies in the delivery of health and human services; and,
- **Barometer** for identifying needs or gaps in service and communicating them to public and private decision-makers and funders.

The **mission** of *Michigan 2-1-1* is to connect people with information and resources to build healthy, safe communities.

Our **vision** is clear – *Michigan 2-1-1* builds stronger communities, day-to-day and in times of emergency by:

- Promoting self-reliance in reaching community resources;
- Fostering civic engagement; and,
- Providing real-time information on health and human service needs, met and unmet, in the community.

Michigan 2-1-1 will be the most recognized, used, and comprehensive source of essential community resource information in the state, delivering highly efficient, cost-effective access to information using technology-based solutions.

Our guiding principles call for our work to be:

- ***Standards based.*** Reliable, accurate and consistent community resource information delivery.
- ***Efficient and cost effective.*** Coordinated statewide system that is a universal access point for multiple needs reducing duplication while increasing access to community resources.
- ***Customer focused.*** Dedicated to listening, understanding and helping people connect to services that truly meet their needs.
- ***Individualized.*** Personal, confidential interaction with knowledgeable staff who will respect and respond to cultural differences.

- ***Accessible.*** Available 24/7/365 to all including those with sensory impairments or limited knowledge of English.
- ***Supported.*** Government, business and the non-profit sector play important roles as active partners in developing and sustaining 2-1-1.
- ***Community-based.*** Information collected and updated on a timely basis by those who are most familiar with local resources.
- ***Accountable.*** Accurate call statistics that identify health and human service needs and help quantify effective solutions for healthy and safe communities.

Michigan 2-1-1 will be built on what has been independently assessed nationally as the most cost-efficient model for a statewide system, combining decentralized services with shared systemwide functions. It will include:

- regional call centers;
- regional resource hubs that will contribute to an integrated, comprehensive statewide database of community resources;
- contact points for every county;
- a highly visible web site; and,
- a small state office providing marketing, resource development and management support to the entire system.

Based on the experience of 2-1-1 systems nationwide, we believe that by the third full year of operation, *Michigan 2-1-1* will be answering almost 800,000 calls annually, equivalent to about 8% of our population.

Planning for 2-1-1 began in Michigan in 1999. In 2000, Michigan Public Act 295 assigned responsibility for designation of 2-1-1 call centers to the Michigan Public Service Commission. The first 2-1-1 call centers, serving Kent and Calhoun counties, became operational in 2002. By the end of 2005, when United Way 2-1-1 in Southeast Michigan became operational, 2-1-1 was available 24/7/365 to approximately 56% of our population.

In 2004, *Michigan 2-1-1* was created by the Michigan Association of United Ways and the then existing 2-1-1 call centers to be the vehicle to implement 2-1-1 statewide. In February 2005, the board of *Michigan 2-1-1* began an intensive planning process, in partnership with the State of Michigan, to ensure full statewide 2-1-1 coverage as soon as possible. The result of that work, funded by Michigan Association of United Ways, is this business plan.

THE NEED FOR 2-1-1

The Public Impact of 2-1-1

Why is 2-1-1 critically important to the people of Michigan?

We are living through a period of economic and social transformation that has touched the lives of virtually everyone – as old jobs disappear before new ones are in place, as we seek to maximize the investment we have made in our public sector through "smart government", as we recognize that we must give increased attention to homeland security and emergency management.

As change affects all of us and as changing economic conditions increase uncertainty and vulnerability, we must seek new ways to connect with one another and with the resources all of us will need at some point in our lives.

> ***"Our aim is to increase efficient access to services…2-1-1 offers an exciting opportunity to do that."***
>
> — Teri Takai, Department of Information Technology

- ***It is a major challenge for people to learn about and connect with services that are available.***

  The reality is that, at some time or another, virtually all of us need to reach out for help, whether for ourselves, members of their family, or neighbors. Economic dislocation, aging, unanticipated life changes, illness can affect all of us. But the process through which people get connected to that help can be confusing, frustrating, inefficient, and stressful.

  Too often, people looking for help in Michigan do not know where to begin. Locating such basic resources as food, shelter, employment, or health care may mean calling dozens of phone numbers, then struggling through a maze of nonprofit organizations and public agencies, each offering a multitude of services, to make the right connections. These problems are exacerbated by our high rate of unemployment, our greater mobility, and our increased diversity, all of which increase complexity and erode traditional support systems. One service provider summed up the problem: "Clients have a huge challenge to find the service they need. It's as if we hide information on purpose."

- ***Greater attention is being paid to homeland security and emergency management at both the state and local levels.***

  The tragedies of September 11 and of Hurricane Katrina brought home to all of us the necessity to be prepared to respond to both natural and man-made disasters. As a result, there has been a determined effort to intensify homeland security measures, to put in place the systems required to respond to future crises, and to prepare our residents. As we have already seen in Michigan, those crises can range from something like the Detroit blackout in 2003 and the gas line break in Jackson in 2000 to the public concern over West Nile Virus and the availability of flu vaccine to the need to help evacuees from other parts of the country.

  With our preparation has come the growing recognition that we also must improve the way in which people connect with the information they need to take care of themselves during a crisis and connect with those agencies that can help them during recovery. Attention is being given to ways to relieve the burden of inappropriate and misdirected calls on our 911 systems and to plan in advance how best to mobilize and manage our neighbors who want to volunteer their time, talent, energy, and material resources in response to disasters so that first responder organizations such as Red Cross and Salvation Army are not overextended.

"Easy access to services supports early intervention and prevention of serious problems in the first five critical years of life and early adolescence."

—Sharon Claytor Peters, Michigan's Children

- ***The growing need of our population for health and human services has come up against the reality of finite public sector resources, increasing the need to connect people with the broadest possible range of community resources.***

  Consider these sobering statistics:

  - Michigan is one of seven states with a significant increase in the poverty rate, which rose from 10.5% in 2002 to 11.5% in 2003. Michigan's child poverty rate worsened by twice as much as the national average; it rose from 14% in 2000 to 16% in 2003.
  - Nearly 25% of Michigan's working families live below the income level considered necessary to meet a family's basic needs.
  - More than 2.5 million or 44% of adults ages 18–64 in Michigan lack the educational attainment levels that employers in high-wage businesses are seeking. Nearly one-third of working age adults has only a high-school diploma or GED, and 40% of adult workers in Michigan have no post-secondary education.
  - Michigan's infant mortality rate ranks 38th among all of the states.
  - More than 100,000 Michigan children live in households where no adult works.
  - In Michigan, children in low-income families are over two times more likely to have moved in the preceding year, meaning that their families do not have the local roots and support systems that can help them through difficult times.

  As a result of federal and state welfare reform, there has been a significant reduction in the numbers of people receiving public assistance and an increase in the number of former recipients who have entered the paid workforce. But in order to remain self-sufficient, individuals and their families need additional support through health and human services provided both by government and nonprofit organizations. One of the greatest barriers to receiving this help is the complexity of the service delivery systems.

- ***Michigan state government is committed to becoming smaller and more efficient, while sustaining its commitment to serving the most vulnerable.***

  The Governor's Office has made cost effectiveness and efficiency in government one of the state's top six priorities. Within the goal to "Make Michigan's People Healthier and Communities Stronger and More Secure," two of the strategies directly address the need for strengthened information and referral services:

  - Ensure that Michigan's vulnerable citizens have access to prevention and early intervention services; and,
  - Improve the delivery of health and human services by lowering overall costs, improving technology and streamlining the way work gets done.

  Similarly, the State Legislature has adopted as two of its nine bipartisan priorities:

  - The most vulnerable live free from harm and as self-sufficiently as possible; and,
  - Government is effective, efficient and accountable.

- ***Increasing demand for culturally sensitive social services and the ability to communicate with non-English speaking callers.*** Southeast Michigan has a long history of racial and ethnic diversity. Today, that diversity continues to be driven largely by immigration. In the 1990s:
  - The Hispanic population grew by 53% throughout the region.
  - The Asian Pacific Islander population grew by 98% in Oakland County, 87% in Macomb County and 64% in Wayne County.
  - The Arab and Chaldean populations grew by 55% and 136% respectively in the 1990s, making their communities in the Detroit area "the largest and most diverse in the United States."

  But this growing diversity is not limited to Southeast Michigan. Statewide, almost 800,000 people, 8.5% of our population, speak a language other than English at home. In Holland, just as one example, 19% of families speak a language other than English in their homes.

  For immigrants, access to trustworthy information that is culturally sensitive plays an important role in their development into self-supporting citizens. As many recently arrived immigrants often begin their life here on the margins of their communities, the need for access to employment opportunities and affordable health and child care are likely to increase as their population grows.

Implications

Our state is changing rapidly. We are continuing to grow and diversify. There will be greater need to efficiently provide health and human services to a diverse, mobile population. We will continue to be confronted with the need to be prepared to respond to both natural and manmade disasters.

It is in precisely this kind of environment that 2-1-1 can be of the most immediate added value as it becomes a "public utility" that is available in multiple languages 24/7/365:

- Providing an easy, visible, and non-judgmental single access point to information and referral for people who need help;
- Increasing efficiency by
  - helping callers clearly define their needs and pointing them to the best places to seek help,
  - reducing misdirected calls to agencies, and
  - providing a ready resource for service providers to use in referring their current clients to additional services available from other providers and for human resource professionals to assist their organization's employees;
- Relieving some of the burden of misdirected calls to 911 call centers, particularly after normal business hours, being available as an outlet for statewide dissemination of rumor-controlled information during emergencies, and helping expand the capacity of emergency management agencies by assisting in handling calls from the public;
- Creating new knowledge about needs and gaps in services that can help elected and appointed policy-makers and public and private funders make better decisions and more effectively plan for the future; and,
- Helping people connect with opportunities to give their time and talent as volunteers to community organizations, helping to strengthen the fabric of community life.

THE VALUE OF 2-1-1 IN MICHIGAN

Overview

The contribution of 2-1-1 can be seen in three ways:

- The personal benefit to people who contact 2-1-1 for help;
- The public impact for the state as a whole; and,
- The value to specific stakeholders.

The Personal Benefit to Consumers

Michigan 2-1-1 will benefit people seeking help by providing:

- Access to comprehensive, up-to-date information at any time by telephone and online;
- Confidential, judgment-free telephone interactions with trained and certified 2-1-1 specialists, based in Michigan, who are able to help people get to the root of their concerns and who can provide multiple options for services and, as needed, make multiple referrals from a single call;
- Alternative approaches to problem-solving in those situations where services may not be available;
- Referrals that are sensitive to the caller's realities, including the need for geographic proximity of services;
- Advocacy with service providers for those unable to effectively make the connection with the services they need;
- Information about both public sector and nonprofit services throughout the state, serving people wherever they and their families live and work; and,
- Multi-lingual services and access for people with sensory impairments.

2-1-1 will provide our residents with a single, easy-to-remember telephone number that will provide the information they need to efficiently access the health and human services they require. This means that they will need to spend less time in the frustrating search for assistance, will not need to "shop" for services by contacting multiple agencies, and will be able to connect as directly as possible with the agencies best prepared to help them.

By creating a brand that becomes synonymous with easy-to-access help, 2-1-1 can make it not only easier but also more acceptable to use human service systems, particularly for those who may be reluctant, because of their age or cultural perspective, or who may find it difficult to seek help.

Due to the often sensitive and complicated issues faced by callers, 2-1-1 staff will be nationally certified to national industry standards by the Alliance of Information and Referral Systems (AIRS), the professional association for over 1,000 community I&R providers, to connect callers with the best available services for their unique needs. By asking callers a succession of questions, trained staff can help identify underlying problems that must be dealt with to help people better cope with the expressed symptoms, and develop their own plan for tackling the root cause of the problem.

We already have begun to see these results from the currently operating 2-1-1s. Marianne Udow, Director of the Department of Human Services, concluded that they "have shown tangible benefits....Access to non-profit and faith-based services, as well as public health and human service agencies, has increased."

