



211 CONTACT CENTER SERVICES & DATABASE MAINTENANCE

REQUEST FOR PROPOSALS

Contact Center Services Request for Proposals (RFP)

I. Introduction

The United Way Association of South Carolina (UWASC) is soliciting proposals from qualified vendors to provide Contact Center services, including live 24/7 coverage, for information and referral (I&R) needs across South Carolina, excluding Aiken and Edgefield Counties. Our goal is to ensure timely, accurate, and compassionate response to calls for help using nationally recognized standards and best practices.

South Carolina 211 (SC 211) was established as a vital resource to connect residents with essential health and human services. Since its inception, SC 211 has evolved into a comprehensive information and referral system, accessible 24/7 via phone, web, and text. SC 211 provides free and confidential assistance, helping individuals navigate a wide range of services including housing, food, healthcare, and disaster response. Today, SC 211 continues to serve as a critical lifeline for South Carolinians, ensuring equitable access to support and resources across the state.

SC 211 currently uses Sophia as their CRM and Database software.

II. RFP Timeline

- RFP Release Date: July 18, 2025
 - Deadline for Questions: August 1, 2025
 - Proposal Submission Deadline: August 30, 2025
 - Award Notification: September 15, 2025
 - Contract Start Date: January 1, 2026
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III. Scope of Work

The selected vendor will:

1. Operate and maintain IVR System
 2. Provide 24/7/365 call handling for an average of 9,000 monthly contacts.
 1. 8,000 - 211 calls
 2. 1,000 - Tier 1 Coordinated Entry (Homeless Connection Line)
 3. Support calls in English and Spanish with real-time interpretation support for other languages.
 4. Offer a callback option if wait times exceed 2 minutes.
 5. Meet performance metrics:
 - Answer 90% of calls within 180 seconds
 - Maintain average Call QA scores of 85%+
 - Weekly and monthly call center performance reports including: Average Speed of Answer, wait time, handle time, queued/answered calls, etc.
 - A minimum of 5% of callers are to receive a follow-up
 6. Provide monthly performance reports and QA scores.
 7. Participate in Quality Assurance meetings with UWASC/South Carolina 211 staff; weekly for the first 3 months, then monthly for the remainder of the contract.
 8. Scale staff, as needed, in response to relevant programmatic shifts incurred by acquired funding or stakeholder requests.
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IV. Minimum Qualifications

- Inform USA accreditation required
 - 25% of agents eligible for Inform USA Community Resource Specialist certification
 - Proven experience handling high-volume I&R or contact center services that are community-focused and service-based.
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V. Proposal Requirements

Vendors must submit:

- Organizational overview and staffing plan
 - Quality assurance plan
 - Business continuity plan (disaster preparedness)
 - Cost breakdown with tiered/pricing flexibility (include budget showing allocations to setup, staffing, software, etc.)
 - Examples of scalability to meet volume growth
 - Three (3) references
 - Past Call QA reports and sample performance reports
 - Timeline for project implementation
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VI. Evaluation Criteria

- Technical approach (30%)
 - Cost proposal (20%)
 - Experience and past performance (25%)
 - Staffing and training (15%)
 - Scalability and innovation (10%)
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VII. Submission Instructions

Submit proposals electronically by 5:00 PM ET on August 30, 2025 to: jesus.caldera@uwasc.org

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Database Maintenance Services Request for Proposals (RFP)

I. Introduction

The United Way Association of South Carolina (UWASC) invites proposals from qualified vendors to maintain and enhance its resource database, which includes over 2,100 organizations and nearly 5,800 service-location listings. The selected vendor will oversee data quality, accuracy, and accessibility, ensuring compliance with Inform USA standards.

II. RFP Timeline

- RFP Release Date: July 18, 2025
 - Deadline for Questions: August 1, 2025
 - Proposal Submission Deadline: August 30, 2025
 - Award Notification: October 1, 2025
 - Contract Start Date: January 1, 2026
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III. Scope of Work

1. Ensure each listing is reviewed/updated at least once every 12 months .
 2. Maintain a minimum of 95% contact accuracy.
 3. Implement protocols for duplicate checks and record merging.
 4. Submit:
 - Monthly update and outreach activity stats
 - Quarterly quality assurance audit reports
 5. Track and report:
 - Outreach to new agencies and providers
 - Participation in events or community meetings
 6. Support providers with training and guidance to update their listings.
 7. Adhere to Inform USA taxonomy standards and maintain a public-facing inclusion/exclusion policy.
 8. Collaborate with the UWASC/SC 211 staff on the maintenance and upkeep of the South Carolina 211 database, which currently spans about 2,000 agencies and over 5,000 services, and calibrate accordingly.
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IV. Minimum Qualifications

- Inform USA accredited or in-process

- Demonstrated experience in large-scale database curation
 - Familiarity with I&R taxonomy (211HSIS)
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V. Proposal Requirements

Vendors must submit:

- Staffing and QA plan
 - Description of update and outreach processes
 - Sample reports or dashboards (if available)
 - Written disaster/business continuity plan
 - Cost breakdown with tiered/pricing flexibility (include budget showing allocations to setup, staffing, software, etc.)
 - References
 - Optional: Any specific examples of database innovation or expertise.
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VI. Evaluation Criteria

- Technical approach (30%)
 - Experience and data quality track record (25%)
 - Staffing and update process (20%)
 - Cost structure (15%)
 - Innovation/scalability (10%)
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VII. Submission Instructions

Submit proposals electronically by 5:00 PM ET on August 30, 2025 to: jesus.caldera@uwasc.org