



Executive Summary from FRG Organizational Assessment Strategic Redesign of Business Model

Prepared by Interim Executive Director, Amanda Madorno
May 2025

Table of Contents

Introduction	Pg 3
FirstRule Group Key Findings	Pg 8
<ul style="list-style-type: none">• Insufficient and unstable funding to support overarching objectives• Lack of established leadership role and authority• Decentralized operations/Regional silos• The client experience, reputation and relationships, level of community awareness	
FirstRule Group Key Recommendations	Pg 10
<ul style="list-style-type: none">• Board composition and structure• Clear leadership, centralized management structure• Business model recommendations• Financial model• Model expenses comparison	
Appendices	
A. WA 211 at a Glance	Pg 21
B. List of People Interviewed	Pg 22
C. Strategic Realignment Timeline	Pg 24
D. Strategic Realignment Work Groups Chart	Pg 25
E. WA 211 Historical Overview	Pg 26

Introduction

Starting in January 2023, the WA 211 Board of Directors has engaged in thoughtful strategic discussions to address long standing structural and funding issues that have limited access to and the efficient use of the WA 211 system. These conversations included a strong community voice from call center representatives on the board) as well as diverse stakeholders. Sharing the commitment that everyone should have easy access to the information and resources they need to manage life crises, we recognized the need to change our business model to ensure our communities continue to have inclusive access to critical 211 services.

A Board established Strategy Taskforce guided the process. In July 2024, the Board hired an interim executive director (the first executive director since 2010) and the FirstRule Group (FRG) to conduct a robust assessment of 211 operations. The goal was to provide recommendations based on their findings on how to best *implement a re-designed, sustainable business model to* 1) more inclusively and effectively serve our communities, 2) address key needs of the evolving public safety and health systems, and 3) respond nimbly to both economic and community crises.

Board of Directors Strategy Taskforce

- *Penni Belcher*, Transportation Specialist, UW of Pierce County, SS211 Director
- *Stacy Kellog*, Director of Social Services, People For People, GC211 Director
- *Deb Miller*, Executive Director, Action Health Partners, Board Chair
- *Michelle McDaniels*, CEO Crisis Connections, KC 211 Representative
- *Alison Poulsen*, CEO, Better Health Together, Board Treasurer
- *Anne Stone*, Early Childhood Innovation Director, Washington Fatherhood Council Director, DSHS, Board Secretary
- *Sandra Suarez*, Director of Fund Development, Yakima Valley Farm Workers Clinic, Board VP
- *Galina Volchkova*, Senior Director, Volunteers of America WA NC211

FirstRule Group and the interim executive conducted more than sixty stakeholder interviews (See Appendix B), including staff and clients from the seven regional contact centers, government agencies and other community partners. They also conducted a three-day design workshop to gain firsthand insight into WA 211's strengths and weaknesses, challenges and opportunities.

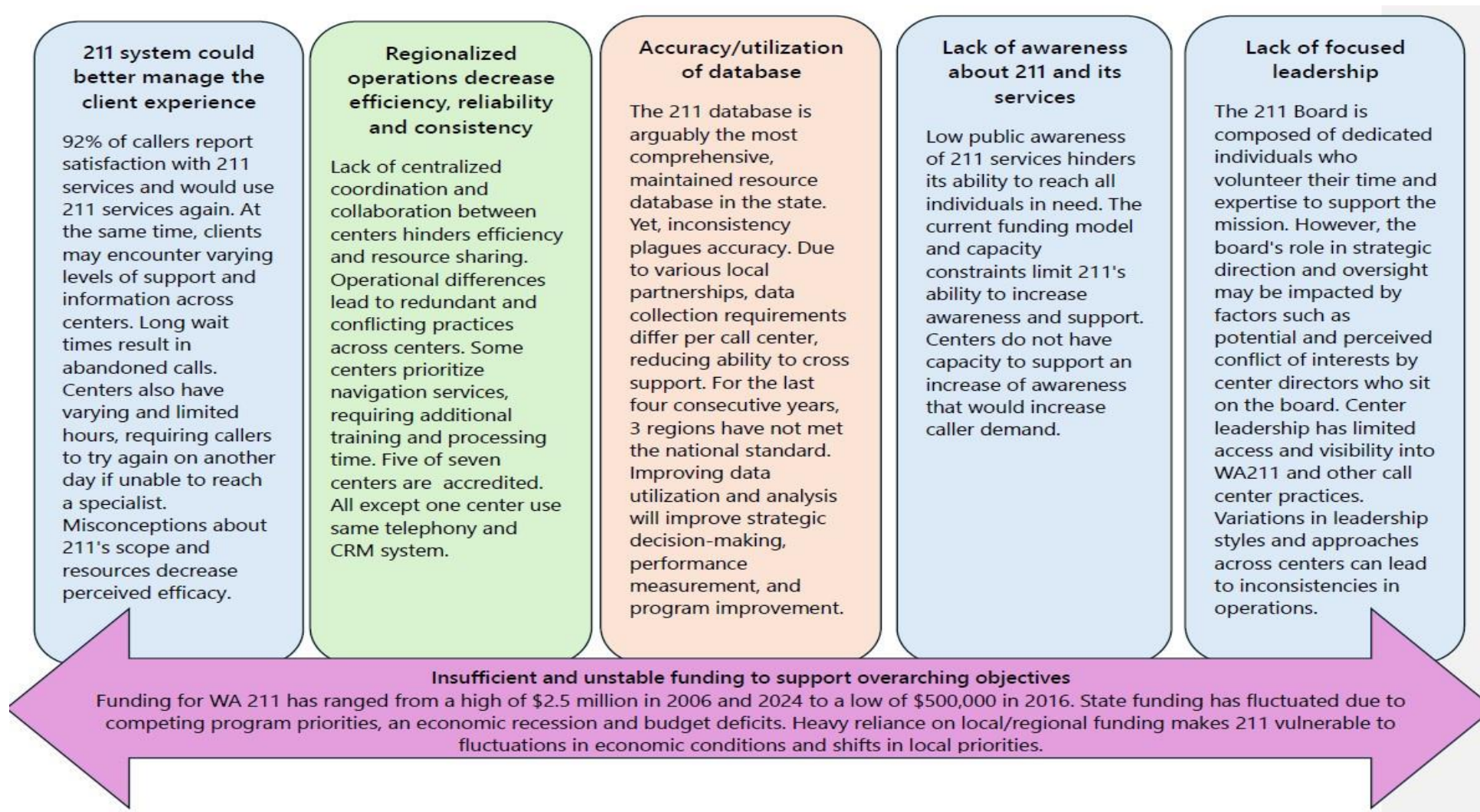
FRG also used the guidelines (see below) established within the Chapter 43.211 RCW as evaluation metrics of WA 211 current system and performance:

- Reduce duplication and inefficiencies
- Statewide integration
- Information and referral for health and human services
- Information and referral for services and information after a disaster
- Consult with 211before establishing a hotline
- Meet the national 211 standards
- Statewide database

FRG poured over financial and quality assurance metrics, identifying trends. They examined operational processes across contact centers, with an eye for improving the customer experience, increasing inclusiveness and efficiency and reducing duplicative functions. They also reviewed WA 211 communications, completed a literature review and scanned other 211 models nationwide.

As a result of this analysis, FRG identified multiple factors that influence the use and effectiveness of the 211 system. The chart below reflects a summary of these findings. (See also Key Recommendations, page 10).

