



Request for Proposals New CVM Launch

CVM National Office Seeks New Host Agency Partners

Introduction

Community Voice Mail (CVM) has been providing free, personalized 24-hour voice mail access since 1993, to *people in crisis and transition* who need a reliable and confidential way to communicate with prospective employers, landlords, health care providers, case managers, social service staff and family.

Each year CVM connects 40,000 people in need directly linking them to jobs, housing and safety. In addition, 2,000 agencies in almost 400 cities nationwide increase their capacity to serve their clients by being a critical part of the CVM network. Several cities around the country include CVM in their toolkit for their 10 year plans to end homelessness.

"It has literally been a godsend to our veterans who have no income, no residential address, and no way of effectively communicating with prospective employers if it weren't for CVM." - Chuck, Department of Veterans Affairs, Phoenix

"CVM was a lifeline for me because I was not financially stable and was having a medical crisis. It also allowed me to get a job because I could put a phone number on applications. I don't know how you get along without it. You are cut off from the outside without communication. It is a God-given program, that is what it is!" - CVM User, Minneapolis/St. Paul, MN

The voice mail system is easily accessible and user friendly for both *English and Spanish* speakers with all of the prompts, menus, sample greetings on the voice mail system available in both languages.

CVM System Features and Additional Benefits

Community Voice Mail (CVM) has value beyond simply providing a voicemail number to a person in crisis or transition and providing their case manager with a reliable way to stay in touch with them. The following lays out the unique 'features' of the CVM centralized system, and ideas for linking CVM to a community wide communication and resource management infrastructure.

- **Broadcast Messaging:** Provides the ability to reach all clients at a single agency, in an entire CVM territory, or all CVM territories with one message. This is resource that we are currently promoting amongst sites for purposes as varied as job listings, civic engagement, weather alerts and EITC eligibility.
- **Reply to Broadcast Messages:** When a CVM Manager or Case Manager sends a broadcast voice message to her clients, clients can push a button and reply to the sender of the message without having to make an additional call. This feature has proven to be very useful in gathering responses quickly from clients.
- **Email Notification:** Clients with email addresses can opt to receive an email notification of "new messages waiting" so that they know if they should find a phone to check their voicemail box. This feature is especially helpful to clients who do not have daily access to a phone but may be checking email at libraries and community computer labs.
- **Ability to issue voice surveys:** The CVM Centralized System can currently be used to collect survey data from Clients (clients listen to questions and respond, etc.).
- **Ability to create "hotlines":** Some CVM Managers are using the Centralized System to create "hotlines" that clients can call to access recorded information.



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- **Email Broadcast Messaging:** When a client provides an email address, the address may be added to a broadcast email list that the CVM Manager can use to send messages to her/his clients. Several CVM Managers are experimenting with email broadcast lists as a way to augment the information sent via broadcast voice messaging.
- **Usage Reporting:** Knowing when a client last accessed their voice mail is an important indicator of usage, and helps case managers know if clients are listening to their messages.
- **Demographic/Outcomes Database Integration:** The CVM Centralized System fully integrates the voice mail service with the demographic/outcome database we use to track our clients.
- **Reset by phone:** The ability to reset a number once a client has been exited from the program.
- **Multi-lingual prompts:** The CVM Centralized System currently offers prompts in Spanish in addition to English. We have plans to enable additional languages in the future.
- **Friendly, customized prompts:** Our prompts are customized to CVM.

Additional CVM Benefits

- **High-quality, personalized technical support:** When a CVM Manager learns about a problem with the CVM Centralized System, they can talk to a CVMN staff member during normal business hours. Our service goal is 48-hour resolution of the problem, and we often respond the same day.
- **Training:** CVMN staff offer personal training to CVM Managers on the use of all of these features and more.
- **Cisco Partnership:** Our close partnership with Cisco has brought the Federation significant financial and in-kind (equipment/software/support) resources.

Community Partnership Potential

- **Regular and Coordinated Broadcast Messaging:** CVM manager can sign up for community resource email listservs including information about employment, health, asset building and more. Partner agency staff should also be enlisted to send announcements to CVM manager. CVM Managers can broadcast messages regularly to all CVM users about the available resources and events.
- **Disaster Plans:** Work with local Emergency Management entities to have CVM included as a resource in disaster plans. Use CVM as an information distribution tool to communicate disaster warning and relief information to people using the voicemail by broadcasting important messages to them. Provide CVM boxes to other human service agencies as "back up" communication tools to help them maintain contact during and after the emergency situation.
- **Project Homeless Connect:** Collaborate with your local Project Homeless Connect organizing group to provide CVM numbers to event attendees. Help to re-connect a segment of the population that may not be regularly accessing the services where CVM is typically available.

