



The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at [wvOASIS.gov](http://wvOASIS.gov). As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at [WVPurchasing.gov](http://WVPurchasing.gov) with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header @ 8

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 807919

Procurement Type: Central Master Agreement

Vendor ID: VS0000036908

Legal Name: Lacuna Health LLC

Alias/DBA: Lacuna Call Center Services

Total Bid: \$419,125.00

Response Date: 12/15/2020

Response Time: 12:28

SO Doc Code: CRFQ

SO Dept: 0402

SO Doc ID: EDD2100000003

Published Date: 12/10/20

Close Date: 12/15/20

Close Time: 13:30

Status: Closed

Solicitation Description: P-EBT Remote Call Center Services

Apply Default Values to Commodity Lines

View Procurement Folder

Clarification Request



Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Price Per Call By Month	1.00000	EA	419125.000000	419125.00

Comm Code	Manufacturer	Specification	Model #
81111811			

**Commodity Line Comments:** Pricing sheet as requested in RFQ and bid information is attached in attached documents.

**Extended Description:**

\*\*If Vendor is submitting bid online, Vendor must upload and attach the Exhibit A-Pricing Page. Vendor should enter total bid amount as the amount bid in wvOASIS commodity line when submitting online.

**Call Center Services**

**Exhibit A - Pricing Page**

Description	Monthly Call Volume	Unit of Measure	Monthly Estimated Quantity	Unit Cost	Extended Cost
Price Per Call By Month	0-2500	Per Call	2500	\$4.50	11250.00
Price Per Call By Month	2501 - 5000	Per Call	5000	\$4.20	21000.00
Price Per Call By Month	5001 - 7500	Per Call	7500	\$4	30000.00
Price Per Call By Month	7501 - 10000	Per Call	10000	\$3.95	39500.00
Price Per Call By Month	10001 - 12500	Per Call	12500	\$3.90	48750.00
Price Per Call By Month	12501 - 15000	Per Call	15000	\$3.80	57000.00
Price Per Call By Month	15001 - 17500	Per Call	17500	\$3.75	65625.00
Price Per Call By Month	17,500 - 20000	Per Call	20000	\$3.70	74000.00
Price Per Call By Month	20000+	Per Call	20000	\$3.60	72000.00
<b>TOTAL BID AMOUNT</b>					<b>\$ 419,125.00</b>
<p>Note: The estimated quantity is for evaluation purposes only. Actual call volume is undetermined. No future use of the contract or any individual item is guaranteed or implied.</p>					
<b>VENDOR'S NAME:</b>					
<b>VENDOR'S REPRESENTATIVE:</b>					

December 14, 2020

Josh Hager  
Senior Buyer  
State of West Virginia – Department of Administration  
2019 Washington St E  
Charleston, WV 25305  
Joseph.E.Hageriii@wv.gov

RE: Solicitation No: CRFQ EDD2100000003

Dear Josh:

Lacuna Call Center Services is pleased to provide the West Virginia Department of Education with this bid for answering services. Attached you will find our comprehensive bid, which shall remain valid for 90 days.

We've done our best to address each element of your RFQ, but if for any reason you feel we have not provided sufficient information, please let us know, and we will turn that around to you the same day.

As a call center organization with over 400 customers, we pride ourselves on providing exceptional service and support. We'd welcome the opportunity to do the same for the West Virginia Department of Education.

Warm Regards,



John Apholt  
Chief Operating Officer  
502-890-8363  
[john.apholt@lacunahealth.com](mailto:john.apholt@lacunahealth.com)

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### APPENDICES SUBMITTED

ADDENDUM ACKNOWLEDGEMENT FORM

SIGNED CERTIFICATION PAGE

LACUNA OVERVIEW PPT

IMPLEMENTATION PROJECT PLAN

W9

CERTIFICATE OF INSURANCE

STATE CERTIFICATION

## COMPANY OVERVIEW

Lacuna Call Center Services is a wholly-owned subsidiary of TPG Capital, Welsh, Carson, Anderson & Stowe, and Kindred. Our ownership structure affords Lacuna Call Center Services financial stability, technical resources, legal, compliance, and the corporate expertise to ensure our clients' the highest possible quality work. Lacuna Call Center Services works with several institutions of various sizes and competitive market dynamics. We are excited about the opportunity to work with the West Virginia Department of Education.

Though based in Louisville, Kentucky, Lacuna Call Center Services provides service to clients across the United States. We have a national team of highly experienced professionals and call center leaders with decades of experience. Our outstanding call center agents go through a comprehensive quality monitoring program, with ongoing staff competency education. Lacuna offers its clients the agility and adaptability of a small, focused team while enjoying the support and backing of one of the country's largest organizations.

We pride ourselves on delivering high quality and impactful programs. We are confident that we can provide exceptional service to the West Virginia Department of Education and are sure you will see and feel the difference in working with Lacuna.

Lacuna Call Center Services is uniquely qualified to provide Answering Service support to the West Virginia Department of Education. We are a healthcare-focused service organization with significant experience in scaling and deploying resources to solve complex healthcare problems. As a physician-led organization, we offer unparalleled service and clinical expertise, interacting with almost 2 million patients a year.