FRG Summary of Influences that Affect WA 211 Operational Efficiency and Effectiveness



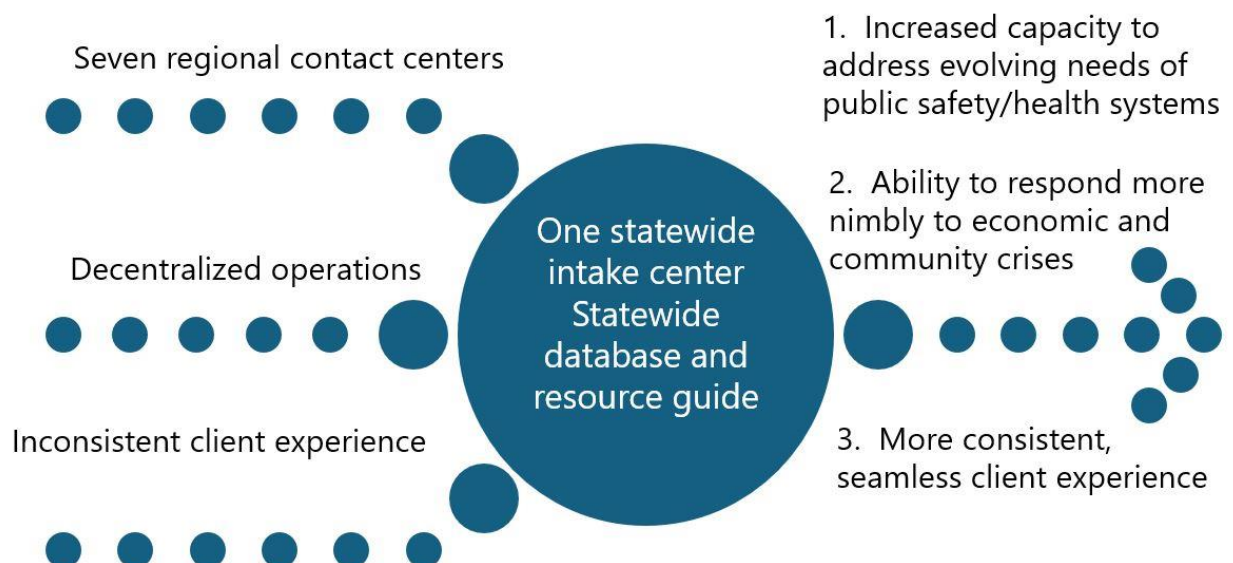
Adoption of a Consolidated Model

The results of this process reinforced the need for a strategic realignment to more inclusively and effectively connect people to community services, as well as build capacity for WA 211 to handle diverted calls from 988 and 911 and play an even stronger role in the state's emergency crisis response system.

FRG proposed two potential models. After much discussion, the Board of Directors voted in January 2025 to **consolidate contact center operations into a single contact center, develop a resource guide service, and centralize administrative, financial and leadership functions under the WA 211 nonprofit organization.** While both models shared some common benefits, the Board chose the consolidated model because:

- It is the most cost-effective approach: funding goes further, with the least amount distributed to overhead costs and the most amount of funding to community resource specialists who answer the phones.
- Most effectively reduces duplication and gains efficiencies through standardized processes and operations for a seamless, consistent customer experience, including standardized hours of operations.
- It offers the best statewide contracting opportunities, with no services left out.
- There is greater alignment of leadership and 211 goals, streamlined leadership approval processes, and elimination of "multiple hat" conflicting priorities.
- There is greater likelihood of financial sustainability.
- It maintains a statewide database and increases statewide integration of resources.

Strategic Realignment



Benefits of this change

This strategic realignment is designed to enhance operational effectiveness and better position WA 211 for future challenges and opportunities. By reducing the number of contact centers from seven to one, refining the WA 211 management structure, improving efficiency through process improvements, streamlining workflows, and technology changes, 211 can:

- support communities more inclusively and effectively by creating a seamless, consistent client experience with quality referrals and reduced wait times.
- better meet the growing demand for basic needs in Washington and support public safety.
- be an equal partner with 988-911 in the crisis and emergency/disaster response system.
- support community care hubs with resources as part of the information and referral network.
- better leverage existing and new partnerships, foster stronger relationships with state agencies and increase participation in statewide contracts.
- increase and diversify revenue sources to support the high demand for 211 services across the state with sustainable funding.
- enhance public awareness and improve partner relationships by creating a consistent statewide 211 brand and key messages.
- Be positioned to participate in national data initiatives.

Vision

In Washington State, people get the help they need. communities collaborate to identify and break cycles of need, and in a crisis, every community is prepared, responds effectively, and recovers stronger than before.

Mission

Throughout Washington State, 211 connects people to help when they need it, builds community resilience, and advocates for breaking cycles of need.

Why Now? Navigating Challenging Times

Since 2008, the WA 211 board of directors and a diverse group of stakeholders, including United Way and contact center representatives, have periodically discussed the need for increased efficiency and a sustainable business model. The need for a strategic realignment has long been necessary. It is not a new conversation or a new idea.

Current political shifts, elimination or severe reduction in funding, and economic uncertainties exacerbate the urgency for change because **our communities need 211 now more than ever.**

- There is a tsunami of need and a looming recession being created by the federal administration's mass layoffs and severe shrinkage or elimination of programs that serve our most under-resourced neighbors.
- The state's already fragile safety net will become more frayed with the proposed 25-27 biennium legislative budget. Financial cuts to state health and human services programs are already underway and will only increase challenges for our communities.

To ensure that 211 continues to serve Washington communities through these challenging times, it is imperative to strengthen our service delivery through operational efficiencies and more cost-efficient strategies. By re-looking at how we invest in staff and technology, expand outreach, and improve how we do business, WA 211 can continue to provide essential support and safeguard the well-being of countless Washingtonians.

We recognize that change is hard and brings concerns for many, especially the seven WA 211 contact centers represented by community-based organizations. Our goal is to work closely with each call center during this transition to ensure as smooth and effective a transition as possible. We share the same commitment to put the needs of our community front and center in our decision making. We believe one of the great strengths of this system is the local experts and those involved in this work. We want to maintain that. Establishing one contact center does not mean we will not continue to partner with the organizations who have run 211 contact centers.

We also know that there will be some bumps in the road along the way and appreciate the grace, understanding and support extended to us by our customers, contact centers, government, non-profit and other community partners during this important time.

Warmly,

A handwritten signature in blue ink that reads "Deb Miller".

Deb Miller
Board Chair
May 2025

Key Findings from FRG Organizational Assessment

Since 2006, 211 has operated with a de-centralized, regionally based business model. The strengths of this approach include flexibility, creativity, and independence. A centralized model offers consistency and compliance but may lack agility. A decentralized approach promotes flexibility but can lead to inconsistencies. The federated model aims to balance control and flexibility, but its complexity requires careful coordination.

1. Insufficient and unstable funding to support overarching objectives

211 relies on a mix of local, state, and federal funding sources, demonstrating adaptability and ability to secure resources. However, state funding for WA 211 has ranged from a high of \$2.5 million in 2006 and 2024 to a low of \$500,000 in 2013 – 2016. This funding has fluctuated due to competing program priorities, an economic recession and budget deficits.

