UNITED WAY
of the Midlands

1229 Millwork Ave., Suite 402
Omaha, NE 68102-4277
P: 402.342.8232
UnitedWayMidlands.org

United Way of the Midlands

Response to Request for Proposal (RFP)

123190 O3

State of Nebraska
Department of Health and Human Services

Third Party Warmline Service

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October 21, 2025

Mr. Bradley Murphy
Procurement Contract Officer
Department of Health and Human Services
301 Centennial Mall South, 5th Floor
Lincoln, NE 68508

Dear Mr. Murphy,

Nebraska families deserve a seamless, compassionate, and 24/7 point of access to help when they are facing adversity, uncertainty, or simply don't know where to turn. To meet this need, a consortium led by United Way of the Midlands (UWM) proposes launching the Warmline Prevention Center, a statewide third-party single access point that will provide live intake, referral, and supportive navigation services around the clock—365 days a year.

The Warmline Prevention Center will act as a centralized hub and connector across the state's human services ecosystem. Through this Warmline, Nebraskans will call, chat, or otherwise access a live, caring voice who can assess their needs, triage, and link them to local support in their community. Rather than navigating a maze of disconnected hotlines and service silos, families will have one reliable, accessible doorway to the resources that meet them where they are.

The strength of this proposal lies in both the partnership and the architecture:

- United Way of the Midlands (UWM) brings deep experience operating a 24/7 human services helpline (211), a strong statewide referral database, and a reputation of community trust. UWM's role as lead ensures governance, coordination, and alignment with local systems across regions.
- Findhelp provides a secure, compliant technological backbone. Their platform will power real-time intake, data collection, routing, and integration with community partner systems.
- Nebraska Children and Families Foundation (NCFF) has existing relationships with 26 community collaboratives across the state. These collaboratives already provide navigational services and local knowledge, positioning them to receive referrals and close the loop on service delivery.
- Boys Town National Hotline (BTNHL), which already operates the Nebraska Family Helpline and 988/behavioral health crisis services, brings a mature crisis-service infrastructure, clinical expertise, and operational capacity for high-stakes work under stress. The Boys Town call center also brings added capacity when needed and redundancy in the event of a disaster that takes 211 offline. BTNHL will also host the data warehouse, dashboard, and reporting infrastructure.

Together, this consortium is more than the sum of its parts. The Warmline Prevention Center is envisioned not simply as a hotline but as a cohesive network of collaboration—bolstering community-based capacity, enhancing consistency in customer experience, enabling data-driven decision-making, and reducing fragmentation in the state's prevention and support ecosystem.

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By centralizing intake, sharing data, and coordinating referrals, the Warmline Prevention Center will:

1. Reduce barriers for families seeking help
2. Improve responsiveness and speed of connection to services
3. Enable continuous quality improvement via real-time performance data
4. Strengthen local collaboratives with direct referrals and support their capacity
5. Create a more cohesive, emotionally responsive, and equitable safety net for all Nebraskans

We submit this proposal in recognition that prevention and family support are best delivered when systems are caring, coordinated, and accessible. The Warmline Prevention Center will stand as that bridge — connecting hearts and systems, empowering families, and strengthening Nebraska from the ground up.

Sincerely,

Matthew Wallen

Matthew Wallen
Chief Operating Officer
United Way of the Midlands

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1. Corporate Overview and Experience

1. Corporate Overview and Experience

United Way of the Midlands (UWM), headquartered in Omaha, Nebraska, is a nonprofit organization with over 100 years of service and a legacy of convening, investing, and delivering critical services that meet community needs.

UWM has operated 211 services (formerly First Call for Help) for more than 40 years and currently manages 211 statewide coverage in Nebraska and Iowa, 83 counties in Illinois and afterhours/weekend coverage for 12 counties in western Kentucky. The 211 program is accredited by Inform USA, meeting 27 standards for information and referral excellence and supporting call, text, chat, and web-based access 24/7/365. In fiscal year 2025, UWM responded to over 315,000 contacts, reflecting the scale, reliability, and responsiveness of its call center operations.

UWM has extensive experience serving vulnerable populations including older adults, persons with disabilities, and disaster-affected individuals. UWM 211 is a State of Nebraska Aging and Disability Resource Center (ADRC), providing information and benefit assistance to Nebraskans who are aged 60+ and/or disabled. The organization also runs a Save our Seniors program to empower Nebraskans 60+ to overcome hardships caused by abuse, financial exploitation and neglect. Through partnerships like Nebraska ADRC, Help Me Grow, Unite Us, and Save Our Seniors, UWM provides tailored navigation and light-touch case management support. The 211 resource database maintained by UWM includes over 10,000 programs from 4,000+ organizations, and UWM contributes to the 211 National Database, supporting resource interoperability nationwide.

UWM 211 provides 24/7/365 coverage and is experienced in responding to both everyday requests and crisis-driven surges. For example, during the Arbor Day tornado disaster in spring 2024 that impacted Omaha and Western Iowa, UWM successfully scaled operations to meet dramatically increased demand, coordinating with emergency response partners and leveraging its scalable staffing infrastructure.

Our contact center is powered by a team of trained professionals using nationally recognized standards, including taxonomy-based resource categorization, follow-up protocols, and quality assurance practices. The UWM 211 leadership team has a combined 300 years of human service contact center experience. Staff work to attain Inform USA certifications with 76% of the 211 team currently certified.

The Warmline Prevention Center will be an expansion to UWM call center operations. The call center will be in the UWM office located in the Millwork Commons Ashton Building in rapidly developing North Downtown Omaha, just two blocks outside of the Department of Economic Development, Enterprise Zone. UWM is located on the 4th floor of the Ashton Building. The office space is secure, modern, and offers the latest technology and office amenities. The call center is located in a separate wing in the office.

UWM 211 has deep expertise in delivering responsive, high-performing contact center services across Nebraska, Iowa, and Illinois. Our current contracts with state and regional programs—including Iowa and Illinois 211, the Nebraska Aging and Disability Resource Center (ADRC), and Save Our Seniors—

demonstrate our ability to provide high-quality support, performance tracking, and routing across various service lines.

Qualifications

- UWM has operated an information and referral helpline since the 1980's.
- 211 operates 24 hours a day, 7 days a week, 365 days a year since 2019.
- Programs provided and clients served:

Program	Population Served	Includes Intake and Support	Total Contacts July 2024 - June 2025
211 Helpline	Statewide Nebraska, Iowa and 83 counties in Illinois	x	315,000
Aging and Disability Resource Center (ADRC)	Nebraskans over age 60 or disabled	x	23,567
Help Me Grow	Parents and children ages 0 - 8	x	959
Goodfellows	Nebraska statewide	x	2,356
Unite Us	Nebraska Statewide	x	3,607
Weatherization	Douglas County, Nebraska	x	6
Save Our Seniors	Victims of Crime aged 60+	x	4,185

a. BIDDER IDENTIFICATION AND INFORMATION

Name: United Way of the Midlands
Address: 1229 Millwork Avenue, Suite 402, Omaha, NE 68102-4277
Website: https://unitedwaymidlands.org/
Entity organization (corporation, partnership, proprietorship): Nonprofit organization under section 501(c)(3) of the Internal Revenue Code
State of incorporation: Nebraska
Year in which first organized to do business: 1923

Has the name and form of organization changed since first organized? Yes. The organization began as The Community Chest in 1923. The name changed to United Community Services in 1950. In 1975, the organization became United Way of the Midlands.

b. FINANCIAL STATEMENTS

Contact Information for First National Bank
Name: Betsy Vrba
Address: 1620 Dodge Street, Omaha, NE 68197
Telephone: 402-602-6539

United Way of the Midlands (UWM) is not subject to any judgment, pending or expected litigation, or other real or potential financial reversals, which might materially affect the viability or stability of the organization or the State of Nebraska. Attached, please find a copy of UWM's most recent audited financial report approved by its board of directors.

c. CHANGE OF OWNERSHIP

United Way of the Midlands does not anticipate any change in ownership or control during the twelve (12) months following the solicitation response due date.

d. OFFICE LOCATION

United Way of the Midland's office at 1229 Millwork Avenue, Suite 402, in Omaha will be responsible for performance pursuant to an award of this contract with the State of Nebraska.

e. RELATIONSHIPS WITH THE STATE

United Way of the Midlands (UWM) holds a strong record of performance with grants and contracts with the State of Nebraska. In the past five fiscal years, UWM has secured 26 grants and contracts totaling $22,754,127 from the State of Nebraska through multiple sources.

<u>211 Nebraska</u>

Nebraska's Public Service Commission has provided grant funding for UWM to provide 211 services across the entire state since 2010. In Fiscal Year 2025, UWM received a $1.455 million grant from the Nebraska Public Service Commission for 211 Nebraska to provide information about and referrals to health, human and social services organizations. In Fiscal Year 2025, UWM's 211 Contact Center received 315,000 contacts including 216,000 Nebraska contacts.

Since 2023, UWM has partnered with the Nebraska Department of Health and Human Services (DHHS) to serve as the official Aging Disability Resource Center (ADRC). As an official ADRC for Nebraska, UWM's 211 contact center offers personalized support and guidance to seniors, individuals with disabilities, and their families. DHHS chose UWM to add the ADRC to 211 Nebraska because of UWM's proven track record of delivering valuable services to Nebraskans. The current DHHS grant provides $435,841 for ADRC Nebraska. In Fiscal Year 2025, UWM 211 received 23,567 contacts for ADRC services.

UWM has received Victims of Crime Act (VOCA) grant funds from the Nebraska Crime Commission since 2023 for the Save our Seniors Program that provides strengths-based, trauma-informed, person-centered services and referrals to people aged 65 and older who have been victimized by abuse, neglect and/or financial exploitation. For Fiscal Year 2025, UWM received a VOCA grant of $200,000 and assisted with 4,185 contacts for Save our Seniors services. The 2023 VOCA grant number is 261-2024-VA1055.

UWM has received a Title V Maternal Health grant from DHHS for the Help Me Grow Program since 2024. UWM 211 provides resources that address parents' concerns about their children's health, development, behavior, and/or learning. Families may also receive scheduled follow-ups about previous referrals and additional concerns. In Fiscal Year 2025, UWM's 211 contact center received a $84,942 grant and 959 contacts for Help Me Grow services.

Jobs for America's Graduates (JAG)

Since 2020, UWM has received funds from the Nebraska Department of Labor (NDOL) for administration for the Jobs for Americas Graduates (JAG) Program that provides professional and technical education to help students overcome barriers to success. UWM also receives Workforce Innovation and Opportunity Act (WIOA) funds to administer the JAG Program. In the 2024-2025 school year, UWM served 4,153 students through 81 programs in Nebraska and achieved a 99% high school graduation rate for our seniors.

UWM, NDOL and DHHS have collaborated since 2019 to offer the Jobs for Americas Graduates (JAG) Program in Nebraska. In Fiscal Year 2025, DHHS allocated $6.5 million of Temporary Assistance for Needy Families (TANF) funds to the JAG Nebraska program. In Fiscal Year 2025, UWM served over 4,000 students through 81 programs in Nebraska. In November 2025, UWM completed a full state audit and passed all audit requirements without any prompting for change or additional information.

Weatherization Program

UWM has received a grant from the Nebraska Department of Water, Energy, and Environment for the Weatherization Assistance Program in Douglas County since 2024. With this grant, UWM collaborates with Omaha Public Power District and Metropolitan Utilities District to reduce energy costs with services such as insulation, ventilation, and repairs while ensuring the health and safety of low-income households in Douglas County at no cost. For Fiscal Year 2025, UWM received a $676,983 grant.

f. BIDDER'S EMPLOYEE RELATIONS TO STATE

United Way for the Midlands (UWM) states that no party in its bidder's solicitation response is or was an employee of the State of Nebraska within the past twelve (12) months.

UWM further states that no employee of any agency of the State of Nebraska is employed by United Way of the Midlands or is a subcontractor to United Way of the Midlands as of the due date for solicitation of response submission.

g. CONTRACT PERFORMANCE

United Way for the Midlands (UWM) has not had a contract terminated for default, convenience, non-performance, non-allocation of funds, or any other reason during the past five (5) years.

h. SUMMARY OF BIDDER'S CORPORATE EXPERIENCE

United Way of the Midlands (UWM) is a preferred partner for call center services with a solid record of implementing projects of similar size, scope, and complexity as the proposed contract with the Nebraska Department of Health and Human Services. UWM boasts experience as a convener and collaborator for projects with community partners, corporate leaders, and governmental agencies. In addition, UWM brings a successful history of securing and managing federal, state, and local government grants including the American Rescue Plan Act (ARPA), Workforce Innovation and Opportunity Act (WIOA), and Temporary Assistance for Needy Families (TANF).

Project	Aging and Disability Resource Center (ADRC)
Customer	Nebraska Department of Health and Human Services State Unit on Aging
Time period of project	July 2024 - present
Completion Data	Current subaward ends June 30, 2026
Budget	$435,841
Project Description	The Nebraska ADRC is a collaborative effort between aging and disability organizations that provides information, assistance and education on community services and long-term care options for Nebraskans aged 60+ and persons with a disability. The ADRC serves as a 'One Stop Shop' at the community level to help make informed decisions about long-term services and support.
UWM responsibilities similar to this RFP	• Provide free and comprehensive information and referrals by phone for 1) seniors aged 60 and older, 2) people with disabilities, and 3) family members, caregivers, and advocates for both • Operate 24 hours per day/7 days per week/365 days per year • Serve as a one-stop source of information • Collaborate, and partner with other ADRC's including 8 Areas on Aging, Monroe-Meyer Institute, League of Human Dignity, Brain Injury Alliance, and Easter Seals. • Participate in monthly ADRC Consumer Review Team meetings • Assist non-English-speaking Iowans with language Line translation services • Assist Nebraskans with vision, hearing, and/or speech-related disabilities by using alternative communication methods • Train and manage 211 staff • Utilize database accredited by Inform USA for information and referrals • Store information in contact management software system iCarol with data security and privacy protocols plus annual risk assessment for HIPAA and GDPR • In Fiscal Year 2025, UWM's 211 Contact Center received 23,567 contacts for ADRC services
Reference	Ben Stromberg Program Manager for Nebraska DHHS Unit on Aging (402) 580-9166- Ben.stromberg@nebraska.gov

Project	Save Our Seniors
Customer	Nebraska Crime Commission
Time period of project	July 2024 - present
Completion Data	Current subgrant ends June 30, 2026
Budget	$160,000 VOCA subgrant
Project Description	Save Our Seniors is a free and confidential initiative designed to assist Nebraskans aged 60+ overcome hardships caused by abuse, neglect and/or financial exploitation through person centered services and

	referrals. A trained Victim Assistance Navigator provides information, support and advocacy about safety and rights, helping seniors navigate the emotional, legal, and financial consequences of crime. The program is funded by the Victims of Crime Act (VOCA).
UWM responsibilities similar to this RFP	• Offer services such as Information and Referral, Personal Advocacy and Emotional Support, Shelter and Housing, Criminal and Civil Justice System Assistance and Assistance filing for compensation. • Utilizes basic assessment questions to determine appropriate resources for referral. • Utilize a warm transfer to connect with the program referred to. • Utilize a closed loop referral system. • Provide free and comprehensive information and referrals by phone. • Operate 24 hours per day/7 days per week/365 days per year • Serve as a one-stop source of information • Assist non-English-speaking Iowans with language Line translation services • Assist Nebraskans with vision, hearing, and/or speech-related disabilities by using alternative communication methods • Train and manage 211 staff • Utilize database accredited by Inform USA for information and referrals • Store information in contact management software system iCarol with data security and privacy protocols plus annual risk assessment for HIPAA and GDPR • In Fiscal Year 2025, UWM's 211 assisted 4,185 contacts for Save Our Seniors Program.
Reference	Shealyn Warrick Federal Aid Administrator Nebraska Crime Commission Shealyn.Warrick@nebraska.gov 402.471.3710

Project	211 Iowa Contact Center
Customer	United Way of Central Iowa
Time period of project	July 2023 - June 2028
Completion Data	Current contract ends June 30, 2028
Budget	$750,000
Project Description	Provide information and referral services 24/7/365 via phone, chat, text, web to Iowa residents.
UWM responsibilities similar to this RFP	• Provide free and comprehensive information and referrals by phone, text, e-mail, online chat, and mobile app • Operate 24 hours per day/7 days per week/365 days per year • Serve as a one-stop source of information for people in need of assistance • Assist non-English-speaking Iowans with language Line translation services

	• Assist Iowans with vision, hearing, and/or speech-related disabilities by using alternative communication methods • Train and manage 211 Iowa staff • Utilize database accredited by Inform USA for information and referrals • Store information in contact management software system iCarol with data security and privacy protocols plus annual risk assessment for HIPAA and GDPR • In Fiscal Year 2025, UWM's 211 Contact Center received 150,000 contacts from Iowa. The 211 Contact Center received calls from all 99 counties in Iowa
Reference	Mary Sellers President of United Way of Central Iowa (515) 246-6501

In addition to the above, UWM has other relevant partnerships that demonstrate experience of successful performance with projects of similar size, scope, and complexity including call center services.

Since 2008, UWM has contracted with Iowa State University Extension to operate several free and confidential hotlines (i.e., Iowa Concern, Farmer's Hotline, Teen Line, and SAGE line) on nights and weekends. In Fiscal Year 2025, UWM contracted with Iowa State University Extension and received 3,245 contacts for Iowa State University Extension.

Since 2010, UWM has received grant funding from the Nebraska Public Service Commission to provide 211 services including information about and referrals to health, human and social services organizations for the entire state of Nebraska. In Fiscal Year 2025, UWM received a $1.455 million grant from the Nebraska Public Service Commission, and the 211 contact center received 315,000 contacts including 216,000 Nebraska contacts.

In 2022, Douglas County Emergency Management Agency developed a Disaster/Emergency Preparedness Plan for the UWM 211 helpline. In the event of a disaster, UWM 211 can be activated to disseminate information from local, county, and state governments. In April 2024, UWM's 211 contact center was activated and received 893 calls from Douglas County in response to the Arbor Day tornado outbreak. In July 2024, UWM received 2,100 calls from Douglas County following a destructive windstorm.

i. SUMMARY OF BIDDER'S PROPOSED MANAGEMENT APPROACH

Warmline Prevention Center Consortium Management Approach and Leadership Team Members

In our role as convener and collaborator, United Way of the Midlands (UWM) has assembled a robust coalition of statewide human services providers to administer and run the day-to-day operations of the Warmline Prevention Center. Collectively, the partners bring expertise in call center operations, closed loop technology solutions, data and analytics, crisis intervention, and improving overall community well-

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being. UWM will lead Findhelp, Nebraska Children and Families Foundation, and Boys Town leadership members to manage the Warmline Prevention Center functions and operations. Each partner will

actively participate in all phases of the project, from discovery to full-scale launch. Attached, please find copies of MOUs signed by each partner, demonstrating a strong commitment of each to efficiently and effectively deliver the very best Warmline service to the State of Nebraska.

Below, please find background information on each leadership and project team member representing each partner.

Matthew Wallen, UWM Chief Operating Officer joined UWM as Senior Vice President of Community Investments and Programs in September 2019. He became Chief Operating Officer in December 2024. Mr. Wallen is responsible for UWM's grant investments and direct service programs, including UWM 211. Mr. Wallen has over 25 years of public service and reports to UWM President and CEO Shawna Forsberg. His resume is attached.

Karen Heng, UWM Program/Project Manager, has contracted with UWM as a consultant since January 2022. Ms. Heng develops and implements programs such as the Nebraska Aging and Disability Resource Center (ADRC), Help Me Grow Nebraska, and Nebraska Save Our Seniors. Ms. Heng brings almost 40 years of experience in public human services work and reports to Matthew Wallen, Chief Operating Officer. Her resume is attached.

Oscar Gonzalez, BTNHL Director, has been with BTNHL for 5 years and has been the Director for 2 years. Oscar is a veteran with many years of operations management experience. Oscar has expertise in management and information technology. Oscar reports to Senior Director of Community Services, Scott Hartman. His resume is attached.

Kristine Bosiljevac, BTNHL Manager, has been with BTNHL for 35 years and has been in her current position for 25 years. Kristine has Crisis Worker certification from the American Association of Suicidology and is a member of the National Association of Crisis Center Directors. Kristine reports to BTNHL Director, Oscar Gonzales. Her resume is attached.

Jennifer Skala, NCFF Executive Vice President, has been with NCFF for over 13 years and has been in her current position since 2021. Jennifer is responsible for providing leadership, strategic oversight, initiative, and system development. Her resume is attached.

Zachary Nelson, NCFF Associate Vice President of Operations and IT Solutions, has been with NCFF since 2022. Zachary is responsible for Operations Architecture and Process Design and Risk Mitigation and Systems Compliance. His resume is attached.

Erin Gurak, Findhelp Director of Government Delivery, has been with Findhelp since 2021 and has been in her current position since 2023. Ms. Gurak brings expertise in the delivery and implementation of government products. Her resume is attached.

Lisa Boyle, Findhelp Senior Customer Success Manager, joined Findhelp in 2024 and has extensive experience in the delivery and implementation of products. Her resume is attached.

Key Project Members

Johana Fellers, UWM Community Programs Director, joined UWM in October 2024. Ms. Fellers is responsible for Community Programs such as Save Our Seniors and Help Me Grow. Ms. Fellers is also responsible for strategic leadership, operational management, and overall effectiveness of the Community Programs. Her resume is attached.

