

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

927



**FROM:** DEPARTMENT OF PUBLIC SOCIAL SERVICES

**SUBMITTAL DATE:**  
September 1, 2009

**SUBJECT:** Agreement with inTelegy Corporation for Consulting Services on the Medi-Cal Service Center

**RECOMMENDED MOTION:**

1. Approve and authorize the Chairman of the Board to sign the attached Agreement # CW-01151 with inTelegy Corporation for the period of September 1, 2009 through November 30, 2010 for an amount not to exceed \$ 338,520.
2. Authorize the Director of the Department of Public Social Services (DPSS) to administer the contract.
3. Authorize the Purchasing Agent, in accordance with Ordinance No. 459, to sign amendments that do not change the substantive terms of the agreement, including amendments to the compensation provision that do not exceed the annual CPI rates.

**BACKGROUND (Continued on page 2):**

*Susan Loew*

Susan Loew, Director

|                       |                               |           |                         |       |
|-----------------------|-------------------------------|-----------|-------------------------|-------|
| <b>FINANCIAL DATA</b> | Current F.Y. Total Cost:      | \$194,880 | In Current Year Budget: | Yes   |
|                       | Current F.Y. Net County Cost: | \$ 0      | Budget Adjustment:      | No    |
|                       | Annual Net County Cost:       | \$ 0      | For Fiscal Year:        | 09-10 |

|   |                                  |                          |
|---|----------------------------------|--------------------------|
| <b>SOURCE OF FUNDS:</b><br>Federal Funding: 52.3% State Funding: 47.7%; County Funding: 0%;<br>Realignment Funding: 0%; | Positions To Be Deleted Per A-30 | <input type="checkbox"/> |
|   | Requires 4/5 Vote                | <input type="checkbox"/> |

**C.E.O. RECOMMENDATION:**

APPROVE

BY: *Debra Cournoyer*  
Debra Cournoyer

**County Executive Office Signature**

Mark Setzer  
 County Purchasing Department  
 Departmental Concurrence  
 Larisa McKenna  
 County Counsel

Consent  
 Policy  
 Consent  
 Policy  
 Dep't Recomm.:  
 Per Exec. Ofc.:

**Prev. Agn. Ref.:** \_\_\_\_\_ **District:** All **Agenda Number:**

ATTACHMENTS FILED  
WITH THE CLERK OF THE BOARD

**3.89**

**TO: BOARD OF SUPERVISORS**

**DATE:** September 1, 2009

**SUBJECT:** Agreement with inTelegy Corporation for Consulting Services on the Medi-Cal Service Center

**BACKGROUND (Continued):**

The Department of Public Social Services (DPSS) is planning to implement new client service strategies in its Medi-Cal program. Currently, DPSS uses a traditional eligibility caseload model. Eligibility workers carry individual caseloads and follow clients from intake through termination. Offices are distributed geographically throughout Riverside County.

DPSS proposes to centralize the maintenance of Medi-Cal cases in call centers. Initial eligibility applications will continue to be conducted in existing offices, while continuing case maintenance will be conducted in most instances on the telephone through the call centers.

This model is being or, has already been, implemented in other counties in the state, including San Francisco, Santa Barbara, Solano, and Tulare.

This model has been shown to benefit customers by decreasing the need for office visits while also reducing wait times during those visits. DPSS will benefit through greater efficiency in processing cases, allowing us to handle increasing caseloads without expanding our workforce.

inTelegy Corporation will be responsible for creating the business model, developing technology and logistics standards, training eligibility staff in the new processes, and assisting DPSS in managing the project until the pilot is in operational status.

**PRICE REASONABLENESS:** Purchasing released a Request for Proposal, mailing solicitations to 30 companies and advertising on the County's Internet. Proposals were submitted by 13 vendors.

The proposals were reviewed by an evaluation team consisting of personnel from Purchasing and the DPSS. The evaluation team reviewed and scored each proposal based on the bidder's overall responsiveness to the requirements of the scope of service, technical capability and project methodology, references, resumes and the overall cost. inTelegy Corporation was selected as the most responsive/responsible vendor, submitting total cost of \$338,520. The other bidders proposed fees ranged from \$379,500 to \$1,084,184.

The evaluation committee recommends that the award be given to inTelegy Corporation as the lowest responsive/ responsible vendor with the total amount of \$338,520.

**ATTACHMENT(S):**

Contract CW-01151

**CONCUR/EXECUTE** – Purchasing/County Counsel

SL:bt

Riverside County Department of Public Social Services  
Contracts Administration Unit  
10281 Kidd Street  
Riverside, CA 92503

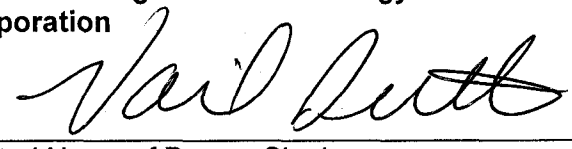
SERVICES CONTRACT: CW-01151  
CONTRACTOR: inTelegy Corporation  
CONTRACT TERM: September 1, 2009 – November 30, 2010  
MAXIMUM REIMBURSABLE AMOUNT: \$338,520.00

WHEREAS, the Department of Public Social Services hereinafter referred to as DPSS, desires contract for Medi-Cal Service Center consulting services.

WHEREAS, inTelegy Corporation is qualified to provide Medi-Cal Service Center consulting services

WHEREAS, DPSS desires inTelegy Corporation, hereinafter referred to as the Contractor, to perform these services in accordance with the TERMS and CONDITIONS (T&C) attached hereto ; incorporated herein by this reference. The T&C specify the responsibilities of DPSS and the Contractor

NOW THEREFORE, DPSS and the Contractor do hereby covenant and agree that the Contractor ; provide said services in return for monetary compensation, all in accordance with the terms and conditions contained herein of this Contract.

|   |   |
|---|---|
| Authorized Signature for County:                  | Authorized Signature for inTelegy Corporation<br> |
| Printed Name of Person Signing:<br>Jeff Stone     | Printed Name of Person Signing:<br>Vail Dutto   |
| Title:<br>Chairman                                | Title:<br>Chief Executive Officer   |
| Address:<br>10281 Kidd St.<br>Riverside, CA 92503 | Address:<br>PO Box 2578<br>Danville, CA 94526   |
| Date Signed:                                      | Date Signed:<br>8/17/09   |

For scanning

FORM APPROVED COUNTY COUNSEL  
BY:   
LARISA R-MCKENNA DATE

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    Exhibit A- Deliverable Sign-Off

    Exhibit B- Change Order

    Exhibit C- inTelegy Description of Service

    Exhibit D- Milestone Payment Schedule

    Exhibit E- DPSS 2076A

**CONTRACT TERMS AND CONDITIONS**

**I. DEFINITIONS**

A. "DPSS" refers to the County of Riverside and its Department of Public Social Services, which has administrative responsibility for this Contract.

**II. PROJECT DELIVERABLES**

All deliverables will be reviewed and accepted by the assigned County Project Manager. The deliverables are listed in the following table:

| A. Milestone #1 Strategy and Planning (Months 1 through 3) |   |  |
|--|---|--|
| Deliverable  | Acceptance Criteria   |  |
| 1.   | Strategy and Plan document completed including budget and staff analysis. | This deliverable will be considered complete upon review and approval of the Strategy and Planning document and DPSS has signed the Deliverable Sign-off document. The Strategy and Planning document will be provided in a MS Powerpoint format.  |
| B. Milestone #2 Project Management (Months 4-12)           |   |  |
| Deliverable  | Acceptance Criteria   |  |
| 1.   | Master Project Plan   | This deliverable will be considered complete upon review and approval of the Master Project Plan and DPSS has signed the Deliverable Sign-off document. The Master Project Plan will consist of the base-line project plan. It will be provided in a MS Excel format.  |
| 2.   | Bi-Weekly Project updates for each design and build committees            | This deliverable will be considered complete upon review and approval of 18 project updates for each committee and DPSS has signed the Deliverable Sign-off document. The updates will consist of 9 Executive oversight presentations (one per month) and 9 updated Master Project Plans (one per month).                            |
| C. Milestone # 3 Design and Build Kick-off (Months 4-5)    |   |  |
| Deliverable  | Acceptance Criteria   |  |
| 1.   | Committee Outline   | These deliverables will be considered complete upon review and approval of:<br>1. Committee outline documenting committee participants and committee recurring schedules<br>2. Committee agenda and minutes template<br><br>and DPSS has signed the Deliverable Sign-off document. The documents will be provided in MS Word format. |
| 2.   | Project Kick-Off Presentation   |  |
| 3.   | Committee Kick-Off Presentation   |  |
| 4.   | Committee agenda and minutes template                                     |  |
| D. Milestone # 4 Committee Work and                        |   |  |

| <p>Operation Manual complete, Task Management Tool implemented (Month 10)</p>   |   |
|---|---|
| Deliverable   | Acceptance Criteria   |
| 1. Service Center Operations Manual complete  | This deliverable will be considered complete upon review and approval of the Service Center Operational Manual and DPSS has signed the Deliverable Sign-off document. The Manual will be provided in MS Word format.                        |
| 2. Task Management tool software requirements defined   | This deliverable will be considered complete upon the review and approval of Task Management tool software requirements and DPSS has signed the Deliverable Sign-off document. The requirement document will be provided in MS Word format. |
| 3. Curricula Documentation completed  | This deliverable will be considered complete upon review and approval of the training curricula and DPSS has signed the Deliverable Sign-off document.  |
| <p>Milestone #5 Training (Months 11-12)</p>   |   |
| Deliverable   | Acceptance Criteria   |
| 1. Training plans and agendas completed   | This deliverable will be considered complete upon review and approval of the Training plans and agenda and DPSS has signed the Deliverable Sign-off document.   |
| 2. Training curriculum and leader guides completed  | This deliverable will be considered complete upon review and approval of the Training plans and agenda and DPSS has signed the Deliverable Sign-off document.   |
| 3. Training classes completed for Eligibility staff (4 classes, maximum of 80 staff)  | This deliverable will be considered complete at the completion of the fourth class and DPSS has signed off the Deliverable Sign-off document. DPSS will provide a SDD In-Service 1330 Form documenting attendance for all training classes. |
| 4. Training classes completed for Clerical staff (1 class, maximum of 20 staff)   | This deliverable will be considered complete at the completion of the class and DPSS has signed off the Deliverable Sign-off document. DPSS will provide a SDD In-Service 1330 Form documenting attendance for all training classes.        |
| 5. Training classes Supervisory staff (1 class, maximum of 20 staff)  | This deliverable will be considered complete at the completion of the class and DPSS has signed off the Deliverable Sign-off document. DPSS will provide SDD In-Service 1330 Form documenting attendance for all training classes.          |
| 6. Train the Trainer class completed (1 class, maximum of 5 staff)  | This deliverable will be considered complete at the completion of the class and DPSS has signed off the Deliverable Sign-off document. DPSS will provide a SDD In-Service 1330 Form documenting attendance for all training classes.        |
| <p>inTelegy will only be responsible to provide the above listed classes. DPSS be responsible for providing any "make-up" classes for DPSS staff that either fail to attend or complete the</p> |   |

|           |  |   |
|-----------|--|---|
|           | training. DPSS will pay for each class completed, regardless of the numbers of students present. |   |
| <b>F.</b> | <b>Milestone #6 Launch (Month 12)</b>  |   |
|           | <b>Deliverable</b>   | <b>Acceptance Criteria</b>  |
| 1.        | Banked case load   | These deliverables will be considered complete at the end of the first day on which the Center is operational and processing calls from the Project. The Center launch date will be confirmed in the Master Project Plan.   |
| 2.        | Task Distribution and Case Management  |   |
| 3.        | Center Launch  |   |
| <b>G.</b> | <b>Milestone# 7 Operational Support (Months 13-15)</b>   |   |
|           | <b>Deliverable</b>   | <b>Acceptance Criteria</b>  |
|           | Executive Oversight Reports  | This deliverable will be considered complete upon review and approval of 6 project updates for each committee and DPSS has signed the Deliverable Sign-off document. The updates will consist of 3 Executive oversight presentations (one per month) and 3 updated Master Project Plans (one per month) |

**III. ACCEPTANCE OF DELIVERABLES**

- A. The County shall have a period of ten (10) business days to determine the acceptability of a Deliverable provided by Contractor hereunder (the "Acceptance Period"). The Contractor will notify the County in writing of the completion of the Deliverable, using the Deliverable Sign Off Document (Exhibit A). The Contractor agrees that the Acceptance Period for a Deliverable shall begin when Contractor receives from the assigned County Project Manager a written receipt for such Deliverable. At any time within the Acceptance Period, the County shall:
1. Provide to the Contractor a signed copy of the Deliverable Acceptance Sign Off Document or;
  2. Provide written notice of Non Acceptance with reasonable written comments to Contractor regarding the deficiencies of the Deliverable(s). If changes or modifications are required by the County as evidenced by the Non Acceptance notification, Contractor shall have ten (10) business days to correct the deficiency noted therein and resubmit the Deliverable to the County beginning a new Acceptance Period. This process shall not exceed two cycles.
- B. All Deliverables will be delivered both electronically and in paper form to the County in English, unless otherwise specified in the Statement of Work. The County will deliver to Contractor all documents, studies, and materials in English, unless otherwise specified in the Statement of Work. All electronic documents will use the Microsoft suite of products, including, but not limited to Word, Excel, PowerPoint, Project, and Visio Pro. Signature pages may be delivered using Adobe PDF.
- C. The County will be deemed to have accepted the Deliverable(s) upon occurrence of either of the following ("Acceptance"):
1. The County submits to the Contractor the Deliverable Sign Off Document or:
  2. The County fails to notify Contractor within the Notice Period described above.