Similarly, a May 12, 2004 article in the Battle Creek Enquirer cites the value of 2-1-1 for a minimum wage working mother of three unable to afford health insurance. "She said she learned of MI-Child after calling 2-1-1." 2-1-1 reaches families who are calling for other basic needs and connects them to MI-Child.

This ability to help callers clearly define their needs and then to make multiple referrals means that 2-1-1 can help people address problems as early as possible and to take preventative steps, thus adding to their long-term personal and family stability.

Sharon Claytor Peters, President and CEO, Michigan's Children, says, "2-1-1 will improve the quality of life for children and their families by connecting them with necessary health and human services. Easy access to services supports early intervention and prevention of serious problems in the first five critical years of life and early adolescence. Multi-language 2-1-1 service breaks down barriers so that all families can make important connection to services. 2-1-1 supports our 'whole child philosophy' with a comprehensive database addressing multiple problems."

The Public Impact of 2-1-1

"2-1-1 provides relief to our caseworkers through a great database of community resources..."
— Andy Zylstra, Kent County DHS

2-1-1 brings these overall benefits to the state:

- ***Helping to create new efficiencies in delivery of health and human services.***

  There are three significant efficiencies that 2-1-1 will help create when it is fully operational:

  - First, it can save the time and ease the frustration of consumers in their search for appropriate services for which they are eligible.
  - Second, as 2-1-1 becomes more widely known and used, it will be referring ever more callers to the right places, thus relieving some of the burden on service providers of handling inappropriate calls.
  - Third, it will be a resource to service providers and human resource professionals to help them do their jobs more easily – as a proven high quality service to which they can refer consumers and employees and as an immediately accessible source of information for the providers to use in making their own referrals to and connections with other providers.

  Susan Cervantes, Program Supervisor at the Ottawa County Community Action Agency, says: "Not only have the wrong referrals to our agency decreased since the inception of 2-1-1 services, but the right referrals have improved our service delivery. We no longer spend half of our time with customers that were incorrectly referred to us. We are spending more time with customers who are eligible for our services. Additionally, we have been able to utilize 2-1-1 when one of our customers not only needs our assistance but the assistance dealing with another issue upon further evaluation. The ability for us to mutually refer customers is priceless."

  Andy Zylstra, Director, Kent County DHS, says, "2-1-1 provides relief to our caseworkers through a great database of community resources and an easy phone number for families to connect with needed services." Just a 10-20 minutes per week savings by each FIA caseworker statewide would provide a $2 million per year benefit.

- ***Providing a new resource for businesses to help their employees while maintaining their productivity.***

  One of the places where the value of 2-1-1 will be most welcomed is in the workplace. Writing in *Business Direct Weekly* in May 2003, Holland, Michigan employment lawyer Ted J. Baird makes this case for 2-1-1:

"2-1-1 provides greater access to service needs of our jobseeker and employer customers."

— Bob Straits, Michigan Works! Upjohn Institute

"Businesses are working with more undereducated and unprepared workers, single-parent and two income families, employees with disabilities and an aging work force. This situation adds to the cost of doing business. The 2-1-1 service can provide the contact for individuals, families and employers that will eliminate or greatly reduce the effects of these issues. 2-1-1 has the potential to save time, decrease stress, increase employment opportunities, increase labor pools and reduce pressure on employers to increase benefits."

Ralph W. Babb, Jr., Chairman and CEO of Comerica, says, "2-1-1 will provide a simple way for people in need to get the assistance they need in an expeditious and efficient manner. Michigan desires to attract new residents and businesses. Reinforcing the social infrastructure for a healthy community and workforce is one way to make our state more attractive."

Anthony Earley, Jr., Chairman and CEO of DTE Energy agrees. He says, "2-1-1 has the potential to save time, support stressed employees, increase employment opportunities, decrease absenteeism and reduce pressure on employers to increase benefits. It provides a major resource in support of our employee assistance program. I support 2-1-1 as a powerful social innovation that will positively impact the health of our workforce."

- ***Creating a new resource that can help our jurisdictions and our state strengthen the way they provide information to the public.***

  2-1-1 complements and enhances existing state government information and assistance services by triaging a high volume of calls and ensuring that callers are directed to the right resource, thus reducing the level of inappropriate calls that are placed to those services.

  In some states, 2-1-1 also has become an integral part of state government's efforts to provide more efficient and effective services. A 2000 University of Nebraska study sites the potential of $7.6 -$16.5 million in annual cost savings for Nebraska resulting from such factors as: one call for multiple referrals, reduced overlapping helpline costs and improved community planning through caller data.

  Connecticut provides an excellent example of how 2-1-1 can be such an asset for state government. There, 2-1-1 InfoLine, operated by United Way of Connecticut, has become a cost-effective, flexible service partner of government in two distinct ways.

  First, 2-1-1 InfoLine expands the Connecticut state government's capacity to deliver effective services, providing:

  - around-the-clock response by state social workers—police and other mandated reporters call 2-1-1 after hours – for the Protective Services for the Elderly Program;
  - a call point for a new consumer office in the Office of Managed Care Ombudsman;
  - an I&R call center – and care coordination – for HUSKY Plan (Healthcare for UninSured Kids & Youth), 1-877-CT-HUSKY;
  - post-welfare service outreach and service referral to families after 60-month federal (and 21-month state) cutoff in Temporary Family Assistance;
  - counseling for parents in choosing quality child care, locating openings, and getting help with payments; and,

- a statewide database of community resources, and reports to government agencies on customer service barriers and human service needs.

Second, 2-1-1 InfoLine helps Connecticut state government communicate by serving as an easy-to-remember response point, staffed by highly-trained, specialized call specialists with a passion for telephone customer service, for government media campaigns, news releases, service changes:

- Department of Social Services used 2-1-1 as access point for publicity about winter heating assistance, 'summer cooling' program, changes to children's health insurance;
- Department of Public Health used 2-1-1 as response point for media campaigns for breast cancer early detection, youth violence prevention, and teen pregnancy prevention; and,
- Department of Children & Families used 2-1-1 as response point for media campaigns promoting healthy parenting practices.

In one example of increased cost efficiency, their existing infrastructure of call specialists meant that InfoLine was able to staff the state's tobacco cessation hotline, QuitLine, with only one additional staff person versus the five to seven people that the state estimated it would need to put in place.

While the specifics will differ, we believe that *Michigan 2-1-1* can grow into an equally important resource for our jurisdictions and for state government. Once its infrastructure is in place, 2-1-1 will be a way to:

- make services more accessible to our people by providing a single, easy-to-remember number, available 24/7/365 that can triage their call and direct them to the right place; and,
- increase efficiency by combining small program-specific call centers that take advantage of the trained call specialists that are already prepared to respond to people seeking help.

Teri Takai, Director of the Department of Information Technology, has recognized the potential contribution 2-1-1 can make, saying, "Our aim is to increase efficient access to services through the innovative use of technology. 2-1-1 offers an exciting opportunity to do just that."

One early example of 2-1-1's potential contribution is Born Learning, a statewide early childhood development education campaign. *Michigan 2-1-1* contracted with the Born Learning coalition for one of the existing 2-1-1 call centers to serve as the response point for the media campaign, providing personal telephone assistance 24/7/365 for parents and other caregivers. By utilizing a 2-1-1 call center, the campaign's call to action receives a high level of service at a minimal incremental cost.

The 2005 General Government budget bill calls for a study across state departments to identify the cost efficiencies that can be achieved for the State of Michigan through full implementation of 2-1-1. Section 584 of SB 272 states, "The Department of Information Technology shall coordinate a study with the Department of Human Services, the Department of Community Health, the Department of Labor and Economic Growth, the Department of Education and the State Police, identifying all information and referral services for state government, including but not limited to 1 800 help lines. The report will summarize the purpose, scope and cost of each service and identify potential cost savings to the state of Michigan through the shared use of 2-1-1." When completed in early 2006, this study will outline specific ways in which 2-1-1 can benefit state government.

- ***Creating a new resource that can play a role in homeland security and/or serve as a support system for crisis management.***

  During and immediately after emergencies our 2-1-1 system can act as a complementary support by helping reduce the overwhelming number of telephone calls to 911, emergency management and first-response organizations, thus freeing them to focus on their primary work. 2-1-1 can serve as the memorable, easy-to-access utility for residents of the entire state to call for critical information as a result of a crisis.

  During recovery periods following a crisis, the system can serve as a longer-term resource by coordinating information on the status of available health and human services, connecting victims with the help they need, helping disseminate information on the details of local recovery, and potentially informing individuals where to send cash or in-kind donations or to volunteer to help.

  In the aftermath of Hurricane Katrina, Michigan's 2-1-1s played key roles in relocating evacuees and connecting them with local services and in managing the response of our residents who wished to volunteer or make cash and in-kind contributions to help. In Battle Creek where there were 300 evacuees, 2-1-1 placed 185 local volunteers and identified specific needs that could be met through contributed goods and services. In Detroit, call volume increased 80% after the storm with almost all of that from calls offering assistance.

  Loren Snippe, Director of the Ottawa County Department of Human Services, says, "2-1-1 was our public communication and coordination link for county-wide hurricane relief efforts. It greatly expanded our capacity to meet critical needs of evacuees and harness the willingness of folks who wanted to help."

  Had the 2-1-1 system been fully operational statewide, it could have responded to the need to quickly ramp-up telephone access and absorbed the 16,000 calls that went to the specially-created state government helpline, triaging and redirecting them as appropriate.

  2-1-1 also can relieve the burden on 911, both day-to-day and in times of crisis. It can remove the need for 911 to be what 911 coordinators have described as "the primary social service responder after hours and on weekends" by providing trained staff prepared to handle not only calls directed to 2-1-1 but also calls transferred from 911. During Hurricane Charley in October 2004, the 911 coordinator in Lee County, Florida, who had contracted in advance with 2-1-1 to handle calls for the county, estimated that in the week of the storm, 2-1-1 took 60,000 calls that otherwise would have gone to his 911 operators.

  2-1-1 InfoLine in Connecticut was widely recognized for the role it played on September 11 and in the days following, providing a key link to information for people throughout the state and beyond, helping manage everything from blood donations to support groups.

  During the 2004 hurricane emergency in Florida, 2-1-1s conclusively demonstrated the value they can add to emergency management and disaster relief. Leaders in municipal, county and state governments, in private philanthropy, and in the first-responder community agreed that 2-1-1s:

  - expanded the capacity of Emergency Operations Centers (EOCs) by providing trained information and referral specialists and by offering the public an alternative access point for information;
  - became critically needed clearinghouses of information about availability of services and the status of health and human service organizations and

government agencies;

- were able to spot unmet and emerging needs, helping direct resources to high priority places;
- provided critically needed telephone reassurance and crisis support for callers, complementing the work of the EOCs;
- helped mobilize and manage volunteers and cash and in-kind donations;
- served as intake points on behalf of government agencies and nonprofit organizations, increasing the efficiency of connecting people with needed help; and,
- have continued to be a critical part of recovery efforts, providing a connection to help for people whose lives have been dramatically affected by the storm.

- ***Supporting economic development by helping bring new resources into the state.***

> ***"Reinforcing the social infrastructure for a healthy community and workforce is one way to make our state more attractive."***
> — Ralph W. Babb, Jr., Comerica

Since 2002, the Kent County Tax Credit Coalition – a partnership of Kent County Department of Human Services, United Way, United Way's 2-1-1, Delta Strategies and financial institutions – has increased the amount of Earned Income Tax Credits for county residents from less than $200,000 to almost $3,000,000, virtually all of which was reinvested within the county. A key component of their work has been the marketing of 2-1-1 as the phone number to call for help with EITC and other tax issues. 2-1-1 call specialists also were able to identify people who might benefit from EITC and help them make that connection.

Statistics from the federal Government Accountability Office indicate that unclaimed EITC refunds in Michigan were $214,366,000 in 2004. If all of this was recovered and reinvested in the state, it would generate an additional $12.8 million in sales tax revenue.