Contact centers have creatively pursued local and regional funding to offset the gap, requiring diligent maintenance and building of relationships. Yet, consistent development of center specific contracts without an overarching strategy has diluted the focus, direction and purpose of 211 overall. And despite best efforts, the cost of meeting demand for services has outpaced the level of funding. Because this funding is geographically specific, it does not benefit the entire system and may create competing priorities within each center. It also means that individual centers may or may not decide to participate in statewide contracts.

2. Lack of established leadership role and authority

WA 211 has not had an executive director since 2010 and currently contracts with a contact center for its administrative, financial, technology and IT management. The resulting impact has limited 211's ability to execute on vision and strategic direction and to bring overarching alignment to center operations including training and accreditation, quality assurance, policies and procedures, marketing and outreach, new business development and fundraising, and advocacy.

The 211 Board is composed of dedicated individuals who volunteer their time and expertise to support the mission. However, the board's role in strategic direction and oversight may be impacted by factors such as potential and perceived conflict of interests by center directors who sit on the board.

3. Decentralized operations/Regional silos

Many operational decisions are **unique to each contact center**, which makes it challenging to achieve consistent quality and efficiency across the system. **Lack of centralized coordination and collaboration** between centers hinders efficiency and resource sharing. Each center has its own staffing model and structure, job descriptions, compensation and benefits. Hours of service vary and are not aligned with client needs or 988-911. Other operational differences lead to redundant and conflicting practices across centers.

Some centers prioritize **navigation and/or early application services**, requiring additional training and processing time. Some of these services are linked to partnerships and contracts

that require specialists' **access to external portals**, also requiring additional training and responsibility. This is a barrier for other centers to support in event of heightened traffic, or emergency.

Contact Center Summary

	North Sound	Peninsula	Southwest WA	South Sound	King County	Greater Columbia	Eastern WA
Empathetic Specialists	✓	✓	✓	✓	✓	✓	✓
Specialists Core Responsibilities (information & referral)	✓	✓	✓	✓	✓	✓	✓
Common Database	✓	✓	✓	✓	✓	✓	✓
80% updated annually (FY23/24)		✓	✓				
Telephony System	✓	✓		✓	✓	✓	✓
CRM	✓	✓		✓	✓	✓	✓
Inform USA Accreditation			✓	✓	✓	✓	
WA211 Administered Contracts:							
Dept. of Commerce – Earned Income Tax Credit	✓	✓		✓	✓	✓	✓
DSHS – Traumatic Brain Injury	✓	✓			✓	✓	✓
Similar Regional Contracts:							
Dept. of Transportation		✓		✓		✓	
DSHS Basic Food Program	✓	✓		✓	✓	✓	✓
Operating Hours (M-F 9a-4p common)	9a – 4p	9a – 5p	8a – 6p	9a – 4p	9a – 5p	8a – 5p	8a – 5p

6

Some centers are **metric focused**, others are not. This means the common standards, adopted by the contact centers themselves and in line with InformUSA accreditation standards, are inconsistently met (see chart example below).

211 Minimum Operating Standards	Goal	2024 Yearly Average
Abandonment Rate (dropped queued calls)	15%	22%
Percent of Calls Answered within 7 minutes	80%	42%
Percent of Database Records Updated Yearly	80%	86%

4. The client experience, reputation and relationships, level of community awareness

Client experience: Because of varying operational standards and processes – from operating hours to different services to training standards for specialists – customers report a mixed experience and messaging, depending on the contact center they reach out to. Each contact

center has a different local reputation. Overall, WA 211 has a weak reputation for service and outcomes.

Referral resources also impact WA 211's reputation. If a customer is referred to housing and there are no options available, customers often fault WA 211, even though it has no control over the availability of resources.

Legislative support: While supported by representatives in the past, Legislative connections and relationships are inconsistent. Some individual contact centers have strong relationships with legislative representatives. Overall WA 211 has inconsistent legislative relationships and a poor funding reputation because WA 211 keeps asking for more without delivering.

Limited public awareness: Low public awareness and limited understanding of 211 services hinders its ability to reach individuals in need. The current funding model and capacity constraints limit 211's ability to increase awareness and support. Call centers do not have capacity to support an increase of awareness that would increase callers.

Key Recommendations

1. Board composition and structure

The recent changes within the board have significantly impacted WA211's trajectory. This renewed leadership has instilled a fresh perspective and a clear direction, propelling the organization towards a brighter future. The board's pivotal role in shaping WA211's strategic vision cannot be overstated. The board's recent decisions have already led to the evaluation and redesign of WA211 to become a stronger organization.

WA211 is at a pivotal stage, requiring extensive action and change to continue. The board will continue to be pivotal in pushing strategic change forward, and then implementation. The board has expressed a strong desire to move forward with great change, even if the path requires effort and sacrifice. By providing guidance, oversight, and support, the board empowers the organization to achieve its mission and make a lasting impact on the community.

To foster stronger partnerships and improve communication with potential collaborators, WA211 must adopt a targeted approach. By tailoring messages to the specific needs and interests of each partner, it can reduce noise and ensure that key messages resonate. Highlighting impactful customer stories will further amplify the power of WA211's work and inspire potential partners to support its mission.

Strong leadership is essential to navigate the complex landscape of state-level relationships. By developing strong relationships with key stakeholders and demonstrating exceptional people skills, WA 211 can effectively manage diverse perspectives and build consensus. A skilled leader can foster a collaborative environment, inspiring trust and cooperation among various state agencies.

From contact center directors to subject matter expert (SMEs) participants:

Contact center directors transition from voting members to subject matter experts. This ensures that the board benefits from their deep operational knowledge without diluting their focus on direct service delivery. This also removes any perception of a potential conflict of interest.

Diverse representation: The board should be composed of a diverse group of individuals representing various stakeholders, including government agencies and community partners. Importantly, these individuals should be deeply rooted in the communities they represent, with the ability to authentically articulate the needs and perspectives of both their organizations and WA211. This diversity will bring a wide range of perspectives and experiences to the table, offering the outside perspective and connections needed.

Streamlined Board: The board should be reduced in size to foster more efficient decision-making and encourage deeper engagement from each member.

Clear roles and responsibilities: The board should have well-defined roles and responsibilities, including attendance expectations and performance. Attendance agreements should be formalized to ensure accountability.