#### IV. CHANGE ORDERS

Either party may propose a change order to this Agreement. Change orders affecting this agreement will not be effective until reviewed and approved in writing by Contractor and the County and made part of the Agreement as an addendum. Change orders will be requested using the Change Order Document (Exhibit B). Contractor will submit to the County an analysis of how the County's proposed changes will affect the current work in terms of schedule and cost estimates. The County will be under no obligation to accept the cost estimates for the proposed changes. However, if the parties agree to any proposed changes, such changes shall become binding on the parties only through an Amendment to this Agreement signed by both parties. In no event shall Contractor be required to perform additional work under this Agreement, or the County is required to pay for additional work performed under this Agreement without prior written authorization in accordance with this paragraph.

#### V. DPSS RESPONSIBILITIES

- A. DPSS will assign DPSS staff to be responsible for the following roles and responsibilities:
  - 1. Project Manager responsible for:
    - a. Overall planning in coordination with the Contractor project manager.
    - b. Managing day-to-day project.
  - 2. Subject Matter Experts responsible for providing Riverside County business expertise as requested.
- B. DPSS may monitor the performance of the inTelegy Corporation in meeting the terms, conditions and services in this Contract. DPSS, at its sole discretion, may monitor the performance of the Contractor through any combination of the following methods: periodic on-site visits, annual inspections, evaluations and Contractor self-monitoring.
- C. DPSS will be responsible for scheduling, availability, quality and timeliness of work its resources perform.
- D. DPSS will provide the environment, equipment, access to resources, and certain activities required to facilitate Contractor's ability to deliver these requirements. These responsibilities include the following:
  - 1. Access to the County information and resources;
  - 2. Security access badges and clearance for appropriate the County facilities where Contractor will be expected to work on this project

#### VI. CONTRACTOR RESPONSIBILITIES

##### A. SCOPE OF SERVICE

- 1. The Contractor shall: provide personnel to fulfill the following roles and responsibilities:
  - a.. Lead consultant responsible for:
    - i. Developing overall plans in coordination with Riverside County Project Manager;
    - ii. Managing day-to-day relationship with the County; taking the lead in working through all issues;
    - iii. Preparing project plan, statement of work and risk management;
    - iv. Providing guidance and advice on issues related to product quality, testing, test procedures and validations;
    - v. Holding overall responsibility for executing and managing the project

deliverables;

- vi. Developing scope and implementation details of the project;
  - vii. Monitoring progress against the plan – effort & schedule deviations;
  - viii. Ensuring quality assurance for the project process and deliverables.
- b. Senior technology consultant responsible for developing the technology requirements for the project.
  - c. Training consultant responsible for participating on the committee developing training curricula and performing end-user and/or train-the-trainer training sessions.
2. The Contractor shall use its best efforts to ensure that personnel are not removed or reassigned during the term of the contract. Should the Contractor be required to change personnel identified in paragraph VI.A.1, the Contractor will notify the County at least two (2) weeks prior to the change.
  3. The contractor shall perform the tasks and deliverables listed in paragraph II "Project Deliverables" and in inTelegy's Description of Service included in their response to DPARC-125, attached hereto and incorporated as Exhibit C by this reference.

In incidences of conflicting provisions, Paragraph II "Project Deliverables" shall take precedence over Exhibit C.

## B. FISCAL

### 1. MAXIMUM REIMBURSABLE AMOUNT

Total payment under this Contract shall not exceed \$338,520.00.

### 2. METHOD, TIME AND SCHEDULE CONDITIONS OF PAYMENT

- a. The Contractor will be paid the actual amount of the invoice for payment as outlined in the Milestone Payment Schedule (Exhibit D) that is accompanied by a Deliverable Sign Off Document signed by the County for each required deliverable. If the required supporting documentation is not provided, DPSS may delay payment until documentation is received by DPSS.
- b. All completed claims must be submitted on a monthly basis no later than 30 days after the end of each month in which the services were provided. All complete claims submitted in a timely manner shall be processed within forty-five (45) calendar days.
- c. The Contractor shall submit DPSS Forms 2076A (Exhibit E) following the instructions set forth on the "Instructions for Form 2076A." Exhibit E is attached hereto and incorporated herein by this reference for request of all payments.

### 3. FINANCIAL RESOURCES

The Contractor warrants that during the term of this Contract, the Contractor shall retain sufficient financial resources necessary to perform all aspects of its obligations, as described under this Contract. Further, the Contractor warrants that there has been no adverse material change in the Contractor, Parent, or Subsidiary business entities, resulting in negative impact to the financial condition and circumstances of the Contractor since the date of the most recent financial statements.

#### 4. RECORDS, INSPECTIONS AND AUDITS

- a. The Contractor shall maintain auditable books, records, documents, and other evidence pertaining to costs and expenses in this Contract. The Contractor shall maintain these records for three (3) years after final payment has been made or until all pending County, State, and Federal audits, if any, are completed, whichever is later.
- b. Any authorized representative of the County of Riverside, the State of California, and the Federal government shall have access to any books, documents, papers, electronic data, and other records, which these representatives may determine to be pertinent to this Contract, for the purpose of performing an audit, evaluation, inspection, review, assessment, or examination. These representatives are authorized to obtain excerpts, transcripts, and copies, as they deem necessary. Further, these authorized representatives shall have the right at all reasonable times to inspect or otherwise evaluate the work performed, or being performed, under this Contract and the premises in which it is being performed.
- c. This access to records includes, but is not limited to, service delivery, referral, financial, and administrative documents for three (3) years after final payment is made, or until all pending County, State, and Federal audits are completed, whichever is later.
- d. Should the Contractor disagree with any audit conducted by DPSS, the Contractor shall have the right to employ a licensed, Certified Public Accountant (CPA) to prepare and file with DPSS a certified financial and compliance audit that is in compliance with generally-accepted government accounting standards of related services provided during the term of this Contract. The Contractor shall not be reimbursed by DPSS for such an audit.
- e. In the event the Contractor does not make available its books and financial records at the location where they are normally maintained, the Contractor agrees to pay all necessary and reasonable expenses, including legal fees, incurred by DPSS in conducting such an audit.
- f. Contractors that expend \$500,000 or more in a year in Federal funding shall obtain an audit performed by an independent auditor in accordance with generally accepted governmental auditing standards covering financial and compliance audits as per the Single Audit Act of 1984 and the Single Audit Act Amendments of 1996, as per OMB Circular 133. However, records must be available for review and audit by appropriate officials of Federal, State and County agencies.

#### 5. SUPPLANTATION

The Contractor shall not supplant any federal, state, or county funds intended for the purpose of this Contract with any funds made available under any other Contract. The Contractor shall not claim reimbursement from DPSS for, or apply any sums received from DPSS, with respect to the portion of its obligations, which have been paid by another source of revenue. The Contractor agrees that it will not use funds received pursuant to this Contract, either directly or indirectly, as a contribution or compensation for purposes of obtaining state funds under any state program or county funds under any county programs without prior approval of DPSS.

## 6. DISALLOWANCE

In the event the Contractor receives payment for services under this Contract which is later disallowed for nonconformance with the terms and conditions herein by DPSS, the Contractor shall promptly refund the disallowed amount to DPSS on request, or at its option, DPSS may offset the amount disallowed from any payment due to the Contractor under any contract with DPSS.

## C. ADMINISTRATIVE

### 1. CONFLICT OF INTEREST

The Contractor, Contractor's employees, and agents shall have no interest, and shall not acquire any interest, direct or indirect, which shall conflict in any manner or degree with the performance of services required under this Contract.

### 2. CONFIDENTIALITY

The Contractor shall maintain the confidentiality of all information and records and comply with all other statutory laws and regulations relating to privacy and confidentiality.

Each party shall ensure that case record information is kept confidential when it identifies an individual by name, address, or other information. Confidential information requires special precautions to protect it from loss, unauthorized use, access, disclosure, modification, and destruction.

The parties to this Agreement shall keep all information that is exchanged between them in the strictest confidence, in accordance with Section 10850 of the Welfare and Institutions Code. All records and information concerning any and all persons referred to the Contractor shall be considered and kept confidential by the Contractor, its staff, agents, employees and volunteers. The Contractor shall require all of its employees, agents, subcontractors and volunteer staff who may provide services under this agreement with the Contractor before commencing the provision of any such services, to maintain the confidentiality of any and all materials and information with which they may come into contact, or the identities or any identifying characteristics or information with respect to any and all participants referred to the Contractor by Riverside County.

The confidentiality of juvenile records is established under section 827 and 828 of the Welfare and Institutions Code, California Rules of Court, Rule 5.552 and case law. The Juvenile Court has exclusive jurisdiction over juvenile records and information and has the responsibility to protect the interests of minors and their families in the confidentiality of any records and information concerning minors involved in the justice system and to provide a reasonable method for release of these records and information in appropriate circumstances.

Contractor shall ensure that no person will publish, disclose, use, permit, or cause to be published, disclosed, or used, any confidential information pertaining to any applicant or recipient of services under this Agreement. The Contractor agrees to inform all persons directly or indirectly involved in administration of services provided under this Agreement of the above provisions and that any person deliberately violating these provisions is guilty of a misdemeanor.

### 3. EMPLOYMENT PRACTICES

- a. The Contractor shall not discriminate in its recruiting, hiring, promoting, demoting, or terminating practices on the basis of race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status, age, or sex in the performance of this Contract, and to the extent they shall apply, with the provisions of the Fair Employment and Housing Act (FEHA), and the Federal Civil Rights Act of 1964 (P. L. 88-352).
- b. In the provision of benefits, the Contractor shall certify and comply with Public Contract Code 10295.3, to not discriminate between employees with spouses and employees with domestic partners, or discriminate between the domestic partners and spouses of those employees.
- c. For the purpose of this section Domestic Partner means one of two persons who have filed a declaration of domestic partnership with the Secretary of State pursuant to Division 2.5 (commencing with Section 297) of the Family Code.

### 4. EQUAL EMPLOYMENT OPPORTUNITY

By signing this agreement or accepting funds under this agreement, the contractor shall comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity", as amended by Department of Labor regulations (41 CFR Chapter 60).

### 5. HOLD HARMLESS/INDEMNIFICATION

Contractor shall indemnify and hold harmless the County of Riverside, its Agencies, Districts, Special Districts and Departments, their respective directors, officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives (individually and collectively hereinafter referred to as Indemnitees) from any liability whatsoever, based or asserted upon any services of Contractor, its officers, employees, subcontractors, agents or representatives arising out of or in any way relating to this Contract, including but not limited to property damage, bodily injury, or death or any other element of any kind or nature whatsoever arising from the performance of Contractor, its officers, employees, subcontractors, agents or representatives Indemnitors from this Contract. Contractor shall defend, at its sole expense, all costs and fees including, but not limited, to attorney fees, cost of investigation, defense and settlements or awards, the Indemnitees in any claim or action based upon such alleged acts or omissions.