The CVM Model

Each CVM site around the United States is hosted by one main social or health service agency ("host agency") that is responsible for managing the service for the whole city/community. A CVM Manager at the host agency distributes the voicemail boxes to other local agencies who then give them to their clients. The key to the program is the fact that clients receive a local telephone number at which to receive messages -- and case workers can utilize CVM to stay in consistent contact with their clients, doubling the impact of the service.

Each new CVM site will use the Centralized Voice Mail System managed by the CVM National office. The host agency has no hardware/software costs for the voicemail system and needs only to have a recent model PC & high speed Internet access from which to manage the CVM Program. The centralized system



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is housed in Seattle and includes the following: phone lines, voicemail server space, client database & reporting, back-ups, upgrades, virus protection and technical support.

The CVM National Office provides the voicemail technology, the CVM name and model, and ongoing support for the CVM sites through broad-based governance, advocacy, public awareness, technical support, targeted marketing and fundraising, and strategic national partnerships.

Minimum Eligibility and Capacity Requirements for Applicant Agencies

1. Community need and intended participation by an active community-wide coalition with diverse representation of services within human service community.
2. An organization with 501(c)(3) status and administrative, fiscal, and technological capacity with ability to oversee all elements of the Community Voice Mail (CVM) program, including community organizing, program implementation, financial management, fundraising, outreach, training and management of participating agencies and management of CVM program statistical information, including user demographics, and outcomes.
3. Agency with history of coordinating collaborative projects across sectors that benefit the community.
4. Plans for ongoing fund development for the program and plans to evaluate and sustain a CVM program.
6. Willingness to participate in national CVM Federation, including annual membership dues and signed Memorandum of Agreement between CVM Host Agency and CVM National Office (see www.cvm.org – Starting a CVM – Memorandum of Agreement).

Estimated Standards For A "Minimally Healthy" CVM Program

Community Population	# of voice-mail boxes in inventory <i>by end of year 2</i>	# clients served annually <i>by end of year 2</i>	# of participating agencies <i>by end of year 2</i>	% FTE <i>by end of year 2</i>
> 1,000,000	1000+	1200	>60	1+
500,000 - 1,000,000	501-800	700-960	35-60	1
up to 500,000	up to 500	600	10-35	0.5-0.75

Sample CVM Manager Job Description

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

This is normally a full time professional position. The CVM Manager will direct and oversee various elements of the CVM program, including community organizing, marketing, implementation, financial management, fundraising, training, and management of voice mail lead contacts in area non-profit organizations/participating agencies.

Qualifications:

Bachelors degree. Previous experience in human services is preferred. Demonstrated sensitivity to low-income people and to staff at participating agencies. Individual should have proven community organizing ability, including ability to work with diverse groups of people, leadership and marketing skills, solid knowledge of local community service organizations, strong written and oral communication skills. Individual



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should be comfortable with computers and learning new technologies, be organized, highly motivated, comfortable speaking publicly, and able to work independently.

Responsibilities:

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

Cost to Host CVM

Some costs associated with hosting CVM for your community are unique to the program while others are standard costs associated with the addition of any new program to an organization. CVM National has pricing for the voicemail technology, dues and estimate needed for materials. All other costs associated with staffing and supporting the program are determined by the host agency.

The costs particular to CVM include:

- **CVM Voicemail and Database System:** There is a tiered cost structure based on the number of voicemail boxes in your inventory. The CVM National office maintains the centralized voicemail and database system and invoices host sites monthly for the use of this system.

# of voicemail boxes	Voicemail Cost
First 0-500	\$2/box/month
Next 501+	\$1.75/box/month

Examples

500 voicemail boxes = \$1,000/month; \$12,000/year

1000 voicemail boxes = \$1,875/month; \$22,500/year

- **CVM Materials and Supplies:** Electronic templates of the necessary CVM materials and supplies are provided by CVM National. \$3,000 is an estimate to cover the necessary printing and purchasing of supplies.
- **CVM National Support and Dues:** are charged annually at \$300/year. The dues pay for all support above and beyond voicemail technology, eg, program models and assistance, marketing, public relations, grantwriting assistance, peer-to-peer networking and trainings, and stewardship.

A blank budget is provided below to help you plan and fundraise for CVM.