## PROJECT TEAM

The Lacuna Leadership team supporting you and your program are listed below:

- Heather Vonnahme. Certified Project Manager for Implementations. 502-905-7325
- Robert Buttles III. Account Manager. 518-269-5335
- Keith Fegley. Operations Manager. 530-338-8207
- Fata Dzeko. Operations Director. 412-390-9788
- John Apholt. Executive Sponsor. 303-909-6816

More than just a list of contacts, we are a value centric organization that puts the patient at the center of what we do. Lacuna Call Center Services has multiple roles that all have a single focus – provide exceptional service to our clients and their patients.



## EXPERIENCE

Founded in 2018 as a spin-out of a previously internally focused call center, Lacuna Call Center Services has, in a short time, grown both organically and through acquisition. As a result of these efforts, we are pleased to share that we provide exemplary service to over 400 clients and growing. Lacuna Call Center Services employs roughly 350 FTE, and we possess the capability to ramp-up rapidly when the need arises.

Lacuna Call Center Services offers a state of the art call center operation. Our top of the line platforms allows us to process inbound calls rapidly and cost-effectively. Our scripting tools and highly trained agents ensure consistent data capture and information sharing. We utilize state of the art telephony and workforce management systems in tight synchronization, allowing us to optimize scheduling to drive improved service levels. Additionally, this capability will enable us to adjust staffing in real-time to address spikes and valleys within the call arrival patterns. The combination of technology, people, and process allows us to keep our service offering price competitive. Unlike many call center offerings, our customers only pay for the services they use. We record 100% of calls handled and can share any of those calls upon request.

For the past six years, Lacuna Call Center Services has designed, implemented, and nurtured the '866-KINDRED Hotline Talk To A Nurse' service. This inbound service handles calls and online chat conversations generated from all Kindred Healthcare website, TV, billboard, and radio advertisements. These calls are explicitly geared towards providing triage, education, and care recommendations and coordination to all who may benefit.

Lacuna provides trusted experience to large public entities. We provide transfer coordination to one of the largest health systems in West Virginia to ensure more streamlined and efficient transfers between facilities. We provide post-discharge stroke support to patients of the University of Louisville, one of only four certified stroke centers in Kentucky. Lacuna also furnishes clinical support after hours and on weekends via our Nurse Triage Program. All these service offerings promote brand loyalty, improve patient outcomes, create higher Provider utilization, and decrease ED visits. We feel confident that we can organize and offer this same level of sophistication and structure to the West Virginia Department of Education.

## KEY LEADERSHIP ROLES

**John Apholt:** John is a highly experienced executive serving in the role of Chief Operating Officer at Lacuna. John has extensive leadership experience in healthcare service delivery to patients and has a proven track record of delivering improved outcomes, enhanced patient satisfaction, and lowered costs for his clients. Prior to joining Lacuna, John held several senior leadership roles, all focused on delivering clinical services to patients. Most recently, John worked as Chief Operating Officer for Sonic Healthcare, the third-largest clinical diagnostic company with over 6,500 employees and operating in 32 states in the U.S. John also served as a Divisional President and CEO during his time at Sonic Healthcare. Before serving in those roles, John served in senior leadership roles leading large, complex health contact centers and health networks delivering clinical programs and services to managed care, disease management, disability, health and welfare, long term care, and benefits services to a large number of Fortune 500 clients.

**Fata Dzeko:** Fata is an experienced professional serving as Director of Operations at Lacuna. She is responsible for overseeing the day-to-day operations of a rapidly growing team of Nurse Advocates and Care Coordinators who provide inbound and outbound telephonic services. Fata has fourteen years of call center experience with a focus on healthcare. She started her career at the University of Pittsburgh Medical Center (UPMC). While at UPMC, she was responsible for the day-to-day operations of a 24/7 after-hours call center servicing the UPMC Physician Services Organization. There Fata oversaw significant improvements in average handle time, workflow efficiencies, and customer issues. In addition, she successfully led many telephonic outreach campaigns. Fata was a *2010 Fine Awards for Teamwork Excellence in Health Care* bronze medal recipient for her role in the UPMC's Patient Quality Outreach program awarded by Jewish Healthcare Organization.

**Heather Vonnahme, PMP:** Heather serves as Lacuna's Project Manager. She leads Client Implementations by overseeing all planning and execution. She works directly with each interdisciplinary team to ensure all requirements in the Scope of the project are delivered. A University of Louisville College of Business graduate, Heather has worked in the healthcare industry for seven-plus years, gaining vast experience in many divisions from Insurance Recovery to Central Placement in Project Management. In 2018, she launched Lacuna's first AfterHours program, which has grown to be both Clinical and Non-Clinical. Heather has continued to work closely with Operations to refine ongoing programs by analyzing outcomes and creating and implementing process improvements.

**Keith Fegley:** Bringing over 20 years of Operational Management experience focused on security monitoring and answering service call centers, Keith is an experienced professional serving as Operations Manager for Lacuna. Keith rose from answering service agent to Operations Manager in just five years, simultaneously operating a security alarm monitoring station and answering service that serviced 4300 clients by the age of 24. He is responsible for maintaining and improving standards while creating solutions to deliver top quality service levels. As an experienced professional and home caregiver, Keith understands that treating people with dignity and compassion is just as crucial as providing accurate and efficient service.