With respect to any action or claim subject to indemnification herein by Contractor, Contractor shall, at their sole cost, have the right to use counsel of their own choice and shall have the right to adjust, settle, or compromise any such action or claim without the prior consent of COUNTY; provided, however, that any such adjustment, settlement or compromise in no manner whatsoever limits or circumscribes Contractor's indemnification to Indemnitees as set forth herein.

Contractor's obligation hereunder shall be satisfied when Contractor has provided to COUNTY the appropriate form of dismissal relieving COUNTY from any liability for the action or claim involved. The specified insurance limits required in this Contract shall in no way limit or circumscribe Contractor's obligations to indemnify and hold harmless the Indemnitees herein from third party claims.

## 6. INSURANCE

- a. Without limiting or diminishing the Contractor's obligation to indemnify or hold the COUNTY harmless, Contractor shall procure and maintain or cause to be maintained, at its sole cost and expense, the following insurance coverages during the term of this Contract.

(1) Worker's Compensation:

If the Contractor has employees as defined by the State of California, the Contractor shall maintain statutory Worker's Compensation Insurance (Coverage A) as prescribed by the laws of the State of California. Policy shall include Employers' Liability (Coverage B) including Occupational Disease with limits not less than \$1,000,000 per person per accident. The policy shall be endorsed to waive subrogation in favor of The County of Riverside, and, if applicable, to provide a Borrowed Servant/Alternate Employer Endorsement.

(2) Commercial General Liability:

Commercial General Liability insurance coverage, including but not limited to, premises liability, contractual liability, products and completed operations liability, personal and advertising injury, and cross liability coverage, covering claims which may arise from or out of Contractor's performance of its obligations hereunder. Policy shall name the County of Riverside, its Agencies, Districts, Special Districts, and Departments, their respective directors, officers, Board of Supervisors, employees, elected or appointed officials, agents or representatives as Additional Insureds. Policy's limit of liability shall not be less than \$1,000,000 per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this Contract or be no less than two (2) times the occurrence limit.

(3) Vehicle Liability:

If vehicles or mobile equipment are used in the performance of the obligations under this Contract, then Contractor shall maintain liability insurance for all owned, non-owned or hired vehicles so used in an amount not less than \$1,000,000 per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this Contract or be no less than two (2) times the occurrence limit. Policy shall name the County of Riverside, its Agencies, Districts, Special Districts, and Departments, their respective directors, officers, Board of Supervisors, employees, elected or appointed officials, agents or representatives as Additional Insured(s).

b. General Insurance Provisions – All lines:

- (1) Any insurance carrier providing insurance coverage hereunder shall be admitted to the State of California and have an A M BEST rating of not less than A: VIII (A:8) unless such requirements are waived, in writing, by the County Risk Manager. If the County's Risk Manager waives a requirement for a particular insurer such waiver is only valid for that specific insurer and only for one policy term.
- (2) The Contractor's insurance carrier(s) must declare its insurance self-insured retentions. If such self-insured retentions exceed \$500,000 per occurrence such retentions shall have the prior written consent of the County Risk Manager before the commencement of operations under this Contract. Upon notification of self insured retention unacceptable to the COUNTY, and at the election of the County's Risk Manager, Contractor's carriers shall either; 1) reduce or eliminate such selfinsured retention as respects this Contract with the COUNTY, or 2) procure a bond which

guarantees payment of losses and related investigations, claims administration, and defense costs and expenses.

- (3) Contractor shall cause Contractor's insurance carrier(s) to furnish the County of Riverside with either 1) a properly executed original Certificate(s) of Insurance and certified original copies of Endorsements effecting coverage as required herein, and 2) if requested to do so orally or in writing by the County Risk Manager, provide original Certified copies of policies including all Endorsements and all attachments thereto, showing such insurance is in full force and effect. Further, said Certificate(s) and policies of insurance shall contain the covenant of the insurance carrier(s) that thirty (30) days written notice shall be given to the County of Riverside prior to any material modification, cancellation, expiration or reduction in coverage of such insurance. In the event of a material modification, cancellation, expiration, or reduction in coverage, this Contract shall terminate forthwith, unless the County of Riverside receives, prior to such effective date, another properly executed original Certificate of Insurance and original copies of endorsements or certified original policies, including all endorsements and attachments thereto evidencing coverages set forth herein and the insurance required herein is in full force and effect. Contractor shall not commence operations until the COUNTY has been furnished original Certificate(s) of Insurance and certified original copies of endorsements and if requested, certified original policies of insurance including all endorsements and any and all other attachments as required in this Section. An individual authorized by the insurance carrier to do so on it's behalf shall sign the original endorsements for each policy and the Certificate of Insurance.
- (4) It is understood and agreed to by the parties hereto that the Contractor's insurance shall be construed as primary insurance, and the COUNTY'S insurance and/or deductibles and/or self-insured retentions or self-insured programs shall not be construed as contributory.
- (5) If, during the term of this Contract or any extension thereof, there is a material change in the scope of services; or, there is a material change in the equipment to be used in the performance of the scope of work which will add additional exposures (such as the use of aircraft, watercraft, cranes, etc.); or, the term of this Contract, including any extensions thereof, exceeds five (5) years the COUNTY reserves the right to adjust the types of insurance required under this Contract and the monetary limits of liability for the insurance coverages currently required herein, if; in the County Risk Manager's reasonable judgment, the amount or type of insurance carried by the Contractor has become inadequate.
- (6) Contractor shall pass down the insurance obligations contained herein to all tiers of subcontractors working under this Contract.
- (7) The insurance requirements contained in this Contract may be met with a program(s) of self-insurance acceptable to the COUNTY.
- (8) Contractor agrees to notify COUNTY of any claim by a third party or any incident or event that may give rise to a claim arising from the performance of this Contract.

## 7. LICENSES AND PERMITS

In accordance with the provisions of the Business and Professions Code concerning the licensing of Contractors, all Contractors shall be licensed, if required, in accordance with the

laws of this State and any Contractor not so licensed is subject to the penalties imposed by such laws.

The Contractor warrants that it has all necessary permits, approvals, certificates, waivers, and exemptions necessary for the provision of services hereunder and required by the laws and regulations of the United States, State of California, the County of Riverside and all other appropriate governmental agencies, and shall maintain these throughout the term of this Contract.

#### 8. INDEPENDENT CONTRACTOR

It is understood and agreed that the Contractor is an independent contractor and that no relationship of employer-employee exists between the parties hereto. Contractor and/or Contractor's employees shall not be entitled to any benefits payable to employees of the County including, but not limited to, County Worker's Compensation benefits. County shall not be required to make any deductions for employees of Contractor from the compensation payable to Contractor under the provision of this Contract.

As an independent contractor, Contractor hereby holds County harmless from any and all claims that may be made against County based upon any contention by any third party that an employer-employee relationship exists by reason of this Contract. As part of the foregoing indemnity, the Contractor agrees to protect and defend at its own expense, including attorney's fees, the County, its officers, agents and employees in any legal action based upon any such alleged existence of an employer-employee relationship by reason of this Contract.

#### 9. ASSIGNMENT

The Contractor shall not assign any interest in this Contract, and shall not transfer any interest in the same, whether by assignment or novation, without the prior written consent of DPSS. Any attempt to assign or delegate any interest without written consent of DPSS shall be deemed void and of no force or effect.

#### 10. PERSONNEL

Upon request by DPSS, the Contractor agrees to make available to DPSS a current list of personnel that are providing services under this Agreement who have contact with children or adult clients. The list shall include:

- a. All staff who work full or part-time positions by title, including volunteer positions; and
- b. A brief description of the functions of each position and hours each position worked; and
- c. The professional degree, if applicable and experience required for each position.

DPSS has the sole discretion to approve or not approve any person on the Contractor's list that has been convicted of any crimes involving sex, drugs or violence, or who is known to have a substantiated report of child abuse, as defined in Penal Code Section 11165.12, who occupy positions with supervisory or disciplinary power over minors, or who occupies supervisory or teaching positions over adult clients. DPSS shall notify the Contractor in writing of any person not approved, but to protect client confidentiality, may not be able to disclose the reason(s) for non-approval. Upon notification, the Contractor shall immediately remove that person from providing services under this Agreement.

## 11. SUBCONTRACT FOR SERVICES

No agreements will be made by the Contractor with any party to furnish any of the services herein contained without the prior written approval of DPSS. This provision will not require the approval of agreements of employment between the Contractor and personnel assigned for services hereunder

## 12. DEBARMENT AND SUSPENSION

As a sub-grantee of federal funds under this Contract, the Contractor certifies that it, and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from covered transactions by a federal department or agency.
- b. Have not within a 3-year period preceding this Contract been convicted of or had a civil judgment rendered against them for the commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction; violation of Federal or State anti-trust status or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- c. Are not presently indicated or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offenses enumerated in the paragraph above; and
- d. Have not within a 3-year period preceding this Contract had one or more public transactions (Federal, State or local) terminated for cause or default.

## 13. COMPLIANCE WITH RULES, REGULATIONS, REQUIREMENTS AND DIRECTIVES

The Contractor shall comply with all rules, regulations, requirements, and directives of the California Department of Social Services, other applicable state agencies, and funding sources which impose duties and regulations upon DPSS, which are equally applicable and made binding upon the Contractor as though made with the Contractor directly.

## 14. HEALTH INSURANCE PORTABILITY ACCOUNTABILITY ACT (HIPAA)

The Contractor in this Agreement is subject to all relevant requirements contained in the Health Insurance Portability and Accountability Act of 1996 (HIPAA), Public Law 104-191, enacted August 21, 1996, and the laws and regulations promulgated subsequent thereto. The Contractor hereto agrees to cooperate in accordance with the terms and intent of this Agreement for implementation of relevant law(s) and/or regulation(s) promulgated under this Law. The Contractor further agrees that it shall be in compliance, and shall remain in compliance with the requirements of HIPAA, and the laws and regulations promulgated subsequent hereto, as may be amended from time to time.

All social service privacy complaints should be referred to:

Department of Public Social Services  
HR/Administrative Compliance Services Unit  
10281 Kidd Street  
Riverside, CA 92503  
(951) 358-3030

15. LOBBYING

The contractor agrees that it will not expend any Federal appropriated funds to pay any person for influencing or attempting to influence an officer or employee of any agency, or a Member of Congress in connection with any of the following covered Federal actions:

- a. The awarding of any Federal contract;
- b. The making of any Federal Grant;
- c. The making of any Federal loan;
- d. The entering into of any cooperative agreement; and
- e. The extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement covered by 31 U.S.C. 1352.

**VII. GENERAL**

A. EFFECTIVE PERIOD

This Contract is effective September 1, 2009 to November 30, 2010.

B. NOTICES

All notices, claims, correspondence, and/or statements authorized or required by this Contract shall be addressed as follows:

**DPSS:**

Deliverables, Deliverable Sign Offs, Change orders, and other project related material:  
Department of Public Social Services  
Attn: Lorean Williamson  
4060 County Circle Drive  
Riverside, CA 92503

Invoices and other financial documents:

Department of Public Social Services  
Fiscal/Management Reporting Unit  
4060 County Circle Drive  
Riverside, CA 92503

Contracts, insurance and other administrative documents:

Department of Public Social Services  
Contracts Administration Unit  
P.O. Box 7789  
Riverside, CA 92513

CONTRACTOR: inTelegy Corporation  
Chief Executive Officer  
PO Box 2578  
Danville, CA 94526

All notices shall be deemed effective when they are made in writing, addressed as indicated above, and deposited in the United States mail. Any notices, correspondence, reports and/or statements authorized or required by this Contract, addressed in any other fashion will not be acceptable, except invoices and other financial documents, which must be addressed to:

C. AVAILABILITY OF FUNDING

DPSS' obligation for payment of any Contract is contingent upon the availability of funds from which payment can be made.