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SAMPLE CVM BUDGET Projected Budget for Years One & Two

	Year 1	Year 2
CVM Manager Salary and Fringe Benefits (Minimum 0.5 FTE, professional level position)		
CVM Voicemail and Database System – paid to CVMN (First 0-500 boxes at \$2/box/month; 501+ at \$1.75/box/month)		
CVM Federation Membership Dues – paid to CVMN	\$300	\$300
CVM Materials and Supplies – budgeted for program use (Printing, binders, marketing materials)	\$3,000	\$3,000
Travel for CVM Conference (Annual trip to Seattle, 3 days, 2 nights)		
Mileage (CVM Manager outreach and training)		
Occupancy (Office space and utilities)		
Equipment (Office supplies, postage, computer)		
Communications (Telephone, cell phone, Internet)		
Community Meeting/CVM Coalition Expenses		
Other Direct Expenses		
Other Indirect Expenses		
TOTAL CVM PROGRAM EXPENSES		

The Proposal

Responses to this Request for Proposals (RFP) should be provided in no more than **10 pages**, including budgets and attachments, in the following numbered format with the content elements listed below. (Please see the attached document, "Tips for Sustaining CVM Programs", for additional information.)

1. Describe the applicant agency and why it is particularly qualified to provide CVM in your community. Please also speak to how CVM meets the agency's mission.
2. What is the plan for staffing & administering CVM?
3. Describe the applicant agency's overall budget, planned start-up budget for CVM, and the expectations/sources of continued support for the CVM program.
4. Please submit a list of agencies and organizations, including the type of services they each provide, who support this application and will agree to work as coalition members to provide guidance to implementation of the program.
5. Describe the estimated CVM program milestones for the first two years of the applicant's CVM program, i.e. the number of people to be served, number of participating agencies, and program objectives for CVM.
6. The CVM National Office requires collection and reporting of basic program outputs, client demographics and client outcomes. In addition to these descriptive statistics and client outcomes, how does the applicant agency plan to evaluate the program's outreach and effectiveness?

New Site Launch Process

1. CVM National (CVMN) reviews proposals and decides on finalist.
2. All parties sign relevant agreements (Memorandum of Agreement, payment agreement, confidentiality forms.)
3. New Host Agency hires a CVM Manager, works with CVMN to order phone numbers (voicemail boxes), receive training and set up program. CVMN will help guide process and work closely with new CVM Manager and others at host agency. CVMN will provide remote training on administering voicemail boxes and compiling program data.
4. CVMN will share knowledge, best practices, sample materials and provide recommendations re: how to operate a CVM program. CVMN will add new CVM site to the CVM web site and connect new Host Agency with a professional network of peers. Host Agency will have the opportunity to attend annual CVM National Meeting, which is usually held in October.
5. CELEBRATE! After getting voicemail program up and running, new Host Agency will plan a public "launch" for the program to introduce it to the community. A launch can be as simple as a few people in a conference room to a large media event with public officials on hand. CVMN tries to attend all launches and/or send a representative from the CVM Federation. Congratulations!
6. Ongoing technical support from CVMN and connection to network of CVM sites across the country while providing a critical service to the community.



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Technical Assistance Available in Preparation of this Application

PLEASE contact the CVM National office if you are considering submitting a proposal. We encourage you to call or email BEFORE sending a proposal to us. We can provide programmatic and fundraising assistance for all applicants. Please contact Anna Landa, Program Manager at (206) 441-7872 ext. 185 or at alanda@cvm.org. More information about Community Voice Mail is available on our website www.cvm.org.

Submission Deadline: Rolling Applications

Please send an electronic copy of the application to Anna Landa, Program Manager, at alanda@cvm.org. Please email the proposal as an MS Word or PDF attachment. A receipt will be emailed. Proposals will be reviewed and applicants will be notified by CVM National as soon as possible.

Tips for Sustaining CVM Programs

The following tips are provided to help your agency make early, strategic decisions about how to sustain your CVM program both financially and programmatically once it's off the ground. The information below includes ideas and tips for building community partnerships and cultivating diversified funding sources. This information is in addition to other materials provided by the CVM National Office and is based on the experiences of CVM programs from across the country.