***Robert Buttles:*** Robert serves as Senior Account Manager for Lacuna Call Center Services. Robert has five years of experience focused on medical answering services, starting internally in his local hospital call center as an agent. He has advanced to service hundreds of medical providers across the country by the age of 25. Robert is responsible for implementing all new clients, developing accurate and efficient call process flows, and maintaining communication lines with clients. Robert's goal is to be the point of contact every client can rely on to give them effective and friendly service no matter the time of day.

## PROJECT APPROACH

Lacuna Call Center Services provides a turn-key full-service solution that operates under all local and federal laws. We will ensure we also meet all West Virginia Department of Education administration rules and policies through the contract term. We also provide daily, weekly, and monthly reporting capabilities and align them with your requirements.

As part of your implementation process, you will have a dedicated Project Manager who is, at minimum, a certified Project Management Professional (PMP). This PMP will work with you throughout the implementation process until the business has achieved a steady-state and as new components to your program are added. You will also have an Executive Sponsor who will participate in calls with you to ensure the highest quality of service. In this instance, John Apholt, our Chief Operating Officer, will be your Executive Sponsor. We have provided a detailed implementation timeline in the appendices.

Here is an overview of the phases of our project implementation.

### Phase 1: Initiation

- Identify Key Stakeholders
- Finalize Scope of Services
- Review Timelines and Milestones
- Identify Risks/Issues

### Phase 2: Planning

- Develop Project Plan
- Select Project Team
- Organize and Facilitate Implementation meetings
- Discuss Developed Strategy
- Discuss Next Steps to Launch Project

### Phase 3: Execution

- Finalize Workflows
- Configure Technology Systems
- Create Training Materials and Review with Staff
- Finalize Volume-Based Staffing Schedules
- Test and Finalize Technology Builds
- Go-live

### Phase 4: Monitoring and Controlling

- Finalize Quality Monitoring Elements for Program
- Monitor Program to Ensure Goals are Achieved
- Monitor Call Volumes and Adjust Schedules as Needed
- Mitigate Unnecessary Changes to Ensure Stability

## REPORTING

Lacuna Call Center Services offers a wide array of reporting functionality to keep you informed of your call history. Clients may wish to utilize our self-service portal, **MiTeam**, to review messages received for any given period. Lacuna also offers standard and custom reports that will be determined and designed during implementation. Reports can be provided at any cadence set forth by the client and can be sent to an individual or group of individuals as requested by the client.

Below are sample reports that can be delivered, but are not limited to these.

### EXCEL/CSV CAPTURED DATE REPORT

AccountNumber	Date	Clinic	CallType	Doctor	Urgent	Message
4466	11/4/2020 14:29	Pichardo	Patient Call	Bartlow, Sarah	No	Needs to schedule an appointment
4466	11/4/2020 14:30	Pichardo	Hospital Call	Bartlow, Sarah	Yes	Needs to clarify orders
4466	11/4/2020 14:30	Pichardo	Hospital Call	Bartlow, Sarah	Yes	Needs to clarify orders
4466	11/4/2020 14:27	Pichardo	Patient Call	Bartlow, Sarah	No	Needs to schedule an appointment
4466	11/4/2020 14:28	Pichardo	Patient Call	Garcia, James	No	Needs to schedule an appointment
4466	11/4/2020 15:06	Pichardo	Patient Call	Garcia, James	No	Needs to schedule appt for physical
4466	11/4/2020 15:07	Pichardo	Patient Call	Bartlow, Sarah	No	Needs to cancel 1/17/21 appt
4466	11/4/2020 15:08	Pichardo	Hospital Call	Bartlow, Sarah	Yes	Looking for orders
4466	11/4/2020 15:05	Pichardo	Doctor Call	Bartlow, Sarah	Yes	Sphenopalatine ganglioneuralgia
4466	11/4/2020 15:06	Pichardo	Patient Call	Garcia, James	No	Needs to schedule appt for physical

### MESSAGE REPORT

**PATIENT CALL MESSAGE DELIVERED TO AT 11/20/2020 7:54:56 AM**

**Taken:** 11/20/2020 07:54 am **Open**

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**Account:** 4469  
**From:** LZ-KEITHF  
**Sent:** Friday November 20, 2020 07:54:56 am

**PATIENT CALL MESSAGE DELIVERED TO AT 11/20/2020 7:54:56 AM**

**Doctor:** Walker, Donna  
**From:** Christine Kendall  
**Phone:** (555) 555-5555  
**Patient Name:** Terry Kendall  
**DOB:** January 12 1994  
**Message:** Severe migraine

**Call Identify Number:** 77775098

11/20 7:54A SMS - Walker, Donna - SMS Sent  
 11/20 7:54A Cell - Walker, Donna - Patched

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[^ Message History](#)  
 Taken Friday, November 20, 2020 7:54 AM by LZ-KEITHF(KF)