When Lieutenant Governor John Cherry launched an effort to raise awareness of EITC, he said that EITC dollars "...can be brought directly into the wallets of Michigan's working poor families through a successful outreach effort." This is precisely the kind of public education effort for which our 2-1-1 statewide system can serve as the point for response.

- Thus, at the same time that 2-1-1 is connecting people with resources that help them move to greater self-reliance, it is helping to bring new resources into the local economy.
- Providing new trend data on health and human service needs, met and unmet, for planning and resource allocation.

By collecting and analyzing call data, we will generate reports that proactively identify problems or issues in the state. Policy makers can use this information to better understand emerging and existing social problems and to better allocate both public and philanthropic resources. In times of emergency, such data can help focus attention on geographic areas or segments of the population requiring assistance. As a result, 2-1-1 can contribute to better use of scarce resources, including tax dollars and charitable contributions.

2-1-1 in Calhoun County, a service of the Volunteer Center of Battle Creek in partnership with the United Way of Greater Battle Creek, is leading the way in Michigan through its compilation and analysis of data from calls. Its 2003/2004 Annual Report identifies "critical unmet service requests" primarily in the need for assistance in housing, payment of utility bills, dental care and prescription expenses. As a result of their work, United Way released $10,000 in emergency

funds to help with heating bills which was matched with an additional $10,000 from Semco Energy.

- ***Connecting people with opportunities to "give help" as well as "get help".***

  Working in close cooperation with Connect Michigan and our state's thirty Volunteer Centers, 2-1-1 can become a new, highly visible access connection to opportunities to serve the community, both every day and in times of emergencies or disasters when there may be a large outpouring of people wishing to help, as was the case in the aftermath of Hurricane Katrina. Similarly, working in close cooperation with the local United Ways in Michigan, the Michigan Emergency Management Agency and organizations such as the American Red Cross and the Salvation Army, we can help people make in-kind and financial contributions in response to new needs.

> ***"[2-1-1] is a practical tool that will help us carry out our mission…"***
> — Kyle Caldwell, Connect Michigan Alliance

Kyle Caldwell, President and CEO, Connect Michigan Alliance, says of 2-1-1, "It is a practical tool that will help us carry out our mission to promote and strengthen a lifelong ethic of service and civic engagement. Linking with the public regarding opportunities to volunteer or give to communities is a challenge. 2-1-1 has the potential to address these needs by providing a highly visible, easy entry point for individuals and families seeking civic engagement. Our support of 2-1-1 is in line with our goals of providing universal access to volunteer opportunities that will strengthen communities."

How 2-1-1 Will Add Value to Key Stakeholders

2-1-1 has the potential, over time, to provide specific benefits to a variety of stakeholder groups:

Benefit of 2-1-1 to Elected and Appointed Officials

For elected and appointed officials, 2-1-1 offers the opportunity to provide better service for their constituents while helping increase the overall efficiency of the service delivery system and strengthening emergency management systems. For them, 2-1-1:

- provides better statewide service for constituents;
- helps reinforce a statewide approach while supporting local prerogatives and priorities;
- helps reduce call load on 911 and supports emergency management;
- provides new trend data for planning and resource allocation;
- introduces efficiencies throughout the system;
- increases ability of people to become self-sufficient; and,
- aligns Michigan with 2-1-1 development in the rest of the nation.

> ***"2-1-1 greatly expanded our capacity to meet critical needs of evacuees and harness the willingness of folks who wanted to help."***
> — Loren Snippe, Ottawa County DHS

Benefit of 2-1-1 to Emergency Management, 911 and First Responders

For our emergency management, 911 systems and first responders, 2-1-1 is an important new asset, able to relieve day-to-day burden while being prepared to move into active, complementary support in a crisis. For them, 2-1-1:

- reduces call load on 911;
- eliminates need for 911 to be social services contact after hours;
- can expand capacity of Emergency Operations Center during emergencies – trained people, expanded call center, ability to handle calls from people in emotional distress, information management;
- is a potential access point for information dissemination during

emergencies; and,

- can play a major role in managing the spontaneous outpouring of volunteers and in-kind donations, removing that task from first responder organizations.

Benefit of 2-1-1 to Employers and Employees
For employers, 2-1-1 offers a way to help workers find the services they and their families may need, providing an important benefit while increasing their on-the-job productivity and, for workers, helping them remain at work. For them, 2-1-1:

- contributes to making Michigan a good place to do business;
- complements existing employee assistance programs or provides an alternative service where EAPs do not exist;
- reduces the time workers must spend on the phone seeking services; and,
- increases the ability of people to become self-sufficient.

> ***"Not only have the wrong referrals to our agency decreased since the inception of 2-1-1 services, but the right referrals have improved service delivery."***
> — Susan Cervantes, Ottawa County Community Action Agency

Benefit of 2-1-1 to Government Human Service Providers
For government human service providers, 2-1-1 is a way to relieve the load of general information and referral calls, allowing highly-skilled professionals to focus on priority needs while creating a new resource for their staffs to help clients better connect with the broadest array of services. For them, 2-1-1:

- improves customer service statewide, 24/7/365;
- takes a load off of existing systems, allowing them to focus on priority calls and needs;
- builds greater efficiency by reducing "service shopping" and better directing calls;
- is a new resource to help clients, particularly non-English speakers;
- provides new trend data for planning and resource allocation; and,
- has the potential to serve as access point or intake for services.

Benefit of 2-1-1 to Nonprofit Service Providers
For nonprofit service providers, 2-1-1 is a way to provide better service and to reduce the need to provide informal I&R services to clients. For them, 2-1-1:

- reduces number of misdirected calls and "service shopping";
- is a new resource to help clients;
- reduces the need to provide "informal I&R", freeing staff time; and,
- increases direct service capacity by reducing marketing and outreach costs.

Benefit of 2-1-1 to the Public
For the community as a whole, 2-1-1 has the potential to become a "public utility" that is always available to help people connect with the information they need to lead healthier, more productive, and more independent lives. 2-1-1:

- is available 24/7/365 at no cost to callers;
- helps reduce people's stress and frustration levels which has a ripple impact on families and workplaces;
- helps people become more self-sufficient; and,

- helps connect people with opportunities to serve, strengthening ties to community and neighbors.

Results

2-1-1 is an innovative response to the demand for access to critical community information and referral services. It is a groundbreaking, efficient solution that can eliminate the confusing maze of information and services that often overwhelms individuals who need help. It improves upon existing, decentralized services and offers professionals and organizations in health and human services a way to enhance their impact and maximize scarce resources.

As a result of 2-1-1:

- Individuals will be better able to manage their own lives because they have access to the information and tools they require to find and make decisions about the support they need;
- Service providers will have an expanded knowledge of statewide resources to help them better serve their consumers;
- Policy makers and funders – both public and private – will have more complete information about trends in demand for services and early awareness of emerging needs;
- Emergency management will have access to a new statewide infrastructure to help disseminate critical information, assist people through disasters and provide long-term connection to relief and recovery services;
- Businesses will have an additional way to support their employees with their personal needs in an efficient and effective way;
- Government will have access to a proven, 24/7/365, multilingual infrastructure available to help increase its efficiency and effectiveness; and,
- Public officials will be assured that their constituents are better able to get connected with the services they need in cost-effective and responsive ways.

DESIGN OF THE *MICHIGAN 2-1-1* SYSTEM

Overview

2-1-1 is a service for individuals at all stages of life, across all socio-economic groups, who need to call on the safety net of social services, particularly those people on the margin of the community or those in the process of transition or change. Others will call to offer their help as volunteers or through in-kind or other donations. In addition, many 2-1-1 calls are from service providers looking for information for their clients, from human resource professionals seeking help for employees and from public officials seeking information to respond to inquiries from constituents.

In order to best serve this diverse audience, I&R services will be delivered to the public via the telephone and through the Internet. Supporting those services will be the most comprehensive database on health and human services in the state. We are committed to the highest level of quality assurance and to collecting and reporting data that will be helpful to policy-makers and the public in understanding the needs of our state, met and unmet.

In designing the service delivery model for 2-1-1 in Michigan, we were guided by our goal of ensuring that every person in Michigan can have access to 2-1-1 by telephone around the clock, every day of the year. To achieve that, we needed to keep in mind three core values:

- *information is best collected and updated on a timely basis by those who are most familiar with local resources;*
- *callers must feel comfortable with the sensitivity of 2-1-1 specialists to local realities and to a diversity of cultural values; and,*
- *the system must be financially viable, designed to operate as efficiently as possible given the demands of the other values.*

The system design also must respond to the demographic realities of our state – high population density in Southeast Michigan (40% of the population is in Wayne, Macomb and Oakland counties); smaller but equally dynamic regional population centers that serve as the economic and services hubs for surrounding counties; and, rural counties with small populations spread over larger geographic areas.

Functions of a 2-1-1 System

There are four primary functions to be performed in a 2-1-1 system:

Call center. The call center is the public's primary interface with 2-1-1. Trained and certified call specialists, based in call centers in Michigan, answer calls, assist callers in defining their needs and either make appropriate referrals to existing services or assist callers in identifying alternative courses of action to pursue.

Resource database. This is the knowledge base on which the call specialists draw to make referrals. Its value is directly proportional to how comprehensive and how current it is. Trained and certified resource specialists are responsible for building and maintaining the resource database. Ideally this function is performed as locally as possible.

Representation. This is the public "face" of 2-1-1 for purposes of promotion, partnership development with funders, government agencies and nonprofit service providers and use of the call data to assist policymakers and the community in understanding and responding to unmet and emerging needs.

System Development. This encompasses the broad range of activities that are most appropriately undertaken at the system level, creating cost efficiencies to serve the entire system. These are detailed below in the discussion of the proposed state office.

The *Michigan 2-1-1* Model

In order to fulfill these functions as effectively and cost efficiently as possible, we have designed a system that has four primary structural components.

Regional 2-1-1 Centers. There will be seven regional 2-1-1 centers that will combine three functions:

- Serving as the call center for the region;
- Developing and managing the resource database for the region, working in cooperation with sub-regional resource hubs and county contact points; and,
- Acting as the primary focal point for leadership in developing 2-1-1 in the region – serving as the primary public face, managing the collection and analysis of call data, managing regional promotion in support of statewide promotional efforts, building partnerships with funders, governments and nonprofit service providers, etc.

Each Regional 2-1-1 Center will be staffed with trained and certified call specialists and resource specialists.

Resource Hubs. In six of the regions, excluding Southeast, there will be one or more sub-regional resource hubs, a total of ten statewide. Each will be staffed with no more than the equivalent of one full-time staff person who will be trained and certified as a resource specialist. The responsibilities of the resource hubs are to:

- Have primary responsibility for the development and maintenance of the resource database for their portion of the overall region, working in close collaboration and under the supervision of the Regional 2-1-1 Center; and,
- Serving as the "face" of 2-1-1 in their portion of the overall region - in their home counties and, as appropriate, in immediately surrounding counties – promoting 2-1-1, taking the lead in analyzing call data and providing it to policy makers and funders, building community partnerships in support of 2-1-1, etc.

The locations for the resource hubs will be determined by using such criteria as:

- Location of significant population centers;
- Existence of current capacity and experience in building and maintaining a resource database;
- Demonstrated leadership in I&R and in the development of 2-1-1; and,
- Geographic diversity.

County Contact Points. Ideally, there would be a primary contact point for 2-1-1 in each county not served by a Regional Center or a Resource Hub. This would be a nonprofit service provider, a United Way, a local government agency or even an individual who would work under the general supervision of the Regional Center to serve as the "face" of 2-1-1 in the county – assisting in collecting and updating resource data, representing 2-1-1 in the county, promoting 2-1-1, helping disseminate call data on emerging and unmet needs, etc. We recognize that, at least initially, it may not be possible to recruit contact points in each county, particularly in our less populated and more rural counties.