Myria Ming, UWM 211 Director, joined UWM as Senior Manager of UWM 211 in October 2024. She was promoted to 211 Director in December 2024. Ms. Ming is responsible for the strategic leadership, operational management, and overall effectiveness of the 211 Contact Center. Ms. Ming ensures the delivery of high-quality, accessible, and comprehensive information and referral services to individuals in need. She oversees staff, develops partnerships, and ensures compliance with industry standards and organizational policies. Ms. Ming reports to Vice President of 211 Steven Rippe. Her resume is attached.

Kevin Richardson, UWM 211 Quality and Training Manager, has served in his position since February 2025. Mr. Richardson is responsible for the overall management of the 211 quality and training programs. Mr. Richardson assists in developing, creating, and implementing quality and training processes and procedures. Mr. Richardson provides recommendations for quality and training to improve materials and techniques that enhance the overall customer experience. Mr. Richardson reports to Vice President of 211 Steven Rippe. His resume is attached.

Maret Wibel, UWM 211 Community Research Manager, joined UWM as the 211 Community Research and Data Analyst in February 2023. She was promoted to 211 Community Research Manager in December 2024. Ms. Wibel analyzes and leverages 211 call data to uncover trends, inform decision-making, and enhance service delivery. Ms. Wilber works closely with Vice President of 211 Steven Rippe and reports to Chief Strategy Officer Lauren Kimball. Ms. Wilber's resume is attached.

Darienne Pokorny, Senior Director of Grants Accounting, has served in her position since October 2023. Ms. Pokorny is responsible for overseeing grant compliance with private, local, state, and federal requirements including billing, collections, and financial reporting. She also prepares financial statements, journal entries, monthly accounting schedules, account reconciliations, audit schedules, and internal reporting. Ms. Pokorny reports to Chief Financial Officer Jim Richardson. Ms. Pokorny's resume is attached.

Jennifer Hale, NCFF Project Manager, joined NCFF in January 2021 and has extensive experience in project management and implementation. Her resume is attached.

Mary Pinker, NCFF Vice President of Community Well Being, joined NCFF in 2016 and has experience in program administration and management. Ms. Pinker is responsible for the partnership with the 26 Community Collaboratives. Her resume is attached.

Rebecca Monnier, NCFF Managing Director for Evaluation, Research and Continuous Quality Improvement, joined NCFF May 2022 and has been in her current position since February 2025 and has experience in program evaluation and quality improvement. Her resume is attached.

Savannah Cleveland Queen, Findhelp Manager, Customer and Community Success, joined Findhelp in 2021 and has been in her current position since 2023. Ms. Queen has led community engagement and relationship efforts across several states. Her resume is attached.

Heather Dender, Findhelp Customer Training Manager**,** has been with Findhelp since July 2022 and has been in her current position since 2024. Ms. Dender brings experience in managing training and data curation. Her resume is attached.

BTNHL will use a braided staffing structure to support the Warmline Prevention Center, leveraging professional Lead Crisis Counselors (Lead CCs) and Crisis Counselors (CCs) to respond to crisis calls. CCs are trained to assess the urgency and nature of each contact and provide short-term crisis counseling, resource referrals, problem-solving strategies, and guidance.

j. **SUBCONTRACTORS/ CONSORTIUM MEMBER**

Boys Town National Hotline

Name: Father Flangan's Boys' Home (dba Boys Town)
Address: 13603 Flanagan Blvd, Boys Town, NE 68010
Website: www.boystown.org
Entity organization (corporation, partnership, proprietorship): Nonprofit organization under section 501(c)(3) of the Internal Revenue Code
State of incorporation: Nebraska
Year in which first organized to do business: 1917

Summary of Corporate Experience

Boys Town National Hotline (BTNHL), based in Omaha, Nebraska, is a nationally accredited service provider with decades of experience supporting individuals and families in crisis. Established in 1989 as part of Boys Town, one of the nation's largest privately funded organizations, serving at-risk youth since 1917. BTNHL plays a vital role in the national crisis support infrastructure.

Accredited by the American Association of Suicidology (AAS) and the Council on Accreditation (COA), BTNHL operates multiple national and local crisis lines. It served as a National Backup Call Center for the National Suicide Prevention Lifeline until the 988 transitions, answering over 757,000 calls between July 2022 and September 2023. BTNHL is currently Nebraska's sole contracted 988 providers, responding to over 82,000 contacts in 2024 with a 97% answer rate and an average response time of 15 seconds.

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With a certified team, robust infrastructure, and a proven track record, BTNHL is well-positioned to deliver high-impact crisis support to the Warmline through its established services.

Experience in Managing Similar Community-Focused Initiatives

Since 2005, BTNHL has actively contributed to national suicide prevention efforts, beginning as a National Backup Call Center for the National Suicide Prevention Lifeline. As the Lifeline transitioned to the 988 initiative, BTNHL continued its support by serving as a National Backup Center for the 988 Suicide & Crisis Lifeline from July 2022 through September 2023. During this time, 757,509 calls were answered, demonstrating operational capacity and responsiveness in high-volume, high-stakes environments.

In July 2022, BTNHL became the sole contracted provider for Nebraska's 988 crisis line, further solidifying our role in statewide behavioral health support. BTNHL remains in good standing as Nebraska's 988 Suicide and Crisis Lifeline provider, continuing to deliver timely, compassionate, and effective crisis intervention services.

These experiences reflect BTNHL's proven ability to manage large-scale, community-focused initiatives that require coordination across local, state, and national systems. Our work has consistently focused on improving access to care, supporting individuals in crisis, and strengthening the behavioral health infrastructure for the communities we serve.

Internal Project Governance Structure and Decision-Making Processes (Including DHHS Oversight)

BTNHL maintains a collaborative and transparent relationship with the Nebraska Department of Health and Human Services (DHHS), ensuring all crisis line services meet state expectations and contractual obligations. Coordination includes regular performance reporting, compliance reviews, and data submissions aligned with DHHS standards.

BTNHL's internal governance structure supports this oversight through a clearly defined leadership and operational framework. The crisis line is overseen by the Director, Hotline, and organized by service contracts managed by the Manager, Hotline, with support from Supervisors, Lead Crisis Counselors, and Crisis Counselors. Administrative roles such as Quality Assurance Coordinators, Training Managers, and Data Specialists ensure quality assurance, workforce planning, and continuous improvement. This structure enables efficient decision-making, operational consistency, and alignment with DHHS across all levels of delivery service.

Boys Town National Hotline (BTNHL) has extensive experience in crisis line services at both the national and state levels. Key highlights of BTNHL's experience include:

Project	988 Hotline (Nebraska)
Customer	Nebraska Department of Health and Human Services
Time Period of Project	July 2022 - current
Completion Data	Ongoing service. BTNHL became the exclusive contracted provider for Nebraska's 988 Suicide & Crisis Lifeline in July 2022. In fiscal year 2024, BTNHL responded to 22,409 Nebraska 988 Lifeline contacts, marking a 22.5% increase over the previous year. The average answer rate was 95.73%, exceeding the initial goal of 90% and demonstrating BTNHL's continued commitment to responsive and reliable crisis support.

Budget	July 1, 2025 – January 30, 2026, amount not to exceed $3,477,992.00
Project Description	Boys Town serves as the primary 988 Suicide & Crisis Lifeline call center for Nebraska, providing 24/7 crisis intervention services via phone, text, and chat. The center is staffed by trained crisis counselors and operates under the guidance of the Nebraska Department of Health and Human Services (DHHS) and in coordination with Vibrant Emotional Health.
BTNHL Responsibilities similar to this RFP	Crisis Response Services • Provide 24/7 access to trained crisis counselors via phone, chat, and text. • Assess safety, de-escalate crises, conduct triage, and develop safety plans. • Offer follow-up services for individuals with suicidal ideation.
Reference	Michelle Nunemaker DHHS PO Box 95026 Lincoln NE, 68509 402-471-7790 Michelle.nunemaker@nebraska.gov

Project	Nation Suicide Prevention Lifeline/988 Back-up Center
Customer	988 Back-up Center – Vibrant Emotional Health
Time Period of Project	2005-2023
Completion Data	2023
Budget	N/A as project has been completed
Project Description	BTNHL began serving as a National Backup Call Center for the NSPL in 2005. This role involved handling overflow and high-volume calls from across the country, demonstrating BTNHL's capacity to manage large-scale crisis response operations. As NSPL transitioned to the 988 initiative, BTNHL continued its national support role by answering 757,509 calls during its tenure as a National Backup Center for the 988 Lifeline.
BTNHL Responsibilities similar to this RFP	BTNHL was responsible for Safety Assessment, Crisis de-escalation, triage and safety planning, referrals to local services and activation of mobile crisis response, if needed.
Reference	Beau Pinkham BPinkham@vibrant.org

Project	Safe2Help Hotline
Customer	Nebraska Department of Education
Time Period of Project	January 1, 2020 – current

Completion Data	Ongoing project
Budget	July 1, 2025 – June 30, 2026, $845,000
Project Description	Safe2Help is a report system designed for students, staff, and parents to anonymously report concerning behavior which could impact the safety of students or schools across Nebraska
BTNHL Responsibilities similar to this RFP	BTNHL responsibilities include: • Provide 24/7/365 Safe2Help Hotline • Employing and training Crisis Counselors in threat assessment, crisis management, confidentiality, and Nebraska-specific policies. • Ensuring all reports are reviewed and disseminated appropriately, with Life Safety reports handled per agreed protocols. • Overseeing the Safe2Help program through a designated Manager of Safe Schools, who will coordinate with schools, law enforcement, and mental health professionals. • Supporting school districts in forming trained Threat Assessment Teams.
Reference	Jay Martin, Director of School Safety and Security Nebraska Department of Education 500 S 84 Street, 2nd Floor Lincoln, NE 68509-4987 Jay.martin@nebraska.gov

In addition to operating the 988 Suicide and Crisis Lifeline and Safe2Help Hotline in Nebraska, Boys Town offers a broad array of services through its National Hotline (1-800-448-3000), which is tailored to meet the unique needs of youth and families. While 988 is designed for anyone experiencing mental health, substance use, or suicidal crisis, the Boys Town Hotline provides more specialized support, including parenting guidance, teen coaching, and behavioral health resources. Staffed by trained counselors, the hotline offers 24/7 access via phone, text, email, and online chat, and includes tools like the "Your Life Your Voice" app to help youth manage stress and emotions. Boys Town also engages in community outreach, visiting schools to teach coping strategies and emotional wellness. These additional services make Boys Town a comprehensive resource for families seeking immediate crisis intervention and ongoing support for emotional and behavioral challenges.

Boys Town will be responsible for building the data collection platform, data analysis, developing reporting, serve as a backup call center, and the primary referral resource for families in crisis that would benefit from the support of Warmline Prevention Center resources. Boys Town's involvement in the Warmline Prevention Center will constitute roughly 25% of subcontractor hours.

NEBRASKA CHILDREN AND FAMILIES FOUNDATION

Name: Nebraska Children and Families Foundation
Address: 215 Centennial Mall South, Suite 200 | Lincoln, NE 68508
Website: www.NebraskaChildren.org

Entity organization (corporation, partnership, proprietorship): Nonprofit organization under section 501(c)(3) of the Internal Revenue Code
State of incorporation: Nebraska
Year in which first organized to do business: 1997

Nebraska Children and Families Foundation (Nebraska Children) was established in 1996 following the passage of the federal Family Preservation and Support Act. As Nebraska's delegate agency for Community-Based Child Abuse Prevention (CBCAP) and the state chapter of Prevent Child Abuse America, Nebraska Children was founded to strengthen and preserve families through public-private partnerships.

Since its inception, Nebraska Children has convened a wide range of public and private partners—including the Nebraska Department of Health and Human Services (DHHS), the Courts and Juvenile Probation, the First Lady of Nebraska, Legal Aid of Nebraska, the Departments of Labor and Economic Development, national partners, and private funders. Together, through the Bring Up Nebraska network, they support 26 Community-Based Prevention Collaboratives. NCFF provides training, the Findhelp system-of-record platform for Central Navigation, research, evaluation, communications, fund development, and fiscal management to ensure sustainability and impact.

For over 28 years, NCFF and DHHS have built a prevention system that transcends political administrations and sustains collaborative work on behalf of children, youth, and families.

Key Partnership History:

- Child Abuse Prevention: As Nebraska's chapter of Prevent Child Abuse America, NCFF and DHHS jointly support the State Child Abuse Prevention Fund Board.
- Youth Voice and Leadership: DHHS and NCFF launched the state's first Foster Youth Councils and continue to elevate youth leadership in policy and practice through citizen review panels.
- Connected Youth Initiatives: Beginning with the Omaha Independent Living Plan (2006), NCFF, DHHS, and youth partners developed Project Everlast (2007) and later the Connected Youth Initiative (2014), which now operates across the Panhandle, Omaha, and Lincoln.
- Alternative Response: NCFF and DHHS Child and Family Services (CFS) jointly advanced Nebraska's Alternative Response model, rooted in early intervention and local solutions developed through Central Navigation and Community Collaboratives.
- Bring Up Nebraska Network: The statewide network of 19 Collaboratives provides community-based prevention and family support using federal funding from Promoting Safe and Stable Families, the Child Abuse Prevention and Treatment Act (CAPTA), TANF, SSBG, and John H. Chafee programs.
- Community Support Specialists: Four DHHS Community Support Specialists work statewide to support CWB Collaboratives, connect families to economic supports such as SNAP, WIC, childcare subsidies, and energy assistance, and provide feedback loops from communities to state leaders.

- National Recognition: The Community Well-Being (CWB) model under Bring Up Nebraska was selected by the federal Children's Bureau for the Thriving Families, Safer Children initiative and recognized as a promising primary prevention strategy.
- Statewide Coordination: DHHS CFS leaders meet weekly with NCFF and statewide partners to coordinate efforts across the Bring Up Nebraska network and strengthen Nebraska's prevention infrastructure.

Together this collaboration positions the partners and the proposed Warmline with the existing Bring Up Nebraska prevention system and Findhelp closed loop referral platform—ensuring real-time ability to immediately coordinate referrals, warm handoffs, and data-informed support for families across the state with the ability to show immediate outcomes.

NCFF will support data collection and analysis, and collaboration with community partners and 26 community collabs across the state. NCFF also plays an important role in connecting the community collaboratives with the Warmline closed loop referral system. NCFF will utilize roughly 10% of available contractor hours.

FINDHELP

Name: Aunt Bertha, a Public Benefit Corporation doing business as Findhelp
Address: 3616 Far West Blvd. #117, Box 454, Austin, TX 78731
Website: https://company.findhelp.com/
Entity organization (corporation, partnership, proprietorship): Public Benefit Corporation (PBC)
State of incorporation: Delaware
Year in which first organized to do business: 2010

Findhelp is committed to powering the American safety net and improving health outcomes for families, children, veterans, students, and employees across the country. Findhelp's work is rooted in the personal experience of its founder and CEO, Erine Gray. At just 26, Erine became a legal guardian of his mother after she was diagnosed with a rare brain disease. Navigating the complex care system on her behalf was confusing, intimidating, and frustrating, an experience that inspired him to create a better way. In 2010, Erine launched Findhelp with a clear mission: to connect people to the help they need, with dignity and ease.

For the last 15 years, Findhelp has built and scaled the nation's top-rated closed-loop referral platform, connecting individuals to free and reduced-cost community and social care services across the United States. The platform is designed to ensure people not only find care, but receive it, closing the loop through referral confirmations and outcome tracking. Since 2010, Findhelp has supported more than 770 unique customers across 50 states, including government agencies, healthcare systems, nonprofits, and other mission-aligned organizations. Today, Findhelp powers the largest closed-loop referral system (CLRS) in the country and serves millions of users nationwide.

Findhelp's flexible network approach gives customers the ability to access broad public-facing listings or build tightly aligned Trusted Networks of preferred service providers.

- **Access to the open network**: In the open network, Findhelp provides immediate access to more than 973,000 community-based organization (CBO) program locations across the U.S. About 162,000 of these are "in-network," which means the CBOs have taken ownership of their program listings, use our free CBO tools, and participate in electronic referrals and reporting functionality.

- **Access to your curated trusted network:** Many customers choose to develop curated networks of providers they already know and trust. Findhelp helps customers configure the platform to highlight these trusted relationships, ensuring the most relevant programs are easy for navigators and families to find. Within these Trusted Networks, CBOs engage more deeply in the referral process, accepting referrals, reporting outcomes, and communicating back to navigators. This model supports stronger collaboration, closes referral loops, and creates a more seamless experience for families in need of care.

Findhelp is proud to be consistently recognized for its role in strengthening America's safety net. Their commitment to innovation, equity, and impact has earned them several industry-leading awards, including:

- "Best in KLAS" highest ranked social service referral platform in the U.S., from 2022 (when the award began) through 2025, as determined by the independent research firm KLAS, the major rankings benchmark for the U.S. healthcare industry.
- "Best in the World" from B Corp., awarded by being in the top 5% of B Corporations in the world from 2016-2022 (award discontinued after 2022).
- Real Leaders Impact Award (2023 and 2024) from Real Leaders Magazine, recognizing companies that have a clear intention to scale solutions today for the world's most pressing issues.

Findhelp's Software as a Service (SaaS) platform, which is managed through a configurable and secure web interface, delivers the following base capabilities:

- The largest social care network in the United States, with access to more than 973,000 verified program locations for organizations providing social care services—a number that grows nearly every day. We have a strong presence in every U.S. County and across the state of Nebraska.
- Closed-loop tracking of social need referrals.
- Customer-specific platform and workflow configurations.
- Customer-specific or standard needs assessments.
- Secure integration with electronic health records, customer relationship management systems, care coordination systems, and other systems of record.
- Client care coordination including goal setting and management, action planning and management.
- Comprehensive reporting including Referral Activity, Program Inventory, and Group Activity.

- White-labeled, configurable, mobile-enabled public-facing search and referral site for self-assessment and requests by community members.
- White-labeled, configurable, mobile-enabled staff search and referral site including case management, community partner sharing, and reporting functionality.
- Secure coordination and communication between customer staff, clients, and community social care providers.
- Intake screening, referral tracking, and reporting for network community social care providers.
- Community partner network development, maintenance, and continuous improvement.

Findhelp has extensive experience in providing technology solutions. The following is an example of Findhelp's experience:

Project	Bring Up Nebraska
Customer	Nebraska Children and Families Foundation (NCFF)
Time Period of Project	April 1, 2024 - Present
Completion Data	Ongoing project
Budget	$236,500
Project Description	Nebraska Children and Families Foundation contracted with Findhelp to create a collaboration of customized, white-labeled instances of the Findhelp platform. Their community collaborative includes 26 organizations across the state that provide central navigation services, coaching programs, and Rural Postsecondary and Economic Development (RPED) programs in the community. The work includes building out a Trusted Network strategy to increase CBO response and closed referral loops and implementing data sharing agreements with local health districts to improve collaborations and better serve overlapping populations with up-to-date social determinants of health (SDoH) data on the individuals they all serve. NCFF uses Findhelp's intake assessments and data collection forms for pre- and post-service delivery surveys. The organization-built performance dashboards use Findhelp's reporting and analytics to measure progress and outcomes. This data collection and analysis support quality reporting to Nebraska's Department of Health & Human Services and legislature, to prove that this important work cuts costs while still providing vital services to children and families. NCFF is working closely with Findhelp to build Trusted Networks of community partners to drive engagement and closed-loop referrals. These close-knit partnerships will support a mutual goal: to help children and families thrive.
Findhelp Responsibilities similar to this RFP	The NCFF project shares several key features with the Nebraska Warmline initiative. Both rely on a statewide, coordinated model of care that uses centralized navigation, shared intake protocols, and closed loop referral

	systems to improve service connection and follow up. Specifically, this project involved: • **Shared infrastructure across partners:** Like the Warmline, NCFF's collaborative uses a unified, white-labeled version of the Findhelp platform to streamline coordination across multiple organizations and entry points. • **Referral tracking and follow up:** The solution supports a full closed-loop referral process with configurable dashboards enabling navigation partners to monitor outcomes, track client progress, and follow up on service delivery, mirroring Warmline tracking requirements. • **Data sharing agreements:** Both efforts involve secure data sharing to support program evaluation, population health tracking, and compliance with reporting requirements (e.g., to DHHS or funders). • **Trusted Network engagement:** As with the Warmline's coordination with central navigation teams, this project focuses on building a trusted network of CBOs who can receive referrals, report outcomes, and operate from a shared understanding of client needs. • **Customization for local needs:** The NCFF project was tailored to align with the state's broader SDoH initiatives, like how the Warmline will align with the behavioral health and family support infrastructure in Nebraska. These parallels demonstrate Findhelp's ability to configure flexible, statewide solutions that serve the needs of diverse partners while supporting consistent, high-quality client experiences.
Reference	Zach Nelson, AVP Operations & IT Solutions, znelson@nebraskachildren.org, (531) 255-3288

Findhelp will provide the closed loop technology solution for the Warmline Prevention Center. Findhelp technology will connect access points with the 26 community collaboratives and other community resources. They will also integrate data collection and dashboard capabilities to respond to state reporting requirements. In addition, Findhelp will support Warmline through necessary training activities for community partners. Findhelp will utilize roughly 15% of available contractor hours.