2. Clear leadership, centralized management structure

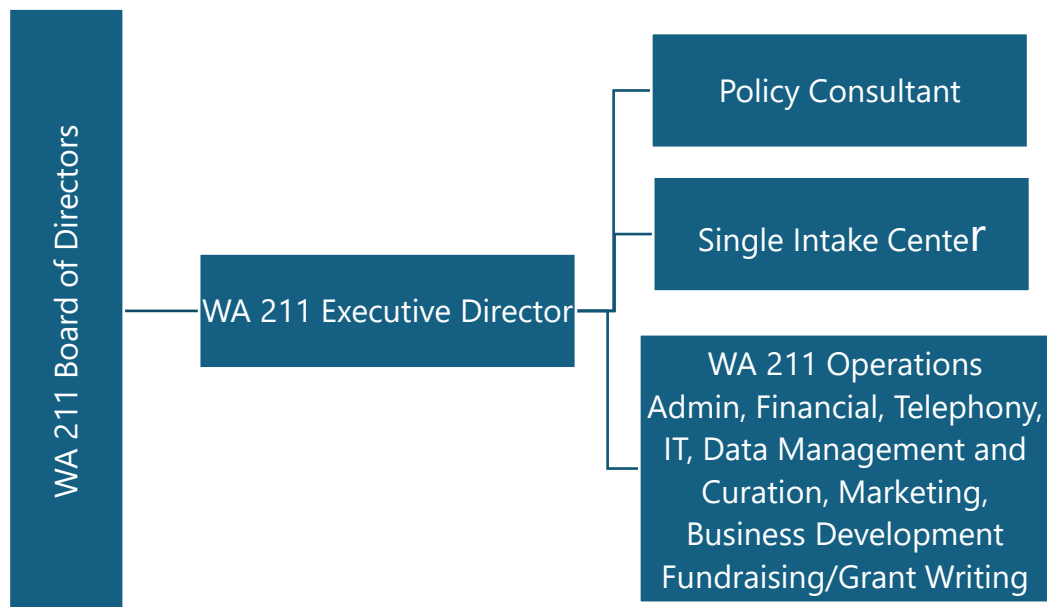
WA211 has the opportunity to expand its role in supporting call centers by streamlining specific tasks that currently slow down operations and by unifying its representation across the network. Shifting the management of contracts from individual call centers to WA211 offers multiple benefits. Currently, WA211 and the call centers have limited visibility into each other's contracts, which restricts the ability to expand contracts or create a cohesive, statewide network. This lack of coordination also creates inefficiencies and slows response times, as WA211 currently has little governance over organizational details. This non-standardized approach poses a risk to the overall health of the organization and contributes to the siloed structure of WA211.

WA 211 can centralize specific responsibilities thereby reducing duplicative work, enhancing consistency, and providing a more unified experience for both call centers and callers. This approach will lower the administrative burden on individual call centers, enabling them to operate more efficiently and focus on higher-value tasks.

A key component of this shift is implementing a system for managing strategic areas such as cybersecurity, IT, funding, and budgeting. Additionally, WA211 should be properly resourced to meet the growing demand for information and referral services, while continuing to expand through supplemental contracts. This shift will ensure resources are allocated effectively and aligned with organizational priorities.

To support this transformation, WA211 should redesign its management structure to include an executive director responsible for overseeing the information and referral services, managing contracts, and holding other leadership accountable. This executive director should be supported by the board to ensure the success of the restructuring.

FRG Recommended Organizational Structure



3. WA 211 business model recommendations

To provide 211 an effective redesign of the current 211 business model, FirstRule conducted a comprehensive evaluation, including interviews, performance analysis, design sessions, and board meetings. This assessment aimed to identify current challenges, limitations, and opportunities for improvement. By examining nationwide models, FRG identified three potential organizational approaches/models:

- Independent
- Aligned (Federated)
- Consolidated (Unified)

Through interviews and research, FirstRule Group looked at national 211 examples to understand what other models were out there, and if any were an ideal fit for WA211. Understanding that each State has unique attributes, partner structures and community needs, and that no single model could be one size fits all. We also attended the Inform USA : 211 Steering Committee Webinar - Sustainable Funding Secrets and learned about Nebraska/Iowa's 211 growth and strategies. Steve Smith conducted these interviews and associated research for FirstRule. Steve previously worked with Connecticut 211 as an alliance partner in a contract providing contact center services to a Connecticut state agency and as a partner with Indiana 211 while serving as the director of an Indiana state human services agency.

FirstRule also worked to understand 211 historical roots. United Way Worldwide was first formed in 1887 as a Charity Organization Society in Denver CO, focusing on coordinated fundraising and service delivery for local Charities. In 2000 United Way, the Alliance of Information and Referral systems petitioned the Federal Communications Commission to create "211" as a health and human services information and referral, as originated by United Way of Atlanta. By April

2004 Washington State had its own nonprofit 501(c) (3) organization that would become WA211.

The 211 system in the United States is a complex network of over 220 agencies providing crucial access to social services. While 88% of these agencies receive some level of funding from United Way, their organization structures vary significantly. Three primary models exist: Independent, federated (aligned), and unified (consolidated). Independent 211s operate autonomously, while federated models involve intermediary organization, ranging from minimal to significant oversight. Unified systems feature a single statewide 211 entity.

The recent integration of 988, the Suicide & Crisis Lifeline, has introduced new funding streams and operational challenges for many 211s. Through FirstRule's review, the following highlights were identified:

- **General:** There are 220 211s in United States. 88% of all 211s receive some level of United Way funding. State 211s use one of three basic organizational designs.
- **Independent** (20% of states) – Each 211 agency operates independently and without a coordinating intermediary. Examples are Georgia and Ohio. In some cases, a 211 agency may only cover one or two counties.
- **Federated:** (40% of states) – An intermediary (501c3) is involved, across a continuum from “weak” (Kentucky, Washington and Wisconsin) to “strong” (New York minus NYC), based on the level of involvement the intermediary has in the management of the federated 211s.
- **Unified or “Statewide”:** (40% of states) – A single 211 entity (a 501c3) covers the entire state (CT, IN, NC, NE, NJ, VA).
- **988-211:** 20% of 211s are “blended” 988-211 agencies.
- **988-211-911:** Limited number of examples but Riverside County, CA was cited. The focus of the Riverside program is “911 diversion”.

211 design observations

- The integrity of statewide resource databases is inversely proportional to the number of 211 agencies. Fewer agencies result in a more complete and robust statewide resource directory.
- The ability to capture “statewide” contracts is inversely proportional to the number of 211 agencies. State agencies don’t like dealing with fragmented and loosely federated 211s.
- The financial strength and viability of 211s is inversely proportional to the number of 211 agencies. In general, fewer 211 agencies lead to federated 211 organizations. The strength of the MOUs between the intermediary and the 211 areas is critical.
- 988-211 agencies have the benefit of accessing both funding sources, which is a big advantage.
- 24/7 access greater financial success.
- Some states that have 24/7 access to 211 in statute. However, there are many examples of 24/7 mandates being achieved via MOUs. For example, NJ covers NC after-hours calls. UWW sees a trend away from 24/7 independent and federated models.

The 211 system demonstrates a diverse range of organizational structures with varying degrees of success.

After careful review, FirstRule determined that an Independent model is not viable for WA 211 and will not be included in the recommendations.

This model would leave each 211 agency/ contact center operating independently without a coordinating intermediary. Such an approach would:

- Conflict with WA State RCW.
- Eliminate potential statewide partnerships.
- Remove base funding options.
- Create an inconsistent customer experience across the state.

Model Strategy - Aligned and Consolidated

The contact center models of aligned and consolidated are as follows:

	Aligned Model	Consolidated Model
Description	<p><i>Three contact centers aligned with the 988 providers, working together as one team providing 211 services for the state.</i></p> <p>In a hybrid or virtual service delivery model, employees of the three centers would provide services for the entire state. Call volume would be managed with an automated routing to any available call specialist and supported by the database. Each center delivers 211 services in a single and consistent manner in alignment with WA211 set expectations. Each center director has a contract delivery relationship with the WA211 Executive Director. Specialty contracts funding additional navigation/facilitation would be assigned to enough trained specialists at each center, to support the volume and minimize the need to call the person back to assist them. Additional roles may be created to have a primary focus on follow-up calls to customers and back up to I&R when overloaded.</p>	<p><i>A single contact center model with virtual team (or hybrid) working across the state.</i></p> <p>Delivery of 211 services are performed in a single and consistent manner in alignment with WA211 set expectations. A single management structure is in place with the contact center director having contract delivery relationship with the WA211 Executive Director. Leveraging the database, all call specialists would take calls from anywhere in the state. Specialty contracts funding additional navigation/facilitation would be assigned to enough trained specialists to support the volume and minimize the need to call the person back to assist them. Additional roles may be created to have a primary focus on follow-up calls to customers and back up to I&R when overloaded.</p>
Center Selection	<p>The three contact centers currently providing 988 services.</p> <p>North Sound – Volunteers of America Western Washington King County – Crisis Connections Eastern Washington – Frontier Behavioral Health</p>	<p>Interested contact centers, including the current seven, may participate in a bidding process to be the center for the whole state.</p>

Consequently, only the Aligned and Consolidated models remain viable options. Each approach has distinct strengths and weaknesses, and FirstRule believes both would lead WA 211 to success. Throughout our assessment, we discovered that beyond the WA 211 number and options are designed to retain as many current staff members as possible by restructuring and reallocating positions and tasks to provide stronger support. These recommendations are intentionally scalable, allowing WA 211 to grow and support evolving state needs, including the

potential future expansion to 24/7 support. The first set of recommendations apply to both the Aligned and Consolidated models.