MONTH TO DATE REPORTING

Date	ABA	ASA	F Vol	A Vol
11/1/20	3.2%	12.6	1063	596
11/2/20	4.8%	35.7	3273	1679
11/3/20	9.6%	19.1	2956	1443
11/4/20	7.0%	20.0	2911	1342
11/5/20	8.1%	23.9	2692	1800
11/6/20	9.0%	27.7	2934	2044
11/7/20	6.3%	22.3	1650	1173
11/8/20	8.1%	29.7	1063	866
11/9/20	8.2%	24.1	3273	2307
11/10/20	8.3%	25.6	2956	2299
11/11/20	7.8%	37.5	2911	2663
11/12/20	4.5%	29.7	2692	1980
11/13/20	3.5%	28.0	2934	2079
11/14/20	9.7%	25.8	1650	1299
11/15/20	6.6%	22.3	1145	967
11/16/20	9.8%	18.0	3324	2292
11/17/20	5.3%	23.5	1687	2148
11/18/20	7.6%	26.8	1426	2297
11/19/20	8.9%	21.1	1613	2180
11/20/20	9.2%	24.6	1631	2202
11/21/20	4.0%	33.7	1080	1503
11/22/20	7.7%	35.6	894	1003
11/23/20	9.7%	26.5	1517	2231
11/24/20	8.2%	26.4	1687	2075
11/25/20	7.9%	15.3	1743	2230
11/26/20	9.4%	26.4	894	1027
11/27/20	7.3%	30.7	4479	3728
11/28/20	6.5%	32.9	1242	1281
11/29/20	8.2%	27.2	907	1107
11/30/20	5.5%	36.3	2025	2842
<b>Grand Total</b>	7.3%	26.3	62252	54683

## REFERENCES

### CFIM

*Contact: Michelle Pribble*

*Title: Executive Director of Strategic Development*

*Phone: 407-848-8000*

*Email: [mpribble@cflim.com](mailto:mpribble@cflim.com)*

*Website: [www.cflim.com](http://www.cflim.com)*

Lacuna provides 24/7/365 answering services using CFIM's standards and protocols. We direct 8,500+ monthly inbound callers to the appropriate physician office line, provide information, or page a provider.

### Mon Health

*Contact: David Goldberg*

*Title: Chief Executive Officer*

*Phone: 304-598-1200*

*Email: [goldbergd@monhealthsys.org](mailto:goldbergd@monhealthsys.org)*

*Website: [www.monhealth.com](http://www.monhealth.com)*

Lacuna provides 24/7/365 inbound support for hospitals and health systems, calling in inpatient referrals to Mon Health. Lacuna utilizes RN's to take down critical clinical information needed for Mon Health to evaluate the referral and communicate it to Mon Health. Lacuna works with Mon Health and the referral source to ensure all required information is received and communicates the acceptance or denial of the referral.

### City of Louisville

*Contact: Stacie Ingram, RN, BSN*

*Title: Director of Nursing*

*Phone: 502-574-6191*

*Email: [Stacie.ingram@louisvilleky.gov](mailto:Stacie.ingram@louisvilleky.gov)*

*Website: [www.louisvilleky.gov](http://www.louisvilleky.gov)*

Lacuna is the exclusive provider of COVID-19 Contact Tracing for Louisville/Jefferson County, Kentucky. Our model consists of three roles: Disease Investigators, Contact Tracers, and Daily Patient Monitors. Our team leverages both non-clinical and clinical resources to monitor patient symptoms, locate additional individuals in need of testing, provide the location of testing centers, how to self-quarantine, and assist with any further resources needed.

## RESPONSES TO RFQ SECTIONS 3-11

### 3. QUALIFICATIONS

#### 3.1. VENDOR MUST HAVE RELEVANT REMOTE CALL CENTER EXPERIENCE SPECIFIC TO THE TYPES OF SERVICES REQUESTED.

Lacuna Call Center Services is a full-service multifaceted operation with substantial experience providing outsourced support to programs requiring high quality and cost-effective call center services through an IVR Option and responsive web-based platforms. We employ over 450 team members, service over 400 clients, and process over 2 million calls annually. All of our team members are experienced remote workers who serve clients throughout the United States, 24/7/365. Excelling in both inbound and outbound solutions, we are excited to work with the state of West Virginia to show you the Lacuna difference.

#### 3.2. VENDOR SHOULD HAVE EXPERIENCE IN SERVING PUBLIC EDUCATION AND/OR PUBLIC SECTOR CLIENTS.

Lacuna has experience working with public sector agencies and municipalities throughout the country. In fact, Lacuna is one of the largest outsourced call center contractors providing services to the City of Louisville. Over 50% of Lacuna Call Center Services volume is focused on delivering services to municipalities and public sector teams.

#### 3.3. SECURITY AND TRAINING MEASURES TO PROPERLY HANDLE CONFIDENTIAL INFORMATION

Lacuna's data is encrypted at rest and in transit with AES256 bit encryption, meaning your information is fully encrypted in both cases. We either SFTP to or from files with AES256 bit encryption or transmit data to or from using restful HTTPS API's with 256-bit encryption. Kindred's information security is based on the ISO 27001 framework which is further validated by a third party, Schellman. Protected Health Information (PHI) is continuously monitored by security, IT, and Lacuna operational staff. Additionally, Lacuna's agents go through initial and continuous training to cover HIPAA laws and federal and state compliance standards.

#### 3.4. SUPPORT FOR ADA COMPLIANCE

Lacuna is ADA compliant and is committed to offer the needed technology to allow those with disabilities to perform their primary job functions.