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2. Technical Response

Project Approach and Methodology

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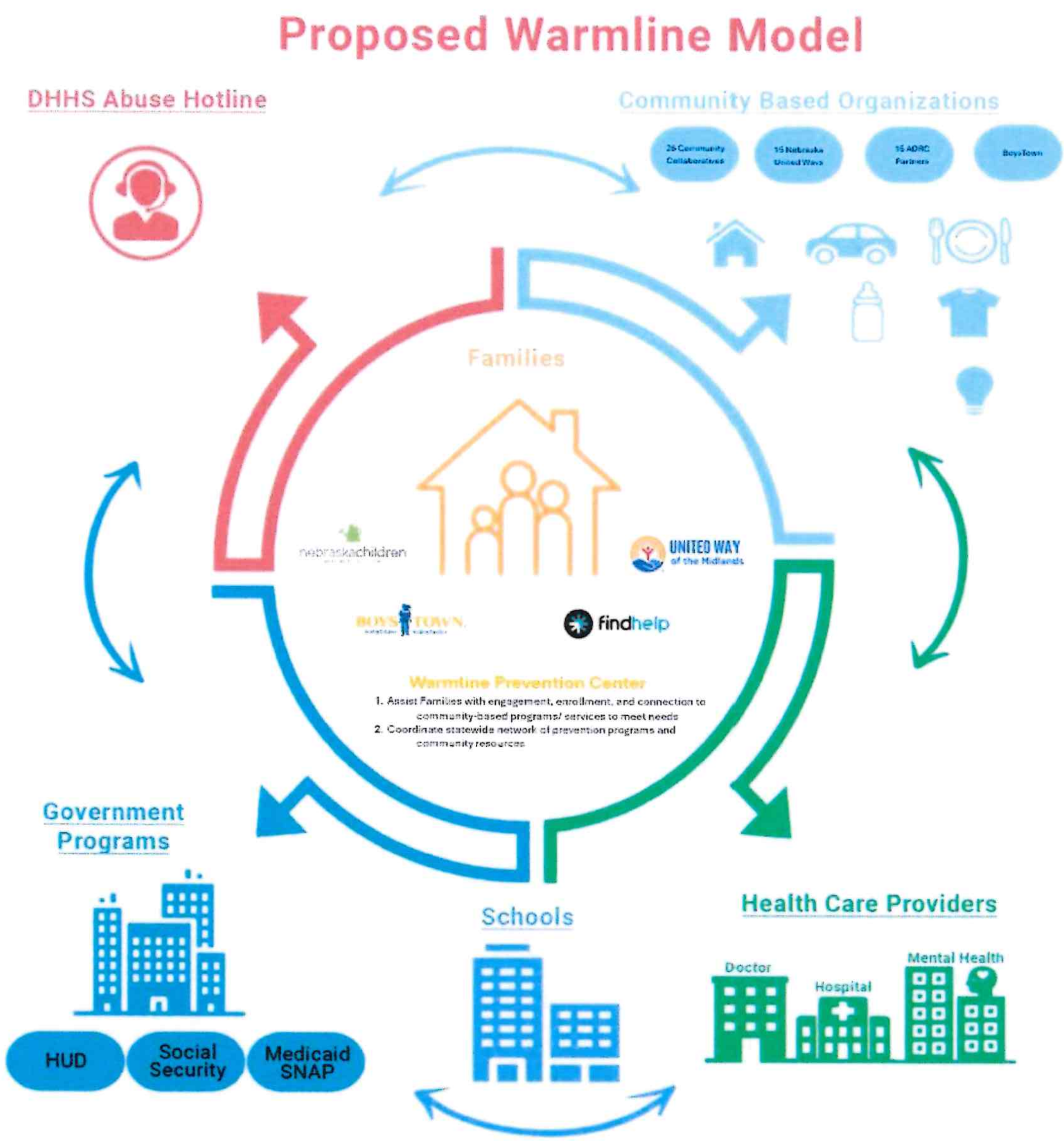
2. Technical Response- Project Approach and Methodology

Project Description – Warmline Prevention Center



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The Warmline Prevention Center is a family-centered, statewide prevention and support program designed to connect Nebraskans to the help they need—when they need it most. The Warmline provides navigation, information, and referrals to community resources that help families overcome challenges and build stability before crises escalate.

Operated by United Way of the Midlands (UWM), the Warmline ensures that all Nebraskans—regardless of geography, language, or circumstance—have 24/7/365 access to live, compassionate assistance through a No Wrong Door approach. This means families can reach the Warmline through multiple pathways and always connect with a trained professional ready to listen and help.

The vision of the Warmline Prevention Center is to strengthen families and prevent crisis escalation by providing an easily accessible, compassionate, and coordinated point of contact for information, navigation, and support. The purpose of the Warmline is to ensure that every Nebraska resident—regardless of location, background, or circumstance—has access to timely assistance and connection to community-based resources that promote safety, stability, and well-being.

The Warmline serves as a prevention-focused connection point for families, caregivers, and concerned community members who need help, but whose situations do not rise to the level of maltreatment, abuse, or neglect. By diverting these non-crisis or situational concerns from the child abuse and neglect hotline, the Warmline enables the DHHS Division of Children and Family Services (CFS) and investigators to focus their resources on cases involving verified abuse and neglect while ensuring all other families still receive the help and guidance they need.

The Warmline is also a hub of collaboration and community connection—linking families, schools, healthcare providers, and community organizations to a shared network of support that emphasizes prevention, empowerment, and resilience.

The Warmline Prevention Center exists to provide an accessible and welcoming place for families and individuals to seek help for non-emergency concerns, including but not limited to:

- Child or family stress and behavioral concerns
- Mental health or wellness support
- Lack of basic needs like food, housing, or transportation
- Childcare, parenting, and educational resources
- Healthcare access and developmental support

The Warmline Prevention Center offers support for those experiencing situational crises or emerging needs, connecting families to prevention services and community resources that can help them stabilize and thrive.

The Warmline Prevention Center will assess families for candidacy and other eligibility criteria needed to be referred to the evidence-based programs approved in the FFPSA Plan. The Warmline Prevention Center will assist the family by obtaining appropriate releases and referral information. This information would be submitted to the program for billing purposes. The information could also be compiled and submitted to DHHS for federal reimbursement.

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By offering an alternative pathway for information and support, the Warmline helps ensure that families with non-maltreatment concerns receive timely help, while enabling the DHHS Children and Family Services Hotline to focus on reports of abuse and neglect. However, the Warmline is broader in scope it serves as a universal access point for any Nebraskan in need of assistance, not limited to referrals from DHHS.

Some of the benefits of the Warmline Prevention Center supporting families will be:

- Free, confidential assistance from a trained Warmline Specialist.
- Families have choice and decision making in the referral.
- Assessment of needs to determine the root cause of the issue.
- Assessment of eligibility for Federal and State funding programs including Medicaid, SNAP, LIHEAP, TANF, CFS FFPSA, Weatherization, HUD, and Social Security.
- Connection to programs and services that best match the family's needs with regards to location, language, ethnicity, and cultural practices/beliefs.
- Connection to viable resources with the capacity to provide immediate and/or long-term assistance.
- Service eligibility and enrollment information shared with the agency receiving the referral.

The Warmline Prevention Center will operate with two key functions:

1. Assist families with engagement, enrollment and connection to community-based programs/services to meet needs.
2. Coordinate a state-wide network of prevention programs and community resources.

The Warmline Prevention Center operates on the following guiding principles:

- **Community Based Services:** Services should be located as close to the family's home as possible.
- **Strength-Based and Family-Centered**: Recognizing families' inherent resilience and focusing on empowerment rather than deficits.
- **Trauma-Informed Care**: All staff receive specialized training in trauma-informed engagement and motivational interviewing.
- **Cultural and Geographic Responsiveness**: Services are tailored to Nebraska's diverse populations, including rural families, tribal communities, and underserved areas.
- **Accessibility and Equity**: 24/7 access via phone, text, chat, and web; multilingual support in English, Spanish, and 250+ additional languages through interpretation services.
- **Collaboration and Coordination**: Seamless partnership with state agencies, community collaboratives, and nonprofit partners.
- **Data-Informed Decision-Making**: Continuous improvement through data monitoring, outcome measurement, and client feedback.

All Warmline Prevention Center services are guided by a strength-based, family-centered, and trauma-informed philosophy, emphasizing empowerment, respect, and hope. Warmline Specialists are trained in motivational interviewing and trauma-informed care to foster engagement, trust, and empowerment.

The Warmline Prevention Center operates on a No Wrong Door model, meaning that families, caregivers, or professionals can connect through any participating organization and still receive the same coordinated care. Whether a family reaches out through UWM 211, BTNHL, a Community Collaborative, or directly via the Warmline Prevention Center 800 number, they are connected to the same system of care and shared resource network.

The Warmline Prevention Center is available to all Nebraskans via:

- Toll-Free 800 Number
- 211 (phone, text, or chat)
- Web-based referral portal

A live person is always available, ensuring every caller receives immediate, compassionate assistance. Services are provided in English and Spanish by bilingual staff, with Language Line Services offering interpretation in more than 250 languages to ensure equitable access for all.

Warmline Specialists assist callers in identifying needs, goals, and action steps that promote stability and reduce risk. The process follows a Closed-Loop Navigation Model, consisting of:

1. **Intake:** Collect demographic and contextual data.
2. **Navigation & Referral:** Connect callers to the most appropriate verified community resources using Findhelp.
3. **Follow-Up:** Contact families within 10 days to ensure connection and assess barriers.
4. **Survey and Closure:** Conduct satisfaction and outcome survey 60–90 days post-contact.

The Warmline Prevention Center will serve all populations, including Nebraska's tribal communities and vulnerable groups, ensuring equitable, culturally competent service delivery.

Nebraska Children's Statewide Community Collaboratives Findhelp data maintains an ongoing needs assessment process grounded in real-time referral and intake records from Central Navigators. This continuous feedback loop provides a clear, data-driven understanding of emerging family needs, patterns of re-engagement, and the efficacy of community-based prevention strategies. The following analysis of activity from October 1, 2024, through September 30, 2025, highlights the scope and nature of help-seeking behavior, urgent needs at intake, and referral outcomes—demonstrating how coordinated navigation and stabilization services translate data into action across Nebraska's prevention network.

An analysis of Community Collaborative engagement from October 1, 2024, through September 30, 2025, demonstrates steady utilization, repeat engagement, and continued emphasis on material-stability needs at the point of intake. During this period, 4,990 unique help seekers completed 5,337 intakes—reflecting 347 additional intakes beyond the number of individuals served. This variance indicates meaningful re-engagement among community members seeking continued support, problem-solving, or follow-up connections beyond their initial episode of need.

Self-reported intake data continues to show the prevalence of urgent needs clustered within core household stability. Housing (2,740 selections), Utilities (1,970), and Finances (1,704) led to all categories, underscoring the persistent pressure of cost-of-living and economic instability. Daily Living

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items such as clothing, hygiene, and phone access (1,145) and Transportation (811) represented the next most common urgent requests, while Employment (558) rounded out the material-support domain. Behavioral health and family-strengthening needs also appeared at consistent levels—Mental Health (481), Supportive Relationships (433), and Parenting Assistance (397)—alongside capability building categories such as General Life Skills (371) and Education (343). Health-related needs were most often Dental (353) and Physical Health (243), with Legal Help (226) and Substance Use (130) reported less frequently at the urgent stage. The relationship between repeat intakes and the breadth of urgent-need selections per person aligns with the stabilization-first, trauma-informed navigation model employed by Central Navigators, in which immediate risks are addressed first, creating space to uncover and mitigate underlying factors that sustain hardship over time.

Downstream referral patterns further validate this two-step stabilization and root-cause model. Referrals materially exceeded the frequency of corresponding urgent-need declarations and extended across a broader range of supportive domains. Food-related referrals were particularly notable—Food Pantry (2,035)—despite "Food" being self-reported as an urgent need only 44 times, demonstrating that access to nutrition is routinely identified and addressed through the navigation process even when not explicitly declared. Referrals aligned with housing and utility stability—help paying for utilities, help paying for housing, and help finding housing—remained among the most frequent, confirming these categories as foundational to household stabilization. Basic needs linked to family protective factors were also significant, including diapers and formula, personal care items, and clothing assistance. A high volume of referrals for "navigating the system" reflects persistent community demand for coordinated problem-solving, benefits access, and service literacy, indicating that families benefit not only from direct resources but also from guided engagement with complex service networks. Additional referral activity—temporary shelter, mediation and emergency payments, and employment supports such as helping find work, résumé development, and job placement—illustrates the expansion of casework from stabilization to barrier reduction. Referrals extending into legal aid, education, oral health, and mental health further demonstrate how the helping relationship evolves toward long-term resilience.

Collectively, these data reinforce a historically consistent trajectory: urgent needs at intake center on housing-cost burden and basic household security, while navigation-driven referrals broaden the service mix to encompass food access, utilities relief, childcare and infant supplies, system navigation, and skill- and connection-building supports. This pattern exemplifies the Community Collaborative's comprehensive, prevention-focused approach in action—ensuring that families are met with immediate stability and sustained pathways toward self-sufficiency throughout the period of record.

The Warmline Prevention Center will maintain regular meetings with the DHHS Child and Family Services Hotline to review referral trends, discuss coordination needs, and refine processes. This partnership ensures seamless integration between prevention and protection systems and reinforces appropriate use of the Warmline as a preventive resource rather than a reporting line.

Each consortium partner contributes unique expertise:

- **United Way of the Midlands (UWM):** Lead agency; provides 24/7 operations, staffing, supervision, quality management, and reporting.

- **Boys Town National Hotline (BTNHL):** Brings expertise in family engagement, crisis support, and coordination with the Nebraska Family Helpline. BTNHL is responsible for data warehouse, data security and compliance, and reporting.
- **Nebraska Children and Families Foundation (NCFF):** Engages its 26 Community Collaboratives statewide to strengthen outreach, follow-up, and community connections. NCFF assists with data monitoring, security, and compliance. NCFF also provides expertise in Program Evaluation.
- **Findhelp:** Provides the Closed Loop Referral System (CLRS) and resource database infrastructure, ensuring secure, coordinated referrals and performance analytics. Findhelp assists with training and community engagement.

The Warmline Prevention Center will work in partnership with the 26 Community Collaboratives, 15 United Ways of Nebraska, 13 Aging and Disability Resource Center Partners, and all community resource providers who assist and support Nebraska's families' human service's needs. In conjunction with Nebraska's FFPSA plan, the Warmline Prevention Center will work with the providers of evidence-based programs such as Healthy Families America, Parents as Teachers, Family Centered Treatment, Family Spirit, Family Check In and Familias Unidas to connect and register families for participation.

In our previous work, we have successfully implemented similar models in partnership with Nebraska Children and Families Foundation (NCFF), Community Collaboratives, and United Way organizations. These efforts emphasized the importance of a clearly defined workflow and formalized agreements resulting in Memorandums of Understanding (MOUs) between stakeholders. By aligning roles, responsibilities, and expectations across these entities, we enhanced communication, reduced duplication of efforts, and provided a more seamless and comprehensive prevention system.

It is critical when a family is engaged with a needed resource that the program/service has the capacity to assist. The Warmline Prevention Center will work with the 26 Community Collaboratives and other community-based organizations to understand their capacity to accept referrals. The capacity information will be available to the Warmline Specialists and continuously updated.

The Warmline Prevention Center is designed to serve and connect statewide. An analysis conducted by NCFF of referral data from October 1, 2024, through September 30, 2025, from the 26 Community Collaboratives demonstrates the strength and reach of Nebraska's community-based prevention network. During this period, Central Navigators connected families to a broad range of support across 15 distinct service categories and more than 320 specialized service tags available statewide. Through the Bring Up Nebraska network, referrals linked families to 684 organizations operating 750 programs, illustrating both comprehensive geographic coverage and the depth of provider relationships established through collective impact.

The geographic distribution and service intensity demonstrates the Community Collaboratives' capacity to address both common and specialized needs across Nebraska's diverse communities, with certain high-demand services like financial assistance and emergency utility support demonstrating the network's responsiveness to immediate crisis intervention needs. Referral patterns confirm that the Community Collaboratives have the infrastructure and relationships in place to respond to both immediate and ongoing needs. High demand supports such as financial assistance and emergency utility aid demonstrate the network's capacity for crisis intervention, while sustained referral activity across housing, food, parenting education, mental health, and substance use services reflect a system responsive to complex family needs.

The referral patterns document the Collaborative network's ability to provide culturally responsive services, including citizenship and immigration support, translation services, and specialized programming for tribal communities, while maintaining consistent service availability across urban and rural regions through established provider relationships and coordinated resource mapping.

For Community Based Organizations including the 26 Community Collaboratives, 13 Aging and Disability Resource Centers, and 15 Nebraska United Ways the benefits of the Warmline Prevention Center will be:

- Coordinated Program/Service referrals that match programs scope.
- Engagement and connection with families.
- Enrollment information that will assist with eligibility and funding.
- Communication with an existing state-wide network.
- Coordination between organizations to best serve families.

UWM's Marketing Team will collaborate with DHHS and partners to develop and implement a statewide public awareness campaign that promotes understanding and accessibility of the Warmline Prevention Center.

This campaign will:

- Increase awareness of how and when to use the Warmline Prevention Center.
- Clarify the distinction between the Warmline Prevention Center and the DHHS Abuse & Neglect Hotline.
- Educate the public about how to report maltreatment and the role of mandatory reporters.
- Promote the Warmline Prevention Center through social media (Facebook, Instagram, LinkedIn), digital outreach, flyers, and community-based promotional materials.
- Provide information for schools, health providers, and local agencies to encourage early connection and family engagement.

This outreach ensures Nebraskans understand "who to call for what" and have confidence that support is available when needed. The campaign will use coordinated messaging with materials that are culturally responsive and multilingual, to educate the public and referral partners on how to access services. Partner toolkits will be made for schools, medical providers, and community organizations. This broad and inclusive campaign ensures every Nebraskan knows there is a place to turn for help and support—day or night.

The Warmline Prevention Center will:

- Simplify access to family support services statewide.
- Strengthen community collaboration and resource coordination.
- Prevent crises and reduce unnecessary child welfare involvement.
- Improve response times and service matching.
- Generate data insights to inform statewide prevention policy and investment.

By combining proven call center operations, trauma-informed engagement, and coordinated statewide networks, the Warmline Prevention Center will serve as a cornerstone of Nebraska's prevention infrastructure, helping families not only find help but thrive.

Scope of Work

Overview

United Way of the Midlands (UWM), on behalf of the Warmline Prevention Center partners, proposes to design, implement, and operate the Warmline Prevention Center—a 24/7/365 information, referral, and support service providing compassionate, trauma-informed assistance to Nebraska families seeking behavioral health, family support, and community-based resources.

The Warmline Prevention Center will be operated through UWM 211 contact center located in Omaha, Nebraska. The call center is a fully staffed, 24/7/365 operation, ensuring that every call, text, chat, or web inquiry is answered by a live, trained specialist. This system offers multiple access points—phone, text, chat, web, and via Consortium partners (26 Community Collaboratives and BTNHL)—to ensure a no-wrong-door approach connecting families to the right assistance at the right time.

The Warmline Prevention Center will utilize Findhelp as the Closed Loop Referral System (CLRS), integrating referral, case tracking, and closed-loop follow-up functions. A centralized Community Resource Database, supported by Findhelp and supplemented with data from UWM 211 and BTNHL, will ensure all resource information is accurate, comprehensive, and accessible. BTNHL will perform data warehouse functions to allow for ease in accessing data for reports and dashboards. BTNHL will take the lead in data security and compliance, and reporting.

Warmline Prevention Center is designed to be scalable as call volume rises. This proposal is based on the 5,000-contact volume but can handle additional volume by adding additional Warmline Specialists.

The Warmline Prevention Center will be developed and operated through coordinated workstreams that encompass technology, operations, quality management, data analytics, and community engagement.

Warmline Prevention Center Operations

Nebraskans will be able to access the Warmline Prevention Center via 800#, by contacting 211 (call, text or chat), and online via website. The UWM 211 contact center, located in Omaha, Nebraska, will operate a 24/7/365 Warmline. The call center will utilize an Interactive Voice Response (IVR) system to answer the call within one minute. Calls will be answered by a live trained Specialist within 90 seconds. The call center has multilingual access including English/Spanish bilingual staff and 250+ additional languages through Language Line. All calls are recorded for quality assurance purposes.

The Warmline Prevention Center follows a consistent Intake → Navigation → Referral → Follow-Up → Closure process utilizing Findhelp. The Intake process includes information gathering, data collection, and a triage assessment. During triage, Crisis-related calls receive a warm transfer to appropriate partners, including 988, 911 or another appropriate hotline. Navigation is a discussion to discover what services are needed to alleviate the issue. Services focus on building hope, reducing stress, and connecting families with support tailored to their situation. Referrals to resources are given; the contact information is given verbally and can be sent via text or email. The Specialist will also assist the contact in making contact with the resource if needed. Findhelp will allow for referrals to be electronically sent to interoperable entities. A Follow-up contact will be made within 10 days to close the loop and ensure the contact is able to resolve the issue. A survey will be conducted in 60 or 90 days to verify the service's resolution and assess satisfaction with the program.

The Warmline Prevention Center will be staffed by Warmline Specialists. The Warmline Specialists will have continuous support from a supervisor who will monitor Warmline Prevention Center performance, assign work, assist with questions, and perform quality assurance activities. A Community Engagement Specialist will be available to support the work of the Warmline Prevention Center in the community by providing information, training and support. Data analytics, reporting, and evaluation will be completed by Data Analysts at Boys Town and NCFF.

Warmline Specialists will be fully trained in program operations, motivational interviewing, strengths-based family centered practice and trauma informed care prior to starting to assist families. Specialists use motivational interviewing with a strength-based trauma-informed approach to guide interactions.