D. DISPUTES

Except as otherwise provided in this Contract, any dispute concerning a question of fact arising under this Contract, which is not disposed by Contract, shall be disposed by DPSS which shall furnish the decision in writing. The decision of DPSS shall be final and conclusive until determined by a court of competent jurisdiction to have been fraudulent or capricious, arbitrary, or so grossly erroneous as necessarily to imply bad faith. The Contractor shall proceed diligently with the performance of the Contract pending DPSS' decision.

E. SANCTIONS

Failure by the contractor to comply with any of the provisions covenants, requirements, or conditions of this Contract including, but not limited to, reporting and evaluation requirements, shall be a material breach of this Contract. In such event, DPSS may immediately terminate this Contract and may take other remedies available by law, or otherwise specified in this Contract. DPSS may also:

- a. Afford the Contractor a time period within which to cure the breach, the period of which shall be established at the sole discretion of DPSS; and/or
- b. Discontinue reimbursement to the Contractor for, and during the period in which the Contractor is in breach, the reimbursement of which the Contractor shall not be entitled to recover later; and/or
- c. Withhold funds pending a cure of the breach; and/or
- d. Offset against any monies billed by the Contractor but yet unpaid by DPSS. DPSS shall give the Contractor notice of any action pursuant to this paragraph, the notice of which shall be effective when given.

**F. GOVERNING LAW**

This Contract shall be construed and interpreted according to the laws of the State of California. Any legal action related to the interpretation or performance of this Contract shall be filed only in the appropriate courts located in the County of Riverside, State of California. Should action be brought to enforce or interpret the provisions of the Contract, the prevailing party shall be entitled to attorney's fees in addition to whatever other relief are granted.

**G. MODIFICATION OF TERMS**

No addition to or alteration of the terms of this Contract, whether by written or verbal understanding of the parties, their officers, agents, or employees shall be valid unless made in writing and formally approved and executed by both parties. Requests to modify fiscal provisions shall be submitted no later than May 1, 2010.

**H. TERMINATION**

This contract shall automatically renew annually, unless cancelled by the County. This contract can be cancelled without cause upon thirty (30) day written notice.

**I. ENTIRE CONTRACT**

This Contract constitutes the entire Contract between the parties hereto with respect to the subject matter hereof, and all prior or contemporaneous Contracts of any kind or nature relating to the same shall be deemed to be merged herein.

Deliverable Sign-off Document

Exhibit A

| Project Information                     |               |           |
|---|---------------|-----------|
| Dept.                                   | Project:      |           |
| Project Manager: County Project Manager |               | Ext:      |
| SOW: SOW Reference                      |               |           |
| Project Deliverable Description         |               |           |
| Due Date:                               | Deliverable#: |           |
| Deliver to:                             |               |           |
| Resource(s) Responsible:                |               |           |
| Deliverable Description:                |               |           |
| Deliverable Approval                    |               |           |
| Approval Signatures:                    | Date:         | Comments: |
| Project Coordinator                     |               |           |
| Project Sponsor                         |               |           |
| Non Acceptance of Deliverable           |               |           |
| Signatures:                             | Date:         |           |
| Project Coordinator                     |               |           |
| Project Sponsor                         |               |           |
| Reason for Non Acceptance               |               |           |
|   |               |           |

Please return to:  
 Department of Public Social Services  
 Attn: Lorean Williamson  
 4060 County Circle Drive  
 Riverside, CA 92503

**CHANGE ORDER REQUEST**

|               |  |       |
|---------------|--|-------|
| Project:      |  |       |
| Change Name:  |  |       |
| Requested by: |  | DATE: |

**Requested Change**

|                   |   |
|-------------------|---|
| Description       |   |
| Change Urgency    | <i>[High, Medium, or Low and the reason]</i>  |
| Reason for Change | <i>[New requirement, design change, etc.]</i> |

**Impact**

|                           |   |
|---------------------------|---|
| Risk to Schedule          | <i>[Note the risk to the schedule if do or do not do the change.]</i> |
| Impact on Cost or funding |   |
| Risk to Client/ Business  |   |
| Risk of NOT doing change  |   |

**Risks**

| Risk | Risk Management Action |
|------|------------------------|
|      |                        |
|      |                        |
|      |                        |
|      |                        |
|      |                        |

**Steps to Implement Change**

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |

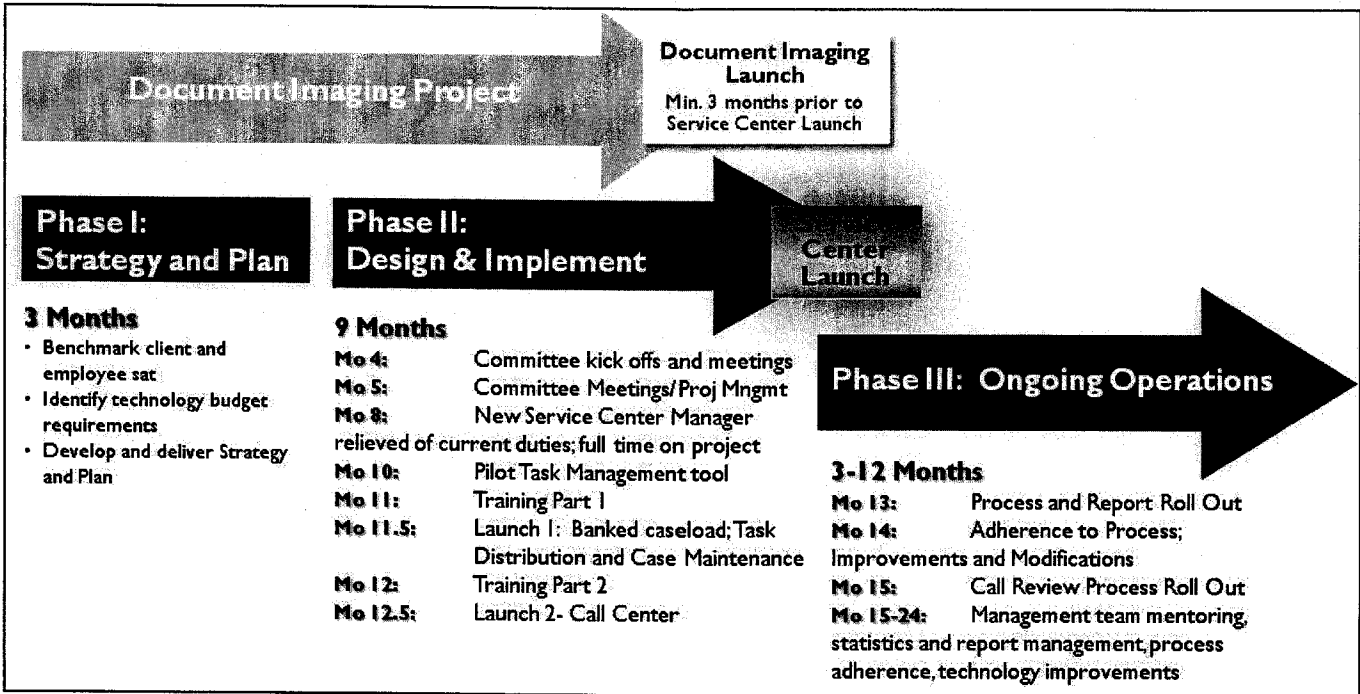
**Approvals**

|                            |           |      |
|----------------------------|-----------|------|
|                            | Signature | Date |
| <b>Project Coordinator</b> |           |      |
|                            | Signature | Date |
| <b>Project Sponsor</b>     |           |      |

Exhibit C inTelegy Description of Service

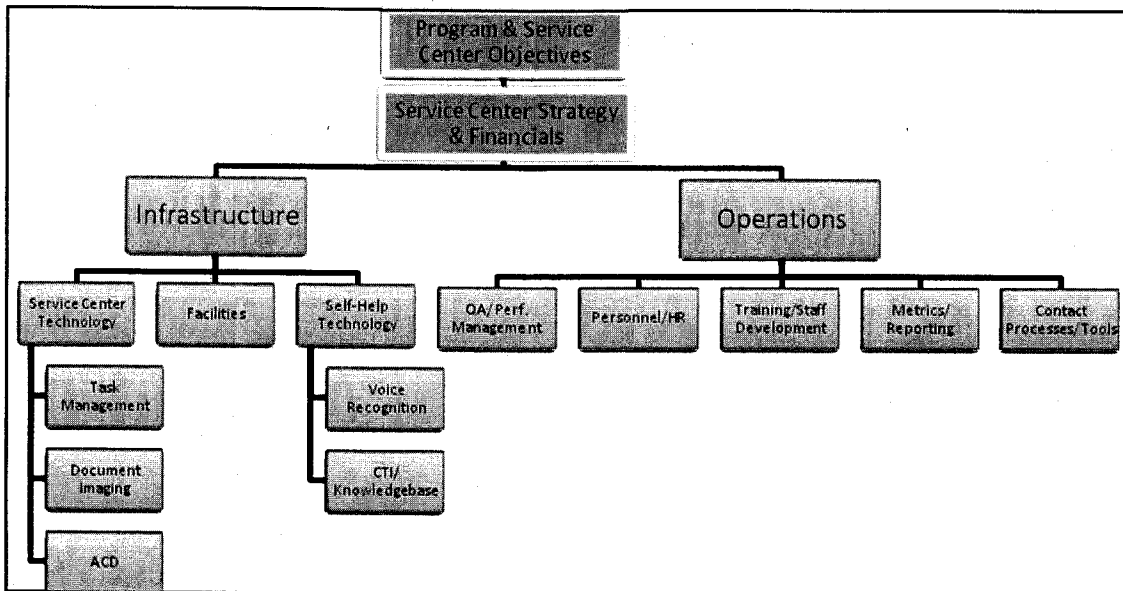
Description of Services

InTelegy's methodology for a new Service Center build is executed in three phases: Phase I-Strategy & Plan, Phase 2-Design & Implementation and Phase 3-Ongoing Operations Support.



Phase I- Strategy & Plan:

In this initial phase, InTelegy senior consultants will meet with the Riverside County Department of Public Social Services (DPSS) management team to review business objectives and define the role of the Service Center in achieving them. This goal of this phase will be to document existing business practices and workflows to identify the necessary number and locations of call centers to handle DPSS' Medi-Cal caseload volume. The following areas are examined:



Program & Service Center Objectives:

- Review & define the desired client experience and the role of the service center in delivering that positive experience
- Define Service Center role/integration with other DPSS departments.
- Review the opportunity and document a recommended phased approach, to be integrated with the CIV roll out and training plan

Service Center Strategy & Financials:

- Identify the required client experience for the intake steps and for ongoing case maintenance.
- Document proposed service process to support required client experience, identifying process steps from intake interviews through ongoing case maintenance.
- Determine the volumes of intake interviews and applications.
- Estimate call volume and peak call volume patterns based on county service center trends and Riverside client base demographics
- Determine / apply service level and service center goals for proposed call volumes
- Analyze discrete eligibility worker task breakdown, task handling times
- Review and estimate time requirements of phone staff, clerical staff and case maintenance staff to meet workload assumptions. Define productivity benchmarks based on county service center trends
- Review current and future budget(s), state allocation standards and federal requirements for case management turnaround time
- Create an operating budget/proforma and cost benefit analysis with major milestones and expense associated
- Create three-year workload and staffing assumptions
  - The workload and cost analysis will be conducted using the InTelegy Staff Planning Tool. Through the process of this consulting this tool will be customized for Riverside County. At the conclusion of Phase I consulting services work Riverside County will have the opportunity to purchase user licenses for this tool for future use.
- Design a five-year vision for the service center to include direction of other Public Assistance programs.

Infrastructure:

InTelegy will partner with Riverside County to assess the infrastructure needs to support a Medi-Cal Service Center. InTelegy will act as the educated end-user, working with the vendor and the county staff to build business requirements for all technology tools and facilities. Our role is to ensure that the needs of the service center are met through innovative and solution oriented technologies and facilities.

**Service Center Technology:**

- Conduct an analysis of the telecom and hardware/software requirements to support the service center initiatives, Compare to existing telecom hardware and software and document additions and /or purchases required to meet the Service Center needs.
- Determine task distribution tool requirements to support work/task distribution and tracking. Identify technology options specific to Riverside County's infrastructure requirements.
- Identify the role that document imaging would have in the service center and make recommendations for document imaging related to the build of a service center.

**Facilities:**

- Review the existing facilities and determine if there are additional requirements to support the desired service center organization.