Recommendation	Recommendation Description
Right Size, then Grow	Staff to incoming call volumes or “demand” for information and referral services. Get the core service strong and consistent and then grow services beyond information and referral.
Tiered Call Specialist – Statewide Coverage	All call specialists would take calls from anywhere in the state. Specialty contracts funding additional navigation/facilitation would be assigned to enough trained specialists to support the volume and minimize the need to call the person back to assist them. Roles created to have a primary focus on follow up calls to customers and back up to I&R when overloaded.
Define Navigation	Navigation services to be defined and standardized across the state. The database should be updated to reflect and facilitate navigation services.
Statewide Contracts	All centers participate in statewide contracts
Standardized Hours	Standard hours of service met by each center.
Extending Hours - Pause 24/7	Hours should be extended and scaled up in a deliberate and strategic way, ensuring that appropriate support measures are in place.
Standardize Communication Methods	All contact centers to use phone, text, chat and email.
Standardize Staff Payrates for Equitable Staffing	Standardize payrates for Customer Specialist across the state.

Right size, then grow: WA211 original mission and core responsibilities are Information & Referral services (I&R). This core service must be delivered consistently and at national standards. WA211 needs to shift to focusing staffing to the demand for I&R services as the primary objective rather than adding services that take away from I&R. Once I&R is delivered consistently and a strong reputation is built, then grow to additional services.

Define navigation: Overtime through the needs of WA211 contact centers (funding) partners and public navigation services have been added. Navigation services come with a lot of positives, it allows callers to be connected to services faster and more directly. It empowers both the call specialist and the caller to take action in a way that I&R does not provide. It benefits partners who may have limited capacity or technical tools to provide. Callers benefit from the insight of the call specialist.

Navigation services do come with additional challenges that need to be considered. Each contact center manages and defines navigation services differently. Navigation takes additional processing time. The contact center specialist training becomes even more extensive and takes longer for a new staff member to become fully trained.

Navigation services often require access to third party portals/websites, creating the requirement to create and maintain access for trained call specialists. Navigation services are not currently input or supported by the database, requiring the call specialist to remember and track these calls in a different way than standard calls. If navigation services are to continue, they must be defined and standardized across the state. The database should be updated to reflect and facilitate navigation services.

Tiered call specialists, statewide coverage: Leveraging the database, all call specialists would take calls from anywhere in the state. Specialty contracts funding additional navigation/facilitation would be assigned to enough trained specialists to support the volume and minimize the need to call the person back to assist them. Roles created to have a primary focus on follow up calls to customers and back up to I&R when overloaded.

Standardized hours: All contact centers should offer the same standardized hours, creating a more unified caller experience.

Extending hours - pause 24/7: Moving the contact centers to 24/7 coverage is the future state goal, which will open the doors for contracts and effective partnerships with 911,988 and ACH's. This will need to be done strategically after WA211 restructuring is fully implemented. Hours should be extended and scaled up in a deliberate and strategic way, ensuring that appropriate support measures are in place.

Statewide contracts: With the understanding that any additional contracts/added capacity requirements will come with the funding to cover it, the expectation should be set that all centers participate in statewide contracts. This will allow the executive director and contract management team to leverage and acquire statewide contracts.

Standardized communication methods: All centers use phone, text, chat and email, creating a standardized client experience across the state.

Standardized staff payrates for equitable staffing: To foster a cohesive team environment, FirstRule recommends implementing a standardized compensation approach that ensures all staff are adequately and equitably compensated and supported throughout the state. This will remove the current struggle of maintaining staff because of what they pay. It will facilitate the ability to hire staff statewide and allow the call specialists to function as one team.

4. Financial Model

Financial Model

Recommendation	Recommendation Description
Staffing investment to meet demand	Staff specialists to the queued contacts rather than the handled contacts. This is the demand for services.
Negotiate contracts for true cost of service delivery	Ensure all contracts cover the actual cost of the service requested and update as necessary. Renegotiate current state and region contracts.
Simplified and clear funding allocation	Eliminate the current funding allocation model and replace it with a transparent method that supports proactive budgeting.

Staffing to demand: Staffing to the demand of the total incoming call volume and sharing the routing of calls, is the most significant investment in the future state. It is also the most impactful for efficiency, quality of experience, and potential for growth. Staffing to the demand in one of the contact center models recommended also provides more output per dollar.

Contract for cost of service: Current and future contracts need to be negotiated for the true cost of delivering the services, whether it is I&R or navigation or a future service. Supplementing I&R service cost through contracts for additional services has proven to detract from I&R and create a wider gap in service delivery. Individual contact center contracts should be evaluated and negotiated into statewide contracts where appropriate. For example, individual contracts with the Department of Transportation are in place with South Sound, Greater Columbia and Peninsula; this may be an opportunity for servicing the entire state within the future model. Municipal funding is likely to remain aligned to the center it is with in the current model.

Simplify funding allocation: The methodology used for funding allocation to each center today is complex, difficult to understand or predict, and is delivered retrospectively. As a result, contact centers lack the predictability necessary to budget effectively. The complexity of the algorithm creates a starvation cycle, perpetuating a reduction in funding which reduces the ability to staff appropriately which reduces the ability to meet the common expectations used to determine the funding allocation.

Current algorithm

(Region Contact Center % of total common expectations met x Common Expectations Weight 10%) x state funding for the quarter + (Region Contact Center % of total 2020 population x Population Weight 25%) x state funding for the quarter + (Region Contact Center % of total delivered multi-channel contacts x contact volume weight 50%) x state funding for the quarter + (Region Contact Center % of counties served x counties weight 15%) x state funding for the quarter = Retrospective funding allocation for the quarter / 3 months.

The allocation must be revamped to support a clear and predictable budget for each fiscal year. Converting to a revenue minus expenses approach provides a transparent and effective funding

allocation that breaks the starvation cycle. A common expectations incentive could be considered once the new model is in place and stable.

Recommended allocation:

Total funding to WA211 (revenue) – WA211 expenses – non-wage expenses = contact center funding.

5. Model expenses comparison

Modeling the expenses for the Aligned and Consolidated contact centers with the revised WA211 management services results in:

- Lower operational FTE with more efficient staffing.
- Expanded management services and business development.
- Lower non-wage expense through economies of scale.
- Reduced complexity in managing contact center contracts.