A goal with Findhelp system training is to empower users to use the platform effectively and to foster continuous improvement and user support. To best meet Warmline Prevention Center needs, we would offer the following training methods and options:

- **A Phased Training Approach:** We will create a plan that includes a phased training approach that supports initial implementation, onboarding for new employees, and ongoing education to reinforce and sustain platform use over time.
- **Customized Skills Based Training:** Our phased approach will focus on slowly introducing various site features and functionality, building the specific skills staff need to support Nebraska Warmline's goals—not just providing training, but equipping teams with the knowledge and confidence to use the platform effectively over time.
- **'Train the Trainer':** Our 'Train the Trainer' module has two options to choose from with the goal of autonomy and sustainability for platform users. We'll ensure that users are fully equipped to lead future training sessions immediately after post-deployment and beyond.

All training materials included in the training plan can be integrated into a Learning Management System (LMS), allowing for seamless alignment with current learning systems and ensuring ongoing access. We will also provide a complete set of all training materials developed specifically for the Findhelp platform.

Findhelp will provide Warmline Prevention Center staff with training content for three courses: Fundamentals, Analytics and Reporting, and Site Administrator Training.

- **Site Fundamentals:** This training is for any users who will be accessing the staff site through a login. Features and functionality will be covered as they use the site to help members in the community.
- **Analytics and Reporting:** This training is for any end user who will be accessing the analytic reporting tools available in the Findhelp customer analytic suite.
- **Site Administrator Training:** This training is for designated end users who will be in the Site Administrator role and have additional provisioning access.

Findhelp will also provide video-based training resources, available either as LMS-compatible files or in their original format. Participants will complete the video training and rely on in-house subject matter experts to answer questions and provide ongoing support. Alternatively, Findhelp can certify selected user groups to lead product training sessions. These facilitators will utilize slide decks and materials to deliver in-person or virtual sessions depending on your preference. Additionally, Findhelp's Instructional Design team will conduct annual check-ins to ensure content remains current. Another resource is Findhelp's monthly training webinars. We host Basics training webinars twice a month. Staff can register for a convenient session using this link and will receive a calendar invite upon registration.

Warmline Specialist will receive refresher training based on findings from the Quality Management Reviews. Training will also be held annually to review confidentiality requirements, mandated abuse and neglect reporting, legal protections and guidance on when and how to refer a caller to make a child abuse or neglect referral to the CFS Hotline. Training will be held to enhance engagement skills, development of supportive communication skills, motivational interviewing, and trauma informed care.

Findhelp will support ongoing training for partner staff who interact with the referral platform. We will provide:

- Role-specific user training materials and quick start guides tailored to Warmline agents, navigators, and administrators.
- Web-based training sessions or recorded tutorials covering referral workflows, system confidentiality settings, and user permissions.
- Ongoing support for updates and new feature releases, including new modules related to referral documentation and client privacy.

While direct training on trauma-informed care and service delivery protocols will be led by partners, Findhelp will ensure that platform-related training aligns with confidentiality best practices and supports a safe, respectful user experience for all.

Findhelp will review and update all platform-related training materials following the pilot phase, if any workflow or future changes are required based on pilot feedback. Updates may include revisions to:

- System navigation and referral workflows
- Intake documentation processes
- User rules or permission protocols
- New or adjusted features introduced in response to pilot learnings

Findhelp will conduct an annual review of training materials provided to the partner organizations, based on the original launch date. Revisions will be shared with designated stakeholders to ensure teams have the most current resources.

For future releases introduced because of the pilot, Findhelp will deliver updated training materials and facilitation guides during the Quarterly Value Review. These may be distributed directly to training leads or uploaded into a learning management system depending on partner preference. Updates will ensure that staff are equipped to adopt new features and maintain consistent service quality across all participating organizations.

Community Resource Database

The Warmline Prevention Center will maintain a statewide resource database utilizing Findhelp. The Findhelp database has many resources currently available and is being utilized by Community Collaboratives. UWM 211 and BTNHL will supplement the resource directories with additional resources when identified. This will help ensure comprehensive statewide coverage.

Findhelp provides a comprehensive community resource database tailored to Nebraska, featuring over 3,800 local and regional programs offering free and reduced-cost social care services. This includes resources for parenting, housing, mental health, economic assistance, transportation, and more. We also will offer customers the ability to create a Trusted Network of Prioritized Community Partners. Findhelp's role is to ensure that the Warmline Specialist can efficiently locate and refer callers to appropriate central navigation programs and services. Findhelp will support specialists, navigators and call agents with the tools they need to make accurate, timely referrals and track outcomes.

Findhelp will maintain and continuously update the Nebraska database to reflect the most relevant, localized, and trusted resources, informed by ongoing partner feedback, changes in the service landscape, and proactive work by our in-house curation team. This infrastructure already exists through our partnership with NCFF and is currently being used to support coordination across the state through 26 collaboratives.

A Trusted Network Approach allows the Warmline Prevention Center to prioritize specific community partners and feature them in search results. This tight-knit network of priority partners helps establish deep, long-term relationships which lead to stronger outcomes for the people you serve. Trusted Network partners are featured in network search results with either a configurable icon or flag and rising to the top of the results list. Trusted networks result in more customer referrals to these partners and more closed-loop referral responsiveness from the partners. During the implementation period, your project team provides the Findhelp team with the list of organizations to be included in your Trusted Network. Findhelp will prioritize these organizations for rapid onboarding and support. Findhelp also supports customers with developing Trusted Networks with our Community Engagement services.

These networks enable the creation of a longitudinal social care record when paired with our consortium functionality. A longitudinal social care record is a shared, secure record that follows individuals across participating organizations, reducing service duplication, strengthening referral coordination, and ensuring individuals receive consistent support regardless of where they first engage with the system. We work closely with consortium partners on data and consent governance, reinforcing consistency and privacy protections. This approach delivers:

- Streamlined referrals with shared data and workflows across partners.
- Reduced duplication of services and outreach.
- Coordinated support for individuals and families at every entry point.

However, a caller connects to the Warmline Prevention Center; their needs are tracked and supported in a single, shared ecosystem, leading to better outcomes, fewer gaps in care, and more efficient use of community resources.

The Findhelp platform is designed to make the work of Warmline Specialists and navigation staff more efficient. Findhelp tools support role-based access, secure intake, consent documentation, and referral tracking, all in one place. Staff can view client goals, track relevant information, and monitor progress toward referral closure. The system will support central navigation programs by offering up-to-date, filterable resource listings and configurable dashboards that reflect local priorities. The Findhelp platform can be configured to support existing workflows that easily integrate with other needed systems.

Findhelp will ensure the Nebraska resource database reflects the most up-to-date, locally relevant services identified during the pilot phase. Updates will incorporate feedback from United Way and pilot users to enhance accuracy, accessibility, and alignment with the needs of Nebraska families. This may include:

- Adding or updating key community-based organizations.
- Ensuring taxonomy matches local language and referral pathways.
- Clarifying eligibility criteria, service descriptions, and intake processes.

These updates will be completed in collaboration with our team members to ensure consistency across intake and navigation and will be maintained regularly throughout the project.

Findhelp maintains a continuously updated community resource database that reflects local, regional, and statewide service availability. The platform includes robust tools for tracking and reporting changes to resource listings, which we will make available in the form of monthly or mutually agreed upon update logs. To support transparency and collaboration, Findhelp will:

- Provide update logs, summarize new, edited, and deactivated listings, including timestamps and change details.
- Offer filterable, exportable reports that allow partners to track updates by geography, service category, time, and other variables.
- Maintain a record of partner-submitted changes and feedback incorporated into the database.
- Deliver reports in PDF or CSV formats or through shared dashboard views depending on partner preference.

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In addition, Findhelp data dashboards are updated daily and provide visual, filterable insights that help partners monitor trends and access patterns over time. For advanced users, SQL Data Warehouse Access can be provided, allowing partner teams to extract raw data for deeper analysis and custom reporting using internal tools like Tableau or Power BI. These reporting capabilities will ensure that partners have visibility into how the resource landscape is evolving, and how these changes are reflected within the platform, supporting better service coordination and improved access for Nebraska families.

By serving as the technology backbone, Findhelp enables Nebraska's Warmline to operate with efficiency, consistency, accountability, and care—ensuring no family falls through the cracks.

Community Engagement and Integration with Community Partners

The Warmline Prevention Center operates with no wrong door strategy. This no-wrong-door model ensures that any partner can serve as an entry point for families. Boys Town and the 26 Community Collaboratives may directly refer or enter information into the Findhelp CLRS. Partner agencies may send Warmline inquiries to UWM 211 for triage or conduct triage independently, following standardized procedures and quality protocols.

As one of the four partners, NCFF brings a proven, statewide infrastructure for coordinated referral tracking and follow-up through its implementation of Findhelp as Nebraska's Central Navigation platform.

Over the past year, NCFF has successfully deployed and supported Findhelp across communities statewide, providing partners with the ability to see when referrals are received, acted upon, and completed. This "closed-loop" process transforms referral activity into measurable outcomes—ensuring that families not only receive referrals but are connected to the help they need.

By prioritizing referrals to NCFF's Collaboratives to manage the referral closure process for Warmline-generated referrals, the coalition is leveraging a system that is already functioning effectively and is ready for immediate integration. This approach avoids duplicative infrastructure, accelerates implementation, and ensures consistency across partner networks.

Through NCFF's leadership, the coalition will benefit from:

- A ready-to-use, statewide platform that already supports closed-loop referral tracking and reporting.
- Established partner relationships and training systems that ensure community providers understand and use the referral tools consistently.
- Data transparency allows the coalition to monitor family connection outcomes and identify service gaps in real time.
- A sustainable infrastructure that aligns with existing community collaborative systems and can easily scale with the coalition's objectives.

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This partnership ensures that Warmline referrals are seamlessly integrated into Nebraska's established Findhelp network—providing immediate capacity for closed-loop follow-up, shared accountability among partners, and verified outcomes for families.

As the technology partner, Findhelp's role in supporting community engagement feedback reporting will focus on providing the tools and infrastructure needed to collect, organize, and visualize feedback from families, providers, and partner organizations. The platform enables:

- Customizable data fields to capture qualitative and quantitative feedback tied to service experiences or referral outcomes.
- Embedded feedback forms or surveys that can be configured in coordination with NCFF and United Way.
- Dashboard views and exportable reports to help partners identify themes, service gaps, and opportunities for improvement.
- Role-based access controls to ensure feedback is shared appropriately across stakeholder groups.

Community engagement efforts will be led by UWM, NCFF, and their collaborative partners, and supported by Findhelp and Boys Town's data efforts by ensuring data from engagement activities is captured securely and reported in actionable formats.

Coordination with CFS Hotline

Coordination and collaboration with the CFS Hotline are critical to the success of the Warmline Prevention Center. During the Discovery Phase, the team will learn more about the work and processes at the CFS Hotline. Members of the operations development team would like to observe the CFS Abuse and Neglect Hotline. Observation of the CFS Hotline also will be a good learning experience for the Warmline Specialists.

Colocation of staff is also an option to be explored to strengthen communication, coordination, and collaboration. This could include Warmline Specialists working at the CFS Hotline or CFS Hotline staff working at the UWM 211 call center.

The Warmline Prevention Center will establish protocols for collaboration and information sharing with the CFS Hotline. Conduct regular coordination meetings between the Warmline Prevention Center and DHHS Hotline teams. Ensure seamless warm transfers for contacts reporting abuse, neglect, or crisis situations to the appropriate hotline (DHHS, 988 Suicide & Crisis Lifeline, or 911 as appropriate). We will also document and report on the number and nature of referrals between systems.

Warmline Prevention Center Public Awareness Campaign

UWM will take the lead in developing a marketing and communications plan. The plan will include a public awareness campaign. The team will develop campaign materials and a digital presence. Launch statewide outreach through social media, press, and community channels. Warmline Prevention Center materials and digital presence will be culturally and linguistically appropriate. Partner with schools, healthcare providers, and community collaboratives to promote access. The team will meet with the tribes to discuss community engagement and access to the program. Informational materials will be developed to distinguish between the Warmline and mandated reporting hotlines. The team will support ongoing evaluation and refinement of messaging to maximize reach and effectiveness.

Technology Review

BTNHL, in collaboration with its partners and stakeholders, will conduct an assessment of technology and infrastructure to identify all relevant technological needs. A comprehensive technology review and development of a Technology and Infrastructure Assessment Report that outlines the Findhelp platform's technical architecture, configuration options, security posture, and readiness to support the Nebraska Warmline. This report will align with the operational requirements outlined in the RFP and support seamless implementation across our team and DHHS. The report will include the following components:

- **Technology Stack - Architecture**
  - A detailed architectural overview of Findhelp's platform, including application layers, hosting environment, redundancy, and uptime metrics.
  - Multi-tenancy model that supports trusted network partners, while ensuring system-wide cohesion and shared reporting visibility.
  - API architecture for interoperability, integration with third-party systems, and data exchange with external systems.
- **Network Segmentation and Logical Components**
  - Description of how Findhelp's network segmentation safeguards client-level data privacy and supports role-based access control for Warmline staff, navigators, and service partners.
  - Logical structure that allows trusted partners to collaborate across shared workflows while maintaining control over their own user access and client records.
  - Diagram of secure data flow across Warmline partners, including shared dashboards and intake visibility for authorized users only.
- **Shared Record Access**
  - Overview of how Findhelp supports shared referral and intake workflows between multiple trusted organizations, with each partner able to manage its own environment while contributing to a unified service experience.
  - Explanation of record-sharing configurations that support real-time visibility into referral status, outcomes, and service delivery progress across connected teams.
- **Security**
  - Description of HIPAA-compliant security features, including end-to-end encryption, role-based access control, audit trails and data logging, SSO and multi-factor authentication.
  - System safeguards for protecting sensitive data during intake, referral, follow-up, and reporting.
- **Hardware and Software**
  - Fully cloud-hosted platform requiring no on-premises infrastructure.
  - Browser-based and mobile-responsive access for call agents and service providers.

   - Accessible UI.
   - Integrations and configurations for partner workflows.
- **Data and Integration Points**
   - Overview of structured data capture during Warmline referrals and service navigation.
   - Support for a closed-loop referral system, enabling follow-up and outcome tracking.
   - Integration readiness for partner systems, 211 call systems, crisis line handoffs, CFS Hotline bidirectional data exchange, State and community partner systems.

System Configuration

Findhelp will finalize System Configuration documentation that outlines how the platform enables secure, efficient coordination across partners. The focus is on enabling digital infrastructure, data pathways, and referral tracking tools that power the Warmline workflow.

We will document the following elements of our configuration to support the Warmline Prevention Center:

- User roles and permissions for each partner organization to ensure secure access and data privacy.
- Referral routing logic based on intake criteria enabling seamless digital handoffs from intake to navigation to central navigation programs.
- Interoperability setup including data exchange standards in any custom integration points.
- Custom fields in forms used for intake tracking, referral outcomes, and notes.
- Security and compliance measures including HIPAA-aligned infrastructure and audit trails.
- Dashboard and reporting tools configured for stakeholders to review referral activity and key indicators.

We will finalize the configuration documentation in collaboration with the partners during the onboarding phase and update it as the program scales.

Data Collection

Findhelp will help develop and implement an initial data collection and monitoring framework to support the Warmline Prevention Center launch and ensure early insight into system performance, community engagement, and service connection outcomes. Our approach is grounded in equity, accessibility, and continuous improvement, and will evolve throughout the Warmline's lifecycle.

- **Core Metrics and Data Elements:** We will configure baseline data elements aligned with the RFP requirements and tailored to Warmline operations. These may include:
   - Call volume and caller demographics
   - Reason for call and presenting need
   - Referral pathways (agency, program type, location)
   - Referral status

   - Connection rates and service outcomes

- Follow-up tracking and closed-loop confirmation

- **System Configuration:** Findhelp's platform supports flexible, partner-specific configuration of intake and reporting workflows. To enable consistent intake across the trusted Warmline network, we will:
  - Customize data collection fields within Warmline partner instances of Findhelp (e.g., UWM and NCFF).
  - Align intake and referral fields across partners to ensure cross-agency consistency.
  - Map data fields to real-time dashboards for visibility and export.
  - Ensure interoperability with external systems (e.g., 211, case management platforms, external reporting systems).
- **Monitoring Procedures:** To support data quality and ongoing system insight, we will:
  - Establish automated data exports and dashboards for monitoring.
  - Configure alerts and quality checks for data anomalies.
  - Track caller feedback, referral outcomes, and service availability in real time.
- **Partner Collaboration:** Findhelp will collaborate with NCFF and Boys Town to refine data definitions, streamline data validation, and support partner readiness. We will:
  - Incorporate state priorities and reporting requirements via coordination with DHHS.
  - Provide ongoing training to partners on accurate and timely data entry.
  - Monitor gaps in referral availability and flag underserved regions or populations.

Closed Loop Referral Management

Findhelp is the Closed Loop Referral System (CLRS). The Findhelp platform powers a secure, configurable, and fully tested closed-loop referral system that supports the Warmline Prevention Center ecosystem by enabling real-time referral coordination, client navigation support, and transparent follow-up workflows. The platform is specifically designed to enhance coordination across central navigation partners.

Key features of the platform include:

- Allows referrals to be made to interoperable entities
- Supports self-navigation for families
- Tracks follow up to confirm service connection
- Referral Tracking

Findhelp allows referrals to be made seamlessly to interoperable systems and partners, including central navigation programs and community-based organizations (CBOs). Our platform includes:

- A national resource directory where central navigation programs and CBOs list their services at no cost, without requiring formal contracts.
- In-network onboarding tools, referral tracking dashboards, and inbound referral inboxes for receiving referrals.
- Fast, secure data exchange through shared intake forms, built-in integrations (EHRs, case management systems) or push APIs (webhooks).

This structure enables Nebraska Warmline partners to route referrals digitally and securely to the central navigation programs, who then match families to appropriate services.

Families in Nebraska can search for and explore services independently via the Findhelp platform without needing to share personal information or speak with a navigator. Topics discussed via the Warmline can be sensitive, and so allowing self-navigation grants Nebraskans another confidential, dignified avenue to locate support for themselves and their families. The platform supports:

- Private self-navigation by ZIP code, service category, keyword, or eligibility criteria.
- The ability to search anonymously or create a profile for saved activity.
- Clear capture consent for sharing client information with central navigation programs.
- Optional sharing of an individual's navigation history or goals with support staff.
- Secure document upload and storage to support eligibility verification or referrals.

This functionality ensures that families who are capable and comfortable with self-navigating have equitable access to services while also supporting assisted navigation by Warmline and central navigation staff.

Findhelp provides cohesive referral tracking and closed loop experience via consistent, user-friendly dashboards that give transparent insight into the history and needs of people being helped via the Warmline.

The People I'm Helping dashboard is where navigators see a list of people they have helped via intakes/assessments completed and supports delivered. Users access this dashboard following secure log in to the platform. They can locate specific individuals using the search box at the top of the page or the filters options on the left side of the page. The People I'm Helping dashboard also operates as a task list, making it possible for authorized users to leverage the dashboard to:

- Access all people that they are helping
- Filter or categorize results by those assigned to them, a specific team, or name
- See an overview of each client referred to them
- Update status of referrals and other services
- Track care coordination milestones
- Add and measure progress towards goals
- Flag clients for follow up

The Seeker Profile is the source of truth for the longitudinal intervention history regarding the individuals the caseworkers help. The Seeker Profile provides an at-a-glance view of the information caseworkers may need to know to efficiently help residents:

- Seeker demographics
- Active assessments and referrals
- History of previous referrals and assessments
- Names of individuals who are helping coordinate services for the client

- Goals that are defined by both the client and the health and human service programs that serve them

Each central navigation program and community organization who manages a social care program that serves clients will also have a dashboard that lets them manage referrals sent to their programs and their program listings.

Findhelp provides full closed-loop referral tracking experience for Warmline call agents and the callers they serve. The platform is configured to assess the needs of individuals and families, search for relevant and convenient central navigation programs who can supply what they need and manage referrals. The steps in the Findhelp referral tracking workflow are:

Step 0: Call Intake:

- Contact Warmline begins the process.

Step 1: Assess the caller's needs by:

- Accessing the Findhelp platform.
- Completing an intake or needs assessment. Please see the example intake form that was configured for Nebraska Children and Families Foundation below.
- Identifying needs.

Step 2: Find relevant central navigation programs by:

- Searching for resources aligned with the caller's assessed and/or expressed needs.
- Reviewing relevant central navigation program listings in the Community Resource Database.
- Filtering programs based on the person's needs and characteristics (e.g., geography, veteran status, language spoken).
- Reviewing central navigation program descriptions and eligibility criteria.
- Confirming relevant programs meet the caller's needs.

Step 3: Connect the caller to support by:

- Pressing the Start a Referral button in the People I'm Helping dashboard or the Refer button on an online program card.
- When the consent window opens, confirming the caller's consent to share their information with the central navigation program(s) to which they are being referred.
- Sending the referral to the central navigation program through the platform.

Step 4: Follow up on the referral by:

- Accessing up-to-date information about the people being helped through the People I'm Helping dashboard.

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- Reviewing each referral status to identify which callers have open referrals in their navigation history.
- Conducting platform, email, and/or telephone outreach to the central navigation program to which the referral was made.
- Updating the referral status.

Findhelp will continuously refine the closed-loop referral functionality to better support the multi-agency coordination model piloted in this initiative. Based on feedback, improvements may include:

- Streamlining referral workflows between United Way, Boys Town, NCFF Navigators, central navigation programs, and CBOs.
- Adjusting status options or data fields to better reflect real-world outcomes.
- Enhancing transparency around referral completion and follow-up to ensure the right people are receiving the right information at the right time.
- Ensuring ease of use for both navigators and providers across the system.

