



Knowledge services

Serving those who serve others, and we want to serve you.

Utah Solicitation No. CH16012
Master Agreement #AR2504

Additions to Master Agreement

Overview

GuideSoft, Inc. dba Knowledge Services submitted our response to the State of Utah Solicitation No. CH16012, in conjunction with NASPO ValuePoint in 2016. Within our technical proposal we listed the prominent features of our Cloud Solution, including, but not limited to:

- Calendaring & Scheduling
- Time Entry & Approval
- Expense Tracking, Entry & Approval
- Consolidated Invoicing & Payment
- Reporting & Business Analytics
- Electronic Data Capture & Management
- Location Validation
- GPS Tracking
- Route Optimization
- Real-Time Alerts & Notifications
- Collaboration Portal
- Safety Features
- Additional User Types

Since the Solicitation and subsequent award, Knowledge Services has augmented our Cloud Solution technology to now include additional functionality for survey management services. We have had an abundance of interest in our survey management solution and are requesting a modification to our Master Agreement #AR2504 to include this functionality and solution.

What is Survey Management

Knowledge Services utilizes our proprietary, NIST-compliant cloud-based technology to coordinate and conduct in-person and online surveys on the State's behalf. Many State governments endeavor to better serve their citizens by gaining feedback through surveys on the programs and services delivered to their citizens. In addition to gaining valuable input, surveys are critical for States to maximize Federal funding opportunities.

Knowledge Services manages the entire survey process, from creation to collection, analytics to reporting. With the utilization of our cloud technology, dotStaff™, we streamline the survey process increasing accuracy, improving responsiveness, and ensuring cost effectiveness. With full transparency and business analytics, the State can improve programs and services delivered uncovered from citizen input.

Knowledge Services partners our survey management solution with our people-centric and human approach, ensuring that both citizen and client satisfaction is unsurpassed. Knowledge Services acts as a trusted and independent collector of participant feedback of services delivered by State agencies, ensuring the correct information is processed and analyzed for agency improvement and better citizen outcomes. Our survey technology and processes are built to create positive experiences for participants in an efficient and timely manner, always staying true to our people-centric approach. With our transparent analytics and reporting model, agencies can depend on Knowledge Services for a real-time snapshot of survey progress and measurement of key performance indicators.



Agencies that partner with Knowledge Services for survey management can take advantage of our mobile survey technology functionality and capitalize on having access to real-time feedback. Stakeholders can measure results, determine needed adjustments, and responsively report back to leadership faster and with the most up-to-the-minute data. Rather than manage a complex and administratively heavy project, Knowledge Services offers efficient and accurate access to reliable insights that have lasting effects.

We will utilize our proven project management plan that was developed in partnership with the Indiana Division of Aging, NCI-AD, and HSRI in 2015 to manage, control, and supervise the scope of services to ensure satisfactory contract performance. We will utilize our proven experience and plan as a basis to build upon and collaborate with governments to ensure we meet their unique requirements.

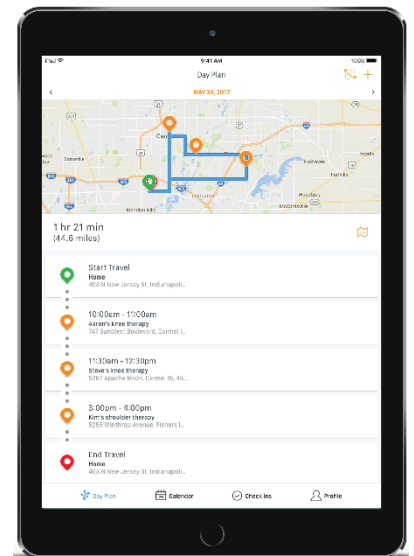
Our survey management approach and strategy will include organized coverage of all regions or locations. Scheduling optimization and accurate data organization will be vital to efficiently and effectively complete the process, and our technology caters to those needs. We catalogue timely and accurate data, track completed surveys, manage travel time, and yield cost savings to the State due to our gained efficiencies. We will strive to meet and exceed every compliance standard and keep sensitive data protected at all times.

Knowledge Services manages the survey management program with a dedicated team of skills-based experts, with project oversight being led by a designated Project Manager who is responsible for all aspects of the administration of the face-to-face surveys. The Knowledge Services team draws upon our experience implementing and managing face-to-face survey management programs. In conjunction with our experience with survey management, Knowledge Services' team utilizes our proprietary SaaS, cloud-based technology solution for project oversight and management.