### **3.5. LINKS TO ANY DEMONSTRATIONS/SIMULATIONS OF YOUR SERVICES**

See attached PowerPoint in appendix for system overview and screenshots.

### **3.6. MUST HAVE BILINGUAL STAFF AVAILABLE WHO CAN SPEAK ENGLISH AND SPANISH FLUENTLY.**

Lacuna staff is currently 55% bilingual in Spanish.

## **4. MANDATORY REQUIREMENTS**

### **4.1 MANDATORY CONTRACT SERVICES REQUIREMENTS AND DELIVERABLES**

**4.1.1 VENDOR MUST PROVIDE INBOUND CALL HANDLING SYSTEM AND MESSAGING SERVICES TO AUGMENT AND SUPPORT THE PANDEMIC ELECTRONIC BENEFIT TRANSFER (P-EBT) PROJECT IN WEST VIRGINIA. THE VENDOR MUST PROVIDE A TURN-KEY, FULL SERVICE SUPPLEMENTAL CALL CENTER OPERATION TO ANSWER INBOUND CALLS TO INCLUDE, BUT NOT LIMITED TO LABOR, FACILITIES, EQUIPMENT, INCLUDING TELEPHONE INSTRUMENTS AND RELATED LINES/CABLE, TELEPHONE SERVICE, SOFTWARE, CIRCUITS, STAFF, TRAINING, AND REPORTING.**

Lacuna offers a state of the art call center operation. Our top of the line platforms allows us to process both inbound calls and outbound call campaigns rapidly and cost-effectively. Our scripting tools and highly trained agents ensure consistent data capture and information sharing.

**4.1.1.1 VENDOR MUST PROVIDE INBOUND ANSWERING SERVICES TO ASSIST WITH CALLS RELATED TO P-EBT DURING NORMAL BUSINESS HOURS (MONDAY-FRIDAY, 8:00 A.M. - 4:45 P.M., EST). ADDITIONALLY, WEEKEND/HOLIDAY CALL COVERAGE MAY ALSO BE NEEDED. THESE CALLS ARE REGARDING A FEDERAL PUBLIC BENEFIT PROGRAM REQUIRING EACH CALLER TO BE TREATED WITH THE UTMOST PROFESSIONALISM AND COURTESY.**

Lacuna is a 24/7/365 operation. Our staff is available at any point to handle calls. We have a team of highly experienced professionals and call center leaders with decades of experience, outstanding call center agents, a comprehensive quality monitoring program, ongoing staff education related to competency, and professional call handling.

**4.1.1.2 VENDOR MUST MAINTAIN ADEQUATE STAFFING TO ENSURE ENOUGH OPERATORS ARE AVAILABLE TO AVOID ANY MISSED CALLS. CALL VOLUME MAY FLUCTUATE BUT COULD PEAK AT A VOLUME OF 2,000 CALLS PER DAY.**

Lacuna attracts talent in many ways, but we pride ourselves that a good portion of our new hires come from existing staff referrals. We feel that it speaks volumes about our culture and the engagement level of our team. We advertise our positions both locally and nationally via job boards such as LinkedIn and Indeed. We are fortunate that we receive approximately 15 applicants for each role that we hire, which allows us to be incredibly selective in our process. The largest class size we have delivered is forty agents, though there is no class size limitation. Our attrition rate from new hire to production is less than 5%. We believe that speaks to a couple of key points; our hiring process is solid, we are incredibly selective, the work is compelling, and our training engaging. We have substantial experience delivering high volume answering service solutions and presently serve over 2,200 physicians and 100 hospitals.

**4.1.1.3 VENDOR MUST HAVE MESSAGE STORAGE AND RETRIEVAL CAPABILITY COMMISERATE WITH THE INDUSTRY BUT NO LESS THAN 36-HOUR RETRIEVAL.**

Lacuna's secure web portal, **MiTeam**, allows direct connection to account messages and on-call posting. Our records are maintained indefinitely and can be transmitted as a message file or email at any time.

**4.1.1.4 VENDOR MUST SCREEN ALL INCOMING CALLS ACCORDING TO REQUIREMENTS USING A PROVIDED SCRIPT TO ENSURE NECESSARY INFORMATION IS COMMUNICATED TO THE CALLERS. WVDE WILL PROVIDE THE SCRIPT AND ANY OTHER RELEVANT COMMUNICATION PROMPTS NEEDED TO MANAGE INCOMING CALLS.**

Lacuna employs individuals with call center experience and provides continuous training around call control to quickly determine the reason for calls. We arm our agents with pertinent information via scripting tools to give each patient the necessary details per call type. During Lacuna's project implementation, we will obtain a full curriculum of information your callers may need or request and customize each bit of information to its call reason. Hence, agents have this readily available to supply to the caller.

**4.1.1.5 VENDOR MUST HAVE PHONE TRANSFER CAPABILITIES - IN WHICH A CALLER CAN BE TRANSFERRED AT THEIR REQUEST TO THE APPROPRIATE ADMINISTERING STATE AGENCY - THE WEST VIRGINIA DEPARTMENT OF EDUCATION OR THE WEST VIRGINIA DEPARTMENT OF HEALTH AND HUMAN RESOURCES (DHHR).**

Lacuna's state of the art platform allows us to process inbound calls and transfer the agency calls efficiently to the appropriate agency. Our Scripting tools will guide our agent to the correct phone number for the agency needed for the caller's inquiry.