	Aligned Model		Consolidated Model		2025 Proposed Budget	
Function	FTEs	Cost (\$M)	FTEs	Cost (\$M)	FTEs	Cost (\$M)
Contact Center Operations	57.9	\$3.81	54.5	\$3.45	83.11	\$5.28
WA211 Management Services	8.7	\$1.29	8.7	\$1.29	4	\$0.48
Non-wage Expense		\$1.17		\$1.17		\$1.95
# Contact Center Contracts	3		1		7	
Total Expenses	66.6	\$6.27	63.2	\$5.91	87.11	\$7.71

The funding/revenue projected statewide from the 2025 proposed budget totals \$2.06M, falling short of the future model expenses. A strong focus on legislative partnerships, business development and performance will be necessary to close the gap.

Source	Projected Amount (\$M)
WA State Legislature	\$1.00
Traumatic Brain Injury Program (TBI)	\$0.27
Earned Income Tax Credit Support (EITC)	\$0.05
DSHS Basic Food (subcontracted to each center)	\$0.74
Total Revenue	\$2.06

	Aligned Model	Consolidated Model	2025 Proposed Budget
Total Revenue	\$2.06	\$2.06	\$2.06
Total Expenses	\$6.27	\$5.91	\$7.71
Net Income	(\$4.21M)	(\$3.85M)	(\$5.65)

Though RCW 43.211 requires the delivery of 211 services to the state, it does not outwardly require the state to fully fund these services. However, health and human services demand has experienced a significant increase in the last two years and is predicted to continue to grow#. This has a direct impact on 211 demand and will require a corresponding increase in funding from the state.

Appendix A

WA 211 at a Glance



Core Functions

System Navigation for Basic Needs Crises

- Highly trained and accredited Community Resource Specialists help Washingtonians connect to community, health, social, and other services they need to manage life crises and be well.

Emergency Response & Disaster Management

- Divert hundreds of 911 and 988 annually which are not high level emergencies or public safety threats. Pivotal point of contact for first responders and communities to disaster related resources during major accidents, pandemics, natural disasters and human-caused catastrophes.

Data/System Mapping

- Certified Community Resource Data Curators maintain the state's only comprehensive database of current health, community and human resources, with **nearly 17,000 services**. Collect, analyze, share and report on - in real time - the services available, the demand for those services, and the barriers to access/service gaps.

Value Proposition

Emphasizing the 'human' in human services

Unlike search engines, 211 has specialists who add a human touch for personalized solutions. They know how to ask the right questions to get the full picture of a person's needs. Then they provide referrals to services and connect them to the right supports. In addition, some partnerships include 211 registering individuals for services directly or providing a warm transfer to the program.

Offering Washingtonians service choice

Regardless of level of digital understanding or internet access, those looking to speak to a friendly voice can phone. Those looking for convenience or who feel the stigma of asking for help can use text, online search, email or chat. 211 also offers interpreter services in 240+ languages, plus TTY/711 relay services.

Making access to public services easy

For Washingtonians
Easy-to-remember number connects people to programs and services they need, when they need them.

For Partners and Communities
Provides data needed to identify service needs and unmet needs that can inform system planning, improve responsiveness of support, and deliver better value for taxpayer dollars.

Supporting public safety

211 reduces crisis events by providing callers with access to basic needs and support *before* they are in crisis. 911 and 988 divert thousands of non-emergency calls to 211 annually. As an emergency information hub, 211 provides disaster-related resources, rumor control, and public health advisories.†

2024 Quick Facts

1,200 calls answered daily **342,284** calls answered annually
758,706 annual referrals **43.8%** of calls for Housing & Shelter
60 Community Resource Specialists handled calls



Appendix B

List of People Interviewed



Board Members

1. Deb Miller, Executive Director, Action Health Partners, *Board Chair*
2. Sandra Suarez, Director of Fund Development, Yakima Valley Farmworkers Clinic, *Board Vice President*
3. Alison Poulsen, Executive Director, Better Health Together, *Treasurer*
4. Anne Stone, Early Childhood Innovation Director, Washington Fatherhood Council Director, DSHS, *Secretary*
5. Penni Belcher, Transportation Specialist, United Way of Pierce County and South Sound 211 Director
6. Maria Courogen, Director, Community-Based Care COO, DOH
7. Jeff DeLuca, Executive Director, Washington State Community Action Partnership
8. Aundrea Jackson, Chief Administrative Officer, Crisis Connections
9. Stacy Kellogg, Director of Social Services, People for People and Greater Columbia 211 Director
10. Denel Lang, Administrative Service Manager, Frontier Behavioral Health, Easter Washington 211 Representative
11. Michelle McDaniel, Chief Executive Officer, Crisis Connections, 211 Representative King County
12. Nichole Peppers, Executive Director, SWACH
13. Mitesh Sanjeeva Shetty, Managing Director, Deloitte & Touche
14. Ariel Scrogam, Southwest 211 Director, 211info
15. Galina Volchkova, Senior Director, Volunteers of America Western WA, North Sound 211 Representative
16. Adam Wasserman, Assistant Director for Emergency Communications and Washington State 911 Coordinator, Washington State Emergency Management Division
17. Joshua Weinstein, COVID Vaccination Events, King County Public Health
18. Shellie Willis, Senior Director of Collective Impact, Workforce Central, Operation Military Family