State Office. A small state office, headed by an executive director, will be responsible for these systemwide responsibilities:

- Developing and executing the formal relationships needed to establish and

implement the network of regional call centers;

- Developing and implementing the platform for the statewide resource database;
- Developing and implementing the internet capability to make the database directly available to the public;
- Developing public and private resources required to build the proposed system and to ensure ongoing operations;
- Working closely with the Governor and State Legislature to ensure that any available federal funds designated to support 2-1-1 are brought into the state through Michigan 2-1-1;
- Developing partnerships, consistent with 2-1-1's mission and phased in over time, through which the assets of the Michigan 2-1-1 system can support emergency management and other public services;
- Ensuring appropriate management of the 2-1-1 brand and the development and coordination of a statewide marketing campaign;
- Coordinating the collection, analysis, and use of call data to identify emerging needs and assist policy-makers and public and private funders in ensuring that the right services are available in the right places;
- Developing standards for the Michigan 2-1-1 system to ensure consistency in information sets and caller experience; and,
- Developing and overseeing continuous quality improvement within the statewide system.

Fulfilling these systemwide responsibilities will require a small, well-organized staff at the state level. We are projecting a phased development of that staff consistent with the availability of resources. At the outset, the staff's focus will be on fund-raising, on building strong, mutually beneficial relationships with state government, and on supporting the regional call centers.

Designing the System

The most critical question we confronted was how to establish the regions that are at the heart of our proposed system – how many should there be and where should they be. In making those decisions, we took four significant steps:

- Learning from the experience of other states;
- Establishing criteria to guide our final decision:
- Projecting system costs for various numbers and configurations of regional centers; and,
- Conducting regional planning sessions for a broad range of stakeholders to work together on how best to deliver 2-1-1 in their communities.

Each of these steps is described below.

Learning from Other States

As part of the process of designing our system, we looked at the experience of other states throughout the country. They fall into three broad categories:

- States that are geographically small (Connecticut, Rhode Island) or with small populations spread over relatively large geographic areas (Nebraska, South Dakota) that have opted for a single 2-1-1 center for the entire state;
- States that currently have "loosely-affiliated" state systems (Florida, Ohio, California);

- States that are building integrated statewide systems (Texas, Washington, Maryland, Virginia, Minnesota and New York).

There is no evidence from any state that a single 2-1-1 center is an appropriate model for a large population state. It does not provide for essential redundancy and means that services are provided at distance from the majority of the state's population.

The "loosely affiliated" systems are characterized by a relatively large number of existing or planned 2-1-1 centers that may collaborate in the development of shared standards and operating systems but have not created a formal structure that ensures statewide coverage for 2-1-1. For example:

State	Population	Number of Current or Planned 2-1-1 Centers	% of State Population with Access to 2-1-1
California	36,000,000	6 currently operating 4 more authorized 10 additional anticipated*	55% 13% will be added 32% would be added
Florida	17,400,000	15**	84.5%
Ohio	11,500,000	22-25	65-75%

* The California model calls for there to be approximately 20 local call centers that provided normal business hours service to one or more counties and an additional five to seven "enhanced call centers" that have "robust capacity to serve multiple counties with complete 24/7/365 services, back-up capacity and redundancy.

** Estimated 5-9 additional providers needed to ensure 100% coverage.

The states building integrated statewide systems have opted for some form of regionalization with 2-1-1 centers serving mutually agreed upon regions of the state with the shared goal of achieving statewide coverage. Determination of the number of 2-1-1 centers is generally made based on existing centers at the time the system is being created; natural geographic, cultural or political divisions within the state; willingness and ability of centers to serve regions larger than their immediate natural service area. For example:

State	Population	Number of Current or Planned 2-1-1 Centers
Texas	22,500,000	25
New York	19,200,000	8*
Virginia	7,500,000	6
Washington	6,200,000	8
Maryland	5,600,000	5
Minnesota	5,100,000	8**

* One call center will handle New York City which has 40%+ of state's population; 7 for approximately 11,000,000 people.

** Currently have six centers that are combined call centers and resource hubs and one that is only a resource hub. An additional resource hub is planned. One combined center, Twin Cities, covers 60%+ of the state's population 7 centers for approximately 2,000,000 people.

In 2004, United Way of America commissioned the Ray Marshall Center for the Study of Human Resources of the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin to conduct a cost-benefit study of various models for 2-1-1 systems. The model they found to be the most cost-efficient was what they termed a "hybrid" – that is, it combined regional 2-1-1 centers (which included both the call center and the resource

database function) with centralized systemwide functions. Their conclusion reinforces our belief that we have put together not only the model that can best serve the people of Michigan but also the one that is the most cost efficient.

Our Criteria

We established these criteria to evaluate alternative designs for the system:

- Must ensure statewide telephone access to 2-1-1;
- Must keep development and management of the resource database as "close to home" as possible;
- Must keep service delivery (the call centers) as "close to home" as possible;
- Must be sensitive to regional idiosyncrasies while still achieving cost efficiency;
- Must recognize and respect the investment that has been made by communities that currently operate call centers;
- Must ensure appropriate redundancy throughout the system; and,
- Must maximize the likelihood that financial support can be obtained from private philanthropy and county and municipal governments throughout the state.

Cost Projection and Regional Meetings

As detailed in Appendix C, we developed initial cost projections for various numbers of call centers using a standardized cost model. We concluded that, based on the cost projections, an acceptable range for us to consider was five to seven regional centers.

We then conducted a series of regional planning meetings between April and August 2005 – in Northeast Michigan, in Western Michigan and in Central Michigan. Those meetings were broadly inclusive of stakeholders in the respective regions and were designed to seek agreement on how best 2-1-1 could be provided to the region.

Conclusion and Rationale

At the conclusion of this process, we analyzed the results and concluded that the system design as we have put it forward in this plan would be the most feasible. As described above, that design includes seven Regional 2-1-1 Centers that combine the call center and resource database functions and ten Resource Hubs that will serve as the "face" of 2-1-1 in their respective sub-regions, including assisting in the resource database function. In addition, only two call centers will operate 24/7, further increasing efficiency during periods of the week when call volume is much lower.

We believe that the proposed system design ensures that:

- Within 24 months of receiving commitment for sustained operational funding from state government, we can provide telephone access to 2-1-1 for everyone in Michigan;
- We will build on the strengths of existing call centers while retaining the active engagement, resources and support of communities that might have anticipated having their own centers;
- We will maintain the local community connections that will be required to build and sustain financial support from private philanthropy and local governments throughout the state;
- An appropriate balance will be achieved between cost efficiency and quality based on proximity to the community, redundancy and overall systemwide capacity; and,
- Sufficient redundancy will be built into the system to ensure that it can continue

to operate during emergencies or periods of extremely high call volumes in one or more regions.

In this design:

- Every major region of the state will have a regional center that will combine the resource database and call center functions and one or more sub-regional centers that will serve as the "face" of 2-1-1 and will further localize the resource database function.
- We will limit the number of call centers while bringing the resource database as "close to home" as feasible.

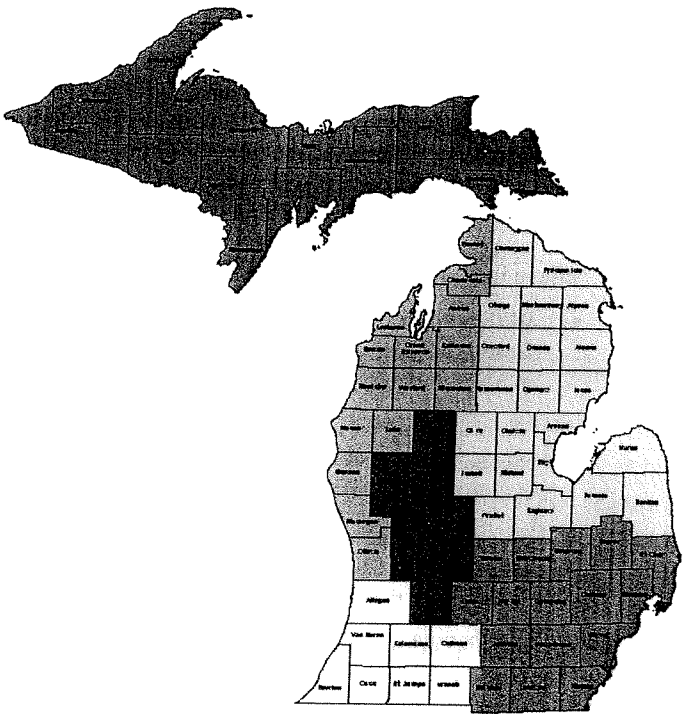
Finally, because it grew out of the active engagement of stakeholders throughout the state, including the currently operating and in-development call centers, this design has the support required for it to be politically feasible to implement it when resources become available.

The Regional System

The timing of final decisions on the precise boundaries of regions and location of Regional 2-1-1 Centers and Resource Hubs will, by necessity, be driven by the availability of funding for the system from the state government and private philanthropy.

For purposes of this plan, however, we believe that the map and table which follows provide a reasonable illustration of how the system will evolve.

2-1-1 Regional Service Areas



Region	Potential Call Centers & Resource Hubs
Southeast Michigan Wayne, Macomb, Oakland, St. Clair and Lapeer counties	Call center in Detroit Contact point for each county
Central Michigan Genesee, Shiawassee, Clinton, Eaton, Ingham, Livingston, Jackson, Washtenaw, Hillsdale, Lenawee and Monroe counties	Call center in Ann Arbor or Jackson Resource hubs in Ann Arbor, Jackson, Lansing and Flint Contact points for balance of counties
Southwest Michigan Calhoun, Branch, St. Joseph, Cass, Berrien, Van Buren, Kalamazoo, Allegan counties	Call center in Battle Creek or Kalamazoo Resource hubs in Battle Creek, Kalamazoo and Benton Harbor Contact points for balance of counties
Western Michigan Emmet, Charlevoix, Leelanau, Antrim, Kalkaska, Grand Traverse, Benzie, Manistee, Wexford, Missaukee, Mason, Lake, Oceana, Muskegon and Ottawa counties	Call center in Muskegon or Grand Haven Resource hubs in Muskegon, Grand Haven and Traverse City Contact points for balance of counties
West Central Michigan Osceola, Mecosta, Montcalm, Kent, Ionia, Barry, Newaygo counties	Call center in Grand Rapids Contact points for balance of counties
Northeast Michigan Gratiot, Saginaw, Tuscola, Sanilac, Huron, Bay, Midland, Isabella, Clare, Gladwin, Arenac, Iosco, Ogemaw, Roscommon, Crawford, Oscoda, Alcona, Alpena, Montmorency, Otsego, Presque Isle and Cheboygan counties	Call center in Midland Resource hubs in Midland, Bay City, Traverse City and Mt. Pleasant Contact points for balance of counties
Upper Peninsula Mackinac, Chippewa, Luce, Schoolcraft, Delta, Alger, Marquette, Menominee, Dickinson, Iron, Baraga, Houghton, Ontonagon, Gogebic and Keweenaw counties	Call center in Escanaba Contact points for balance of counties

THE *MICHIGAN 2-1-1* PARTNERSHIP MODEL

Overview

2-1-1 is a unique asset that will serve everyone in the State of Michigan. But for it to succeed, it must be characterized by:

- Strong, stable systemwide management;
- Sustained, predictable and sufficient funding;
- A strong mutually beneficial relationship between the 2-1-1 system and state government; and,
- Ongoing support from local communities.

Our goal is to build an integrated, efficient statewide system designed to provide seamless telephone access to trained call specialists 24 hours a day, 365 days a year – providing the right information in the right way at the right time.

We believe that the best way to meet this goal and to ensure that the needed characteristics are always present is to build it as a **public-private partnership** between the United Ways of Michigan and the State of Michigan through the corporate structure of *Michigan 2-1-1*.