These refinements will be documented in updated training materials if needed and implemented in advance of broader rollout, ensuring a more responsive, trackable, and family-centered Warmline referral experience.

Quality Management

The Warmline Prevention Center will implement a Quality Assurance (QA) framework led by UWM's Training and QA Manager. Quality management will consist of reviewing call recordings, referrals, and survey results for continuous improvement. A minimum of two Warmline contacts per Warmline Specialist per week will be reviewed by supervisors using a Quality Management Tool. The process will check for and maintain compliance with data privacy and confidentiality standards.

Feedback will be shared in real-time to improve communication, empathy, and accuracy. Findings will inform the development of ongoing training and coaching for Warmline Specialists. A training refresher(s) will be provided to maintain a trauma-informed, accurate, and compassionate service.

Data Sharing

The Warmline Prevention Center will establish a data sharing agreement with Nebraska DHHS. Below is an *example* of a data sharing agreement that will be developed within 90 days of contract execution. This will change, if awarded, as discussed with the project team.

This Data Sharing Agreement (Agreement) is entered into by and between the contracted service provider and designated state agency for the purpose of supporting the implementation and operation of the Warmline project as described in the applicable Request for Proposal.

1. Purpose

The purpose of this Agreement is to establish the terms and conditions under which the service will collect, manage, and share data with the state agency to support the Warmline's intake, referral, and performance monitoring functions. This includes ensuring compliance with HIPAA, state privacy laws, and the Business Associate Provisions outlined in Section III.S of the RFP.

2. Scope of Data Shared

The service provider will collect and share the following categories of data with the state agency:

- *Caller demographics and call volume*
- *Reason for call and referral types*
- *Connection rates and service satisfaction*
- *Unmet resource needs by geographic area*
- *Referrals received from and sent to the CFS Hotline*
- *Post-call survey results*
- *Monthly performance metrics and KPIs*

All shared data will be de-identified unless otherwise required by law or contract.

3. Data Collection and Management

The service provider will: Collect and report data in alignment with the deliverables and timelines outlined in the RFP

4. Data Security and Confidentiality

The service provider agrees to:

- *Comply with HIPAA and all applicable federal and state privacy laws*
- *Implement administrative, physical, and technical safeguards to protect data*
- *Ensure all staff are trained annually on confidentiality, mandated reporting, and data handling*
- *Maintain secure documentation practices and data retention for a minimum of six years or until resolution of any audits or claims*

5. Reporting Requirements

The service provider will submit the following reports to the designated state agency:

- *Monthly performance reports within ten (10) days of month-end*
- *Meeting minutes and action items within two (2) business days of each meeting*
- *Annual internal security assessment*
- *Attestation of annual enterprise penetration testing*
- *Real-time dashboard access for the designated state agency to monitor call data and referral outcomes*

6. Use of Data

Data shared under this Agreement will be used solely for:

- *Program evaluation and improvement*
- *Compliance with RFP deliverables*
- *Informing policy and service delivery decisions*
- *Supporting designated state agency oversight and reporting obligations*

7. Term and Termination

This Agreement will remain in effect for the duration of the Warmline contract and any renewals. Upon termination, the service provider will return or destroy all Protected Health Information (PHI) as directed by the designated state agency, unless retention is required by law.

8. Compliance and Enforcement

The service provider will:

- *Notify designated state agency within fifteen (15) days of any unauthorized disclosure or security incident*
- *Cooperate with designated state agency in breach investigations and corrective actions*

Data Security, Compliance, Retention and Business Continuity

BTNHL will serve as the lead for the data warehouse, developed on Microsoft platforms with integration into Power BI for analytics and visualization. The warehouse will aggregate data from:

- Findhelp CLRS (contact and referral records)
- Follow-Up Survey data
- Partner and system integration metrics

To ensure the integrity and confidentiality of sensitive data managed by external partners, our program will require the submission of third-party security compliance artifacts from all relevant vendors. These artifacts will include current certifications, completed security questionnaires aligned with NIST SP 800-53 standards, and signed data protection agreements. By collecting and reviewing these documents, we will verify that each vendor adheres to industry-recognized security practices and regulatory requirements. This process will support our broader risk management strategy and ensure that all third-party engagements maintain a high standard of cybersecurity and data stewardship.

As part of our commitment to proactive cybersecurity, we will request third-party vendors to provide penetration testing artifacts that demonstrate the resilience of their systems against potential threats. These artifacts will include comprehensive penetration test reports, documentation of testing methodologies (e.g., OWASP Top 10), and evidence of remediation for identified vulnerabilities. By incorporating these materials into our vendor evaluation process, we will ensure that external systems integrated into our environment have undergone rigorous security assessments. This approach will help mitigate risks, enhance system integrity, and align with best practices for continuous security monitoring.

BTNHL maintains robust security posture through annual accreditation reviews, internal audits, and continuous monitoring of its technology infrastructure. As part of our commitment to data protection and system integrity, the following artifacts are maintained:

- Accreditation documentation from AAS and COA, validating adherence to national standards for crisis services and data security.
- VPN access logs and endpoint compliance reports for remote staff.
- System architecture documentation for Cisco Call Manager, UCCX, and Cube SBC, supporting secure voice traffic and SIP routing.
- Staff training records and signed confidentiality agreements.

BTNHL's infrastructure is compatible with industry-standard testing protocols. We are prepared to engage third-party security firms to conduct annual penetration tests and provide:

- Attestation of annual enterprise penetration testing
- Vulnerability assessment reports
- Remediation plans
- Verification of fixes and re-testing documentation

These artifacts will be made available upon request or as part of compliance reviews.

The Warmline will operate under strict confidentiality and privacy standards aligned with HIPAA regulations. All employees are expected to handle protected health information (PHI) with the utmost care. Confidential information is shared only on a need-to-know basis and is not released publicly unless legally required or authorized.

To ensure HIPAA compliance, the following safeguards will be implemented:

- **Privacy Oversight**: Designated staff will oversee HIPAA-related concerns. Employees are instructed to report any suspected unauthorized disclosures immediately.
- **Incident Reporting**: Employees must use a specific HIPAA Unauthorized Disclosure/Privacy Reporting Form to document and escalate any privacy breaches.
- **Training and Accountability**: All staff receive training on confidentiality policies and are held accountable for maintaining privacy standards. Violations may result in disciplinary action.
- **Technology Use**: Employees are prohibited from transmitting or storing confidential information on personal devices or accounts. All digital communications are monitored to prevent unauthorized access or sharing.
- **Social Media Restrictions**: Employees are strictly forbidden from posting any patient or service recipient information online. All online activity must comply with HIPAA and Boys Town's confidentiality policies.

These measures ensure the Warmline maintains a secure and compliant environment for all individuals seeking help, protecting their personal health information at every step.

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The Warmline will comply with the Health Insurance Portability and Accountability Act (HIPAA) by maintaining all records containing protected health information (PHI) for a minimum of six years from the date of creation or the date when they were last in effect, whichever is later. This retention period aligns with HIPAA's administrative requirements under 45 CFR §164.316(b)(2)(i), which mandates that covered entities retain documentation related to privacy practices, disclosures, and security policies.

BTNHL has implemented a robust Business Continuity and Disaster Recovery (BC/DR) strategy to ensure uninterrupted crisis line operations. Key components include:

- **Redundant Infrastructure**: Cisco Cube and SIP routing provide failover capabilities for inbound calls. An automatic backup generator and UPS ensure continued operations during power outages.
- **Remote Work Enablement**: Crisis Counselors are equipped with secure VPN access and softphone technology, allowing seamless transition to remote work environments.
- **Surge Staffing Protocols**: BTNHL utilizes SMS alerts and incentive pay to mobilize additional staff during unexpected call volume increases or system outages.
- **Real-Time Monitoring**: Supervisors and Lead Counselors have access to live dashboards tracking call queues, counselor availability, and answer rates, enabling immediate adjustments.
- **Historical Response Success**: During the December 2022 Vibrant network outage, BTNHL maintained a 90% answer rate with a 17-second speed of answer, demonstrating resilience and scalability.

These measures ensure that BTNHL can continue to provide life-saving services without interruption, even during emergencies or system failures.

Program Evaluation and Surveys

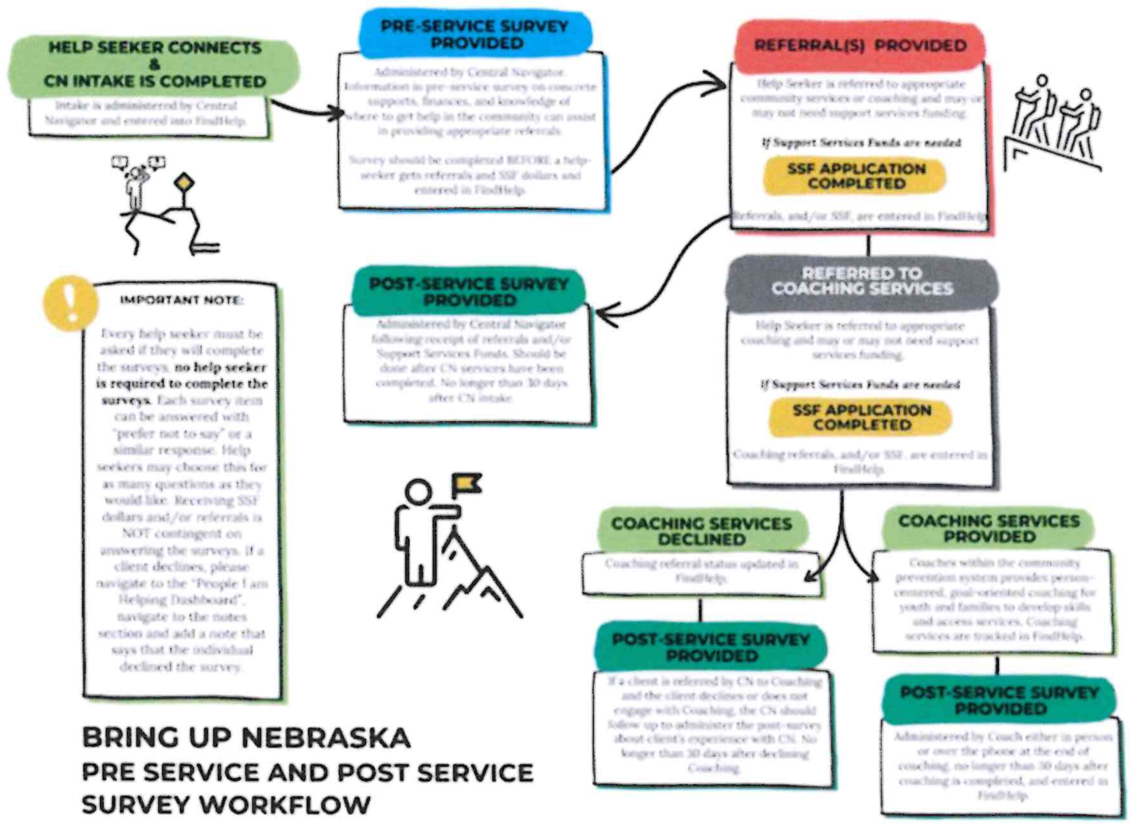
Nebraska Children's Statewide Community Collaboratives use the Bring Up Nebraska (BUN) Central Navigation intake and assessment process to understand the strengths, needs, and experiences of individuals and families engaging through Central Navigation and Coaching. The process integrates validated tools to ensure reliability and comparability of data across communities.

Pre- and post-service surveys measure participants' well-being, protective factors, resilience, and satisfaction with services. These include the Protective Factors Survey, 2nd Edition (PFS-2), the Brief Resilience Scale (BRS), and the Adult Hope Scale—each validated in English and Spanish and widely used in prevention settings.

Survey data are administered through Findhelp, connecting assessment results with referral information to show how services received relate to changes in participants' promotive and protective factors. Because Findhelp is a closed-loop referral system, staff can see when services are completed and use that information to strengthen coordination among partners.

Staff are trained in data collection, informed consent, and confidentiality, ensuring participants can complete surveys independently or collaboratively. Aggregated data are analyzed by Nebraska Children's Research and Evaluation team and external partners to identify trends, inform continuous quality improvement, and guide professional development.

This creates a feedback loop where data are used not only for accountability, but to continuously improve system performance and outcomes for families.



Reporting and Continuous Improvement

Findhelp has dozens of ready-to-use reports that offer insights into all activity related to the public's use of the Resource Database These reports, organized into SQL dashboards, provide data on user activity, searches made, service requests per ZIP code, the number of screening assessments, the scope and volume of search activities, self-referrals made to community organizations, and many other topics.

Reports are also available related to trends and the Social Care Index. The Social Care Index report overlays data from the CDC's Social Vulnerability Index and Findhelp's service location data, so DHHS can clearly see what resources are available (and not available) for the people they serve—especially in vulnerable areas.

Our reporting suites provide both high-level and detailed views of a user's needs; users include individuals navigating anonymously, individuals providing information to create an account, community-based organizations (CBOs), and customer staff.

A dashboard will be utilized to communicate the Warmline Prevention Center's activity in real time. The dashboard will show:

- Call volume (day, month)
- Caller Demographics such as county
- Reason for contact such as situational crisis
- Referral rates, connection rates, and service satisfaction
- Child Maltreatment rate
- Volume of CFS screened out calls diverted to Warmline Prevention Center
- Follow-Up Survey Program Satisfaction Rate

UWM will provide regular reports to DHHS and partners, including:

  - Call volume and trends
  - Referral outcomes and closed-loop completion rates
  - Demographics and service utilization data
  - Survey results and satisfaction measures
  - Monthly and quarterly performance reports
  - Call volume and response times
  - Referral completion rates
  - Client satisfaction and follow-up results
  - Unmet needs and gap analyses

Monthly reports will include the following:

- Number of Families connected to resources/services
- Number of families who did not respond to assistance
- Number of non-family reporters who were engaged
- Referral Types
- Unmet resource needs by area
- Data on Referrals from CFS Hotline (The above reports broken down)
- Performance KPI's such as call volume, caller demographics, reason for call, referral rates, connection rates and service satisfaction

Data review meetings will be utilized to review performance with DHHS Children and Family Services. The meetings will be utilized to identify and adjust processes, training, and outreach strategies based on performance findings and stakeholder feedback.

Annual performance evaluations will inform continuous improvement and ensure accountability to funders and stakeholders.

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Phased Implementation Approach

The Warmline Prevention Center will be developed and implemented through four structured phases, ensuring strong foundations, stakeholder engagement, and continuous quality improvement.

PHASE I – DISCOVERY

Lead Agency: United Way of the Midlands (UWM)
Partners: Nebraska Children and Families Foundation (NCFF), Boys Town National Hotline (BTNHL), and Findhelp
Project Title: Warmline Prevention Center
Phase Duration: 90 Days

Purpose and Objectives
To design and implement the foundational structure of the Warmline Prevention Center — a statewide, trauma-informed, family-centered, 24/7 intake, referral, and navigation model. The Discovery phase will focus on planning, coordination, and readiness activities to ensure all consortium members, systems, and processes are aligned before launching.

Project Objectives:

- Establish governance, communication, and accountability structures.
- Finalize system architecture, data flows, and integration with Findhelp CLRS.
- Map and engage stakeholders statewide, including 26 NCFF Collaboratives.
- Develop service model, intake workflows, referral pathways, and feedback loops.
- Create initial training, data, and quality frameworks.

A Project Kick-Off meeting will be held within two weeks of the contract signing. The goals of the Kick-Off meeting:

- Team Introductions
- Alignment on Warmline Prevention Center goals and scope
- Review initial project plan and timelines
- Establish communication and collaboration protocols
- Discuss stakeholder involvement
- Clarify expectations and next steps

During the Discovery Phase the following activities will take place:

- Assess current systems, workflows, and stakeholder readiness.
- Define technical, operational, and data requirements.
- Develop intake forms, consent processes, and Findhelp configurations.

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- Deliverables:
    a. Detailed Project Plan and Timeline
    b. Community Stakeholder Map
    c. Community Engagement Sustainment Plan
    d. Needs Assessment Report
    e. Warmline Service Model Blueprint
    f. Technology and Infrastructure Assessment Report
    g. Documentation of Collaborative Process with the CFS Hotline (Initial Plan)
    h. Draft Data Sharing Agreement with DHHS
    i. Initial Staff Training Plan
    j. Post-Call Qualitative Survey (Initial Version)
    k. Initial Data Collection and Monitoring Procedures

A. Detailed Project Plan and Timeline

Timeline	Milestone / Deliverable	Lead Partner(s)	Key Activities
Weeks 1–2	Project Kick-Off	UWM	Conduct kick-off meeting with DHHS and partners; confirm roles, goals, communication structure, and shared documentation workspace.
Weeks 2–3	Detailed Project Plan	UWM (Lead), All Partners	Finalize project plan, deliverables, dependencies, and submit it to DHHS for approval.
Weeks 2–4	Stakeholder Mapping	NCFF	Identify statewide collaboratives, community partners, and service providers; create engagement framework.

Weeks 3–5	Preliminary Needs Assessment	NCFF & UWM	Conduct, scan of existing helplines and prevention services; identify local gaps and opportunities for alignment.
Weeks 4–6	Technology & Infrastructure Review	Findhelp, NCFF, BTNHL, UWM	Review CLRS, data flow, and call center infrastructure; evaluate readiness and compliance.
Weeks 5–7	Warmline Service Model Blueprint	UWM	Design intake, triage, referral, and closed-loop follow-up process using trauma-informed, motivational interviewing practices.
Weeks 6–8	Collaboration Plan with CFS Hotline	UWM	Develop shared protocols for referral and crisis escalation.
Weeks 6–9	Initial Staff Training Plan	UWM	Outline curriculum for trauma-informed care, motivational interviewing, data security, and navigation.
Weeks 7–9	Post-Call Survey Design	UWM & NCFF	Develop survey tools for family satisfaction and follow-up.
Weeks 8–10	Data & Monitoring Procedures	NCFF & Findhelp	Define performance indicators, dashboards, and reporting framework.
Weeks 10–12	Phase I Completion	UWM	Submit all deliverables to DHHS;

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			conduct review meeting and secure approval for Phase II.

B. Project Team Organization and Governance

The Warmline Prevention Center will operate under a consortium governance model led by United Way of the Midlands (UWM). The governance structure ensures accountability, collaboration, and transparency among all partners.

Governance Structure:

- UWM – Lead Agency responsible for overall project management, call center operations, data coordination, and DHHS reporting.
- NCFF – Oversees statewide prevention network alignment, and dashboards for performance measurement.
- BTNHL – Provides operational expertise in family crisis response and integration with existing helplines (988 and Family Helpline), data warehouse development, data security and compliance and reporting.
- Findhelp – Provides a secure, compliant technology platform for intake, referral, and data routing.
- DHHS – Serves as contracting and oversight entity, receiving progress updates and data reports.

C. Communication Plan and Collaboration Strategy

Effective communication and collaboration are critical for Phase I success. UWM will facilitate structured communication channels to ensure timely coordination, information sharing, and decision-making among partners and stakeholders.

Key Communication Components:

- Weekly partner check-in meetings led by UWM to review progress and issues.
- Monthly coordination meetings with DHHS to review deliverables and upcoming milestones.
- Centralized project documentation via a shared project management platform.
- Immediate issue escalation protocol to address risks or delays.
- Quarterly statewide partner updates to ensure transparency and alignment.

D. Risk Management

The proposed methodology for managing risks in the Warmline project will utilize a structured framework to identify, assess, and prioritize potential threats to successful implementation. Risk identification draws from historical performance data, staff input, environmental scanning, and technology evaluations. These risks are evaluated using a likelihood-impact matrix to determine their potential impact on project outcomes, with high-priority concerns including excessive call volume, staff burnout, and technology disruptions.

Ongoing risk monitoring is supported through real-time dashboards, quality assurance reviews, staff wellness checks, and continuous updates to referral databases. Mitigation strategies include flexible

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staffing models, trauma-informed training, redundant technology systems, and collaborative engagement with partners. Additionally, data-driven forecasting tools and emergency messaging systems enable proactive adjustments, ensuring the project remains responsive and resilient.

UWM and partners will proactively identify and mitigate risks that could impact the timely and effective delivery of Phase I. Risks will be monitored through a shared risk register and reviewed weekly.

Anticipated Risks and Mitigation Strategies:

- Technology Integration Delays – Mitigation: Early coordination between Findhelp and UWM IT to ensure data flow readiness.
- Staffing or Training Gaps – Mitigation: Cross-training across partners and maintaining on-call backup staff.
- Data Security or Privacy Issues – Mitigation: Adherence to HIPAA-compliant protocols and secure data transmission.
- Stakeholder Misalignment – Mitigation: Transparent communication and frequent check-ins with NCFF collaboratives.
- Timeline Slippage – Mitigation: Weekly review of milestones and realignment where necessary.

E. Quality Management

A comprehensive quality assurance framework will be implemented to ensure the integrity and effectiveness of all project phases and deliverables. This includes structured oversight of the community resource database, training materials, outreach strategies, and operational procedures. Regular audits and performance reviews will be conducted to ensure compliance with standards and protocols. The community resource database will be continuously updated and verified to maintain accuracy and relevance, ensuring that referrals are appropriate and localized. Training materials will be developed and monitored to ensure content is trauma-informed, current, and aligned with best practices. Outreach strategies will be evaluated for effectiveness and cultural responsiveness, with adjustments made based on feedback and engagement metrics. Operational procedures will be reviewed through real-time data monitoring systems to track call volumes, response times, and counselor availability. These mechanisms will be supported by continuous staff feedback, collaborative engagement with national partners, and data-driven decision-making to promote consistent service quality and program improvement across the project lifecycle.