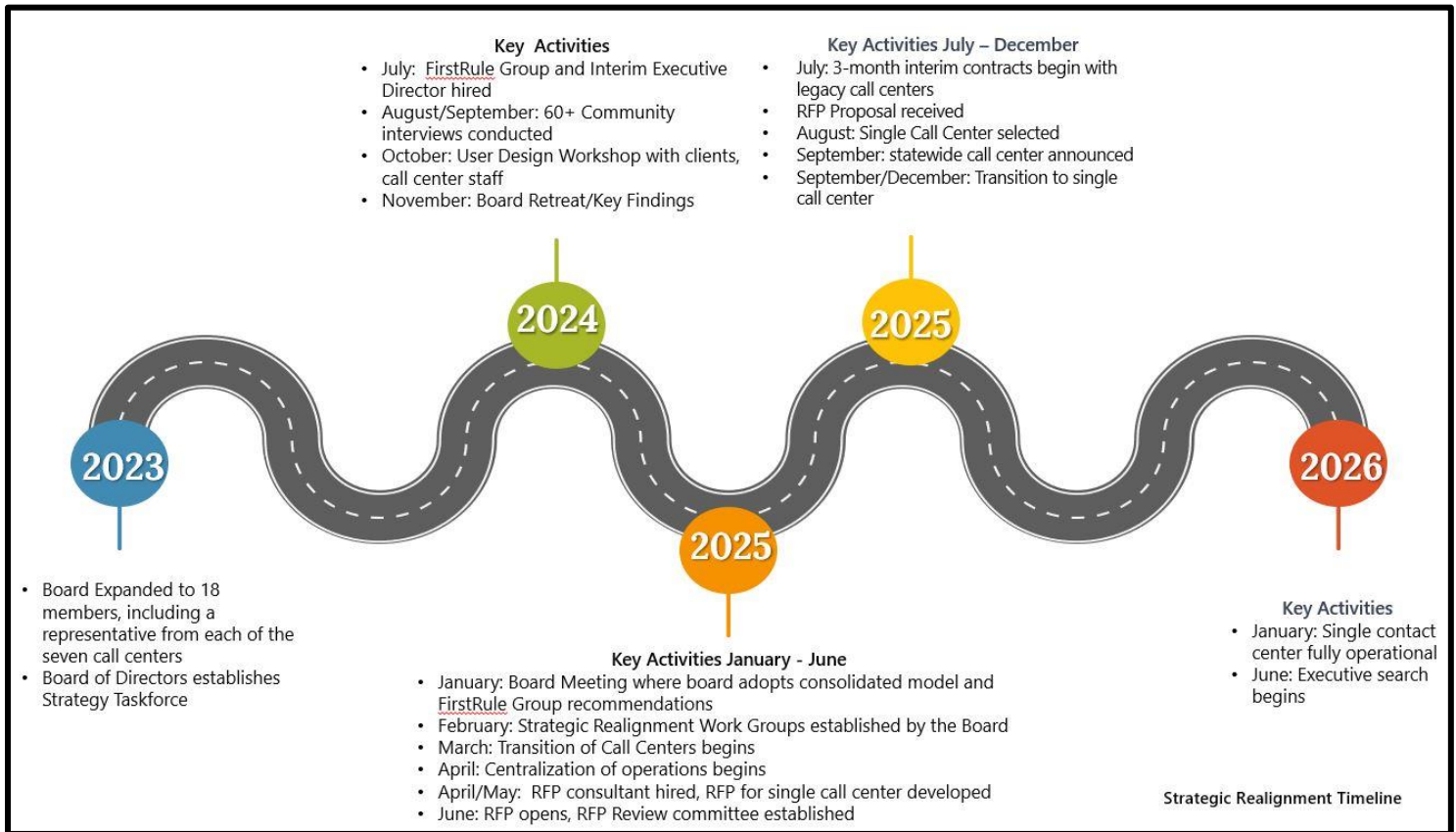
Additional Interviewees

19. Heather Black, Vice President, 211 System Strategy, United Way Worldwide
20. Madelyn Carlson, CEO, People for People
21. Dennise Cervantes, South Sound 211 Senior associate, United Way of Pierce County
22. Jim Cooper, President & CEO, United Way Pacific Northwest
23. Amanda Etchey, North Sound 211 Director, Volunteers of America Western WA
24. James Goodspeed (DSHS/ESA/DCS) Chief Field Officer
25. Dan Herman, CEO, 211info and 211 Southwest Washington
26. Karl Hoffmann, Program Manager, Washington state Department of Commerce
27. Sarah Holdener, MPA, Help Me Grow Lead, DCYF Tim Sullivan, formerly WA211 Program & Operations Director, People for People
28. Cara Kangas, Director of Partnerships, 211info, Southwest 211
29. Paul Knox, Consultant, Knoxworks

30. Diane Klontz, Deputy Director of Division and Program Alignment and Interim Assistant Director, Office of Economic Development and Competitiveness
31. Matthew, Kreuter, Founder/Lead Scientist, Health Communication Research Laboratory, Washington University in St. Louis
32. Rocio Loera, TANF/WorkFirst Program Manager / Office of Programs & Policy, DSHS
33. Ismaila Maidadi, Director of Employment Connections, Employment Security Department
34. Curry Mayer, Emergency Management Director, City of Seattle Emergency Management
35. Kelli Miller, Interim CEO Frontier Behavioral Health
36. Abby Molloy Program Coordinator for Clark County Community Action Programs
37. Brice Montgomery, Interim Director Community Services Division, DSHS
38. Lindsay Morgan Tracy Innovator-in-Chief, DSHS
39. Hannah Newton, WA211 Database Manager, Crisis Connections
40. Nathan Nobbs, Social Services Operations Manager, People for People
41. Tiffany Olsen, Director of Essential Services, Crisis Connections
42. Wanda Oliver, WA211 Operations Manager. People for People
43. Emma Oppenheim, Medicaid Transformation Project Director, HCA
44. Michael Palencia, (DSHS/ESA/DCS) Support Enforcement Office
45. Shawn Paton, VP of Community Impact, United Way Pierce County
46. Joshua Pederson, Director of Network Performance
47. Dona Ponepinto, President & CEO, United Way of Pierce County
48. Cory Portner, Director of the Office of Emergency Medical Logistics, DOH
49. Teresa Posakony, Consultant, Emerging Wisdom LLC
50. Kendall Pritchard, President & CEO, United Way of Kitsap County
51. Sharon Redmond (DSHS/ESA/DCS) Director of Child Support
52. Babs Roberts, Senior Advisor Program & Policy, DSHS
53. Sharon Silver, Chief Executive Officer, Within Reach
54. Brian Smith, CEO, Volunteers of America Western WA
55. Rachell Stetson, Office Supervisor, Fronter Behavioral Health and Eastern Washington 211 Supervisor
56. Caroline Tillier, Director of Strategy and Community Integration, Thrive Together NCW
57. Kate Urwin, WA211 Quality Assurance & Training Manager, People for People
58. Skyler Young, CEO/Lead Developer, Connect 211
59. Vickie Ybarra, Assistant Secretary, Partnership, Prevention, and Services, DCYF
60. Carl Zapora, Consultant