Roles

Michigan 2-1-1 should be a model partnership of state government and the private and nonprofit sectors with shared responsibility for governance and financing and with primary operational responsibility in the hands of the service providers.

The United Ways of Michigan, acting through the Michigan Association of United Ways, have agreed to:

- Raise from private sources the start-up funds required to fully implement the proposed system;
- Work with the 2-1-1 regional centers to secure up to 50% of the annual operating cost of the system from local sources; and,
- Ensure the effective management of the system at all levels.

The State of Michigan is being asked to:

- Provide at least 50% of the annual operating cost of the system;
- Seek ways to utilize the 2-1-1 system to provide information and referral services to the public;
- Provide, as appropriate and mutually agreed upon, telecommunications, technology and other services to the 2-1-1 system; and,
- Participate in the governance of the system.

The Governance Structure

The Board of Directors. Primary responsibility for the development, operation and oversight of 2-1-1 in Michigan will rest with the board of directors. It will be built on the foundation of the current board of *Michigan 2-1-1* which has committed to the changes required to ensure the maximum representation and diversity that will provide the support needed not just to launch 2-1-1 but to maximize its impact. It should include:

- Representation from state government from both the policy and operating levels to the extent allowed by state law or state government policy;

- Representation from the Michigan Association of United Ways; and,
- Board members drawn from the broader leadership of the community – from United Way, business, private philanthropy, local government, etc. – to maximize local investment in 2-1-1.

The board will be responsible for:

- securing the resources required to fully implement and sustain the proposed system;
- building strong partnerships with agencies of state government;
- hiring and providing policy direction to the executive director; and,
- ensuring quality service by establishing and monitoring performance against standards for regional call centers.

The 2-1-1 Operating Council. The board will be complemented by an Operating Council – composed of Regional 2-1-1 Center directors and central office staff, organized and led by the state executive director – that will share responsibility for operation of those shared functions that link the regional centers and resource hubs with one another, that provide consistency of operations, and that ensure uniform quality throughout the system. They will recommend both policies and operating protocols to the board of directors.

On an ongoing basis, that Council will identify and resolve day-to-day operational issues, define needs and priorities for capacity building within the system, and assist in the planning and implementation of statewide marketing activities. Working individually and collectively, the members will also be responsible for building the *Michigan 2-1-1* network so that it includes both specialized I&R agencies and the service providers themselves as active partners.

The Resource Managers Workgroup will be expanded to include representatives of all regional resource hubs and from state government. It will be responsible for ensuring development of the statewide database. It will report to the 2-1-1 Operating Council.

TELECOMMUNICATIONS AND TECHNOLOGY

Michigan 2-1-1 will be built around four interlocking systems – our telephone system, our resource database, our software and our website. Our goal is to ensure that we move to and sustain ourselves at "state-of-the-art" levels in all four because doing so will continuously improve both the quality and the cost-effectiveness of our services for the people of Michigan

Our Telephone System

At the core of any 2-1-1 is the 24/7/365 call center where trained information and referral specialists help callers articulate their needs and connect them with the services they require.

Initially, we will invest in any immediate enhancements required to help our call centers function efficiently and to easily work together. But our goal is to move as quickly as possible to a single telephone system that will serve all of the call centers, providing a seamless environment that allows for full back-up, systemwide communication, and seamless transfer of calls throughout the system. We anticipate that this major investment will be made in years 3 and 4.

The system we envision will include:

- Cost-free access for all users;
- Call routing technology that will appropriately direct calls to individual call centers based on time of day, day of week, location of caller and call volume;
- Central routing for cellular calls;
- Geographic Information Systems (GIS) that will provide call specialists with real time mapping capability to provide callers with accurate directions for locating services and will allow comparative mapping of the locations from which calls are received and locations of needed services;
- Redundant systems that allow calls to be quickly rerouted by local agencies or at the state level in the event of an emergency;
- Capability to easily transfer calls between call centers;
- Low operational cost;
- Anonymous call origination data linked to the program database to allow quick and efficient location of services; and,
- Three-way calling/conferencing.

We anticipate working in close partnership with the Michigan Department of Information Technology on the design of the system and on decisions related to the vendors to be used to provide needed hardware and ongoing service. We will examine a range of options, including VoIP (Voice Over Internet Protocol).

Our Resource Database

The knowledge base that makes 2-1-1 work is its database of community resources. The *Michigan 2-1-1* database will be the single most comprehensive one in the state. As such, it will become the "go-to" asset for state government, nonprofit service providers, business, and the public as well as being the lifeblood of our regional call centers. It will cover the breadth of health and human services available from government, nonprofit organizations and faith-based groups and community-based associations.

Currently, each 2-1-1 call center maintains its own resource database. It is the job of the Michigan Resource Managers Workgroup, composed of representatives of each call center, to "develop and implement a consistent standardization process that meets defined quality assurance criteria practices." As a result of their work, there is consistent quality in the information, a standardized approach to organizing the information and protocols for sharing information statewide.

Our intention is to create an integrated statewide database that is defined by:

- Decentralized collection of data in the framework of standardized protocols;
- Full accessibility by all 2-1-1 call centers;
- Complete redundancy to ensure continuity in emergencies; and,
- Compatibility with other statewide resource data systems, such as HMIS.

We intend to continue the Resource Managers Workgroup, expanding it to include representatives of all regional call centers and resource hubs and adding representation from state government. It will report to the 2-1-1 Operating Council.

Our Software

In order to meet the national 2-1-1 standards of the Alliance of Information and Referral Systems (AIRS) and thus for our call centers to be eligible for the AIRS accreditation that we require them to achieve, the software supporting our system must be up to or surpass industry accepted standards.

Currently, all 2-1-1 call centers use REFER software. As we evolve into a statewide system, we must move to a single statewide software package that supports our integrated statewide resource database, is used by the call centers to track calls and enables collection and analysis of call data. It also must incorporate XML protocols to allow efficient data-sharing. Ideally, it also will interface easily with existing software programs used in state government.

There are many such software packages that have been specifically designed for information and referral services generally and for 2-1-1 particularly. We plan to conduct a full-scale process to identify the package that is most appropriate to our needs. This will include an independent review and assessment of currently available software packages and an open RFP competition among leading vendors. We anticipate the active participation of the Department of Information Technology, universities or other state agencies to ensure maximum feasible compatibility with state systems.

Web Site

Recognizing the increasing public comfort with searching for information on the internet, it is our intent that *Michigan 2-1-1* be a leader in using the internet to make information available in a user-friendly online environment. We want our web site to be as visible, accessible, and user friendly as 2-1-1 is by telephone. Our intent is that users will be able to get the same resource information from our web site as they could obtain by calling 2-1-1. As technology and our resources allow, we will explore ways to make the site increasingly interactive, enabling users to efficiently define their needs and locate the appropriate resources. Responsibility for development and management of the website will rest with the state office staff.

IMPLEMENTATION CONSIDERATIONS

Ensuring Quality Service

Our reputation for quality service is our most important asset as a system. We are committed to ensuring that each call is handled in the same high quality manner, no matter where it originates or at which call center it is received. Our database must always be as current and comprehensive as possible. Our web site must be as user-friendly as possible, providing resource information of the same quality as available by telephone. We also must be prepared to continue to operate during times of emergency, ensuring that we are available to support emergency response agencies and those who are affected.

To achieve our desired level of quality, we are committed to taking these steps:

- Creating a baseline by building the system in full compliance with the National 2-1-1 Standards developed by AIRS, our national professional association.
- Requiring each call center to be based in Michigan with live call specialists and to achieve full AIRS accreditation within 18 months of their application for Michigan AIRS endorsement. As a system we will work together to support one another in achieving this goal, sharing training and best practices and going through the process together so that we can learn from one another.
- Developing our own performance standards for *Michigan 2-1-1* and establishing the specific measurements we will use to determine that we are meeting those and the national standards, developing a collaborative approach to continually assessing and improving the quality of the services we are providing through silent monitoring, callers satisfaction data collection and common performance indicators.
- Requiring call centers to meet the AIRS National 2-1-1 Standards for certification of I&R specialists, at least 25% of eligible professional staff to be formally certified by AIRS, at the time they apply for endorsement by Michigan AIRS. As a system, we will provide the training required to help staff meet this requirement.
- Executing a pro-active, sustained program to ensure that call centers have the cultural competence to handle calls from people from different cultures, including working closely with grassroots groups to ensure that databases are reflective of culturally-appropriate resources and ongoing training is provided to call center staff.

Business Continuity

2-1-1 in other states has repeatedly demonstrated its value in times of natural and manmade disasters or other emergencies. The first step in providing that value is to ensure that our own operations will continue during such times. We will do this in five ways:

- Having full redundancy in our system so that there always is a back-up plan to handle calls coming in, even if one or more of the regional call centers have been rendered inoperable;
- Building into our new phone system the capability to create "virtual call centers" through which call specialists and resource specialists can work from home and or other remote access sites;
- Taking all industry-standard steps to ensure the safety of our database,

including daily back-ups, redundancy in our servers, and off-site archiving;

- Requiring each of our call centers to develop their own emergency plans for relocation, emergency power, relationship with emergency planning system at the county and local level; and,
- Building an emergency communications structure within the system to ensure that hubs always can communicate with one another.

Public Education and Marketing

For 2-1-1 to make the maximum contribution to the people of Michigan, we must have a well-defined brand that is effectively managed and a sustained marketing effort that ultimately will reach everyone in the state in ways that will encourage their use of the system when they need it.

Our desired brand identity is clear – *2-1-1 is the way to get help and give help in the State of Michigan. The 2-1-1 system is accessible and prepared to respond effectively to calls from all parts of the state at all times. Identification as a regional 2-1-1 call center is a reflection of assured quality and responsiveness.*

Through a sustained, collaborative marketing strategy, we will educate the public about the most appropriate ways to use 2-1-1, differentiating it from other N-1-1 numbers. The *Michigan 2-1-1* brand will be used to identify the system as a whole. Regional call centers will have the option to localize that brand within the overall framework of the system.

Our marketing plan will have five critical components.

Mass media campaign. Our plan is to formally launch *Michigan 2-1-1* with a significant public service media advertising campaign through television, radio, print and other media (online, transit cards, billboards, etc.) designed, produced and distributed in partnership with our leading advertising agencies and underwriters. We will seek the visible endorsement of well-known Michiganders to give 2-1-1 immediate and intensive exposure. Following the launch, we will ratchet the campaign down to a sustainable level, refreshing it regularly to maintain its visibility. This will include both statewide media and ongoing media promotion by regional call centers and resource hubs.

Grassroots marketing and advocacy. While use of mass media is an obvious statewide approach to marketing, we know that word-of-mouth efforts, seeded among target populations, is an equally effective way to build confidence and understanding. We will incorporate natural community leaders, grassroots and faith-based groups, schools, community associations, and service providers and their staffs to develop an ongoing grassroots campaign to promote 2-1-1 in an effective and culturally appropriate way. This is a low-cost, high impact way to sustain promotion of 2-1-1 over time, a critical element with our increasingly mobile and diverse population. It will be led by the regional call centers and resource hubs and the county contacts.

Leveraging our partners' networks. We will take full advantage of our partnership with the state's United Ways, working through them to reach their existing networks, particularly in the business community. In Southeast Michigan, which covers over 40% of the state's population, we will be an integral part of the United Way's ongoing marketing and public education efforts. We also will work closely with state agencies to develop specific ways to promote 2-1-1 to their consumers.

Building low-cost, easy to use promotional tools. We will put together a "2-1-1 Tool Kit" of information and resources that will assist state and county governments and our partners in the community to market 2-1-1 in the absence of a significant mass media budget. It might include talking points; overview of 2-1-1 services; templates for press releases, media advisories, internal and external articles, newsletters, ads, and flyers;

2-1-1 logos and graphics; and, outreach ideas. Materials will be available not only in English but also in Spanish and potentially other languages.