**4.1.1.6 VENDOR MUST PROVIDE A RECAP REPORT OF ALL INCOMING CALLS RECEIVED, MESSAGES TAKEN, AND MESSAGES DELIVERED. A REPORT MUST BE EMAILED TO DESIGNATE POINTS OF CONTACT AT WVDE AND DHHR DAILY. A PREPARED DAILY SPREADSHEET OF MESSAGES MUST BE PREPARED AND EMAILED TO THE DESIGNATED POINTS OF CONTACT NO LATER THAN 10:00 A.M. EST THE FOLLOWING BUSINESS DAY. WVDE WILL PROVIDE VENDOR WITH THE MINIMALLY ACCEPTABLE FIELDS OF INFORMATION THAT SHOULD BE INCLUDED WITH EACH DAILY REPORT. ALL REPORTS SHALL BE SENT VIA EMAIL.**

Lacuna can provide a myriad of reports for the client's needs and requirements. Reporting is available online to clients and includes tracking down to an individual call level; half-hour splits, intraday, daily, weekly, monthly, etc. Clients can sort the report through many filters, i.e., type of call, department, etc. Reporting can be scheduled to send an email at a set time of day or online and ad hoc. Samples of possible reports are attached in the company introduction.

**4.1.1.7 VENDOR MUST PROVIDE CALLERS ON-HOLD WITH AN OPTION TO PRESS A PROMPT FOR PRIORITY CALL-BACK. CALLS SHOULD BE RETURNED WITHIN ONE HOUR.**

Lacuna will utilize our IVR system to prompt callers on hold to press a specific key if they would like to have a call back rather than wait in a queue. The IVR system allows for these calls to be distributed for a callback from the next available agent or schedule a call back at a particular time if desired.

**4.1.1.8 VENDOR MUST ENSURE THAT CALLERS ARE NOT PUT ON HOLD FOR MORE THAN 2 MINUTES.**

Lacuna's service levels remain outstanding and can ensure callers are not on hold for more than two minutes.

**4.1.1.9 THE NUMBER OF CALLER COMPLAINTS ABOUT THE CALL CENTER MUST BE 3% OR LESS OF ALL RECEIVED CALLS.**

Lacuna prides itself on the quality of phone calls and programs we deliver. We have consistently exceeded all service level agreements put in place and provide data analytics to demonstrate the value of our programs. We have never lost a client due to performance.

**4.1.1.10 80% OF THE CALLS SHOULD BE ANSWERED WITHIN 20 SECONDS OR LESS.**

Lacuna processes just under 1.8 million calls annually. Our service levels are outstanding and can maintain an 80/20 rule, to add our abandon rates run well under 5%.

**4.1.1.11 VENDOR CALL CENTER MUST BE LOCATED WITHIN THE CONTINENTAL UNITED STATES.**

Lacuna’s call center and all of its employees are based in the United States.

**5.2 PRICING PAGE**

<b>Call Center Services</b>					
<b>Exhibit A - Pricing Page</b>					
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Price Per Call By Month	7501 - 10000	Per Call	10000	\$3.95	39500.00
Price Per Call By Month	10001 - 12500	Per Call	12500	\$3.90	48750.00
Price Per Call By Month	12501 - 15000	Per Call	15000	\$3.80	57000.00
Price Per Call By Month	15001 - 17500	Per Call	17500	\$3.75	65625.00
Price Per Call By Month	17,500 - 20000	Per Call	20000	\$3.70	74000.00
Price Per Call By Month	20000+	Per Call	20000	\$3.60	72000.00
				<b>TOTAL BID AMOUNT</b>	<b>\$ 419,125.00</b>
<p>Note: The estimated quantity is for evaluation purposes only. Actual call volume is undetermined. No future use of the contract or any individual item is guaranteed or implied.</p>					

**6. PERFORMANCE: VENDOR AND AGENCY SHALL AGREE UPON A SCHEDULE FOR PERFORMANCE OF CONTRACT SERVICES AND CONTRACT SERVICES DELIVERABLES, UNLESS SUCH A SCHEDULE IS ALREADY INCLUDED HEREIN BY AGENCY. IF THIS CONTRACT IS DESIGNATED AS AN OPEN-END CONTRACT, VENDOR SHALL PERFORM IN ACCORDANCE WITH THE RELEASE ORDERS THAT MAY BE ISSUED AGAINST THIS CONTRACT.**

Acknowledged.

**7. PAYMENT:** AGENCY SHALL PAY BASED ON THE MONTHLY UNIT COST PER CALL, AS SHOWN ON THE PRICING PAGES, FOR ALL CONTRACT SERVICES PERFORMED AND ACCEPTED UNDER THIS CONTRACT. VENDOR SHALL ACCEPT PAYMENT IN ACCORDANCE WITH THE PAYMENT PROCEDURES OF THE STATE OF WEST VIRGINIA.

Acknowledged.