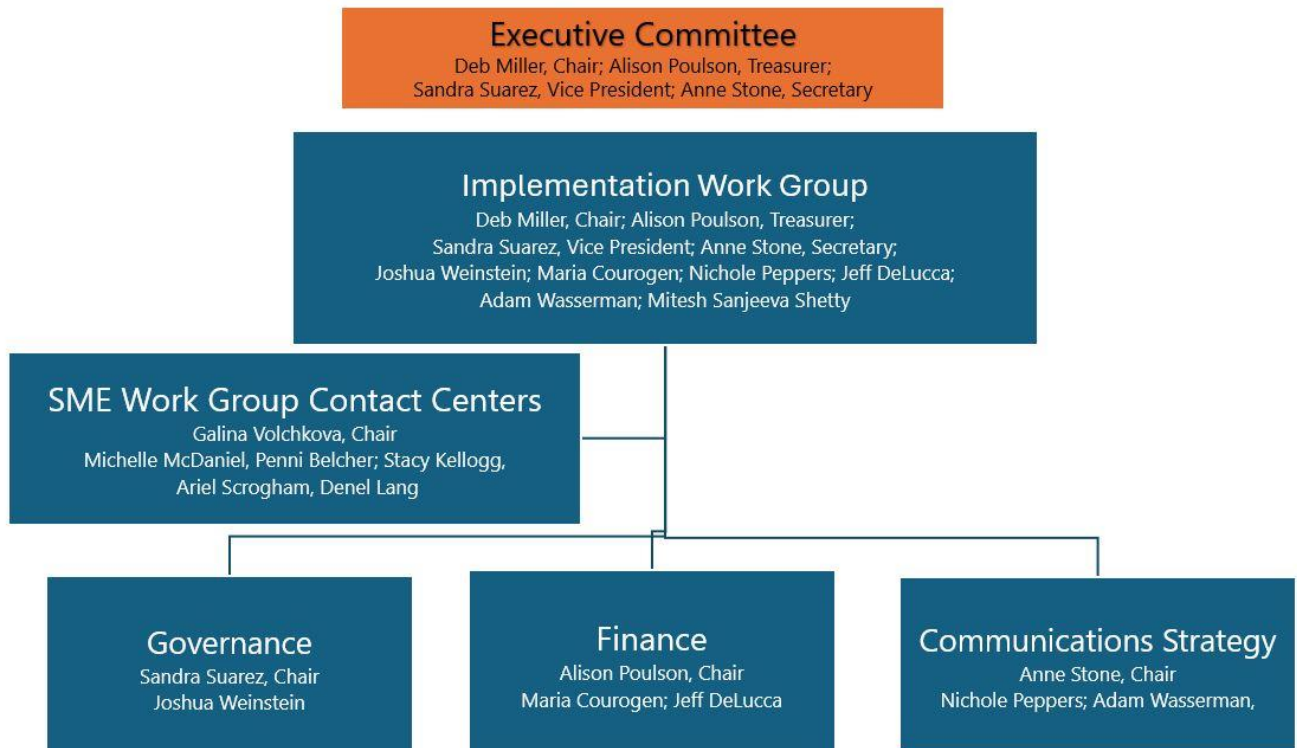
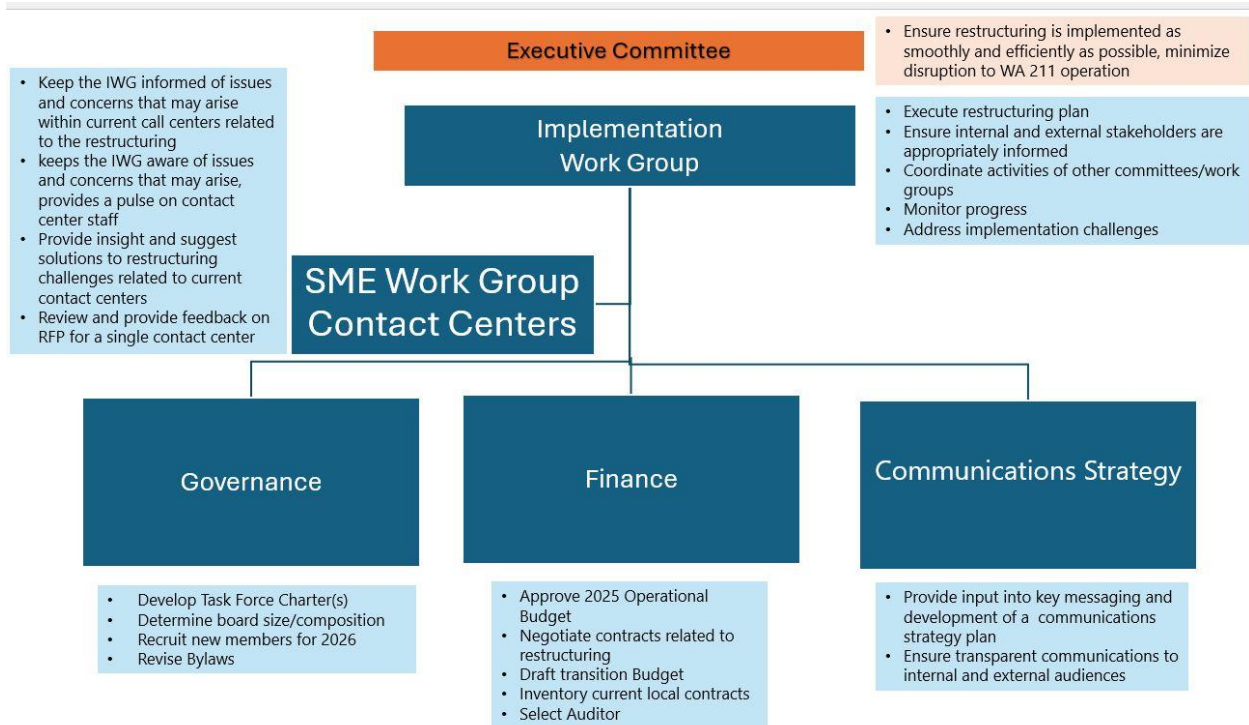
Appendix C

Strategic Realignment Timeline



Appendix D

Strategic Realignment Workgroups



Appendix E

WA 211 Brief History

2000

- In July, the Federal Communications Commission designated 211 as the national telephone number for access to information and referral to health and human services.

2001

- August 1, Washington Information Network 2-1-1 formed as a State of Washington Nonprofit Corporation.

2003

- In April, EHSB 1787 signed into law which assigned WIN211 the responsibility for developing 211 in Washington State. (Chapter 43.211 RCW).
- United Way of Washington and the Bill and Melinda Gates Foundation provide funding to build the 211 infrastructure to operate statewide information and referral services.

2006

- The first calls started to come into eight call centers. Since then, 211 has provided a "No Wrong Door" point of access to over **7 million people** who need help finding local and state human, social and health services.

2007

- Washington State Department of Commerce contracts WIN211 for information and referral for the Earned Income Tax Credit (EITC), free regional tax preparation sites, and AARP services.

2009

- Washington State Department of Health contracts with WIN211 to be the easy-to-remember number to call for H1N1 information and referrals. Daily reports informed Department of Health on where calls originated and what callers were requesting. This allowed Department of Health to quickly adjust their outreach and messaging.
- Boeing Employees Community Fund provides funding to maintain 211 information and referral services.

2010

- During a Legislative Session dominated by budget and revenue concerns with a \$2.8 billion gap, the \$1 million that was appropriated to the Military Department for WIN211 was eliminated.
- Representative Bill Hinkle, Representative Bruce Chandler, and Senator King identified DSHS funding and secured \$500,000 from the Washington Telephone Assistance Program (WTAP).
- The Washington State Budget was signed by the Governor and moved the fiscal agency for 211 from the Military Budget to DSHS.
- WA 211 reorganizes, contracting out operations to People for People.
- Department of Financial Institutions contracted with WA 211 to increase awareness throughout Washington of changes to Washington's payday lending laws.
- U.S. Census 2010 contracted with WA 211 to provide 24/7 messaging about the census.
- Senator Murray secures \$100,000 from the U.S. Department of Health & Human Services to support WIN211.
- The Norcliffe Foundation provides operational support for WIN211.

2014

- SB 5422 – Telecommunications Tax Parity bill repeals WTAP funding and identifies that WIN211 will be funded with an appropriation from the general fund.

2016

- WIN211 Celebrates their 10th Anniversary at the Governor’s Mansion with tributes to community partners and elected officials.

2017

- Washington State Legislature increased funding from \$1 million for the biennium to \$1.5 million for the biennium.

2020

- Washington 211 requested and received \$200,000 from the legislature to support equipment upgrades to maintain a reliable statewide system. Each call center identified replacement equipment.
- Department of Health (DOH) contracted WA211 to provide the COVID-19 Information Hotline.

2021

- January 2021 the COVID-19 Information Hotline was averaging 500 calls per day. With the release of the vaccine, Washington residents were directed to call the Hotline. Calls went from 500 calls per day to 10,000 calls per day. WA211 hired and trained an additional 250 specialists to answer the calls from frightened and fragile individuals.

2022

- Department of Commerce contracts with WIN211 to promote access to information for Washington State residents about applications for the Earned Income Tax Credit (EITC) and referrals for free tax preparation.
- Partnership with DSHS and the Washington Traumatic Brain Injury Strategic Partnership Advisory Council connecting more than 25,000 people to 93,448 resources.
- The Deloitte Company administered a survey to 548 users and community partners who indicated:

2023

- Successful three-year operation of COVID Hotline ends, responding to 560,720 calls.
- Strategic planning begins to identify direction and future of 211.

2024

- Strategic planning wraps with FirstRule Group organizational assessment and hiring of interim executive.

2025

- Strategic realignment begins in the face of a 66% reduction in funding from the Legislature for 2025-2027 biennium.