Quality assurance during Phase I will focus on service design, training consistency, and data accuracy. UWM will lead a quality management framework emphasizing measurable standards, feedback, and continuous improvement.

Quality Control Elements:

- Standardized Warmline scripts using motivational interviewing principles.
- Trauma-informed training curriculum reviewed by Boys Town clinical team.
- Data validation checks in Findhelp CLRS prior to submission.
- Regular review of intake-to-referral ratios and closed-loop outcomes.

- Bi-weekly quality review meetings across consortium partners.

F. Change Management

The Warmline project will incorporate a proactive management strategy to ensure smooth implementation and continuous improvement across all phases. This includes structured onboarding and training for staff, integration of new technologies, and adaptation of operational procedures to meet evolving needs. Staff are supported through trauma-informed training, wellness initiatives, and supervision structures that promote resilience and adaptability. The project also leverages real-time data systems and forecasting tools to anticipate shifts in call volume and staffing needs, enabling responsive adjustments. Continuous feedback loops—through staff debriefs, performance reviews, and community engagement—inform updates to training materials, outreach strategies, and referral resources. Participation in collaborative networks further supports the exchange of promising practices and innovation. These mechanisms ensure that changes are managed thoughtfully, with minimal disruption to service quality and a strong focus on staff and caller well-being.

The project will employ a structured change management process to manage modifications to scope, systems, or deliverables. UWM will serve as the central authority for evaluating, approving, and implementing changes in collaboration with consortium partners and DHHS.

Change Control Process:

- All change requests documented via standardized Change Request Form.
- Evaluation by UWM Project Manager and relevant partner leads.
- Approval or denial by the Governance Committee within 5 business days.
- Communication of approved changes to all stakeholders via project updates.

G. Reporting and Performance Monitoring

To ensure the quality and effectiveness of all phases and deliverables of the Warmline project, a multi-layered quality assurance framework will be implemented. This framework will encompass oversight of the community resource database, training materials, outreach strategies, and operational procedures. Each component will be subject to continuous monitoring, evaluation, and refinement to ensure alignment with trauma-informed care principles, cultural responsiveness, and service excellence.

The community resource database will be maintained through ongoing verification and expansion efforts, ensuring that referrals are accurate, localized, and relevant to the needs of callers. A closed-loop referral system will be used to track service connections and outcomes, supporting accountability and continuous improvement. Training materials will be developed and updated based on pilot feedback and best practices in crisis intervention, equipping staff with the skills and knowledge necessary to provide compassionate and effective support. These materials will be reviewed regularly to ensure consistency with evolving standards and community needs.

Outreach strategies will be informed by community engagement sessions and feedback reports, ensuring that messaging is accessible, inclusive, and trusted by diverse populations. Operational procedures will be monitored using real-time dashboards and monthly performance reports, tracking key indicators such as call volume, referral rates, and caller satisfaction. Quality assurance will be reinforced through regular audits, staff feedback loops, and compliance with HIPAA and data retention

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standards. Together, these mechanisms will ensure that the Warmline project remains responsive, transparent, and impactful throughout its lifecycle.

Reporting and performance monitoring will ensure accountability, transparency, and data-driven decision-making. NCFF will lead the design of a data warehouse and dashboard to track progress and outcomes during Phase I.

Reporting Framework:

- Weekly internal progress reports to consortium partners.
- Monthly performance summaries to DHHS.
- Real-time monitoring dashboards managed by NCFF.
- Quarterly outcomes and trend analyses are shared with all stakeholders.

End-of-phase evaluation report documenting successes, lessons learned, and readiness for Phase II implementation.

Phase II – Development and Community Engagement

Lead Agency: United Way of the Midlands (UWM)
Partners: Nebraska Children and Families Foundation (NCFF), Boys Town National Hotline (BTNHL), and Findhelp
Project Title: Warmline Prevention Center
Phase Duration: 90 Days (starts at completion of the Discovery Phase)

Purpose and Objectives
The Development and Community Engagement phase focuses on building and testing the operational and technical foundation of the Warmline Prevention Center. Over 90 days, the consortium will establish system readiness, strengthen collaborative frameworks, and engage communities statewide to prepare for launch. Activities include:

- Develop call scripts, referral pathways, and multilingual support protocols.
- Create outreach materials and engagement tools for referrers.
- Conduct training for all Warmline staff and Consortium partners.
- Deliverables:
    a. Comprehensive Community Resource Database
    b. Warmline Staff Training Curriculum and Materials
    c. Community Engagement Feedback Reports
    d. Warmline System Configuration Documentation
    e. Data Collection and Monitoring Procedures Document (Finalized)
    f. Documentation of Collaborative Process with the CFS Hotline (Finalized)
    g. Finalized Data Sharing Agreement with DHHS

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h. Standardized Phone and Web Application Intake Process
    i. Closed Loop Referral System (Developed and Tested)
    ii. Third Party Security Compliance Artifacts
    iii. Third Party Penetration Testing Artifacts

A. Detailed Project Plan and Timeline

Milestone / Timeline	Key Activities	Responsible Party
Weeks 1–2	Confirm configuration, finalize intake process, begin resource data population	UWM, Findhelp
Weeks 3–5	Test system integration, develop training materials, pilot closed-loop referral process	Findhelp, Boys Town
Weeks 6–8	Conduct community engagement sessions, finalize referral processes with partners	NCFF, UWM
Weeks 9–10	Finalize documentation and training materials, submit deliverables to DHHS	UWM, NCFF

B. Project Team Organization and Governance

The Warmline Consortium Leadership Team, led by United Way of the Midlands, maintains oversight. NCFF manages data integration and leads community collaboratives participation; BTNHL leads data integration, data storage, security and compliance, and Findhelp oversees technology configuration. Weekly consortium meetings ensure progress and accountability.

C. Communication Plan and Collaboration Strategy

Communication includes weekly leadership meetings, biweekly DHHS updates, monthly stakeholder calls, and a shared Teams workspace for collaboration and documentation.

D. Risk Management

The proposed methodology for managing risks in the Warmline project will utilize a structured framework to identify, assess, and prioritize potential threats to successful implementation. Risk identification draws from historical performance data, staff input, environmental scanning, and technology evaluations. These risks are evaluated using a likelihood-impact matrix to determine their potential impact on project outcomes, with high-priority concerns including excessive call volume, staff burnout, and technology disruptions.

Ongoing risk monitoring is supported through real-time dashboards, quality assurance reviews, staff wellness checks, and continuous updates to referral databases. Mitigation strategies include flexible staffing models, trauma-informed training, redundant technology systems, and collaborative engagement with partners. Additionally, data-driven forecasting tools and emergency messaging systems enable proactive adjustments, ensuring the project remains responsive and resilient.

Primary risks include integration delays and data-sharing barriers. Mitigation includes early API testing, clear governance, and comprehensive data-sharing agreements compliant with HIPAA and DHHS standards.

E. Quality Management

A comprehensive quality assurance framework will be implemented to ensure the integrity and effectiveness of all project phases and deliverables. This includes structured oversight of the community resource database, training materials, outreach strategies, and operational procedures. Regular audits and performance reviews will be conducted to ensure compliance with standards and protocols. The community resource database will be continuously updated and verified to maintain accuracy and relevance, ensuring that referrals are appropriate and localized. Training materials will be developed and monitored to ensure content is trauma-informed, current, and aligned with best practices. Outreach strategies will be evaluated for effectiveness and cultural responsiveness, with adjustments made based on feedback and engagement metrics. Operational procedures will be reviewed through real-time data monitoring systems to track call volumes, response times, and counselor availability. These mechanisms will be supported by continuous staff feedback, collaborative engagement with national partners, and data-driven decision-making to promote consistent service quality and program improvement across the project lifecycle.

Quality assurance includes functional testing, peer review of training, user acceptance testing, and DHHS validation of deliverables.

F. Change Management

The Warmline project will incorporate a proactive management strategy to ensure smooth implementation and continuous improvement across all phases. This includes structured onboarding and training for staff, integration of new technologies, and adaptation of operational procedures to meet evolving needs. Staff are supported through trauma-informed training, wellness initiatives, and supervision structures that promote resilience and adaptability. The project also leverages real-time data systems and forecasting tools to anticipate shifts in call volume and staffing needs, enabling responsive adjustments. Continuous feedback loops—through staff debriefs, performance reviews, and community engagement—inform updates to training materials, outreach strategies, and referral resources. Participation in collaborative networks further supports the exchange of promising practices and innovation. These mechanisms ensure that changes are managed thoughtfully, with minimal disruption to service quality and a strong focus on staff and caller well-being.

Changes are logged, reviewed by leadership, and approved by DHHS. All updates are tracked and communicated transparently.

G. Reporting and Performance Monitoring

To ensure the quality and effectiveness of all phases and deliverables of the Warmline project, a multi-layered quality assurance framework will be implemented. This framework will encompass oversight of the community resource database, training materials, outreach strategies, and operational procedures.

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Each component will be subject to continuous monitoring, evaluation, and refinement to ensure alignment with trauma-informed care principles, cultural responsiveness, and service excellence.

The community resource database will be maintained through ongoing verification and expansion efforts, ensuring that referrals are accurate, localized, and relevant to the needs of callers. A closed-loop referral system will be used to track service connections and outcomes, supporting accountability and continuous improvement. Training materials will be developed and updated based on pilot feedback and best practices in crisis intervention, equipping staff with the skills and knowledge necessary to provide compassionate and effective support. These materials will be reviewed regularly to ensure consistency with evolving standards and community needs.

Outreach strategies will be informed by community engagement sessions and feedback reports, ensuring that messaging is accessible, inclusive, and trusted by diverse populations. Operational procedures will be monitored using real-time dashboards and monthly performance reports, tracking key indicators such as call volume, referral rates, and caller satisfaction. Quality assurance will be reinforced through regular audits, staff feedback loops, and compliance with HIPAA and data retention standards. Together, these mechanisms will ensure that the Warmline project remains responsive, transparent, and impactful throughout its lifecycle.

Performance tracked through deliverable completion, integration success, and stakeholder feedback. Weekly progress reports and a final Phase II report submitted to DHHS.

Phase III – Pilot Program (Soft Launch)

Lead Agency: United Way of the Midlands (UWM)
Partners: Nebraska Children and Families Foundation (NCFF), Boys Town National Hotline (BTNHL), and Findhelp
Project Title: Warmline Prevention Center
Phase Duration: 90 Days (starts at completion of Development and Community Engagement Phase)

Purpose and Objectives
The 90-day Pilot Program will test the Warmline model under real-world conditions. The goal is to validate intake, triage, and referral workflows, monitor performance, and confirm readiness for statewide launch. Activities include:

- Launch limited-scale Warmline operations to validate systems and processes.
- Monitor performance metrics and identify improvement opportunities.
- Test the closed-loop referral system and follow-up process.
- Deliverables:
    a. Pilot Program Launch Plan
    b. Pilot Monitoring Reports and Metrics (Regular Intervals)
    c. Pilot Analysis and Recommendations Report
    d. Finalized Warmline Service Model and Operating Procedures (Based on Pilot)
    e. Updated Training Materials (if changes are required post-pilot)

f. Updated Community Resource Database (Based on Pilot Needs)
g. Refined Closed Loop Referral System (Based on Pilot Feedback)
h. Business Continuity and Disaster Recovery Plan artifacts including the RTO and RPO Targets and -Availability and Uptime SLA's
i. Full Disaster Recovery Test Artifacts

A. Detailed Project Plan and Timeline

Milestone / Timeline	Key Activities	Responsible Party
Weeks 1–2	Select pilot sites, deploy channels, confirm data compliance	UWM, Findhelp, BTNHL
Weeks 3–4	Launch limited operations, monitor intake/referral workflows	UWM, Boys Town
Weeks 5–7	Collect performance data, analyze referral success rates	NCFF, Findhelp, BTNHL
Weeks 8–10	Conduct focus groups, refine operations and training	UWM, NCFF
Weeks 11–12	Submit Pilot Evaluation Report and readiness plan	UWM, NCFF, Findhelp, BTNHL

B. Project Team Organization and Governance

Consortium leadership continues under UWM. BTNHL handles data integration, NCFF assists with analysis, and Findhelp provides technical support.

C. Communication Plan and Collaboration Strategy

Includes daily huddles, weekly reviews, and stakeholder roundtables with DHHS engagement. Metrics shared via CLRS dashboards.

D. Risk Management

The proposed methodology for managing risks in the Warmline project will utilize a structured framework to identify, assess, and prioritize potential threats to successful implementation. Risk identification draws from historical performance data, staff input, environmental scanning, and technology evaluations. These risks are evaluated using a likelihood-impact matrix to determine their potential impact on project outcomes, with high-priority concerns including excessive call volume, staff burnout, and technology disruptions.

Ongoing risk monitoring is supported through real-time dashboards, quality assurance reviews, staff wellness checks, and continuous updates to referral databases. Mitigation strategies include flexible staffing models, trauma-informed training, redundant technology systems, and collaborative engagement with partners. Additionally, data-driven forecasting tools and emergency messaging systems enable proactive adjustments, ensuring the project remains responsive and resilient.

Risks include operational disruptions and data errors. Mitigation includes system monitoring, backup channels, and HIPAA audits.

E. Quality Management

A comprehensive quality assurance framework will be implemented to ensure the integrity and effectiveness of all project phases and deliverables. This includes structured oversight of the community resource database, training materials, outreach strategies, and operational procedures. Regular audits and performance reviews will be conducted to ensure compliance with standards and protocols. The community resource database will be continuously updated and verified to maintain accuracy and relevance, ensuring that referrals are appropriate and localized. Training materials will be developed and monitored to ensure content is trauma-informed, current, and aligned with best practices. Outreach strategies will be evaluated for effectiveness and cultural responsiveness, with adjustments made based on feedback and engagement metrics. Operational procedures will be reviewed through real-time data monitoring systems to track call volumes, response times, and counselor availability. These mechanisms will be supported by continuous staff feedback, collaborative engagement with national partners, and data-driven decision-making to promote consistent service quality and program improvement across the project lifecycle.

Quality reviewed daily via call samples, data audits, satisfaction surveys, and QA dashboards.

F. Change Management

The Warmline project will incorporate a proactive management strategy to ensure smooth implementation and continuous improvement across all phases. This includes structured onboarding and training for staff, integration of new technologies, and adaptation of operational procedures to meet evolving needs. Staff are supported through trauma-informed training, wellness initiatives, and supervision structures that promote resilience and adaptability. The project also leverages real-time data systems and forecasting tools to anticipate shifts in call volume and staffing needs, enabling responsive adjustments. Continuous feedback loops—through staff debriefs, performance reviews, and community engagement—inform updates to training materials, outreach strategies, and referral resources. Participation in collaborative networks further supports the exchange of promising practices and innovation. These mechanisms ensure that changes are managed thoughtfully, with minimal disruption to service quality and a strong focus on staff and caller well-being.

Pilot adjustments logged, assessed for impact, approved by consortium and DHHS, and documented in SOPs.

G. Reporting and Performance Monitoring

To ensure the quality and effectiveness of all phases and deliverables of the Warmline project, a multi-layered quality assurance framework will be implemented. This framework will encompass oversight of the community resource database, training materials, outreach strategies, and operational procedures. Each component will be subject to continuous monitoring, evaluation, and refinement to ensure alignment with trauma-informed care principles, cultural responsiveness, and service excellence.

The community resource database will be maintained through ongoing verification and expansion efforts, ensuring that referrals are accurate, localized, and relevant to the needs of callers. A closed-loop referral system will be used to track service connections and outcomes, supporting accountability and continuous improvement. Training materials will be developed and updated based on pilot feedback and best practices in crisis intervention, equipping staff with the skills and knowledge necessary to provide compassionate and effective support. These materials will be reviewed regularly to ensure consistency with evolving standards and community needs.

Outreach strategies will be informed by community engagement sessions and feedback reports, ensuring that messaging is accessible, inclusive, and trusted by diverse populations. Operational procedures will be monitored using real-time dashboards and monthly performance reports, tracking key indicators such as call volume, referral rates, and caller satisfaction. Quality assurance will be reinforced through regular audits, staff feedback loops, and compliance with HIPAA and data retention standards. Together, these mechanisms will ensure that the Warmline project remains responsive, transparent, and impactful throughout its lifecycle.

KPIs include call volume, referral completion, client satisfaction, and system uptime. Weekly reports and final evaluation submitted to DHHS.

Phase IV – Full Scale Launch

Lead Agency: United Way of the Midlands (UWM)
Partners: Nebraska Children and Families Foundation (NCFF), Boys Town National Hotline (BTNHL), and Findhelp
Project Title: Warmline Prevention Center
Phase Duration: 12 months (starts after completion of Pilot Phase)

Purpose and Objectives
The Full-Scale Launch transitions Warmline operations statewide, focusing on performance stability, continuous improvement, and sustainability. The goal is to ensure 24/7 service access, maintain high quality standards, and establish long-term operational resilience.

- Expand Warmline services statewide with full 24/7 accessibility.
- Continue performance monitoring, training, and community engagement.
- Implement long-term reporting, evaluation, and system sustainability measures.
- Deliverables:
    a. Statewide Warmline Launch Plan
    b. Ongoing Performance Reports (Monthly or as mutually agreed)
    c. Community Resource Database Update Logs (Monthly or as mutually agreed)
    d. Community Engagement Sustainability Plan
    e. Final Documentation of Warmline Operations and Procedures

A. Detailed Project Plan and Timeline

Milestone / Timeline	Key Activities	Responsible Party
Weeks 1–2	Conduct readiness assessment, finalize SOPs, ensure staff certification	UWM, BTNHL
Weeks 3–4	Statewide launch of Warmline operations with full monitoring	UWM, Findhelp, BTNHL, NCFF
Weeks 5–8	Monitor system and service performance, deliver real-time coaching	UWM, NCFF, BTNHL
Weeks 9–10	Analyze statewide data and client outcomes for optimization	NCFF, UWM, BTNHL
Weeks 11–12	Develop sustainability plan and CQI framework	UWM, NCFF, BTNHL Findhelp

B. Project Team Organization and Governance

Governance led by UWM, with NCFF, Boys Town, and Findhelp in key roles. Adds a Statewide Operations Committee and CQI Team for oversight.

C. Communication Plan and Collaboration Strategy

Weekly operations call, monthly DHHS reports, and quarterly stakeholder forums. Shared Teams workspace for real-time updates.

D. Risk Management

The proposed methodology for managing risks in the Warmline project will utilize a structured framework to identify, assess, and prioritize potential threats to successful implementation. Risk identification draws from historical performance data, staff input, environmental scanning, and technology evaluations. These risks are evaluated using a likelihood-impact matrix to determine their potential impact on project outcomes, with high-priority concerns including excessive call volume, staff burnout, and technology disruptions.

Ongoing risk monitoring is supported through real-time dashboards, quality assurance reviews, staff wellness checks, and continuous updates to referral databases. Mitigation strategies include flexible staffing models, trauma-informed training, redundant technology systems, and collaborative engagement with partners. Additionally, data-driven forecasting tools and emergency messaging systems enable proactive adjustments, ensuring the project remains responsive and resilient.

Risks include service demand surges and tech failures. Mitigation includes surge staffing, redundancy, and 24/7 technical support.

E. Quality Management

A comprehensive quality assurance framework will be implemented to ensure the integrity and effectiveness of all project phases and deliverables. This includes structured oversight of the community resource database, training materials, outreach strategies, and operational procedures. Regular audits and performance reviews will be conducted to ensure compliance with standards and protocols. The community resource database will be continuously updated and verified to maintain accuracy and relevance, ensuring that referrals are appropriate and localized. Training materials will be developed and monitored to ensure content is trauma-informed, current, and aligned with best practices. Outreach strategies will be evaluated for effectiveness and cultural responsiveness, with adjustments made based on feedback and engagement metrics. Operational procedures will be reviewed through real-time data monitoring systems to track call volumes, response times, and counselor availability. These mechanisms will be supported by continuous staff feedback, collaborative engagement with national partners, and data-driven decision-making to promote consistent service quality and program improvement across the project lifecycle.

Includes continuous QA reviews, satisfaction surveys, data audits, and quarterly DHHS reports.

F. Change Management

The Warmline project will incorporate a proactive management strategy to ensure smooth implementation and continuous improvement across all phases. This includes structured onboarding and training for staff, integration of new technologies, and adaptation of operational procedures to meet evolving needs. Staff are supported through trauma-informed training, wellness initiatives, and supervision structures that promote resilience and adaptability. The project also leverages real-time data systems and forecasting tools to anticipate shifts in call volume and staffing needs, enabling responsive adjustments. Continuous feedback loops—through staff debriefs, performance reviews, and community engagement—inform updates to training materials, outreach strategies, and referral resources. Participation in collaborative networks further supports the exchange of promising practices and innovation. These mechanisms ensure that changes are managed thoughtfully, with minimal disruption to service quality and a strong focus on staff and caller well-being.

Implements of continuous improvement, monthly reviews, and annual training and process updates.

G. Reporting and Performance Monitoring

To ensure the quality and effectiveness of all phases and deliverables of the Warmline project, a multi-layered quality assurance framework will be implemented. This framework will encompass oversight of the community resource database, training materials, outreach strategies, and operational procedures. Each component will be subject to continuous monitoring, evaluation, and refinement to ensure alignment with trauma-informed care principles, cultural responsiveness, and service excellence.