**8. TRAVEL:** VENDOR SHALL BE RESPONSIBLE FOR ALL MILEAGE AND TRAVEL COSTS, INCLUDING TRAVEL TIME, ASSOCIATED WITH PERFORMANCE OF THIS CONTRACT. ANY ANTICIPATED MILEAGE OR TRAVEL COSTS MAY BE INCLUDED IN THE FLAT FEE OR HOURLY RATE LISTED ON VENDOR'S BID, BUT SUCH COSTS WILL NOT BE PAID BY THE AGENCY SEPARATELY.

Acknowledged.

**9. FACILITIES ACCESS:** PERFORMANCE OF CONTRACT SERVICES MAY REQUIRE ACCESS CARDS AND/OR KEYS TO GAIN ENTRANCE TO AGENCY'S FACILITIES. IF ACCESS CARDS AND/OR KEYS ARE REQUIRED:

**9.1. VENDOR MUST IDENTIFY PRINCIPAL SERVICE PERSONNEL WHICH WILL BE ISSUED ACCESS CARDS AND/OR KEYS TO PERFORM SERVICE.**

N/A

**9.2. VENDOR WILL BE RESPONSIBLE FOR CONTROLLING CARDS AND KEYS AND WILL PAY REPLACEMENT FEE, IF THE CARDS OR KEYS BECOME LOST OR STOLEN.**

N/A

**9.3. VENDOR SHALL NOTIFY AGENCY IMMEDIATELY OF ANY LOST, STOLEN, OR MISSING CARD OR KEY.**

N/A

**9.4. ANYONE PERFORMING UNDER THIS CONTRACT WILL BE SUBJECT TO AGENCY'S SECURITY PROTOCOL AND PROCEDURES.**

Acknowledged.

**9.5. VENDOR SHALL INFORM ALL STAFF OF AGENCY'S SECURITY PROTOCOL AND PROCEDURES.**

Acknowledged.

**10. VENDOR DEFAULT:**

**10.1. THE FOLLOWING SHALL BE CONSIDERED A VENDOR DEFAULT UNDER THIS CONTRACT.**

**10.1.1. FAILURE TO PERFORM CONTRACT SERVICES IN ACCORDANCE WITH THE REQUIREMENTS CONTAINED HEREIN.**

Acknowledged.

**10.1.2. FAILURE TO COMPLY WITH OTHER SPECIFICATIONS AND REQUIREMENTS CONTAINED HEREIN.**

Acknowledged.

**10.1.3. FAILURE TO COMPLY WITH ANY LAWS, RULES, AND ORDINANCES APPLICABLE TO THE CONTRACT SERVICES PROVIDED UNDER THIS CONTRACT.**

Acknowledged.

**10.1.4. FAILURE TO REMEDY DEFICIENT PERFORMANCE UPON REQUEST.**

Acknowledged.

**10.2. THE FOLLOWING REMEDIES SHALL BE AVAILABLE TO AGENCY UPON DEFAULT.**

**10.2.1. IMMEDIATE CANCELLATION OF THE CONTRACT.**

Acknowledged.

**10.2.2. IMMEDIATE CANCELLATION OF ONE OR MORE RELEASE ORDERS ISSUED UNDER THIS CONTRACT.**

Acknowledged.

**10.2.3. ANY OTHER REMEDIES AVAILABLE IN LAW OR EQUITY.**

Acknowledged.

**11.1. CONTRACT MANAGER:** DURING ITS PERFORMANCE OF THIS CONTRACT, VENDOR MUST DESIGNATE AND MAINTAIN A PRIMARY CONTRACT MANAGER RESPONSIBLE FOR OVERSEEING VENDOR'S RESPONSIBILITIES UNDER THIS CONTRACT. THE CONTRACT MANAGER MUST BE AVAILABLE DURING NORMAL BUSINESS HOURS TO ADDRESS ANY CUSTOMER SERVICE OR OTHER ISSUES RELATED TO THIS CONTRACT. VENDOR SHOULD LIST ITS CONTRACT MANAGER AND HIS OR HER CONTACT INFORMATION BELOW.

**CONTRACT MANAGER:** John Apholt

**TELEPHONE NUMBER:** 502-890-8363

**FAX NUMBER:** N/A

**EMAIL ADDRESS:** john.apholt@lacunahealth.com

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFQ EDD21\*03**

**Instructions:** Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

**Acknowledgment:** I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

**Addendum Numbers Received:**

(Check the box next to each addendum received)

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6  |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7  |
| <input type="checkbox"/> Addendum No. 3            | <input type="checkbox"/> Addendum No. 8  |
| <input type="checkbox"/> Addendum No. 4            | <input type="checkbox"/> Addendum No. 9  |
| <input type="checkbox"/> Addendum No. 5            | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Lacuna Health LLC

\_\_\_\_\_  
Company



\_\_\_\_\_  
Authorized Signature


12/14/20

\_\_\_\_\_  
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.  
Revised 6/8/2012



**DESIGNATED CONTACT:** Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

 Chief Operating Officer  
\_\_\_\_\_  
(Name, Title)  
John Apholt, Chief Operating Officer  
\_\_\_\_\_  
(Printed Name and Title)  
680 S Fourth St. Louisville, KY 40202  
\_\_\_\_\_  
(Address)  
502-890-8363  
\_\_\_\_\_  
(Phone Number) / (Fax Number)  
John.Apholt@lacunahealth.com  
\_\_\_\_\_  
(email address)

**CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Lacuna Health DBA Lacuna Call Center Services  
\_\_\_\_\_  
(Company)