**Self-Help Technologies:**

- Identify options for client self-help through technology including IVR/VRU menus, CTI/ Knowledge base information access and voice recognition technology.
- Define the costs, technology infrastructure, timelines and resources required for implementation as well as the cost benefit of utilizing this technology.
- Include a migration plan for Service Center Technology that exists today at Riverside County and suggest future technology based upon review and knowledge of other counties and available private sector options.

Operations:

- Review current staff and management; define future staffing requirements including job profiles and roles/responsibilities
- Define organization structure and staff requirements by position
- Review and document all current processes and service flows
- Review language requirements and projections
- Identify operational dependencies for the CIV implementation project to ensure the service center is created to utilize the CIV technology
- Define processes and service flows required for a case management necessary to support desired client experience and hand offs required within the DPSS
- Assess current quality review processes and recommend quality review processes for the service center environment.
- Identify training needs to support process and service objectives and the transition of case workers to a service center environment; this will include training requirements for intake operations, case maintenance operations, clerical and management.
- Review current reports and report availability, set key performance metrics and reporting matrices.
- Work with DPSS management team to conduct an employee satisfaction survey and a client satisfaction survey and provide analysis and results as a benchmark for future service center measurements
  - a. InTelegy Corporation will provide survey questions and templates. DPSS' management team will be expected to conduct the surveys and collect the results. InTelegy will provide the analysis of the results.

InTelegy's analysis and recommendations will be delivered in a detailed assessment document and an executive level PowerPoint presentation with back-up documentation to include a detailed excel workbook for staff workload analysis. This document will include:

- Proposed service center model for pilot and all other service center operations. This plan will include the following:
  - 3-Year Service Volume and Workload estimates
  - Productivity and staffing estimates
  - Proposed service center processes
  - Proposed service center technology; telephony, software and network requirements
  - Budget and cost estimate milestones
  - Cost Benefit Analysis and Recommendations
  - Proposed implementation timeline
- Change Management training outline and plan
- A comprehensive project plan that details the information required functional responsibility and timelines for effective communication and coordination of the service center implementation.
- Subcommittee charters, roles, and members identified for implementation

## Phase II- Design and Implement:

3.4 Develop the business processes for intake and for the call center, with consideration of the processes mandated by the C-IV Project, including, but not limited to:

- 3.4.1 Call workflow, including escalation and resolution measures;
- 3.4.2 Call scripts;
- 3.4.3 Case file management flow;
- 3.4.4 Call routing tables;
- 3.4.5 Daily operations procedures;
- 3.4.6 Quality Assurance measures, including performance standards.

The Phase I Strategy and Plan will act as the blue print for proceeding with the Pilot Service Center Build. InTelegy's experience working with 10 California Counties to develop service center strategies and plans means that Riverside County will benefit from this experience and will have the opportunity learn from and deploy best practices from their California county peers. InTelegy has developed over 300 customized templates for building a Service Center in a County public assistance environment; these templates have been refined and defined based on our specific county experience. InTelegy is also committed to maintaining up to date statistics and trends from the existing service centers and will use this information to provide accurate, best practices benchmarks while customizing the Medi-Cal workload analysis required by Riverside County.

### **Project Management**

InTelegy Corporation will work with the Riverside DPSS leadership team to develop a project plan and associated committee workgroups for the Service Center Design and Implementation project. InTelegy Corporation's successful process assumes collaboration and support from many parts of the DPSS organization.

InTelegy Corporation will utilize the baseline project plan developed during the Service Center Strategy phase to start the project. The project kick off effort will include:

### **Project Management:**

InTelegy will provide the service center expertise and project management responsibilities for the Medi-Cal service center build. In this role InTelegy will:

- Provide input and guidance on the utilization of the project plan. Maintain responsibility for consolidating and updating ongoing project plans to ensure timely completion of all related tasks.
- Follow up and escalate as necessary to ensure completion of tasks on time and on budget.
- Coordinating weekly implementation meetings, insure the project plan is updated and communicated to all participants
- Insuring that all sub-committee meetings are conducted and that the dependencies and information flow between subcommittees is communicated

Riverside County project team members will be responsible for confirming initial project plan dates and assignments and will then be expected to meet specific dates throughout the course of the project. Riverside County project team members will be expected to be in attendance at all assigned project plan meetings unless otherwise excused. Completion dates of all project plan items will be closely monitored.

### **Committee Planning:**

Based on what has been successful in other county implementations, InTelegy Corporation has identified committees required for a typical county service center build. Starting with these identified committees, InTelegy Corporation will work with the project sponsors to identify committee members and timing and frequency of ongoing committee meetings.

1. **Executive Oversight**
2. **Project Steering Committee**

3. **Business Process and Operations Committees**
  - Intake Process Committee
  - Workload Distribution/Clerical Process Committee
  - Telephone Service Process Committee
  - Case Maintenance Task Process Committee
4. **Quality Assurance and Metrics Management**
5. **Intranet/FAQ**
6. **Service Center Technology**
7. **Communications**
8. **Training**
9. **Facilities**
10. **Implementation**

Committee Kick Off:

InTelegy Corporation will organize and facilitate a committee kick off presentation/meeting. This meeting will be conducted using a PowerPoint presentation, summarizing the original Service Center Strategy and Plans, and identifying the ongoing roles and responsibilities of the committee members.

At the completion of this kick off meeting, individual committee kick off meetings will be scheduled and each committee member will have a full scope overview of the initiatives before them.

Design and Build Detail

InTelegy Corporation will lead the design and build phase through the work accomplished at the committee level. The specific roles and responsibilities are listed by committee:

**Executive Oversight**

The Executive Oversight committee will be comprised of the executive sponsors, directors and managers from Riverside County. The goal of this committee will be to provide overview and direction to the design and build effort and to identify and provide required resources and budget approval. InTelegy Corporation will lead this group through monthly meetings which will be supported by a detailed review of the progress from each committee and an updated high level timeline.

**Project Steering Committee**

The Steering committee will be comprised of the committee leads from each of the design and build committees. The goal of this committee will be to provide direction to design and build effort and to identify allow sharing between the individual committees. InTelegy Corporation will lead this group through twice monthly meetings which will be supported by a detailed review of the progress from each committee and an updated high level timeline.

**Business Process and Operations**

The Business Process and Operations committee will have the responsibility of building all of the service center processes, reporting and support tools. There will be 4 subcommittees that focus on the specific components of the service center operation: Intake, Task Distribution, Telephone Service and Case Maintenance. These subcommittees will be comprised of key managers, supervisors and eligibility staff.

- The Clerical and Task Distribution committee will determine the process and procedures for the assignment of tasks in the service center. This committee will create the Task management system requirements that will then be given to the technology committee to implement. InTelegy will deliver benchmarks and process templates for customizing and incorporating Riverside County procedures as well as guide the committee on the use of these tools.
- Eligibility Workflow Business Processes: InTelegy will provide templates for the documentation of all work flow processes required for the Service center functions. Riverside County will write the workflow processes. Special attention will be paid to adapting existing business requirements to the Service center environment.

- Case File Management: InTelegy will document how case files are accessed, used and updated in the service center.
- Call Handling Processes: InTelegy will provide templates for the documentation of all work flow processes required for call handling; these processes will include call type identification, consistent opening, response, trouble shooting and close.
- This committee will develop the service center operating processes including scheduling, roles and responsibilities for staff, hours of operation and any other business process required for the running of the service center.
- This committee will be responsible for creating the customization plan for the IVR phone tree and scripting to support the required workflow processes and Service center operations requirements. This may include a voice selection process to identify the resource for the actual programming of the technology.

### **Intranet/FAQ Committee**

- FAQ's: InTelegy will structure the documentation of current frequently asked questions and define how new FAQ's will be nominated by representatives, approved and implemented on an ongoing basis. The committee members will provide the questions and answers.
- Job Aides: This committee will also identify any other desk top or intranet based job aides required by the eligibility staff to ensure access to all necessary information.
- Intranet Site: This committee will develop (or modify) an intranet site specific to the service center and ensure that all process documentation, frequently asked questions, useful links and any other resource for the service center staff, is published and routinely updated.

### **Quality Assurance and Metrics Management**

- The Quality Assurance committee will determine appropriate quality monitoring standards and create performance benchmarks. InTelegy will deliver customized monitoring forms that assist in managing agent quality, productivity and attendance, based on input and guidance provided by Riverside County. This committee will also identify CIV case management processes and related supervisor task review processes required for the operation.
- Key Metrics Management: will develop key metrics against which success will be measured in the service center. Service center metrics typically include contact volume, service level, average speed of answer, email response time; average contacts per hour, average handle time. Case Maintenance Metrics will include adherence to state standards, task quantities and completion timeframes and more.
- Reporting: InTelegy will create report templates and distribution schedules. This will include a Dashboard report and a detailed description of reports required from the phone system, Task Management, CIV and any other supporting technologies.

### **Service Center Technology**

If Riverside County will need to procure the required technology outlined in the Phase I Strategy and Plan, InTelegy we will work with the IT team to document business and technical requirements. The Service Center Technology committee will be responsible for the procurement, implementation, customization and/or programming of any technology required to support the service center.

#### ***Automatic Call Distribution Procurement and Implementation (ACD)***

- Develop business and technical requirements for ACD technology.
- Design call routing tables
- Proposal review and vendor selection for the technology purchases.

*IVR/VRU Programming and Implementation*

- A deliverable from the Business Process and Operations committee will be a detailed script, call routing and call flow diagram for the IVR/VRU technology. The Technology committee will be responsible for the programming and testing of this technology.

*Reporting*

- A deliverable from the Quality Assurance and Metrics Management committee will be a detailed reporting plan and requirements for reports from the ACD and phone system and to support case maintenance task management. The Technology committee will be responsible for developing and delivering these reports. InTelegy will support this effort by communicating the requirements and working with the technology resources to identify the appropriate reports, programming and testing.

*Task Management System*

- A deliverable from the Business Process and Operations committee will be a detailed plan and requirements for a database to support task distribution and tracking of tasks among the phone and case maintenance teams. The Technology committee will be responsible for developing and delivering this database. InTelegy will support this effort by communicating the requirements and working with the technology resources to identify the appropriate tools and interpreting requirements for programming.

*Technology Implementation*

- The InTelegy consultant will guide the testing of all systems to ensure readiness for the Service Center, and work with vendor and internal IT team to make necessary changes in support of Service Center strategy.

**Communications**

- The Communications Committee will be responsible for developing internal and external marketing/communication materials to promote the new service center. These materials may include employee newsletter, client mailing, press articles, presentations, facility open house events and more. InTelegy will participate in this committee providing guidance and examples from other county implementations, and ensuring the appropriate communication is provide to ensure client and employee satisfaction.
- Plan for and implement ongoing employee satisfaction survey and a client satisfaction survey and provide analysis and results as a benchmark for future service center measurements

**Training**

Working with county staff development, program management and supervisor representation, InTelegy will create a comprehensive training agenda, including skills enhancement, process/workflow overview, operation expectations, stress and time management. The agenda will cover the aspects of performing the ongoing eligibility duties in a service center environment. This training plan will also incorporate the logistics required to train the required staff while also maintaining appropriate levels of client service. It is assumed that Riverside County personnel working in the service center have already received specific training on Riverside County Medi-Cal policy and procedures. The training is not for new hires.

**Facilities**

InTelegy will form a Facilities committee to address the facility requirements specific to the Service Center project. This may include customization of an existing facility or the identification and build out of a new facility to support the new operations. InTelegy will participate in this committee to provide service center expertise and to relay to the requirements to the facility manager, ensuring that the facility designed supports the planned operation.

**Implementation**

InTelegy will form the implementation committee will be formed at the end of the design and build process and will support the two-launch process with the development of an implementation plan including case bank and backlog process, transition plan and timeline, testing/pilot plans, and pre-launch communication plans.

3.5 Provide training regiment to include:

3.5.1 Development and documentation of a training curriculum of call center(s) processes for all staff transitioning into the call centers and for staff conducting intake;

3.5.2 Development and documentation of a training curriculum for new hires for both the call center(s) and intake staff;

3.5.3 Onsite training of line staff, clerical and supervisors staffing the pilot call center;

3.5.4 A Train the Trainer course for ten DPSS Staff Development trainers;

3.5.5 Provision of all training materials, including electronic copies. DPSS will reserve the right to reproduce all materials.