The community resource database will be maintained through ongoing verification and expansion efforts, ensuring that referrals are accurate, localized, and relevant to the needs of callers. A closed-loop referral system will be used to track service connections and outcomes, supporting accountability and continuous improvement. Training materials will be developed and updated based on pilot feedback and best practices in crisis intervention, equipping staff with the skills and knowledge necessary to provide compassionate and effective support. These materials will be reviewed regularly to ensure consistency with evolving standards and community needs.

Outreach strategies will be informed by community engagement sessions and feedback reports, ensuring that messaging is accessible, inclusive, and trusted by diverse populations. Operational procedures will be monitored using real-time dashboards and monthly performance reports, tracking key indicators such as call volume, referral rates, and caller satisfaction. Quality assurance will be reinforced through regular audits, staff feedback loops, and compliance with HIPAA and data retention standards. Together, these mechanisms will ensure that the Warmline project remains responsive, transparent, and impactful throughout its lifecycle.

Performance tracked via call volumes, referral success, satisfaction scores, staff training, and system uptime, reported monthly to DHHS.

Operational Requirements

During Phases III and IV, the following operational requirements will be fully implemented:

Requirement	Description
24/7 Operations	Nebraska-based, phone and online access.
Community Resource Database	FindHelp's verified, updated statewide database.
Closed-Loop Referral System	Follow up within 10 days; post-contact surveys at 60–90 days.
Multilingual Support	English/Spanish staff; Language Line for other languages.
Outreach Materials	Professionally designed materials for community partners.
Staff Training	Confidentiality, trauma-informed care, referral protocols.
Real-Time Dashboard	Quality and performance data available to leadership.
KPI Tracking	Call data, referrals, unmet needs, and satisfaction metrics.
Monthly Reporting	Standardized reports on performance and outcomes.
Documentation	Meeting minutes, action items, and system updates.
Security & Compliance	HIPAA compliance, annual penetration testing, and data retention for 6 years.
Continuity & Recovery	Business continuity and disaster recovery plan maintained and tested annually.

Section 3: Implementation

3. IMPLEMENTATION

A. Overall Implementation Philosophy and Guiding Principles

The Warmline Prevention Center implementation reflects a unified, trauma-informed, and data-driven statewide approach to prevention and family support.

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This initiative is guided by the following principles:

- "No Wrong Door" access model ensuring all entry points lead to consistent, compassionate support.
- Trauma-informed, strength-based service philosophy prioritizing hope, dignity, and empowerment.
- Collaborative governance among consortium partners to ensure alignment, accountability, and seamless coordination.
- Data-driven decision-making through Findhelp CLRS real-time dashboards, and continuous performance monitoring.
- Commitment to compliance with HIPAA, state data security standards, and ethical care practices.
- Continuous improvement through stakeholder feedback and quality assurance reviews.

B. Phase-Specific Implementation Steps and Activities

Phase I – Discovery (90 Days After Project Kick-Off)

Milestone/Deliverable	Responsible Party	Key Activities
Detailed Project Plan and Timeline	UWM Project Management	Finalize governance, deliverables, and project tracking.
Community Stakeholder Map	Consortium Partners	Identify all referral partners and collaboratives.
Needs Assessment Report	UWM Data Team	Analyze gaps and resource distribution.
Warmline Service Model Blueprint	Consortium Leadership	Outline service workflows and triage procedures.
Technology and Infrastructure Assessment	UWM IT	Assess readiness of Findhelp CLRS and phone systems.
Draft Data Sharing Agreement with DHHS	UWM Legal	Develop draft for review.
Initial Staff Training Plan	Training Manager	Develop onboarding and curriculum framework.
Post-Call Qualitative Survey (Initial)	QA Team	Design satisfaction feedback instrument.
Initial Data Monitoring Procedures	Evaluation Team	Establish performance indicators.

Phase II – Development and Community Engagement (90 Days)

Milestone/Deliverable	Responsible Party	Key Activities
Comprehensive Resource Database	Findhelp Database Curator	Compile and validate entries for statewide network.
Staff Training Curriculum and Materials	UWM Training Manager	Finalize modules and certification.
Community Engagement Feedback Reports	Community Partners	Document findings from engagement sessions.
System Configuration Documentation	IT Team	Finalize CLRS and reporting configuration.
Finalized Data Sharing Agreement	UWM Legal	Execute agreement with DHHS.
Closed Loop Referral System (Developed & Tested)	IT / Evaluation	Integrate follow-up and feedback mechanisms.
Security Compliance Artifacts	IT Compliance	Document penetration and system tests.

Phase III – Pilot Program (Soft Launch, 90 Days)

Milestone/Deliverable	Responsible Party	Key Activities
Pilot Launch Plan	UWM Project Lead	Define scope and communication strategy.
Pilot Monitoring Reports	QA Team	Track outcomes, referrals, and satisfaction.
Pilot Analysis and Recommendations	Evaluation	Summarize findings and improvement plans.
Finalized Warmline Service Model	Operations	Implement post-pilot adjustments.
Business Continuity and Disaster Recovery Plan	IT Team	Document resiliency standards and tests.

Phase IV – Full-Scale Launch (12 Months from Kick-Off)

Milestone/Deliverable	Responsible Party	Key Activities
Statewide Launch Plan	UWM Project Lead	Initiate a full rollout and awareness campaign.
Ongoing Performance Reports	Evaluation / QA	Publish monthly performance dashboards.
Database Update Logs	Database Curator	Ensure real-time accuracy of services.
Sustainability Plan	Consortium Partners	Formalize community engagement and funding model.
Final Documentation of Operations	UWM	Complete the final service delivery manual.

C. Key Implementation Considerations

- Alignment with Nebraska FFPSA goals and community collaboratives.
- Seamless integration with DHHS CFS Hotline and referral systems.
- Strong focus on equity, accessibility, and multilingual services.
- Scalability for future statewide expansion and 24/7 operations.
- Continuous monitoring to ensure service quality, compliance, and sustainability.

D. Resource Allocation and Management

- Human Resources: Consortium-wide staffing with 24/7 coverage including Warmline Specialists, Navigators, QA, and Training roles.
- Technology: Findhelp CLRS, VoIP phone systems, secure cloud environment, and redundancy built for uptime and continuity.
- Financial Resources: Managed through phase-based budget allocation and consortium cost-sharing agreements.
- Infrastructure: HIPAA compliant systems with secure data retention (minimum six years).

E. Training and Onboarding

Comprehensive onboarding is led by UWM's Training and QA Manager. Training modules include trauma-informed care, motivational interviewing, referral protocols, data confidentiality, and CLRS use. Refresher sessions and call monitoring ensure consistency, compassion, and compliance across all consortium partners.

F. Community Outreach and Engagement (During Implementation)

Community engagement will include collaboration with 26 Community Collaboratives, 15 United Ways, and 13 ADRCs.

Key outreach activities include:

- Local awareness campaigns through community events and digital media.
- Development of multilingual marketing and referral materials.
- Partner webinars, onboarding sessions, and coalition updates.
- Ongoing progress reports to stakeholders and DHHS.

G. Integration of Operational Requirements

The Warmline Prevention Center implementation ensures the following operational requirements are met from launch through sustainability:

- 24/7 Warmline Operations (phone and online, Nebraska-based)
- Closed-Loop Referral System with Follow-Up
- Multilingual Support (phone, text, print)
- Real-Time Quality Dashboard & KPI Tracking
- Monthly Reports on call data, referrals, and unmet needs
- Secure Documentation & De-identified Reporting
- Annual Security Assessment & Penetration Testing
- HIPAA Compliance and Six-Year Data Retention
- Business Continuity & Disaster Recovery Plans

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4. DELIVERABLES AND DUE DATES

Warmline Prevention Center - Deliverables by Phase

Phase I – Discovery (Complete within 90 days after Project Kick-Off)

Deliverable	**Description**	**Due Date (after Project Kick-Off)**
Detailed Project Plan and Timeline	Comprehensive project plan including phase milestones, timeline, responsibilities, and implementation approach.	Day 30
Community Stakeholder Map	Map identifying key partners, tribal nations, collaboratives, agencies, and other stakeholders across the state.	Day 30
Community Engagement Sustainment Plan	Plan for ongoing engagement, responsibilities, outreach channels, and sustainability of stakeholder participation.	Day 45
Needs Assessment Report	Assessment of current service landscape, gaps, capacity, and community needs to inform Warmline design.	Day 45
Warmline Service Model Blueprint	Detailed service model including intake, triage, referral pathways, warm handoffs, and closed-loop follow-up processes.	Day 60
Technology and Infrastructure Assessment Report	Documentation of technology stack, Findhelp CLRS configuration needs, phone systems, security, integrations, and infrastructure readiness.	Day 60
Documentation of Collaborative Process	Initial plan outlining coordination, referral thresholds, and	Day 45

with the CFS Hotline (Initial Plan)	confidentiality protections with the CFS Hotline.	
Draft Data Sharing Agreement with DHHS	Draft Data Use / Sharing Agreement specifying data elements, HIPAA compliance, retention, and access controls.	Day 75
Initial Staff Training Plan	Outline of the training curriculum, schedule, roles, assessments, and onboarding process for Warmline staff.	Day 75
Post-Call Qualitative Survey (Initial Version)	Initial post-call survey instrument to capture caller satisfaction, connection to services, and experience metrics.	Day 75
Initial Data Collection and Monitoring Procedures	Definition of performance indicators, collection methods, dashboard requirements, and reporting cadence.	Day 80

Phase II – Development and Community Engagement (Complete within 90 days after Phase I)

Deliverable	Description	Due Date (after Phase I Completion)
Comprehensive Community Resource Database	A populated, validated, and searchable database of statewide services, capacity info, and contact details in Findhelp.	Day 30 of Phase II
Warmline Staff Training Curriculum and Materials	Finalized training curriculum, job aids, assessments, and certification materials for Warmline staff.	Day 45 of Phase II
Community Engagement Feedback Reports	Reports documenting community sessions, stakeholder feedback, and incorporation of findings into service design.	Day 60 of Phase II

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Warmline System Configuration Documentation	Technical configuration documentation for Findhelp CLRS, telephony, integrations, and system settings.	Day 30 of Phase II
Data Collection and Monitoring Procedures Document (Finalized)	Final procedures for data capture, de-identification, dashboarding, and reporting.	Day 45 of Phase II
Documentation of Collaborative Process with the CFS Hotline (Finalized)	Finalized referral protocols, data sharing, and confidentiality measures with CFS Hotline.	Day 60 of Phase II
Finalized Data Sharing Agreement with DHHS	Executed Data Sharing Agreement (DSA) detailing permitted data flows, security, and retention.	Day 75 of Phase II
Standardized Phone and Web Application Intake Process	Standardized scripts, intake forms, consent language, and workflow for phone, chat, text, and web.	Day 45 of Phase II
Closed Loop Referral System (Developed and Tested)	Operational closed-loop referral mechanism that tracks referrals to confirmation and documents outcomes in Findhelp.	Day 75 of Phase II
Third Party Security Compliance Artifacts	Documentation of third-party security compliance reviews and attestations.	Day 80 of Phase II
Third Party Penetration Testing Artifacts	Penetration testing report(s) and remediation plans for third-party systems.	Day 90 of Phase II

Phase III – Pilot Program (Soft Launch, 90 days)

Deliverable	**Description**	**Due Date (after Phase II Completion)**

Pilot Program Launch Plan	Detailed plan for pilot scope, sites, staffing, timeline, and evaluation approach.	Day 1 of Phase III
Pilot Monitoring Reports and Metrics (Regular Intervals)	Ongoing monitoring reports capturing KPIs, service volumes, referrals, and issues throughout the pilot.	Weekly/Biweekly during Phase III
Pilot Analysis and Recommendations Report	Comprehensive analysis of pilot findings with recommended adjustments for full launch.	Day 90 of Phase III
Finalized Warmline Service Model and Operating Procedures (Based on Pilot)	Updated service model, SOPs, and workflows reflecting pilot improvements.	Day 90 of Phase III
Updated Training Materials (if changes are required post-pilot)	Revised training modules and materials incorporating pilot feedback.	Day 90 of Phase III
Updated Community Resource Database (Based on Pilot Needs)	Database updates and corrections informed by pilot usage and partner input.	Ongoing during Phase III; report by Day 90
Refined Closed Loop Referral System (Based on Pilot Feedback)	Improvements to referral routing, follow-up processes, and outcome tracking based on pilot results.	Day 90 of Phase III
Business Continuity and Disaster Recovery Plan artifacts including the RTO and RPO Targets and -Availability and Uptime SLA's	Completed BCDR plan artifacts, including RTO/RPO targets and uptime SLAs documentation.	Day 90 of Phase III

Full Disaster Recovery Test Artifacts	Results and remediation from full disaster recovery test.	By end of Phase III

Phase IV – Full-Scale Launch (Complete within 12 months from Project Kick-Off)

Deliverable (as stated in RFP)	**Description**	**Due Date (after Project Kick-Off)**
Statewide Warmline Launch Plan	Comprehensive plan for statewide rollout, roles, communications, and sustainability.	By Month 10 (of project)
Ongoing Performance Reports (Monthly or as mutually agreed)	Monthly KPI and performance reporting of call volumes, referrals, outcomes, and satisfaction.	Monthly starting Month 1 of Phase IV
Community Resource Database Update Logs (Monthly or as mutually agreed)	Monthly logs documenting database updates and maintenance activities.	Monthly
Community Engagement Sustainability Plan	Long-term plan to sustain collaborative engagement, outreach, and partner relationships.	By Month 12
Final Documentation of Warmline Operations and Procedures	Complete operations manual, SOPs, training records, and technology documentation.	By Month 12

Ongoing Operational Requirements (Post Launch)

Operational Requirement (as stated in RFP)	**Description / How Met**	**Frequency / Due Date**
24/7 Warmline Operations (phone	Continuous 24/7 service coverage through UWM 211 staff located in Nebraska.	Continuous

and online, Nebraska-based)		
Updated Community Resource Database	Findhelp database maintained with updates, capacity indicators, and verification.	Monthly updates; continuous maintenance
Closed-Loop Referral System with Follow-Up	Findhelp tracks referrals; 10-day follow-up to close the loop and 60–90-day surveys	10-day follow-up; 60–90-day survey
Multilingual Support (phone, text, print)	25% bilingual English/Spanish staff; Language Line for 250+ languages; translated materials.	Continuous
Professional Outreach Materials for Referrers	Toolkit of brochures, flyers, web content, and digital assets for partners.	Delivered in Phase II; updated quarterly
Ongoing Staff Training (confidentiality, trauma-informed care, referral protocols, etc.)	Quarterly training and annual refreshers; call monitoring and coaching.	Quarterly; annual refreshers
Real-Time Quality Dashboard	NCFF-hosted dashboards surfaced from Findhelp and CLRS metrics for leadership.	Real-time; monthly summaries
KPI Tracking & Post-Call Surveys	Automated KPI calculations and post-call surveys for satisfaction and linkage.	Monthly reporting; surveys at 60–90 days
Monthly Reports (call data, referrals, unmet needs, etc.)	Standardized monthly reporting to DHHS covering required metrics.	Monthly
Meeting Minutes & Action Items (within 2 business days)	Consortium and DHHS meeting minutes captured and delivered within two business days.	Within 2 business days of meetings

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Annual Security Assessment & Penetration Test Artifacts	Third-party penetration testing and security assessment reports with remediation.	Annually
Business Continuity & Disaster Recovery Plan	Documented BCDR plan, periodic testing, and DR exercises.	Annual testing; plan maintained ongoing
HIPAA Compliance and Data Retention (min. 6 years)	HIPAA compliant systems and retention policy for data and records.	Ongoing; 6-year retention
Secure Documentation & De-identified Reporting	All reporting de-identified for analysis; secure storage with access controls.	Ongoing

F. INFORMATION AND SECURITY AND TECHNICAL REQUIREMENTS

Technical Specifications
RFP#: Warmline
State of Nebraska, Department of Health and Human Services

IMPORTANT:
Please note that any additional costs must be captured in the Cost Proposal and NOT within in the technical response.
Failure to adhere to these instructions will result in the bidder being deemed as "non-responsive".

General Guidelines for Vendors

1. **Thoroughly Review Requirements:** Carefully read each requirement, including subpoints, and links in the requirement. Ensure responses clearly address each aspect of the requirement.
2. **Provide Supporting Details:** Each response shall include clear descriptions, processes, tools, or diagrams demonstrating how the solution meets the requirement.
3. **Organize Responses:**
    - Use headings and subheadings to structure responses.
    - Include bullet points for clarity.
4. **Use Standards and Best Practices:**
    - Refer to relevant standards (e.g., Section 508, NIST, FIPS, HIPAA).
    - Provide details of certifications, tools, and industry-compliant processes.
5. **Clarity and Precision:**
    - Avoid vague language or ambiguous claims.
    - Use concise, professional terminology.
    - Ensure responses are tailored to DHHS requirements and align with federal and state guidelines.
6. **Supporting Artifacts:**
    - Include visuals such as diagrams, charts, and flowcharts where applicable.
    - Reference external documents or standards as appropriate.
7. **Testing and Validation:** Detail testing approaches, validation processes, and evidence that the solution meets outlined expectations.

Specific instructions to complete Technical Requirements

Bidders are to refrain from providing a solution that would result in additional fees and/or expressing that a feature or functionality is available at an additional cost.

This document contains four tables for each Technical Requirement type. The requirement types are as follows:

Requirement Type	Range
Architecture	ARCH-01 - ARCH-06
Data Management	DM-01 – DM – 04
Security and Compliance	SPC-01 – SPC-09
Operations	OM-01 – OM-05

For each requirement listed under the tables in this document, the bidder shall choose whether the solution "Met the Requirement" then choose the "Implementation Approach" and the "Bidder's Response" by following the instructions provided for each requested information directly below.

Met The Requirements
Within each requirement there is a dropdown option to select three options to answer whether the bidder will meet the requirement or not. The available options to choose from and the descriptions are as follows.

Available Options	Description
YES	The Bidder confirms that the solution meets the specified requirement.
NO	The Bidder confirms that the solution does not meet their requirement.
MET WITH DEVIATION	The Bidder Confirms that the solution meets the specified requirement with deviation taken to the specified requirement. (If this option is selected, then the bidder shall describe the deviation taken).

Implementation Approach:
The Implementation Approach requested in this document can be described as the methodology that will be utilized by the bidder to meet the specific requirement. Within each requirement there is a dropdown option provided to select the Implementation Approach from which an option must be selected. The available options to choose and the descriptions are as follows:

Available Options	Description
Out of Box (OOB)	Indicates that the functionality is available in the solution without any modifications.
Customization	Refers to changes made to the base product to meet specific requirements. This may involve coding or other significant alterations.
Configuration	Refers to adjustments or settings changes within the solution that do not require coding but adapt the product to meet requirements.
TPS	Met with third party software.
NA	Not Available.

Bidder's Response

As bidders prepare responses to each individual requirement, the responses are expected to address the individual requirement in a manner that demonstrates to the State that the bidder understands the requirement and how the bidder will meet the specific requirement. If the bidder's response simply repeats the requirement, acknowledges, or adds sales materials in the bidder's response, the State reserves the right to deem the response as a "Non-Responsive Solicitation Response". However, if needed to appropriately explain the bidder's response, a mix of tables, graphical details, and written narrative is acceptable.

The bidder's response to each requirement must include confirmation and a detailed explanation for the Implementation Approach taken. Bidders shall capture any assumptions, risks, or dependencies related to fulfilling each individual requirement.

Provide specifics, such as:

- Tools or methods used.
- Estimated effort for customizations/configurations.

<table>
<tr><th colspan="2">ARCHITECTURE</th></tr>
<tr><th>Number</th><th>Requirement Description</th></tr>
<tr><td rowspan="3">ARCH-01</td><td>Describe the bidder solution to addressing the following architectural details:

Technology Architecture: Describe the software components, including third-party software products, open-source libraries, and utilities that complete the platform for running a service or supporting an application. This section should document any technical requirements for accessing the software, including but not limited to client desktop installs, etc. Further, the section should clearly outline any State required infrastructure, such as setting up VPN, SFTP, etc., to implement or operate the system.

Network Architecture: Describe the means of communication, the method of sending and receiving information, between the assets in the Technology Architecture.

Application Architecture: Describe how the solution components are assembled and interact to meet the business needs. Describe the solution's ability to manage and store documents and attachments.

Data Flow Architecture: Describe the data flows into and out of the system boundary, include transmission and storage, along with ports, protocols, and services of all inbound and outbound traffic.</td></tr>
<tr><td>Met the requirement: YES

Implementation Approach: Out of Box (OOB)</td></tr>
<tr><td>[Bidder's Response]
Technology/Network Architecture: Findhelp's proposed solution is software-as-a-service (SaaS) platform. It uses a services-based application architecture that is protected and supported by scalable and secure cloud infrastructure. Our solution has supported more than 70 million unique users and results in hundreds of thousands of connections each month between those who need help and the community-based services that support them.

Findhelp operates on the Google Cloud platform, offering high availability, dynamic scaling, and redundant geographical locations. Data is securely backed up with encryption and supports a 1-hour recovery point objective (RPO) and a 15 minute (RTO). Our site is hosted on the Google App Engine cloud environment, which means customers do not need to install or set up any servers on their local network. All that is needed are clients running standard web browsers. Google App Engine allows the site to be presented from geographically separate locations within the United States and can scale up dynamically when usage increases. Google's data centers are protected with the best physical environmental controls in cloud computing and undergo frequent audits to ensure everything is secure.