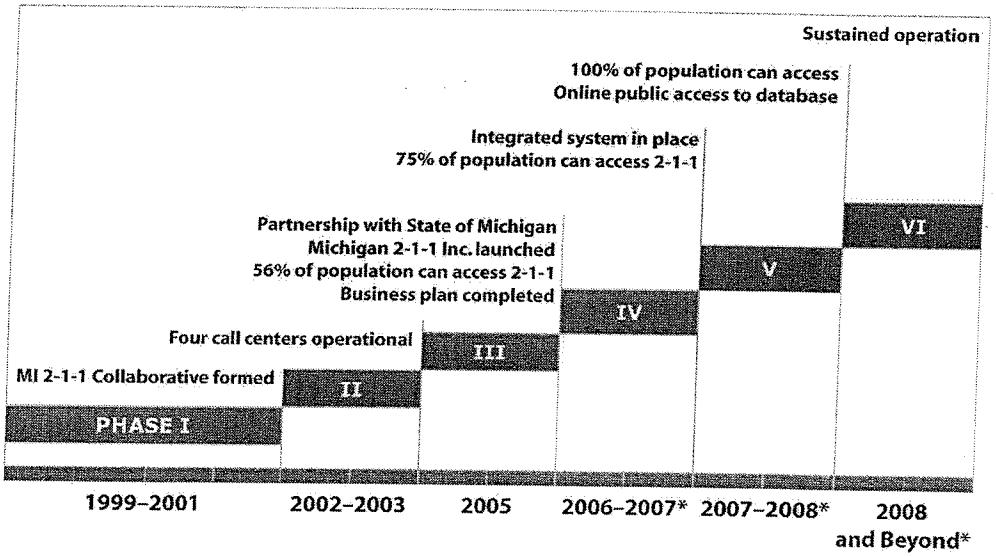
Identifying promotional opportunities. We will build relationships with businesses to promote 2-1-1. In some states, for example, 2-1-1 is included on utility bills or as envelope stuffers. We will turn to health care and mental health providers, pharmacies, and other consumer-based businesses to help promote 2-1-1. We also will reach out to major employers in all sectors and to employee assistance programs to inform their employees of 2-1-1 and to ensure that their PBX telephone systems do not automatically block calls to 2-1-1.

Roll-Out Strategy

Because we want *Michigan 2-1-1* to be a strong, enduring, statewide presence that provides high-quality comprehensive information and referral services for our residents and that supports policy makers and service providers in the public and private sectors, we have undertaken a systematic long-term approach to planning and implementation.

Since the formation of the Michigan 2-1-1 Collaborative in 1999, we have made steady progress in building needed relationships and developing our strategic and operational plans. Now, we are prepared to move forward aggressively to bring 2-1-1 to life statewide by October 2007.

Our strategy will be executed in six phases. The first three phases have already been completed. Full execution of Phase 4 and beyond, beginning January 1, 2006, is fully contingent on the availability of resources and on commitment by state government for sustained operational funding for the system. Thus, dates for those phases appear in brackets to reflect that contingency. We believe that once funding is committed, we can complete the full build-out of the system within 24 months, achieving coverage of 75% of the state population within 12 months and 100% coverage within 24 months.



* Contingent on commitment of sustained funding from state government and private philanthropy.

- **Phase 1 / Laying the Groundwork / 1999 through 2001**
  - Michigan 2-1-1 Collaborative created with leadership by the Michigan Association of United Ways (MAUW), Michigan AIRS, local United Ways and the Detroit Public Library. (1999)
  - Michigan Public Act 295 signed into law; section 214 assigns

responsibility for designation of 2-1-1 call centers to the Michigan Public Service Commission. (2000)

- MI-AIRS Standards established, review process developed for endorsing call centers, AIRS accreditation required within 18 months.
- Part time Michigan 2-1-1 Coordinator position funded through a grant from the W.K. Kellogg Foundation to MAUW. (2001)
- Michigan 2-1-1 Collaborative began quarterly meetings to support statewide 2-1-1 implementation. (2001)

- **Phase 2 / Initial Grass Roots Implementation / 2002 through 2003**
  - Call centers serving Calhoun and Kent counties become operational, 7% MI population serviced. (2002)
  - 2-1-1 data transfer project funded through grant from SBC to MAUW. (2002)
  - Blue Cross Blue Shield provided 2-1-1 sponsorship funding to MAUW for statewide 2-1-1 outreach activities. (2002)
  - Call centers serving Kalamazoo and Ottawa counties become operational, 12% MI population serviced. (2003)
  - Initiated after-hours call rollover between 2-1-1 call centers.
  - Training sessions held for 2-1-1 call centers – software training, database training and data sharing forum. (2003)
  - Resource Managers Workgroup is established to work toward consistent, quality 2-1-1 databases statewide, began monthly meetings. (2003)
  - Michigan 2-1-1 Collaborative completes initial plan for statewide coverage. (2003)
- **Phase 3 / Expanded Statewide Planning / 2004 through 2005**
  - Established partnership with the State of Michigan to develop statewide technological infrastructure plan. (2004)
  - Full Time Michigan 2-1-1 Director position funded through W. K. Kellogg Foundation and Blue Cross Blue Shield of Michigan grants to MAUW. (2004)
  - Secured MDCH OPHP grant to develop 2-1-1s as future resource for health crisis communication with the public.
  - 2-1-1 leaders and funders commit to establish a statewide 2-1-1 organization with formal governance structure. (2004)
  - Statewide 2-1-1 Call Center Operations Manual developed. (2004)
  - Michigan 2-1-1, Inc. launched as formal organization. (2004)
  - Training session held for 2-1-1 call centers on database development and management. (2004)
  - Call center serving Jackson County becomes operational as 2-1-1, 14% MI population serviced. (2004)
  - 2-1-1 concept presented to State of Michigan Department Directors. (2004)

- Michigan Association of United Ways funds statewide 2-1-1 organization operations. (2005)
- Statewide 2-1-1 Business Plan Steering Committee established with State of Michigan Department representatives and 2-1-1 MI leaders. (2005)
- Convened regional 2-1-1 meetings for local stakeholders throughout Michigan on statewide business plan. (2005)
- Secured statewide contract to provide service for Born Learning public education campaign. (2005)
- Call center serving Muskegon County becomes operational, 16% MI population served. (2005)
- Legislature passed and Governor signed Bill 272, Sec. 584 of which orders the identification of potential 2-1-1 benefits across seven state Departments.(2005)
- Strategic business plan for *Michigan 2-1-1* completed. (2005).
- 2-1-1 language in the Michigan Telecommunications Act re-write Bill 5237 section 214 establishes *Michigan 2-1-1* as the agency to recommend 2-1-1 designation, coordinate 2-1-1's use across state departments, and calls for statewide call routing system. (2005)
- Launch regional 2-1-1 service in Southeast Michigan, 56% MI population served. (2005)
- Secured private foundation funding for statewide database application. (2005)

- **Phase 4 / Initial Statewide Implementation / [2006]**
  - Launch regional 2-1-1 service in Upper Peninsula, 59% MI population coverage.
  - Complete the state department study identifying potential cost savings through re-allocation and shared use of 2-1-1.
  - Integrate 2-1-1 service with the State of Michigan health and human services delivery.
  - Launch regional 2-1-1 service in central MI, 65% MI population served.
  - Complete *Michigan 2-1-1* board composition.
  - Prepare technology plan for telephone integration and statewide database software and implementation.
  - Secure private foundation funding for statewide technological infrastructure and start-up.
  - Invest in short-term enhancements for call center telephone systems.
  - Secure state funding, and work for passage of Federal 2-1-1 authorization.
  - Complete Statewide 2-1-1 emergency management protocols in conjunction with the Michigan State Police Emergency Management Division.

- Initiate statewide reporting of 2-1-1 caller data.
- Gain Community Collaborative support for connectivity into regional 2-1-1 service for statewide coverage.
- Secure point of contact for every county and provide training.
- Complete community resource databases for outlying counties.
- Develop regional coverage from single-county call centers by connecting outlying counties.
- Prepare marketing and communications plan.
- Launch Regional 2-1-1 service in Northeast Michigan.

- **Phase 5 / Expanded Statewide Implementation / [2007]**
  - Hire additional staffing for *Michigan 2-1-1* (i.e. Resource Development Director, Quality Assurance, Tech Support).
  - Implement infrastructure and initiate testing for statewide call routing and data sharing.
  - Complete planning for new integrated telephone system.
  - Activate cellular access.
  - Launch online public access to database.
  - Complete connectivity with outlying counties to regional call centers and launch statewide service.
  - Implement marketing and communications plan.
- **Phase 6 / Sustaining the System and Adding Value / [2008 – ongoing]**
  - Install new integrated telephone system for all regional centers and resource hubs.
  - Maintain ongoing system-wide marketing and communications.
  - Measure quality assurance and cost effectiveness.
  - Integrate 2-1-1 with new State health and human services outreach, eligibility and client-management systems.

STRATEGIC RELATIONSHIPS

Key to our success will be our ability to develop strong strategic relationships with an array of partners. Each set of relationships will have its own set of challenges and requirements.

State government. Our long-term success is heavily dependent on our ability to build strong partnerships throughout state government. We must work closely, to our mutual benefit, with the Office of the Governor, the state departments and the State Legislature, demonstrating that 2-1-1 can add value to their efforts to simplify government and improve services to its customers.

We will be seeking a bi-partisan approach to ensuring that the system is put in place and is sustained. This includes formal validation of *Michigan 2-1-1*'s leadership role in providing ongoing 2-1-1 services for the people of Michigan, support in positioning us to serve as the conduit for any federal funds that may become available to support 2-1-1 and sustained financial support to put in place and maintain the 2-1-1 infrastructure.

We also must sustain our strong, positive relationship with the Public Service Commission so that we can address any issues that may arise around assignment of the 2-1-1 dialing code.

Michigan State Police Emergency Management Division and the statewide emergency management network. One of the most important contributions 2-1-1 can make comes in times of natural disaster or man-made emergencies. We know from the experience in other states that 2-1-1 can add significant value during, in the immediate aftermath of, and in the longer-term recovery from such situations. But for *Michigan 2-1-1* to make that same level of contribution, we must build strong working relationships with state, county and municipal agencies in these areas, developing protocols to guide our work in support of them. We also must work in close partnership with the Office of Public Health Preparedness of the Department of Community Health.

County and local government and 911. One of the great advantages of a regional call center system is that we are bringing the service as close to the local level as is feasible. That means that our call centers are in a position to build relationships with and to tailor services for individual counties and even cities, developing specific protocols that will guide how they handle certain calls or providing call center services on a contract basis.

Because 2-1-1 is a way of helping to relieve the burden of inappropriate calls on 911, it will be essential that each regional call center build a relationship with all of the 911s in its region, again developing individualized protocols for moving calls between them. Our plan is to work through the Michigan State Police to help establish a state-level template for such protocols to maximize consistency and to make the local development process as efficient as possible.

United Ways and the Michigan Association of United Ways. United Ways are a critical local leadership resource for 2-1-1. They can provide sustained funding as well as help build 2-1-1's local visibility and impact. They will play a key role in putting 2-1-1 call data to work identifying unmet needs and gaps in services and stimulating community response. At the state level, MAUW serves as the initial fiduciary and funder for *Michigan 2-1-1* and as the principal convener for planning.

Private philanthropy. To fully launch and to sustain the *Michigan 2-1-1* system, we will need the active support of the business community and of private foundations and individual donors. Our major challenge is to draw all three into active participation.

To do this, we must be open to presenting 2-1-1 as a new opportunity for corporate sponsorship, to finding new ways for I&R to serve the people and issues of greatest concern to private philanthropy, and to leveraging the networks of our United Way partners. We will seek "start-up" funding from these private sources in anticipation of long-term sustaining support from both the private and the public sectors.