**Service Center Training**

Training Curriculum Development:

InTelegy will lead the development and delivery of the service center training utilizing InTelegy's customer service skills training curriculum and incorporating extensive customization based on Riverside County's unique requirements. The Training committee will be responsible for planning and implementing the service center training (see Training Committee details above.)

**Service Center Training Delivery:**

The InTelegy training staff will deliver the service center training plan developed by the Training Committee. This scope of work assumes the following class size and time requirements

| Training Class   | Class size limits   | Days/Class                     | Total Training Days Included in Proposal |
|--|---|--------------------------------|--|
| Service Center EW Training<br>Assumes 80 EW (intake/ongoing) | Max 20 participants<br>(class must include at least one supervisor) | 2.5 days<br>4 classes required | 10                                       |
| Service Center Clerical                                      | Max 20 participants   | 1 day<br>1 class required      | 1  |
| Service Center Supervisor                                    | Max 20 participants   | 2 days<br>1 class required     | 2  |
| Train the Trainer **   | Max 5 participants  | 1 day                          | 1  |
|  |   | Total Training Days            | 14                                       |

\*\*Train the Trainer: After completion of the customer service representative skills training, assuming that the Riverside County designated trainer is in attendance at all classes, InTelegy will conduct a train-the-trainer instruction session to certify the Riverside County trainer(s) to deliver the skill training to subsequent training classes. The train-the-trainer session would include review of all Leader Guides, Classroom role-play and mock training scenarios and certification.

- With agreement to this train-the-trainer session, Riverside County obtains the rights to duplicate the InTelegy training for use with subsequent customer service representative training classes. This right does not extend outside the Riverside County Medi-Cal Service center.

3.8 Provide support for a minimum of three months after center pilot is operational

3.6 Assist the DPSS project manager in implementing the new processes for the call center pilot through the pilot becoming operational.

3.7 Safeguard Medi-Cal data privacy and security in accordance with California Welfare and Institutions Code section 14100.2 and 42 code of Federal Regulations section 431.3000 et seq., or as required by law.

#### Phase III- Service Center Ongoing Operations:

A differentiator in the InTelegy offering is our process of working with our service center clients throughout the first months of the service center operation. A consistent and proactive approach to project management will ensure that the service center implementation is smooth, that all plans are executed successfully and that the service center exceeds expectations by the end of the first year.

- **On Site Service Center Deployment:** Continuing in the role of Project Leader and onsite service center expert, the InTelegy consultants will continue with the initiatives outlined in the project plan for the implementation of the pilot service center. In this role the InTelegy consultants will:
  - Manage and participate weekly post launch meetings to ensure adherence to the design and build plan for the service center process and procedures designed in phase II.
  - Provide input to prioritize, change and enhance the newly launched service center, collect and analyze feedback on process and technology functions that may require adjustment and insure adjustments are implemented
  - Provide continued Service center expertise through interaction with the service center management team.
- **Ongoing Operations:** After the initial training and launch of the service center, it will be critical that the service center management team has a resource to support them as they learn new skills and processes. The InTelegy consultants will be responsible for ensuring adherence to process and the continued process update and enhancement effort. The InTelegy consultant will participate in weekly meetings with the service center supervisor and management team to review weekly reports from the service center.

In this role they will:

#### Ongoing operations:

- Review representative productivity metrics
- Provide input on coaching and counseling for individual representatives
- Provide feedback on Service center enhancements
- Provide coaching for Service center supervisors and managers
- Work side by side management team to insure a transfer of knowledge in their new role as service center managers
- Review and update all workflow processes, gaining input from worker representatives and communicating all changes throughout the organization.
- **Service Center Roll-Out Planning:** At the conclusion of the ongoing operations period, the InTelegy Consultants will work with Riverside County personnel to finalize the service center roll out planning. This will include updates/modifications to the original plans based on lessons learned during the Pilot project roll out.

| Committee | Category                   | Task  | Finish   |
|-----------|----------------------------|---|----------|
| Oversight | Budget                     | Budget Approval/Budget Source identified                                      | Month 4  |
| Oversight | Project Mangement          | Launch Committees   | Month 4  |
| Oversight | Project Mangement          | Confirm/ Validate Highlevel Timeline  | Month 4  |
| Oversight | HR                         | Analyst Position in support of Service Center defined                         | Month 8  |
| Oversight | HR                         | Call Center Manager named   | Month 8  |
| Oversight | HR                         | Meet & Confer with Unions   | Month 8  |
| Oversight | HR                         | Plan for ACD Admin/ Reporting Analyst position                                | Month 8  |
| Oversight | HR                         | Position profile, requisition plan for all changes/additions to org structure | Month 8  |
| Oversight | HR                         | Review Classification Impact of Line, Supv, & Clerical Roles                  | Month 8  |
| Oversight | HR                         | Staffing Plan Finalized   | Month 8  |
| Oversight | Oversight Review Meetings  | Month 4 status  | Month 4  |
| Oversight | Oversight Review Meetings  | Month 5 status  | Month 5  |
| Oversight | Oversight Review Meetings  | Month 6 status  | Month 6  |
| Oversight | Oversight Review Meetings  | Month 7 status  | Month 7  |
| Oversight | Oversight Review Meetings  | Month 8 status  | Month 8  |
| Oversight | Oversight Review Meetings  | Month 9 status  | Month 9  |
| Oversight | Oversight Review Meetings  | Go/No Go Launch Decision  | Month 10 |
| Oversight | Ongoing Operations         | Identify InTelegy involvement in ongoing operations                           | Month 12 |
| Oversight | Service Center Launch 1    | Banked case load, task distribution and clerical launch                       | Month 11 |
| Oversight | Ongoing Operations         | Develop Post Launch check list for ongoing operations                         | Month 12 |
| Oversight | Project Close Out          | Define post go-live activities  | Month 12 |
| Oversight | Project Close Out          | Project Close Out Presentation  | Month 12 |
| Oversight | Service Center Launch 2    | Call Center launch  | Month 12 |
| Oversight | Oversight Review Meetings  | 1 month post launch   | Month 13 |
| Oversight | Project Close Out          | Document Lessons Learned  | Month 13 |
| Oversight | Oversight Review Meetings  | 2 month post launch   | Month 14 |
| Oversight | Oversight Review Meetings  | 3 month post launch   | Month 15 |
| Steering  |                            |   |          |
| Committee | Business Model Decisions   | Determine Labor involvement & Timing  | Month 4  |
| Steering  |                            | Determine service center dependency on Scanning project timeline              | Month 4  |
| Committee | Business Model Decisions   | Determine service center hours of operation                                   | Month 4  |
| Steering  |                            | Identify in-person requirements for RRR processing                            | Month 4  |
| Committee | Business Model Decisions   | Determine timelines and criteria for selection process.                       | Month 4  |
| Steering  | Staff selection/assignment |   | Month 4  |
| Committee | Staff selection/assignment | Review Day in the Life docs   | Month 4  |
| Steering  | Business Model Decisions   | Confirm Service Center name?  | Month 5  |

|                              |                            |  |         |
|------------------------------|----------------------------|--|---------|
| Committee Steering Committee | Business Model Decisions   | Determine list of caseloads required in service center   | Month 5 |
| Committee Steering Committee | Business Model Decisions   | Confirm Unit structure & functions   | Month 5 |
| Committee Steering Committee | Business Model Decisions   | Confirm worker roles, position names, & rotation opportunities.  | Month 5 |
| Committee Steering Committee | Staff selection/assignment | Identify staff schedule and schedule considerations for service center requirements-union approval/input | Month 5 |
| Committee Steering Committee | Business Model Decisions   | Identify 2 month Pre-Launch transition plan  | Month 4 |
| Committee Steering Committee | Business Model Decisions   | Approved Quality Review Plan   | Month 5 |
| Committee Steering Committee | Business Model Decisions   | Approved Service Center reporting requirements   | Month 5 |
| Committee Steering Committee | Staff selection/assignment | Phone EW staff identified  | Month 7 |
| Committee Steering Committee | Staff selection/assignment | CMEW staff identified  | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Clerical staff identified  | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Supervisors Identified- job responsibilities defined   | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Finalized Day in the Life docs   | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Provide staff names & roles to facilities committee for move input.                                      | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Provide staff names & roles to technology committee for ACD,CalWin/MEDS input.                           | Month 7 |
| Committee Steering Committee | Staff selection/assignment | Staff selection, role assignment complete  | Month 9 |
| Business Process             | VRU Scripting              | Determine languages to be supported by EWs   | Month 4 |
| Business Process             | VRU Scripting              | Determine languages to be supported by IVR   | Month 4 |
| Business Process             | VRU Scripting              | Review sample IVR flow from other counties   | Month 4 |
| Business Process             | Workflow-General           | Finalize list of processes to be defined   | Month 4 |
| Business Process             | Workflow-General           | Deliver template for detailed workflow documentation   | Month 4 |
| Business Process             | VRU Scripting              | Design/document Food Stamps IVR flow & scripts   | Month 5 |
| Business Process             | VRU Scripting              | Design/document Medi-Cal IVR flow & scripts  | Month 5 |
| Business Process             | Workflow-General           | Document Current Process   | Month 5 |
| Business Process             | Workflow-Intake            | <insert each intake workflow from list>  | Month 4 |
| Business Process             | VRU Scripting              | Select voice(s) for IVR  | Month 5 |
| Business Process             | VRU Scripting              | Provide script details to new IVR vendor/implementer   | Month 6 |
| Business Process             | VRU Scripting              | Determine/document ongoing process for updating scripts and/or flows                                     | Month 6 |
| Business Process             | Workflow-General           | Hand-off all Workflows to Training Group   | Month 6 |
| Business Process             | VRU Scripting              | Translate English IVR scripts to Spanish   | Month 7 |

|              |                        |   |          |
|--------------|------------------------|---|----------|
| Process      |                        |   |          |
| Business     |                        |   |          |
| Process      | VRU Scripting          | Finalize VRU Script, Hand Off for recording                         | Month 7  |
| Business     |                        |   |          |
| Process      | Workflow-General       | Route all new workflows for approval & signoff                      | Month 7  |
| Business     |                        |   |          |
| Process      | Workflow-call handling | <insert each call handlingi Workflow from list>                     | Month 8  |
| Business     |                        | <insert each case maintenance workflow from list>                   | Month 8  |
| Process      | Workflow-Case Maint.   |   |          |
| Business     | Workflow-clerical task | <insert each clerical task disti Workflow from list>                | Month 8  |
| Process      | distirbution           |   |          |
| Intranet/FAQ | FAQ and Job Aids       | Develop FAQ/Job Aid time line                                       | Month 4  |
| Intranet/FAQ | FAQ and Job Aids       | Evaluate existing FAQ/Knowledgebase/Job Aids                        | Month 4  |
|              |                        | Determine technology to support FAQ                                 |          |
| Intranet/FAQ | FAQ and Job Aids       | Knowledgebase   | Month 5  |
| Intranet/FAQ | FAQ and Job Aids       | Develop initial list of questions                                   | Month 5  |
|              |                        | Master list of questions distributed to sub-committee for answering |          |
| Intranet/FAQ | FAQ and Job Aids       |   | Month 5  |
| Intranet/FAQ | FAQ and Job Aids       | Develop and review answers to questions                             | Month 6  |
|              |                        | Determine FAQ communication/training requirement                    |          |
| Intranet/FAQ | FAQ and Job Aids       |   | Month 6  |
|              |                        | Determine ongoing FAQ nomination, approval, implementation process  |          |
| Intranet/FAQ | FAQ and Job Aids       |   | Month 6  |
| Intranet/FAQ | FAQ and Job Aids       | Final Data Submitted to IT  | Month 6  |
| Intranet/FAQ | FAQ and Job Aids       | Intranet Mock up built  | Month 6  |
| Intranet/FAQ | FAQ and Job Aids       | Submit Content and Colors to IT                                     | Month 7  |
| Intranet/FAQ | FAQ and Job Aids       | Final FAQ Job Aide Intranet Site Completed                          | Month 7  |
| Intranet/FAQ | FAQ and Job Aids       | Introduce Intranet Site at All Staff Meeting                        | Month 7  |
| Intranet/FAQ | QA                     | Evaluate ACD Quality Monitoring Tools                               | Month 5  |
| QA Metrics   | QA                     | Develop & Document Quality Call Monitoring Process                  | Month 5  |
| QA Metrics   | QA                     | Develop & Document Quality Case Review Process                      | Month 5  |
| QA Metrics   | QA                     | Develop Quality Review Requirements                                 | Month 5  |
| QA Metrics   | QA                     | Develop Quality Call Form   | Month 5  |
| QA Metrics   | QA                     | Develop case review scoring forms                                   | Month 5  |
| QA Metrics   | Reporting              | Develop Agent/Team Reporting Requirements, Process, & Templates     | Month 5  |
| QA Metrics   | Reporting              | Develop Service Center Reporting Plan and Requirements- to BPO      | Month 5  |
| QA Metrics   | QA                     | Finalize QA Operations Plan- to BPO                                 | Month 5  |
| QA Metrics   | Reporting              | Hand off reporting requirements to technology                       | Month 5  |
|              |                        | Develop QA Implementation plan for post launch                      |          |
| QA Metrics   | QA                     |   | Month 6  |
| QA Metrics   | QA                     | Schedule and conduct calibration sessions                           | Month 8  |
| Technology   | Network Requirements   | Identify network requirements for service center                    | Month 4  |
|              | Task/Work Distribution |   |          |
| Technology   | Plan                   | Identify current work distribution process                          | Month 4  |
|              | Task/Work Distribution |   |          |
| Technology   | Plan                   | Finalize task management tool detailed requirements                 | Month 4  |
| Technology   | Telephony Purchase     | Identify ACD detailed requirements                                  | Month 4  |
| Technology   | Task Management Tool   | Task Management Pilot   | Month 10 |
| Technology   | Task Management Tool   | Task Management tool/process roll out                               | Month 11 |
|              |                        | Determine & Document ACD Support structure & processes              |          |
| Technology   | ACD Application        |   | Month 5  |
|              |                        | Determine ACD/IVR Administrative role, resource, & training         |          |
| Technology   | ACD Application        |   | Month 5  |