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Knowledge Services' survey management solution enhances the day-to-day activities of interviewers and our program team members alike. Our integrated functions and other related tools can be configured to serve populations that require services in the special needs area. Our transformative solution improves outcomes by utilizing the following features:

- **Survey Creation** – creation of survey questions through defined research objectives and goals
- **Survey Delivery** – determine the appropriate distribution method for the survey (e.g. online, mail, phone, in person)
- **Electronic Data Capture** – timely, efficient, and accurate collection and reporting of the survey
- **Location Validation** – real-time date, time, location, and duration appointment validation and reporting
- **Real-time Data Access** – information access to help interviewers deliver their surveys at any location through the use of iPads
- **Interactive Calendaring & Scheduling** – streamlined coordination of survey delivery, enhancing responsiveness and improving outcomes
- **Real-time Notification** – integrated alerts and notifications keeping the program team and interviewers on track with effective and efficient survey delivery
- **Route Optimization** – reduced travel time and expenses allowing interviewers more time focusing on quality survey delivery



Please [click here](#) to see how we utilize our technology to streamline and automate NCI projects.

Experience in Survey Management

Knowledge Services has been delivering project management services to State government since 2005 and currently serves ten (10) State government clients and dozens of cooperative members such as cities, towns, and universities. Since 2013, Knowledge Services has had experience in providing survey management solutions including National Core Indicators (NCI) surveys to help States gather performance and outcome data regarding services provided by the State. Knowledge Services' responsibilities include project management, in-person interview delivery, recruitment and training of interviewers in the field, data collection, quality assurance, data delivery, and reporting. Through our experience with the State of Indiana, we have conducted over 29,000 face-to-face interviews with aging and/or disabled individuals, improving our methodology and technology through our experiences.

Knowledge Services just recently completed our fourth year partnering with the State of Indiana Aging Division to provide management for their NCI Survey program. Each year the State has from June 1st to May 31st to complete the survey, and Knowledge Services has executed the survey in half that amount of time each year by utilizing our cloud-based technology and proven program management approach. We provide the highest quality team and interviewers to enhance the experience for not only the State, but for the citizen as well. Our schedulers work diligently to schedule interviews through phone calls, and through that process are also able to provide vital data to the State on participation, for example, why a citizen has chosen not to participate. Knowledge Services can also report back to the State when a resident's information (i.e. address, phone number) has changed and provide the correct information where possible. The Knowledge Services team has found a way to incorporate multiple value adds to this contract within our survey management program. We believe these additions will meaningfully increase the contract's utilization.

EXPERTS IN SURVEY MANAGEMENT

Knowledge Services has conducted multiple surveys over the past 7 years in partnership with the Indiana Family and Social Services Administration's Division of Aging.

- > **5,600** NCI-AD* surveys
- > **3,000**+ nursing home surveys
- > **1,000** phone surveys regarding outcomes of services

In total, we have contacted more than 15,000 participants around the State of Indiana, which includes nearly 45,000 touchpoints.

* National Core Indicators - Aging and Disabilities

Below is an overview of our experience specifically with the State of Indiana including the type of survey, survey cycles, number of project team members, and services provided to achieve successful survey management project outcomes.

State Agency	State of Indiana Family and Social Services Administration, Division of Aging (DA)
Survey	National Core Indicators (NCI)
Survey Cycle(s)	2015-2016 2016-2017 2017-2018
Number of Project Team Members	19 project team members (5 project management team members and 14 local field personnel)
Services Provided	■ Project management team to provide overall project management and field team for face-to-face interviews ■ Recruit and train interviewers (field team) ■ Conduct annual number of surveys required, in-person to individuals throughout the State of Indiana

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	■ Utilize technology to schedule, track, and coordinate interviews providing improved outcomes and reduced costs ■ Reporting on all project analytics and data ■ Submission of accurate data into the Online Data Entry Survey Application (ODESA) ■ Auditing of all project data and interviews ■ Weekly updates with project stakeholders ■ Review of project and “lessons learned” following project completion
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Pricing

Provided below is the pricing schedule which reflects deliverables, some deliverables may not apply to procuring entity. Deliverables will be evaluated on a case-by-case basis and agreed upon between the procuring entity and Knowledge Services.

Survey Programming	Not to exceed \$25,000.00
Recruitment and Training	Not to exceed \$25,000.00
Data Collection	Not to exceed \$25,000.00
Per Survey	Not to exceed \$425.00 per survey