Universities. We want to build strong relationships with higher education for three reasons. First, we will need their help in planning and executing research on and evaluation of 2-1-1 to help us assess our performance and impact. Second, we need to make 2-1-1 as well known among students as it will be to the general public. Third, we can offer students meaningful service-learning opportunities throughout the 2-1-1 system.

Volunteer Centers. To fulfill our commitment to make 2-1-1 a tool for civic engagement, we must develop a strong working relationship with Connect Michigan and the Volunteer Centers of Michigan to ensure that 2-1-1 is playing the most appropriate role in helping people identify and connect with opportunities to volunteer.

KEY CHALLENGES TO SUCCESS

It is important for us to understand and prepare for major challenges we will confront as we implement 2-1-1. These may include:

- ***Building sustained funding.*** Building a successful 2-1-1 requires sustained, predictable funding. We believe that the partnership approach we are developing will ensure that:
  - through the recognition by state government of the multiple ways the 2-1-1 infrastructure can help it maximize the investment that Michiganders make in government;
  - through the continued leadership and long-term commitment to 2-1-1 of United Ways as an integral part of their community impact focus; and,
  - through the support that can be built among other private sources, both foundations and business.

  Ensuring the success of that approach will require us to develop strong, mutually beneficial relationships with the Office of the Governor, the State Legislature and state agencies as well as with United Ways and leaders in private philanthropy. Of critical importance will be the planned expansion of the current *Michigan 2-1-1* board of directors to bring on to it leading representatives of each of these sectors who can give us the credibility and access we need to develop new resources.
- ***Building the relationship with state government.*** The 2-1-1 system can help state departments do their jobs better and more efficiently – by triaging calls to ensure that they are directed appropriately, by providing data on emerging and unmet needs and by becoming the publicized access point for information and referral to state services and for public education campaigns. But in order to do that, we must have strong and mutually beneficial relationships in place with those departments at both the policy and operational levels.
- ***Strengthening the infrastructure.*** Although we will be building the system around existing call centers, we recognize that each of those will need enhancement both in their technological capacity and in the size and training of their staff. We also must recruit a talented and committed state executive director and consolidate into a small state office the responsibilities for fund-raising and marketing for the system and for management of the integrated statewide database. We will need start-up funding to build the capacity to fulfill the projected central office functions. All of this will require the board to be heavily involved in the start-up phase of the system, to set clear policy directions and to actively assist in obtaining the resources needed to implement our plan.
- ***Maximizing technology.*** Our telephone system, the software package that supports our resource database and call tracking, and our web site lay at the very heart of our operations. We must secure expert assistance in determining the detailed operational plan for selecting and putting in place the appropriate systems. We plan to work in partnership with the Department of Information Technology to take full advantage of their expertise, the system they are building and the cost-savings they can offer. We also must move quickly to build a system that will enable us to receive calls from cell phones.

APPENDIX A: LEADERSHIP FOR *MICHIGAN 2-1-1*

Michigan 2-1-1 Board of Directors	Michael Brennan, United Way of Southeastern Michigan, Detroit Robert Haight, Heart of West Michigan United Way, Grand Rapids Jonathan Mead, UPCAP Services, Inc., Escanaba Sherry Miller, Ottawa County 2-1-1, Grand Haven Christopher Nelson, Michigan Association of United Ways, Lansing (Vice-President) Bill Pell, Gryphon Place, Kalamazoo (Secretary-Treasurer) John Zimmerman, United Way of Midland County, Midland (President)
Michigan 2-1-1 Planning Committee	George Boersma, Office of Technology Partnerships, Michigan Department of Information Technology Beverly Davenport, Michigan Department of Human Services Robert Haight, Heart of West Michigan United Way, Grand Rapids Jennifer Heston, Senate Majority Policy Office El Cabrel Lee, United Way 2-1-1, United Way of Southeastern Michigan, Detroit Mary Ludtke, Community Collaboration Coordinator, Michigan Department of Community Health Robert McKown, United Way 2-1-1, Heart of West Michigan United Way Jonathan Mead, UPCAP Services, Inc., Escanaba Marie Milkovich, Office of Public Health Preparedness, Michigan Department of Community Health Robert Miller, Washtenaw United Way, Ann Arbor Sherry Miller, Ottawa County 2-1-1, Grand Haven Christopher Nelson, Michigan Association of United Ways, Lansing Jim Pearl, Volunteer Center of Battle Creek Bill Pell, Gryphon Place, Kalamazoo Beth Perrine, Public Relations, Michigan Department of Community Health Dee Scott, Senior Resources, Muskegon Kevin Seitz, Blue Care Network of Michigan Nicole Shugars, Volunteer Center of Battle Creek Ken Toll, United Way of Jackson County, Jackson Dana Wolverton, Michigan State Police, Emergency Management Division John Zimmerman, United Way of Midland County, Midland
Current Investors in 2-1-1 throughout the State	***Private Foundations*** Dorothy Dalton Foundation The Herbert H, and Grace A. Dow Foundation Irving S. Gilmore Foundation W. K. Kellogg Foundation Kresge Foundation Loutit Foundation McGregor Fund Metro Health Foundation Polk Foundation RNR Foundation Sebastian Foundation Sherwood Foundation Slemons Foundation Weatherwax Foundation Whitney Fund Harold and Grace Upjohn Foundation

Corporations
Alticor
Blue Cross Blue Shield of Michigan and Blue Care Network
Comerica Inc.
Daimler Chrysler Corporate Fund
DTE Energy
Herman Miller
Johnson Controls
JSJ Corporation
Pfizer Global Research Development
Shape Corporation
Steelcase Foundation

Community Foundations
Ann Arbor Area Community Foundation
Battle Creek Community Foundation
Community Foundation of the Holland/Zeeland Area
Community Foundation for Southeast Michigan
Grand Haven Area Community Foundation
Grand Rapids Community Foundation
Jackson Community Foundation
Kalamazoo Community Foundation
Muskegon Community Foundation

Public Sector
Building Restorative Communities/Ottawa
Kent County Department of Human Services
Kent County Health Department
Kent County Senior Millage Program
Ottawa Area Intermediate School District
Ottawa County Community Action Agency
Ottawa County Health Department
State of Michigan Office of Public Health Preparedness
Strong Families/Safe Children, Ottawa County DHS

United Way
Barry County United Way
Capital Area United Way
Eaton County United Way
Greater Kalamazoo United Way
Heart of West Michigan United Way
Hillsdale County United Way
Livingston County United Way
Marshall United Way
Michigan Association of United Ways
Shiawassee United Way
United Way for Southeastern Michigan
United Way of Bay County
United Way of Chippewa County
United Way of Genesee County
United Way of Greater Battle Creek
United Way of Greater Niles
United Way of Jackson County
United Way of Manistee County
United Way of Mason County

United Way of Midland County
United Way of Monroe County
United Way of Muskegon County
United Way of Sanilac County
United Way of Southwest Michigan
Washtenaw United Way

Other
UPCAP Services, Inc.

Additional Participants in 2005 Regional Planning Meetings

Mary Kraft	Alcona, Iosco Community Collaborative
Anita Lyden	Allegan County Crisis Response
Robert Ells	Allegan County United Way and Volunteer Center
Brenda Terberg	Allegan County Crisis Response
Carlene Przykucki	Alpena Community Collaborative
Gary Knapp	Antrim Community Collaborative
Mary Leininger	Region VII Area Agency on Aging
Lynn Briel	Barry Community Collaborative
George Heron	Bay County United Way
Vicki Ribble	Bay County United Way
Sarah May	Benzie Community Collaborative
Mike Larson	United Way of Greater Battle Creek
Kari Marciniak	Volunteeer Center of Battle Creek
Mike Larson	United Way of Greater Battle Creek
Nancy MacFarland	United Way of Greater Battle Creek
Peter Amar	Cheboygan Community Collaborative
Shelli Wolfe	Clare Community Collaborative
Debby Kloosterman	Clinton Community Collaborative
Cynthia Timmons	Crawford Community Collaborative
Lorraine Berry	Emmet and Charlevoix Community Collaborative
Ramona Mems	Genesee Community Collaborative
Ron Butler	United Way of Genesee County
Dale Weighill	The Resource Center
Tami Jenkinson	United Way of Gladwin County
Barbara Lemcool	Grand Traverse Community Collaborative
Mickie Janazzo	Third Level Crisis Center
Pia Seebach-York	Hillsdale County United Way
Kathie Harrison	Huron County Community Collaborative
Suzanne Eman	Capital Area United Way
Amanda Burns	Capital Area United Way
Krista Hqusermann	Ionia County Community Collaborative
Sheila Ransom	United Way of Ionia County
Don Schuster	Listening Ear
Kathy Tarrant	Listening Ear
Al Kaufman	Listening Ear
Nicole Bliss	United Way of Isabella County
Richard LaPratt	Jackson 2-1-1
Janet Jones	Kalamazoo Community Collaborative
Eric Dewey	Greater Kalamazoo United Way
Ranae McCauley	Kalkaska Community Collaborative

Mathew VanZetten	Kent Community Collaborative
Jan Watz	United Way of Lapeer County
Bob MacEachran	Leelanau County FCC
Rich Cole	Lenawee United Way and Volunteer Center
Nancy Roso	Livingston County United Way
Madeline Nantais	Macomb Community Collaborative
Deb Wright	Manistee Community Collaborative
Mary Beeherwelt	Manistee County, Volunteer
Kathy Ervin	Manistee County, Volunteer
David Bair	Mecosta Community Collaborative
Sue Asher	Midland Community Collaborative
Brian Jackson	Midland Area Community Foundation
Doug Redding	Monroe Community Collaborative
Micheal Hoydic	Monroe United Way
Lisa Lund	Montcalm Community Collaborative
Jim Beach	Montmorency Community Collaborative
Phil Stoffan	Call 2-1-1 Muskegon
Christine Robere	United Way of Muskegon
Susan Howell	Call 2-1-1 Muskegon
Sarah Bowman	Newago Community Collaborative
Wendy Sinicki	United Way of Newago County
Cindy Pushman	Otsego Community Collaborative
Carol Bedient	Grand Haven Area Community Foundation
Sylvia Geisler	Greater Ottawa County United Way
Sue Boes	Ottawa 2-1-1
Amy Fullerton	Presque Isle Community Collaborative
Mary Schalk	Presque Isle Community Collaborative
Cindy Timons	Roscommon Community Collaborative
Sharon Brittich	Sanilac Community Collaborative
Amy Smith	St. Clair Community Collaborative
Lonnie Stevens	United Way of St. Clair County
Susan Andrus	Tuscola Community Collaborative
Claren Schweitzer	VanBuren Community Collaborative
Margie Murphy	VanBuren ISD
Mike Scholl	Washtenaw Community Collaborative
Sandy Rupp	Washtenaw United Way
Dale Berry	Huron Valley Ambulance
Jerry Zapolnik	Huron Valley Ambulance

APPENDIX B: OVERVIEW OF N-1-1 NUMBERS

N-1-1 dialing codes, are three-digit numbers of which the first digit can be any digit other than one or zero, and the last two digits are both one. N-1-1 codes "0-1-1" and "1-1-1" are unavailable because "0" and "1" are used for switching and routing purposes. Hence, there are only eight possible N-1-1 codes, making N-1-1 codes among the scarcest of telephone numbering resources.

The following chart outlines the existing N-1-1 code assignments:

N-1-1 Code	***Assignment***
2-1-1	Assigned for community information and referral services.
3-1-1	Assigned nationwide for non-emergency police and other government services.
4-1-1	Unassigned, but used nationwide for directory assistance.
5-1-1	Assigned for traffic and transportation information.
6-1-1	Unassigned, but used broadly by carriers for repair service.
7-1-1	Assigned nationwide for access to Telecommunications Relay Services (a service for the hearing and speech impaired).
8-1-1	Assigned as universal number for "call before you dig" location services for public utilities.
9-1-1	Unassigned, but used nationwide for emergency services.

APPENDIX C: DETAILED FINANCIAL PROJECTIONS

Overview

A three-step process was used in developing the financial projections for Michigan 2-1-1.