  
\_\_\_\_\_  
(Authorized Signature) (Representative Name, Title)

John Apholt, Chief Operating Officer  
\_\_\_\_\_  
(Printed Name and Title of Authorized Representative)

12/14/20  
\_\_\_\_\_  
(Date)

502-890-8363  
\_\_\_\_\_  
(Phone Number) (Fax Number)







# CERTIFICATE OF LIABILITY INSURANCE

1/1/2021

DATE (MM/DD/YYYY)

12/8/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Lockton Companies 1185 Avenue of the Americas, Suite 2010 New York NY 10036 646-572-7300	<b>CONTACT NAME:</b> <b>PHONE</b> (A/C, No, Ext):		<b>FAX</b> (A/C, No):
	<b>E-MAIL ADDRESS:</b>		
<b>INSURED</b> 1456976 KINDRED HEALTHCARE, LLC ATTN: NITA BLEVENS 680 SOUTH FOURTH STREET LOUISVILLE KY 40202	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	<b>INSURER A : Continental Casualty Company</b>		20443
	<b>INSURER B : Arch Insurance Company</b>		11150
	<b>INSURER C : Cornerstone Insurance Company</b>		0
	<b>INSURER D : Arch Indemnity Insurance Company</b>		30830
	<b>INSURER E :</b> <b>INSURER F :</b>		

**COVERAGES** KINHE03      **CERTIFICATE NUMBER:** 17186794      **REVISION NUMBER:** XXXXXXXX

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	N	HAZ3011743248-11	1/1/2020	1/1/2021	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ Included MED EXP (Any one person) \$ Included PERSONAL & ADV INJURY \$ Included GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 \$
B	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	N	N	11CAB4974609(AOS) 11CAB4974709 (MA)	1/1/2020 1/1/2020	1/1/2021 1/1/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
C	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input checked="" type="checkbox"/> CLAIMS-MADE DED    RETENTION \$	N	N	CIC2020 - 2	1/1/2020	1/1/2021	EACH OCCURRENCE \$ 15,000,000 AGGREGATE \$ 15,000,000 \$ XXXXXXXX
B D D	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	11WCI4974809 (AOS) 14WCI1001209 (CA,KY,MO,NY,TX)	1/1/2020 1/1/2020	1/1/2021 1/1/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	<b>PROFESSIONAL LIABILITY</b>	N	N	HAZ 3011743248-11	1/1/2020	1/1/2021	\$2,000,000 EACH CLAIM \$3,000,000 AGGREGATE

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 RE: Lacuna Health, 733 Barret Ave, Louisville, KY 40204. Certificate holder is additional insured with respects to General Liability.

**CERTIFICATE HOLDER**

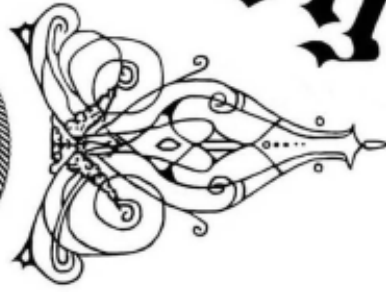
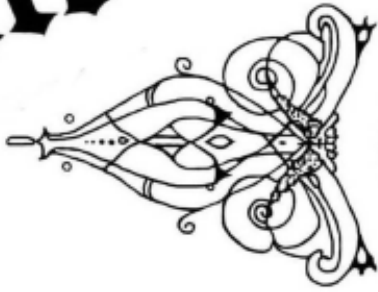
**17186794**  
 The WV Department of Education  
 1900 Kanawha Blvd.  
 E. Charleston, WV 25305

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

# State of West Virginia



## Certificate

*I, Mac Warner, Secretary of State,  
of the State of West Virginia, hereby certify that*

LACUNA HEALTH, LLC

has filed the appropriate registration documents in my office according to the provisions of the West Virginia Code and hereby declare the organization listed above as duly registered with the Secretary of State's Office.

*Given under my hand and  
the Great Seal of West Virginia  
on this day of  
September 29, 2020*



*Mac Warner*

*Secretary of State*

**From:** [B4WV\\_DoNotReply@wv.gov](mailto:B4WV_DoNotReply@wv.gov)  
**To:** GFTEVIDENCE  
**Subject:** WV Business Registration Approved by WV State Tax Department!  
**Date:** Tuesday, September 29, 2020 4:35:56 PM

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RE:  
Business: Lacuna Health, LLC  
2020 B4WV Novice Interview 2

Dear WV One Stop Business Portal Registrant:

The new business registration application you filed online through the WV One Stop Business Portal has been accepted by the State Tax Department and is now awaiting processing at the Unemployment Compensation Division. Your business registration certificate (i.e., business license) and/or additional correspondence from the State Tax Department will be mailed to you at the business mailing address you provided. You are now authorized to begin doing business in West Virginia.

If you have any questions about the State Tax Department portion of your registration, please contact the State Tax Department by email at [TaxHelp@wv.gov](mailto:TaxHelp@wv.gov), or by phone at (304) 558-3333. Log in to your account at <https://onestop.wv.gov> at any time and from your dashboard click the 'Register a Business' tab to check the progress of your application under 'My New Business Filings' section.

Thank you,  
WV One Stop Business Portal