BUILD COMMUNITY SUPPORT FOR CVM

- ***Recruit participating agencies to give out "voicemail boxes"*** - Building partnerships includes having a large, diverse group of "participating agencies" to provide CVM services to the community. This group of agencies might include: homeless services, shelters, employment agencies, domestic violence, veterans services, disability services, foster care system, public health, schools, community colleges and other community-based social/health services.
- ***Host community meetings*** - Having a regular community meeting to bring together all of your participating agencies can be a way to celebrate the work of these agencies, recognize best practices, and highlight the CVM program for public officials, community leaders, executive directors, board members, and/or funders who can be invited as "special guests".
- ***Establish a CVM strategic council/advisory committee*** - Scheduling an ad hoc strategic council/advisory committee meeting can be a way to bring together public officials, funders and key community leaders to focus on the ongoing need to support the CVM program. This can be especially helpful if the program is going through crisis and needs attention. People may be willing to sit on such a committee if they know that their time commitment will be time-limited. A one-time or annual meeting can be used for brainstorming and making connections that CVM staff can follow-up on throughout the year.
- ***Incorporate CVM into existing service provider meetings*** - Attending existing service provider meetings in the community (coalition meetings, city's committee on homelessness, emergency services, etc) can help make sure that CVM stays in the minds of the providers/agencies and in the minds of the public officials who are part of these meetings.

SEEK DIVERSIFIED FUNDING

- ***Consider fees from participating agencies*** - Approximately one-third of the CVM sites charge their participating agencies a fee for the CVM service (note: cannot be passed-on to the client). Sometimes fees can cause the number of participating agencies to drop. However, fees are a way for all of the community agencies to come together to help sustain the program. Fees are usually a small per box charge that helps to cover not only the cost of the voicemail number but also the cost of administering the program (e.g., \$2/box per month). Another option is a sliding scale annual membership fee (e.g., \$50/year for 0-25 boxes...based on annual budget size). It is a good idea to warn agencies about changes in the fee structure so that executive directors can start building CVM costs into their budgets/funding requests. It can also be helpful to provide new agencies the chance to use the boxes during a "free trial period" and to have the fee agreement as part of an overall "Participating Agency Agreement" that is signed between agency and host.

- ***Seek public funding*** – Several CVM programs have been successful in obtaining local, state and/or federal funding, especially if the CVM program can be tied to other programs that are being funded via public funding streams. Types of funding that have supported some CVM programs in the past include: Continuum of Care/Housing & Urban Development; City/County Emergency Services; City/County Human Services; Community Service Block Grant (CSBG); statewide telephone assistance programs; and Workforce Investment Act/Dept of Labor funding. Making sure that the mayor's office and county executive's office is invited to CVM strategy meetings and/or aware of CVM activities can help with both support and funding in the long run.
- ***Seek diversified types of foundation and corporate funding*** – CVM programs have been funded through a wide array of foundation grants and corporate funding. Success in these areas depends on the ability to make the connection between CVM and the funding priorities, the local relationships with funders, and/or collaboration with other community partners (eg, as part of multi-service strategy). Types of funding categories may include: human services, poverty, homelessness, employment, technology, community capacity and/or a population-specific focus (ie, domestic violence, foster care, immigrants, etc).
- ***Seek individual donations*** – Cultivating individual donors should be a key component of any fundraising strategy and should be part of the overall funding strategy for the entire host agency. Make sure that potential donors learn about the CVM program and have the opportunity to donate directly to the CVM program if needed.
- ***Get nominated for an award*** – Applying, or receiving a nomination, for awards which recognize service providers, community innovators and the like is not only an honor for the CVM program but can also help raise the profile of the program in the eyes of funders.

KEEP CVM IN THE MEDIA

- ***Write press-releases for all noteworthy events*** – Make sure that the local media is aware of the activities of the CVM program. Getting a grant, receiving an award, and/or hosting a successful community event can be an opportunity to get positive media attention. While the media may not respond with coverage each time, the ongoing contact will keep CVM in the minds of the editors/journalists. Note: the CVM National Office can help draft a press release and help spread the word at the national level.
- ***Find media allies and help create a "feature story"*** – It can be helpful to cultivate a relationship with the local journalists who produce community-focused feature stories so that the CVM program and/or host agency can be considered for such a story. You can build your relationships with journalists by always being available for their questions, having ideas for feature stories, and preparing information/factsheets about your agency and program ahead of time.
- ***Use media to put out a "call for help"*** – Sometimes sharing the bad news can be just as beneficial as sharing the good news. The right type of article in the local newspaper or on the radio may help a program keep its doors open by rallying individual donors and local funders to come to the aid of a struggling program. A call for help via media outlets should be used sparingly since it will put the whole host agency under a spotlight and since there may be a sense of competition for scarce resources among other social service providers. However, people won't help unless they are asked to help.