Step One was to develop the framework within which the decision was made about the design of the system and the number of regional call centers. We used standardized assumptions on costs to compare the cost of a range of one to twelve centers.

Step Two came after the decision on the number of centers and the preliminary regional boundaries. In it, we used the same assumptions but applied them to the actual populations of the proposed regions to project more precisely the anticipated costs.

Step Three focused on the systemwide costs for start-up and for ongoing operations.

This appendix describes the outcome of each of these steps. Details on the assumptions used in the projections are at the end.

Step One. Preliminary Projections to Use in Determining Design of the System

So that we could compare costs for various numbers of call centers, we used standard assumptions to project those costs for one to twelve centers using the following guidelines:

- The projection for two centers was based on dividing the state population in half between them.
- For all models of three or more centers, we assumed that one of the centers would always be in Southeast Michigan and one would always be on the Upper Peninsula. This ensures coverage for the largest block of the population and redundancy housed in the most remote region of the state.
- For all models of three or more centers, we deducted the combined population of Southeast Michigan and the Upper Peninsula and then divided the balance by the additional call centers to be projected. Thus, for five call centers, we divided the balance by three for the additional centers beyond Southeast and the Upper Peninsula.
- We projected costs for five years of full operation and calculated both the annual and total cost for each model.

The following is the rounded total five year cost for call centers in each model:

One center	$26,200,000
Two centers	$31,000,000
Three centers	$31,000,000
Four centers	$33,200,000
Five centers	$34,200,000
Six centers	$34,500,000
Seven centers	$35,700,000
Eight centers	$37,500,000
Nine centers	$39,500,000
Ten centers	$40,000,000
Eleven centers	$41,600,000
Twelve centers	$43,400,000

We were seeking an appropriate balance between cost efficiency and quality based on proximity to the community, redundancy and overall systemwide capacity. We took into consideration the regional realities of the state, the presence of well-developed 2-1-1 operations in some parts of the state and the desirability of keeping service delivery as "close to home" as possible. Thus, we were seeking a model that would be broadly supported by key stakeholders, one that is achievable.

We reached these conclusions:

- A single call center would be at too great a distance from the majority of the population and would not provide needed redundancy in case of an emergency.
- It likely would not be politically feasible, given the current level of development of 2-1-1 around the state to have only two, three or four centers nor would it meet our criteria of keeping services as "close to home" as possible.
- There is a significant cost escalation once we moved past seven call centers.

Based on these conclusions, we decided that an acceptable range for us to consider was five to seven centers. That was the guideline we used as we moved into a series of regional planning meetings between April and August 2005. Out of those meetings came the proposed regional system outlined in this plan.

Step Two. Refined Call Center Projections

After we reached agreement on the regional system outlined in this plan, we recomputed the projected cost for each regional center using actual population sizes for each one. The results:

Southeast	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Total**
211 Service	1,483,920	1,746,680	2,049,226	2,148,465	2,261,678	9,689,969
Telecommunications	148,796	187,362	225,881	236,082	246,789	1,044,910
Regional Marketing	5,000	5,000	5,000	5,000	5,000	25,000
Administrative	236,781	243,948	252,173	256,328	260,962	1,250,192
Total	**1,874,498**	**2,182,991**	**2,532,281**	**2,645,875**	**2,774,426**	**12,010,071**
211 Service	813,098	945,209	1,060,157	1,143,987	1,184,527	5,146,978
Telecommunications	78,765	96,194	113,613	118,228	123,074	529,874
Regional Marketing	11,000	11,000	11,000	11,000	11,000	55,000
Administrative	123,510	127,292	130,528	133,617	135,568	650,515
Total	**1,026,373**	**1,179,695**	**1,315,298**	**1,406,832**	**1,454,169**	**6,382,367**
211 Service	550,765	633,556	698,342	722,339	769,430	3,374,432
Telecommunications	54,425	62,332	69,999	72,324	74,416	333,496
Regional Marketing	8,000	8,000	8,000	8,000	8,000	40,000
Administrative	77,414	80,014	82,042	83,305	85,243	408,018
Total	**690,604**	**783,902**	**858,383**	**885,968**	**937,089**	**4,155,946**
211 Service	500,848	560,203	630,355	651,589	686,206	3,039,201
Telecommunications	44,534	51,950	59,170	61,051	63,011	279,716
Regional Marketing	15,000	15,000	15,000	15,000	15,000	75,000
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Total**

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Administrative	71,038	72,895	75,135	76,274	77,743	373,085
Total	**631,420**	**700,048**	**779,660**	**803,914**	**841,960**	**3,757,002**
West Central						
211 Service	646,405	702,910	746,380	772,353	818,226	3,686,274
Telecommunications	68,716	72,871	77,593	80,412	83,371	382,963
Regional Marketing	7,000	7,000	7,000	7,000	7,000	35,000
Administrative	80,688	82,780	84,444	85,777	87,592	421,281
Total	**802,809**	**865,561**	**915,417**	**945,542**	**996,189**	**4,525,518**
Northeast						
211 Service	527,918	612,740	667,646	690,499	739,430	3,238,233
Telecommunications	49,480	58,208	66,653	68,843	71,122	314,306
Regional Marketing	22,000	22,000	22,000	22,000	22,000	110,000
Administrative	76,970	79,555	81,280	82,486	84,315	404,606
Total	**676,368**	**772,503**	**837,579**	**863,828**	**916,867**	**4,067,145**
Upper Peninsula						
211 Service	356,742	387,491	407,307	420,413	433,964	2,005,917
Telecommunications	29,337	32,502	35,636	36,461	37,325	171,261
Regional Marketing	15,000	15,000	15,000	15,000	15,000	75,000
Administrative	46,270	47,334	48,136	48,867	49,620	240,227
Total	**447,349**	**482,327**	**506,079**	**520,741**	**535,909**	**2,492,405**
Resource Hubs	**500,000**	**500,000**	**500,000**	**500,000**	**500,000**	**2,500,000**
Total	**6,649,421**	**7,467,027**	**8,244,697**	**8,572,700**	**8,956,609**	**39,890,454**

Step Three. Projecting Systemwide Costs

Systemwide costs were projected in three categories: start-up, ongoing telecommunications and state office costs. Startup database and telecommunications as well as ongoing telecommunication projections were done in consultation with the Department of Information Technology, estimating the cost of development and management of an integrated, state of the art database and telephone system for the Michigan 2-1-1 over five years.

Start Up Costs	Year 1	Year 2	Year 3	Year 4	Total
Complete local build-out	175,000	175,000			350,000
Make regional databases web ready	250,000	250,000			500,000
Develop statewide web access and	250,000	250,000			500,000
Telecommunications equipment			750,000	750,000	1,500,000
State office set-up	30,000				30,000
Total	**705,000**	**675,000**	**750,000**	**750,000**	**2,880,000**

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
State Office Costs						
Executive Director	65,000	66,950	68,959	71,579	74,299	346,787
Capacity Building/Quality Assurance Director	45,000	46,350	47,741	49,173	50,648	238,912
Marketing Director			45,000	46,350	47,741	139,091
Resource Database Director		45,000	46,350	47,741	49,173	188,264
Administrative Assistant	20,000	20,600	21,218	21,842	22,526	106,186
Total Salaries	130,000	178,900	229,268	236,685	244,387	1,019,240
Fringe Benefits @35%	45,500	62,615	80,243	82,840	85,535	356,733
Total Staff Costs	175,500	241,515	309,511	319,525	329,922	1,375,973
Contracted Marketing Support	50,000	50,000				100,000
Statewide Marketing Campaign	50,000	100,000	120,000	120,000	120,000	510,000
Total Marketing	100,000	150,000	120,000	120,000	120,000	610,000
Capacity Building and Training	48,000	48,000	41,000	41,000	41,000	219,000
Administrative Costs	90,000	90,000	90,000	90,000	90,000	450,000
Sub-Total	413,500	529,515	560,511	570,525	580,922	2,654,973
Contingency @ 10% of total	41,350	52,950	56,050	57,050	58,090	265,490
Total State Office Costs	**454,850**	**582,465**	**616,561**	**627,575**	**639,012**	**2,920,463**

Assumptions Used in Developing the Financial Projections

We used the national 2-1-1 Financial Planning Tool of AIRS, the Alliance of Information and Referral Systems to develop the financial projections. The tool is based on call volume as the primary driver of costs, using a widely-accepted queuing formula to compute staffing requirements.

Call Volume. Typically, call volume is expressed as a percentage of the population being served. Nationwide, 2-1-1s generally aim for call volumes at least in the 6-8% range with many moving into the 8-10% range. The AIRS 2-1-1 Financial Planning Tool asks for projected call volume in the third year of full operation of 2-1-1. We used 8% by year three with a 5% annual growth rate after that. This was based on current actual call rates in existing 2-1-1s and realized rates of growth when 2-1-1 is activated.

Call Duration. The length of the call plus the "close-out" time required to complete the record of the call constitutes the "call duration" and has a direct relationship to the number of staff required. Based on actual experience plus nationwide experience, we used 8.5 minutes as the average duration.

24/7/365 Service. National standards call for 2-1-1 to be available 24/7/365. In most states, it has proven most economical to pool calls received after normal business hours, reducing the number of call centers that must remain open with "after hours" calls routed to only a few centers. We made the assumption that we would have only two 24/7/365 call centers. We used a figure of $7.00 per call as the incremental cost of those centers accepting after-hours calls. We calculated the cost each center would thus bear if their after-hours calls were forwarded.

Call Specialists. The AIRS 2-1-1 Financial Planning Tool spreads calls across the week

based on the actual experience of major 2-1-1s nationwide and, using a standard queuing formula, computes the number of call specialists required to answer varying percentages of the calls received. Based on best practice nationwide, we projected for 95% of calls to be answered. We used a wage figure of $12.00 per hour for call specialists and a fringe benefit rate of 25%.

Resource Specialists. Resource specialists are responsible for building and maintaining the resource database that provides the knowledge base from which referrals are made. We allowed each center 1.0 FTE resource specialist for every 1,000 records in their database with a minimum of 1.0 FTE resource specialist in each center at a salary of $30,000.

Resource Hubs. In addition to the 1.0 FTE resource specialist allowed for each center, we budgeted an additional $20,000 per year for operating expenses. We anticipate that each resource hub will develop a budget and staffing plan, within these parameters, that will allow it to meet its 2-1-1 responsibilities in the light of local and regional needs.

Other Staffing. We allowed each regional call center the following staff complement beyond call specialists and resource specialists:

1.0 FTE Director @ $65,000 per year
1.0 FTE follow-up specialist @ $25,000 per year
0.5 FTE business manager @ $30,000 per year
0.3 FTE fiscal assistant @$25,000 per year
0.5 FTE technical systems manager @ $40,000 per year

Fringe Benefits. We used a rate of 35% of salaries for all positions.

Operating Costs. We used identical formulas or set assumptions for the following line item operating costs:

- Telecommunications
  - $50 per phone line per month
  - Two cents per minute for calls routed through statewide 800 number
  - $1.60 per minute of calls requiring contracted language translation services; assumes 1% of calls will require the service
  - $8,000 per year for maintenance of automatic call director
  - $2,400 per year for bandwidth

- Software and technology
  - $5,600 per year for web hosting, database hosting, other software support with the primary cost for software and technology support budgeted as a systemwide cost

- Marketing
  - $1,000 for every county served; all other marketing budgeted as a systemwide cost

- Administrative costs
  - Occupancy - $14 per square foot
  - Travel - local and non-local based on size of population served and staff size
  - Legal - $5,000 per year
  - Insurance - $3,100 per year
  - Audit - $3,500 per year
  - Supplies - $15 per staff member per month

- Utilities - $10 per staff member per month
- Printing and Postage - $250 per every 100,000 people served
- Memberships - $200 per year
- Repairs and Maintenance - 2% of occupancy cost
- Contingency - 1% of total