|            |                                 |  |         |
|------------|---------------------------------|--|---------|
| Technology | Task/Work Distribution Plan     | Develop Task/work distribution high level requirements       | Month 5 |
| Technology | Task/Work Distribution Plan     | Buy or Build decision- Task Management tool                  | Month 5 |
| Technology | Telephony Purchase              | Buy or Build decision-Telephony                              | Month 5 |
| Technology | Telephony Purchase              | Document requirements for RFP development                    | Month 5 |
| Technology | Telephony Purchase              | RFP drafted, edit and review                                 | Month 5 |
| Technology | Toll Free & Extension Plan      | Order 800 number as required                                 | Month 5 |
| Technology | Trunking / Circuit Requirements | Analyze forecasted call volume                               | Month 5 |
| Technology | Worker Desktop Requirements     | Decide upon monitor configuration for phone-based workers    | Month 5 |
| Technology | Worker Desktop Requirements     | Determine Supervisor desktop requirements                    | Month 5 |
| Technology | Worker Desktop Requirements     | Determine worker desktop requirements                        | Month 5 |
| Technology | ACD Application                 | Develop High-Level Call Flows & Skillsets                    | Month 3 |
| Technology | Other Phone Setup               | Identify plan for courtesy phones in remote locations        | Month 3 |
| Technology | Task/Work Distribution Plan     | Identify options for tool development                        | Month 3 |
| Technology | Task/Work Distribution Plan     | Gain approval/budget for development                         | Month 3 |
| Technology | Telephony Purchase              | RFP Finalized, distributed (if required)                     | Month 3 |
| Technology | Trunking / Circuit Requirements | Determine need for additional circuits                       | Month 3 |
| Technology | VRU Application- Programming    | Determine Hours of Operation & Overflow routing              | Month 3 |
| Technology | VRU Application- Programming    | Determine system-initiated 'emergency' routing requirements. | Month 3 |
| Technology | VRU Application- Programming    | Determine user-initiated 'emergency' routing requirements.   | Month 3 |
| Technology | Worker Desktop Requirements     | Purchase monitors  | Month 3 |
| Technology | Reporting                       | Evaluate ACD Agent/Team Reporting Tool                       | Month 4 |
| Technology | Task Management Tool            | Programming  | Month 4 |
| Technology | Task Management Tool            | Report development from Task Management                      | Month 4 |
| Technology | Task Management Tool            | Task Management tool roll out plan developed                 | Month 4 |
| Technology | Toll Free & Extension Plan      | Update SBC Blue Pages for any toll-free changes              | Month 4 |
| Technology | ACD Application                 | Evaluate Supervisor ability to update agent skills           | Month 5 |
| Technology | ACD Application                 | Finalize technology training plan and IT resource            | Month 5 |
| Technology | Other Phone Setup               | Termination plan for old staff extensions                    | Month 5 |
| Technology | Phone System Reporting Plan     | Receive reporting plan and templates                         | Month 5 |
| Technology | Task Management Tool            | Task Management tool testing                                 | Month 5 |
| Technology | Telephony Purchase              | Telephony purchase order placed with vendor                  | Month 5 |
| Technology | Trunking / Circuit Requirements | Install and Test Circuits                                    | Month 5 |
| Technology | ACD Application                 | Install phones for phone-based agents & supervisors          | Month 6 |
| Technology | ACD Application                 | Install phones in Lab  | Month 6 |
| Technology | ACD Application                 | Install Reporting System                                     | Month 6 |
| Technology | ACD Application                 | Install Workstation and Sup Station in lab                   | Month 6 |
| Technology | ACD Application                 | Map Agent names to skillsets & supervisors                   | Month 6 |

|                |                                 |   |         |
|----------------|---------------------------------|---|---------|
| Technology     | IVR Application                 | IVR tested and finalized  | Month 6 |
| Technology     | Network Requirements            | Implement network requirements                                    | Month 6 |
| Technology     | Phone System Reporting Plan     | Develop report drafts   | Month 6 |
| Technology     | Worker Desktop Requirements     | Install new desktop machines for all service center staff         | Month 6 |
| Technology     | Worker Desktop Requirements     | Test dual-monitor configuration for CalWIN & Imaging applications | Month 6 |
| Technology     | Worker Desktop Requirements     | Train workers on new monitor recommended usage                    | Month 6 |
| Technology     | Other Phone Setup               | Test ACD Hours of Operation and Overflow routing                  | Month 7 |
| Technology     | Other Phone Setup               | Test estimated wait time prompt to caller                         | Month 7 |
| Technology     | Other Phone Setup               | Test system initiated emergency routing options                   | Month 7 |
| Technology     | Other Phone Setup               | Train users and supervisors on usage                              | Month 7 |
| Technology     | Phone System Reporting Plan     | Final reports available; programming complete, testing complete   | Month 7 |
| Technology     | Reporting                       | Reports tested and implemented                                    | Month 7 |
| Technology     | VRU Application-Programming     | Record voice scripts  | Month 8 |
| Communications | Client Satisfaction Surveys     | Develop client satisfaction measurement process                   | Month 4 |
| Communications | Presentations                   | Identify community presentations required                         | Month 4 |
| Communications | Printed Materials               | Determine approach for client communication - NOA or direct-mail  | Month 4 |
| Communications | Strategy                        | Communications and Marketing Strategy Established                 | Month 4 |
| Communications | Events                          | Identify Events related to the Service Center-launch party etc    | Month 5 |
| Communications | Logo and Voice Contest          | Develop plan for Service Center Logo/Motto Contest                | Month 5 |
| Communications | Strategy                        | Develop communications plan and budget                            | Month 5 |
| Communications | Voice of the Service Center     | Develop plan for Voice contests (for IVR recording)               | Month 5 |
| Communications | Employee Satisfaction Surveys   | Develop Employee Survey, gain approval                            | Month 3 |
| Communications | Internal Staff Comm.            | Presentations in staff meetings                                   | Month 3 |
| Communications | Internal Staff Comm.            | Identify plan for County to County Service Center Panel           | Month 3 |
| Communications | Internal Staff Comm.            | Service Center Site Visits  | Month 3 |
| Communications | Internal Staff Comm.            | Setup Bulletin Board in Service Center staff area                 | Month 3 |
| Communications | Logo and Voice Contest          | Launch Logo/Motto Contest   | Month 3 |
| Communications | Printed Materials               | Posters & Client Brochure - draft                                 | Month 3 |
| Communications | Printed Materials - Newsletters | Identify community newsletters for possible article submissions   | Month 3 |
| Communications | Voice of the Service Center     | Launch "Voice" contest  | Month 3 |
| Communications | Internal Staff Comm.            | Conduct County to County Service Center Panel                     | Month 4 |
| Communications | Presentations                   | Develop service center presentation                               | Month 4 |
| Communications | Press/Media                     | Call Center Media Release   | Month 4 |
| Communications | Printed Materials - Newsletters | Draft article   | Month 4 |
| Communications | Voice of the Service Center     | Decide Winners for Voice Contest                                  | Month 4 |
| Communications | Client Satisfaction Surveys     | Implement Pre-Launch Client Survey                                | Month 5 |
| Communications | Employee Satisfaction           | Implement Pre-Launch Employee Survey                              | Month 5 |

| Surveys        |                                 |  |          |
|----------------|---------------------------------|--|----------|
| Communications | Internal Staff Comm.            | Pre-launch "Addressing your Fears"                                   | Month 5  |
| Communications | Logo and Voice Contest          | Decide Winners for Logo/Motto Contest                                | Month 5  |
| Communications | Printed Materials               | Posters & Client Brochure - review with BP&O                         | Month 5  |
| Communications | Printed Materials - direct mail | Client Notification - draft mail communications (2)                  | Month 5  |
| Communications | Press/Media                     | Engage individual reporters with story hooks                         | Month 6  |
| Communications | Printed Materials               | Client Brochure printed & distributed                                | Month 6  |
| Communications | Printed Materials               | Posters printed & distributed  | Month 6  |
| Communications | Printed Materials - direct mail | List extracted from CalWIN & finalized for first mail drop           | Month 6  |
| Communications | Printed Materials - direct mail | Client Notification - drop first mail piece                          | Month 7  |
| Communications | Printed Materials - direct mail | Client Notification - drop second mail piece                         | Month 9  |
| Communications | Client Satisfaction Surveys     | Implement Post-Launch Client Survey #1                               | Month 13 |
| Communications | Employee Satisfaction Surveys   | Implement Post-Launch Employee Survey #1                             | Month 13 |
| Communications | Client Satisfaction Surveys     | Implement Post-Launch Client Survey #2                               | Month 15 |
| Communications | Employee Satisfaction Surveys   | Implement Post-Launch Employee Survey #2                             | Month 15 |
| Facilities     | Space Requirements              | Determine Go-Live & Build-out Staffing Levels                        | Month 4  |
| Facilities     | Space Requirements              | Determine Service Center location and high level plan                | Month 3  |
| Facilities     | Modifications                   | Research cost to add acoustic panels to walls surrounding Phone unit | Month 4  |
| Facilities     | Space Requirements              | Decide on location of Phone Unit                                     | Month 4  |
| Facilities     | Staff Relocation                | Finalize move schedule   | Month 5  |
| Facilities     | Staff Relocation                | Movers Contract Awarded  | Month 5  |
| Facilities     | Staff Relocation                | "Smooth Move" Meeting with all move participants                     | Month 9  |
| Facilities     | Staff Relocation                | Develop Detailed spreadsheet of user changes                         | Month 9  |
| Facilities     | Staff Relocation                | Update Employee Directory with new user profiles/phone numbers       | Month 10 |
| Facilities     | Staff Relocation                | Update Service desk with new user profiles                           | Month 10 |
| Training       | Clerical Curriculum             | Define training prerequisites  | Month 4  |
| Training       | EW Curriculum                   | Define training prerequisites  | Month 4  |
| Training       | Supervisor Curriculum           | Define training prerequisites  | Month 4  |
| Training       | Clerical Curriculum             | Clerical Curriculum Finalized, hand off for printing                 | Month 10 |
| Training       | EW Curriculum                   | EW Curriculum Finalized, hand off for printing                       | Month 10 |
| Training       | Supervisor Curriculum           | Supervisor Curriculum Finalized, hand off for printing               | Month 10 |
| Training       | Training Delivery               | Training Finalized   | Month 10 |
| Training       | Training Delivery               | Deliver Service Center Training- Launch 1                            | Month 11 |
| Training       | Training Delivery               | Train the Trainer  | Month 12 |
| Training       | Training Delivery               | Compile evaluations & report findings to team                        | Month 12 |
| Training       | Training Planning               | Develop ongoing training calendar- 12 month                          | Month 12 |
| Training       | Training Delivery               | Deliver Service Center Training- Launch 2                            | Month 12 |
| Training       | Clerical Curriculum             | Determine which InTelegy Skills modules will be utilized.            | Month 3  |
| Training       | EW Curriculum                   | determine which InTelegy Skills modules will be utilized.            | Month 3  |
| Training       | Supervisor Curriculum           | determine which InTelegy Skills modules will be utilized.            | Month 3  |
| Training       | Training Planning               | Decide on full day vs half day classes                               | Month 3  |
| Training       | Training Planning               | Develop comprehensive training plan draft                            | Month 3  |

|          |                   |  |         |
|----------|-------------------|--|---------|
| Training | Training Planning | Identify class size requirements and determine # of classes required | Month 3 |
| Training | Training Planning | Identify classroom requirements: set up, flip charts, white boards   | Month 4 |
| Training | Training Planning | Identify training space/location                                     | Month 4 |
| Training | Training Planning | Present training options to BPO                                      | Month 4 |
| Training | Training Planning | Identify technology training resource                                | Month 5 |
| Training | Training Planning | Training Plan for ACD Admin  | Month 5 |
| Training | EW Curriculum     | Mock Go Live exercise developed                                      | Month 6 |
| Training | Training Delivery | Compile necessary documentation & handouts                           | Month 7 |
| Training | Training Delivery | Develop training feedback & evaluation process                       | Month 7 |
| Training | Training Planning | Finalize training plan   | Month 9 |

d. Describe methods that will be used to distill and disseminate collected data.

One of the first steps in designing the service center strategy and plan is to collect and analyze data related to workload quantities, patterns, handle time assumptions, call volumes, call types and other services provided. This data will be collected and reviewed with the Medi-Cal management team and utilized in the InTelegy Staff Planning tool, a customized staffing model tool that determines staff quantities required by task type and will serve as a tool that Riverside County can use to determine future staff requirements based on case and/or task and call increases. This data and assumptions will be documented in the strategy and plan report. During the Design and Implementation phase this data will be reviewed and revised as required and will be utilized by the various design committees.

Data collected will be benchmarked against examples and data from other counties to ensure that Riverside county's planning benefits from lessons learned at other service center counties.

InTelegy has a collection of service center templates that are used to evaluate information collected, as well as to ensure information collected is specific, organized and required, to keep the project teams productive and effective.

Each committee will also prepare agendas and minutes for all committee meetings. These will be sent to all committee members and the key project sponsors. All minutes will also be posted on an intranet site for easy access by all project team members.

e. Discuss your philosophy towards managing and keeping the engaged project on schedule and within budget.

Philosophy: InTelegy's process for project management includes a multi-tiered project management team, a comprehensive project plan and an open and proactive line of communication with our client executive sponsors.

The project team that will work with Riverside County will include InTelegy's CEO, providing executive oversight and strategic direction; InTelegy's Director of Consulting, the overall responsible party to ensure that the scope of work is fulfilled and that the service center design and build process stays on schedule and under budget; and the Onsite consultant, responsible for the day to day progress and completion of the project plan items.

Tools:

- Weekly project plan management and review
- Pre-scheduled committee dates; agendas and meeting minutes completed for each
- Monthly executive oversight reports and presentation

Project Plan: The comprehensive project plan that InTelegy will design for Riverside County will start with project plans used at other successful service center builds. InTelegy has applied the experience gained at the other 9 county service center builds to ensure that no task is left undone and that timelines assigned are reasonable.

Committee Management: Along with proactive and detailed project management, InTelegy's consultants are experts at engaging committee members, facilitating effective and efficient committee meetings, communicating with project team members through agendas, meeting minutes and reminders, and making the project fun and engaging. Each of our consultants have logged hundreds of hours working with all levels of county social service employees and understand the unique requirements of keeping people focused and productive, while maintaining the committees ability to come to decisions through thoughtful consideration and without undue pressure.

Executive Oversight Reports: InTelegy will also present project updates to the executive oversight committee on a monthly basis. These reports ensure that progress is reported, that issues are communicated often and early and that the executive sponsors have an opportunity to respond to project requests as needed. The third important tool and process deployed is the monthly tracking and reporting of the project budget. As a part of the executive oversight presentations, InTelegy will report against the project budget that covers consulting expense, technology expense and any other approved budget line item. These meetings allow for required escalation, changes in timeline and or budget discussions that may impact the overall project and therefore provide sufficient communication to enable enough time to fix any problems that may occur.

f. Describe how the interaction between your company and the County will take place to ensure that the services are performed and to the County's satisfaction, including resolving problems that may be encountered during the project.

Phase I: Strategy and Plan. The Strategy and Plan process includes a series of onsite and offsite interviews of key personnel from the Medi-Cal operations and the collection and analysis of key program and productivity data. Interviews will also be conducted with key support personnel from the Department of Public Social Services and county departments. The delivery of the Strategy and Plan will include draft reviews with key executive sponsors and a final delivery to all key stakeholders.

Phase II: Design and Implementation: As described in section e. above, InTelegy uses a thorough process of project management and communication, including meeting agenda and minutes publish and monthly executive oversight presentations to ensure that the project's progress and services are performed to the county's satisfaction. Issues are brought to the executive oversight committee early and solutions are recommended.

g. Detail whether or not your firm will be subcontracting portion(s) of the work. If so, indicate the name(s) of the subcontractor(s) and the portion of the work that will be subcontracted.

InTelegy is staffed with a group of independent consultants, as listed in section E. below, that are all independently employed, but are committed to InTelegy's clients.

h. Describe your company's policy regarding this project to ensure proper compliance and quality assurance.

Our unique project management process, including oversight from the CEO InTelegy Corporation, hands on project management and oversight from the Director of Consulting and a deliverables based incentive plan for our onsite consultant ensures that InTelegy delivers quality products and services. All deliverables are revised with the InTelegy project team prior to hand off and all each of the project team members maintains an open line of communication with key project sponsors to ensure feedback is received often.

**MILESTONE PAYMENT SCHEDULE**

| <b>Milestone Description</b>  | <b>Payment</b>   |
|---|------------------|
| <b>Milestone #1</b><br><b>Strategy and Planning (Deliverable A1)</b>  | \$ 41,440        |
| <b>Milestone #2</b><br><b>Project Management</b>  |                  |
| Month 4 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 5 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 6 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 7 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 8 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 9 (Deliverable B1 and B2)   | \$ 3,500         |
| Month 10 (Deliverable B1 and B2)  | \$ 3,500         |
| Month 11 (Deliverable B1 and B2)  | \$ 3,500         |
| Month 12 (Deliverable B1 and B2)  | \$ 3,500         |
| <b>Milestone #3</b><br><b>Design and Build Kick-off (Deliverable C1, C2, C3, C4)</b>                              | \$ 18,420        |
| <b>Milestone #4</b><br><b>Committee Work and Operations Manual Complete;<br/>Task Management Tool Implemented</b> |                  |
| Deliverable D1 and D3   | \$ 73,680        |
| Deliverable D2  | \$ 36,840        |
| <b>Milestone #5</b><br><b>Training (Deliverables E1, E2, E3, E4, E5, E6)</b>                                      | \$ 47,780        |
| <b>Milestone #6</b><br><b>Launch (Deliverables F1, F2, F3)</b>  | \$ 36,840        |
| <b>Milestone #7</b><br><b>Operational Support</b>   |                  |
| Month 13 (Deliverable G1)   | \$ 17,340        |
| Month 14 (Deliverable G1)   | \$ 17,340        |
| Month 15 (Deliverable G1)   | \$ 17,340        |
| <b>Total Not to Exceed</b>  | <b>\$338,520</b> |

COUNTY OF RIVERSIDE  
DEPARTMENT OF PUBLIC SOCIAL SERVICES

**CONTRACTOR PAYMENT REQUEST**

Exhibit E

To: Riverside County  
Department of Public Social Services  
4060 County Circle Drive  
Riverside, CA 92503

|                 |       |          |
|-----------------|-------|----------|
| Remit to Name   |       |          |
| Address         |       |          |
| City            | State | Zip Code |
| Contractor Name |       |          |
| Contract Number |       |          |

Total amount requested \_\_\_\_\_ for the period of \_\_\_\_\_ 20\_\_

Select Payment Type(s) Below:

Advance Payment \$ \_\_\_\_\_  
(if allowed by Contract/MOU)

Unit of Service Payment \$ \_\_\_\_\_  
\_\_\_\_\_ # of Units) X (\$) \_\_\_\_\_  
\_\_\_\_\_ # of Units) X (\$) \_\_\_\_\_

Actual Payment \$ \_\_\_\_\_  
(Same amount as 2076B if needed)

\_\_\_\_\_ # of Units) X (\$) \_\_\_\_\_  
\_\_\_\_\_ # of Units) X (\$) \_\_\_\_\_  
\_\_\_\_\_ # of Units) X (\$) \_\_\_\_\_

Any questions regarding this request should be directed to: \_\_\_\_\_  
Name Phone Number

I hereby certify under penalty of perjury that to the best of my knowledge the above is true and correct

\_\_\_\_\_  
Authorized Signature Title Date

**FOR DPSS USE ONLY (DO NOT WRITE BELOW THIS LINE)**

Business Unit (5) \_\_\_\_\_

Account (6) \_\_\_\_\_

Fund (5) \_\_\_\_\_

Dept ID (10) \_\_\_\_\_

Program (5) \_\_\_\_\_

Class (10) \_\_\_\_\_

Project/Grant (15) \_\_\_\_\_

Vendor Code (10) \_\_\_\_\_

Purchase Order # (10) \_\_\_\_\_ Invoice # \_\_\_\_\_

Amount Authorized \_\_\_\_\_

If amount authorized is different from amount request, please explain:  
\_\_\_\_\_  
\_\_\_\_\_

Program (if applicable) \_\_\_\_\_ Date \_\_\_\_\_

Management Reporting Unit \_\_\_\_\_ Date \_\_\_\_\_

Contracts Administration Unit \_\_\_\_\_ Date \_\_\_\_\_

General Accounting Section \_\_\_\_\_ Date \_\_\_\_\_

**DEPARTMENT OF PUBLIC SOCIAL SERVICES FORMS**

**Mailing Instructions:** When completed, these forms will summarize all of your claims for payment. Your Claims Packet will include **DPSS 2076A, 2076B** (if required). invoices, payroll verification, and copies of canceled checks attached, receipts, bank statements, sign-in sheets, daily logs, mileage logs, and other back-up documentation needed to comply with Contract/MOU.

**Mail Claims Packet to address shown on upper left corner of DPSS 2076A.**

*[see method, time, and schedule/condition of payments].*

*(Please type or print information on all DPSS Forms.)*

**DPSS 2076A****CONTRACTOR PAYMENT REQUEST****"Remit to Name"**

The legal name of your agency.

**"Address"**

The remit to address used when this contract was established for your agency. **All address changes must be submitted for processing prior to use.**

**"Contractor Name"**

Business name, if different than legal name *(if not leave blank)*.

**"Contract Number"**

Can be found on the first page of your contract.

**"Amount Requested"**

Fill in the total amount and billing period you are requesting payment for.

**"Payment Type"**

Check the box and enter the dollar amount for the type(s) of payment(s) you are requesting payment for.

**"Any questions regarding..."**

Fill in the name and phone number of the person to be contacted should any questions arise regarding your request for payment.

**"Authorized Signature, Title, and Date (Contractor's)"**

Self-explanatory (required). **Original Signature needed for payment.**

**EVERYTHING BELOW THE THICK SOLID LINE IS FOR DPSS USE ONLY AND SHOULD BE LEFT BLANK.**