Application Architecture: Findhelp's solution architecture allows our solution to be customizable and interoperable in a variety of ways. We provision uniquely branded versions of the solution to customers at URLs of their choosing through a straightforward process. We also support dozens of useful integrations such as the option for single sign-on.

Regardless of any choices with provisioning, when a user interacts with our solution, they can do so either directly through a browser or application programming interface (API), or indirectly through a third-party portal. In all cases, these interactions are handled by web servers that invoke the specific actions necessary to fulfill the user's request.</td></tr>
</table>

For example, when a user is looking for resources to refer a patient in a clinical setting from within an electronic health record (EHR) to a resource, the EHR makes several requests to our solution. The first interacts with the web server and authentication services to confirm that the EHR and the person using it have permissions to access the solution. Later requests interact with the web server and our seeker, care provider, and referral services in order to register and perform the referral.

The services also update their activity in data warehouses so that it is possible for the Findhelp platform to provide reports on the types of resources users are looking for and what types of connections they are establishing.

For more than 15 years, our solution's architecture has provided a scalable, secure, interoperable, and available service that connects all people in need to the programs that serve them (with dignity and ease). Findhelp's focus on this mission has produced a solution that supports the largest closed loop referral service and network in the United States. We are confident it can support the needs of the State as well.

Data Flow Architecture: There are three principal business workflows in the Findhelp platform that data flows through. These are: assessments, referrals, and analytics.

- **Assessments:** Findhelp offers the State's users the ability to use industry standard assessments or custom assessments created by the State. We support multiple assessments and do not limit our customers to the number of assessments they wish to use with their Findhelp platform.

Assessments are a valuable tool for not only capturing needed information from callers, but also for automating best-match social care services for each individual. Users can quickly search and display curated lists of social care services that correlate to each individual section of your assessment. When the user submits an assessment, the software automatically generates best-match service results addressing the identified needs; from there, it's just a matter of clicking a button to send a referral.

- **Referrals:** Users can initiate referrals for callers in four ways:
  - By launching a referral through the People I'm Helping dashboard.
  - Directly from a platform search.
  - Through the program listings that pre-populate based on a caller's intake or needs assessment.
  - Through a community service provider's Inbound Referrals dashboard tool.

To accept a referral, a community service provider simply needs to update the status to read Referral Accepted. This status communicates to the care navigator that someone has seen the referral and is actively working to secure services. From this point, the team can be in touch with the community service provider, either through the platform or through other means. Referral statuses are easy to view and updatable by all parties involved in the referral.

- **Analytics**: Findhelp provides more than 40 out-of-the-box reports that offer insights into all activity and outcomes related to a customer's configured Findhelp platform. These reports, organized into dashboards, provide data on user activity, the number and outcomes of screening assessments, the scope and volume of search activities, referrals made to community resources such as mental health providers, closed loops to help measure referral outcomes, and many other topics needed by our customers.

Findhelp reports are always available, updated daily, graphically meaningful, and filterable. Customers appreciate that these extensive reports can be filtered in many ways — date ranges, care team groups, location, etc. The reports can also be downloadable as CSV files.

ARCH-02	Describe the bidder solution to address the following: * Type of Software – SaaS, PaaS or, IaaS * Licensing Model- Perpetual or Subscription based licenses * Single or Multi-Tenant architecture
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **Type of Software:** Findhelp is a Software as a Service (SaaS) platform, which is managed through a configurable and secure web interface. **Licensing Model:** Findhelp access is granted based on an annual recurring subscription-based license model that includes unlimited users and usage. **Single or Multi-Tenant architecture:** Findhelp provides its platform as a multi-tenant site, with logical data labeling and identifiers unique to each customer. The labels are used to enforce data authorization and availability. The Findhelp platform has instantaneous replication on all instances of the application and databases. This allows for instant failover in the event of a disaster recovery scenario.
ARCH-03	The bidder solution must be a cloud-based hosted environment with all components and data residing in the United States and consisting of ready-made software products that do not require major modifications but support customization to meet the functional requirements. Bidder must describe how the approach will meet these requirements.

	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] The Findhelp platform is hosted on the Google Cloud Platform, applying Google's expertise as a world leader in managing platform security. The Google data centers have undergone many security-related certifications including ISO 27001, NIST, and SOC 2 Type 2 Certification. All customer data, including PHI, is stored and available only in the United States. All Findhelp data resides in the Google Cloud Platform, with data centers located in Council Bluffs, Iowa, and Berkeley County, South Carolina. Findhelp does not allow any data to be transferred outside of the United States. To ensure the data we store in Google actually remains in the US, we define the "location" value for Google Cloud Platform objects in compute engine and app engine, and we ensure they are located in one of the following locations: us-west2, us-central1, us-east1, us-east4. Additionally, all Findhelp personnel and subcontractors are based in the United States, with special access authorizations required for those who have access to PHI in any Findhelp platform. Findhelp is a fully configurable platform, and though we do not require any major modifications to meet the functional requirements, we are willing and able to make updates, enhancements, and adjustments to continue to meet the State's evolving needs.
	The bidder solution must provide multiple environments concurrently to support functions, including but not limited to production, testing, and training. Bidder must describe how their approach will meet these requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)

ARCH-04	[Bidder's Response] Findhelp maintains multiple environments to support customer functions, including development, test, and production environments. Findhelp uses non-production environments for prospect demonstrations, user testing, integration development and testing, and prospect training. Findhelp separates these environments from the production environments to reduce the risk of inadvertent or unauthorized modifications to the operational system (production environment) that could compromise the system's integrity or availability. Configuration across these environments is managed by Findhelp. We can provide the State with access to the relevant environments to facilitate user testing, demos, as well as integration development and testing. Configuration across these environments, which will mirror the production environment, is managed by Findhelp. These environments are each supplied at no additional cost.
ARCH-05	Bidder shall review the accessibility requirements described in the following: · Section 508 compliance standards https://www.section508.gov/manage/laws-and-policies/) · 45 CFR Part 85 (https://www.ecfr.gov/current/title-45/subtitle-A/subchapter-A/part-85) · State of Nebraska Accessibility requirements (https://nitc.nebraska.gov/standards/index.html#2). Bidder must indicate how the solution will meet such requirements as they relate to the accessibility requirements for each of the items listed above.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)

	[Bidder's Response]
	• **Section 508**: Findhelp is committed to reducing barriers so that anyone can easily find and connect to social services using our SaaS product. One of the ways we do this is by supplying all customers with a Section 508 and Web Content Accessibility Guidelines (WCAG)-compliant platform that integrates with all standard web browsers. Our accessible platform allows users to:
	  • Adjust color contrast on the page for those with color blindness or low contrast vision.
	  • Change site font to allow for 10xPX for people with blurry vision or nearsightedness.
	  • Tab through fields and move the user's focus when a pop-up occurs.
	  • Connect screen readers and third-party web browser add-ons to be connected to our site for impaired readers.
	The Findhelp attestation of accessibility is linked in the footer of all our search pages and includes a support email address for users to report difficulty accessing any part of our site, or if they need alternative formats. The Findhelp team measures and assesses platform usability and adherence to federal and state regulatory requirements in several ways:
	  • We continually monitor existing pages and test new features to maintain Section 508/WCAG compliance.
	  • We regularly conduct accessibility audits using manual and automated methods to check the platform against the WCAG criteria for being perceivable, operable, understandable, and robust.
	  • We regularly complete VPAT surveys.
	• **45 CFR:** The Findhelp platform and terms for CBOs comply with 42 CFR Part 2, which serves to protect patient records created by federally assisted programs for the treatment of substance use disorders. We've developed multiple policies and procedures to ensure that privacy is maintained for special populations and is aligned with state-specific variations. We also have education customers in elementary, secondary, and collegiate domains who use their platform in accordance with FERPA, as well as our SchoolCare EHR, which complies with FERPA.

	Findhelp's Chief Technology Officer Mukta Nandwani manages the R&D teams responsible for our WCAG compliance activities, as well as our compliance with 42 C.F.R. § 433.112 regarding the design, development, testing, installation, or enhancement of mechanized processing and information retrieval systems. • **State of Nebraska (NITC):** Because of the Findhelp platform's HITRUST r2 certification, the platform is largely compliant with the IT policies, standards, and guidelines. The HITRUST certification addresses most of the core requirements of the Privacy Act of 1974, and the Office of the National Coordinator's (ONC's) privacy and security framework. However, as a commercial platform, not a Health Information Network or other regulated service, and much of our platform's functionality does not fall under the direct purview of these regulations. The platform also has the ability to import and export data using the XML, JSON, CSV file types. In addition, many of the DHHS IT Security Policies and Standards can be configured in the instance of Findhelp that we would provide for this project. However, because we are hosted in Google Cloud (GCP), a public cloud, and since we believe we would be storing High Impact information, although the GCP environments holding application data are FedRAMP moderate, under NITC guidelines it is possible we would need approval from the CIO.
ARCH-06	The bidder's solution must provide Scalability and High Availability Architecture. The bidder must describe how the solution will meet this requirement. The response must include, at a minimum the following details: * The system architecture must support scaling with increased load.

	* The system must provide high availability to support minimum disruptions to the business operations. * The system must handle notifications when a component or interface endpoint is unavailable. * The system must handle performance functionality and monitoring tools. * The system must handle recovery of failed transactions because of a component failure. * The system must be available online 24 hours a day and 7 days a week.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **The system architecture must support scaling with increased load.** As the largest closed-loop referral system in the United States, Findhelp is designed for unlimited scalability. The platform is built to scale and serve millions of users. We also provide access to more than 945,000 verified program locations for organizations providing social care services — a number that grows nearly every day. Because we host our platform on the Google Cloud Platform, we are able to serve all of the assessment, referral, and other needs of our more than 680 customers and scale for many more. Findhelp's platform has been used by 77 million+ users in the United States to date. **The system must provide high availability to support minimum disruptions to the business operations.** Our system uptime SLA meets the industry standard of 99.9% system uptime. **The system must handle notifications when a component or interface endpoint is unavailable**. Users see role-appropriate notifications and alerts in the event of service interruption or endpoint availability issues. **The system must handle performance functionality and monitoring tools.** In addition to customer dashboards displaying real-time performance, our publicly-available performance monitoring site **status.Findhelp.com** provides up-to-the-minute information on any site availability issues and historical outage information. **The system must handle recovery of failed transactions because of a component failure**. Although such incidents are rare, the customers Customer Success team will work with them to recover any data lost in the event of a failed transaction. **The system must be available online 24 hours a day and 7 days a week**. Our system uptime SLA meets the industry standard of 99.9% system uptime.

DATA MANAGEMENT	
Number	**Requirement Description**
DM-01	The bidder solution must use industry standard cryptographic modules such as those certified to meet FIPS 140-2/-3 for encrypting data at rest and in transit. Bidder must describe how the approach will meet this requirement.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp's data at rest is in the Google Cloud Environment (GCP). Findhelp ensures that data at rest is encrypted using AES-256, with a FIPS-validated module. Findhelp's data in transit is using TLS 1.2/1.3 with FIPS-compliant encryption. Each customer's data is assigned a unique data label to allow logical separation of data and enforce access permissions. The Google data centers have undergone several security-related certifications related to security and data protection compliance, including ISO 27001 and SOC 2 Type 2 Certification. User information is stored encrypted and associated with a non-identifying token. Identifying user information is stored separately encrypted and only authorized authenticated users may join the user information with the identifying information. Encryption keys are managed with the Google Cloud Key Management Service which provides secure and redundant storage of objects.
DM-02	The bidder's solution must support data integration. The bidder must describe how the solution will meet this requirement. The response must include, at a minimum, the following details: * Ability to import and export data using these file types (XML, JSON, CSV). * Support for integration using industry standards approaches and principles for REST APIs and Webservices. * Support for industry integration data standards where applicable such as Health Level 7 (HL7), Fast Healthcare Interoperability Resources (FHIR), X-12, HIPAA.)
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **Supporting data integration:** The Findhelp application is designed to integrate with unlimited third-party programs and vendors through our external APIs and as internally-developed native integrations. Today, Findhelp supports more than 200 integrations with more than 40 systems including Epic, Cerner, and Innovaccer, as well as customers' proprietary SORs. Findhelp is also able to integrate with community portals and patient portals (such as Epic MyChart). Findhelp is the only vendor that supports a fully native API integration with Epic. We use SMART on FHIR Launch integrations and native API integrations for the majority of our integrations. Findhelp leverages the principles of interoperability to facilitate integrations. This includes • Using standardized file layouts and file exchange methods aligned with HIPAA and other industry standards (i.e., HL7/FHIR, EDI/X12, and the National Information Exchange Model). • Mapping platform data to the United States Core Data for Interoperability (USCDI v2 and v3) and Gravity Project consensus-driven SDoH data standards. Findhelp is a collaborative advocate for interoperability, playing active roles in myriad national, regional, and local task forces, such as the Michigan MIHIN Interoperability Committee. Senior leaders from Findhelp attended regular committee meetings over several months. In contrast to our primary competitor, who walked away from the Committee. **Ability to import and export data using these file types (XML, JSON, CSV):** We support outgoing FHIR message types including JSON, XML and RDF, as well as data exports into CSV format.

	Support for integration using industry standards approaches and principles for REST APIs and Webservices. Findhelp provides read-only REST API endpoints that allow customers to search for program and office information. We also provide a set of read/write REST API endpoints for creating, updating, and retrieving referrals specific to a given customer. The referral endpoints are secured and authorized using JWT token exchange. Our REST API is JSON-based, and some endpoints do support HL7 data standards when applicable (we also have non-HL7 endpoints, as we support customers across many industries). We also support FHIR-based launch integrations, which include some HL7 formats as well. **Support for industry integration data standards where applicable such as Health Level 7 (HL7), Fast Healthcare Interoperability Resources (FHIR), X-12, HIPAA.)** Findhelp supports Legacy HL7 message types including HL7 version 2 and HL7 version 3 inclusive message types. We also support ADT, MDM, CCD/A and related transactions. We also support FHIR message types including JSON, XML and RDF. Findhelp's platform undergoes an annual HIPAA assessment conducted by a third party to ensure that HIPAA standards are consistently met. Findhelp is currently exploring support for 834 and 837 X12 files for eligibility and claims data transfers with relevant systems (e.g. clearinghouse) as used for active workflows, but they are not typically used for export/import.
DM-03	The bidder solution must securely dispose of State data from its systems upon request and in accordance with the National Institute for Standards and Technology (NIST) Special Publication 800-88 revision 1 (https://nvlpubs.nist.gov/nistpubs/SpecialPublications/NIST.SP.800-88r1.pdf) and must provide to the State of Nebraska a certificate of data destruction. Bidder must describe how the approach will meet this requirement.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp has a full data destruction policy and procedures which we follow to destroy both data in our cloud and physical laptops in accordance with National Institute for Standards and Technology (NIST) Special Publication 800-88 revision 1.

DM-04	Bidder shall review the data retention requirements described in the following: · 45 CFR Part 164.316 (https://www.ecfr.gov/current/title-45/subtitle-A/subchapter-C/part-164/subpart-C/section-164.316) Bidder must meet all the capabilities and/or requirements as outlined for each of the items and indicate how the solution will meet such requirements as they relate to the data retention requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] The Findhelp platform and terms for CBOs comply with 42 CFR Part 2, which serves to protect patient records created by federally assisted programs for the treatment of substance use disorders. We've developed multiple policies and procedures to ensure that privacy is maintained for special populations and is aligned with state-specific variations. We also have education customers in elementary, secondary, and collegiate domains who use their platform in accordance with FERPA, as well as our SchoolCare EHR, which complies with FERPA.

SECURITY AND COMPLIANCE	
Number	**Requirement Description**
SPC-01	Bidder shall review the standards and policies described in the following: * DHHS Information Technology (IT) Security Policies and Standards (http://dhhs.ne.gov/ITSecurity). * Nebraska Information Technology Commission (NITC) Standards and Guidelines (https://nitc.nebraska.gov/standards/index.html). * Health Insurance Portability and Accountability Act (HIPAA) of 1996. *Health Information Technology for Economic and Clinical Health Act (HITECH) of 2009 *Nebraska Electronic Signature Statute (http://www.nebraskalegislature.gov/laws/statutes.php?statute=86-611) *Privacy Act of 1974 *45 CFR 164 Security standards for PHI *Office of the National Coordinator's Nationwide Privacy and Security Framework for Electronic Exchange of Individually Identifiable Health information *Family Educational Rights and Privacy Act (FERPA) [statute] and [regulations]; and *Any other state or federal law, regulation, or administrative rule relating to the specific DHHS program area that Contractor supports on behalf of DHHS. Bidder must meet all the capabilities and/or requirements as outlined for each of the items and indicate how your solution will meet such requirements as they relate to the standards and policies described above.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **DHHS Information Technology (IT) Security and NITC Policies and Standards:** Because of the Findhelp platform's HITRUST r2 certification, the platform is largely compliant with the IT policies, standards, and guidelines. The HITRUST certification addresses most of the core requirements of the Privacy Act of 1974, and the Office of the National Coordinator's (ONC's) privacy and security framework. However, as a commercial platform, not a Health Information Network or other regulated service, and much of our platform's functionality does not fall under the direct purview of these regulations. The platform also has the ability to import and export data using the XML, JSON, CSV file types. In addition, many of the DHHS IT Security Policies and Standards can be configured in the instance of Findhelp that we would provide. However, because we are hosted in Google Cloud (GCP), a public cloud, and since we believe we would be storing High Impact information, although the GCP environments holding application data are FedRAMP moderate, under NITC guidelines it is possible we would need approval from the CIO. **Health Insurance Portability and Accountability Act (HIPAA) of 1996:** Findhelp's HITRUST certified incorporates other known security frameworks such as HIPAA (Health Insurance Portability and Accountability Act). **45 CFR:** The Findhelp platform and terms for CBOs comply with 42 CFR Part 2, which serves to protect patient records created by federally assisted programs for the treatment of substance use disorders. We've developed multiple policies and procedures to ensure that privacy is maintained for special populations and is aligned with state-specific variations. We also have education customers in elementary, secondary, and collegiate domains who use their platform in accordance with FERPA, as well as our SchoolCare EHR, which complies with FERPA. **ONC framework:** Findhelp's HITRUST R2 certification meets the core requirements of the Privacy Act of 1974, and the Office of the National Coordinator's (ONC's) privacy and security framework.

	Privacy Act of 1974: Findhelp's HITRUST R2 certification meets the core requirements of the Privacy Act of 1974, and the Office of the National Coordinator's (ONC's) privacy and security framework. **FERPA**: Findhelp has education customers in elementary, secondary, and collegiate domains who use their platform in accordance with FERPA, as well as our SchoolCare EHR, which complies with FERPA.
SPC-02	The bidder must agree to conduct an independent, third-party penetration test for the solution in which they are offering within one year prior to the anticipated go-live date, that includes, at a minimum, the Open Web Application Security Project (OWASP) Top 10. Identified risks must be classified by severity and additional information must be provided for any risks identified as medium and above. This must be conducted at no additional charge to the State. Bidder must conduct this test at the appropriate time and describe how their approach will meet these requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp's platform is HITRUST CSF certified, offering the highest level of security to protect the confidentiality of all records, data and other information. Maintaining this certification entails no additional cost to the State. Findhelp's HITRUST CSF certification is valid for our site, endpoints, and supporting infrastructure and includes regular testing and recertification. With this certification, we affirm that Findhelp's platform meets very rigorous criteria related to vulnerability policies and mitigation plans. This status demonstrates that we've met key regulatory and industry-defined requirements and that we're appropriately managing risk. HITRUST is also inclusive of OWASP Top 10 security standards and frameworks including: • **Federation:** WS-Secure Conversation, WS-Federation, WS-Authorization. • **Mechanism:** Extensible Access Control Markup Language (XACML), XML Encryption, XML-Digital Signatures, Extensible rights Markup Language (XrML), X.509 certificates. • **Policy:** WS-Policy, WS-Trust, WS-Privacy, Security Assertion Markup Language (SAML), Enterprise Privacy Authorization Language (EPAL). Furthermore, the Findhelp platform operates on the Google Cloud Platform, applying Google's expertise as a world leader in managing platform security. The Google data centers have undergone several security-related certifications including ISO 27001, NIST, and SOC 2 Type 2 Certification.
SPC-03	The bidder must agree to conduct an annual independent third-party penetration test of the solution that includes the Open Web Application Security Project (OWASP) Top 10. The report must provide details of the critical, high, and medium findings and associated risks. This must be conducted at no additional charge to the State. Bidder must conduct this test at the appropriate time and describe how the approach will meet these requirements.

	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp's platform is HITRUST CSF certified, offering the highest level of security to protect the confidentiality of all records, data and other information. Maintaining this certification entails no additional cost to the State. Findhelp's HITRUST CSF certification is valid for our site, endpoints, and supporting infrastructure and includes regular testing and recertification. With this certification, we affirm that Findhelp's platform meets very rigorous criteria related to vulnerability policies and mitigation plans. This status demonstrates that we've met key regulatory and industry-defined requirements and that we're appropriately managing risk. HITRUST is also inclusive of OWASP Top 10 security standards and frameworks including: • **Federation:** WS-Secure Conversation, WS-Federation, WS-Authorization. • **Mechanism:** Extensible Access Control Markup Language (XACML), XML Encryption, XML-Digital Signatures, Extensible rights Markup Language (XrML), X.509 certificates.

	• **Policy:** WS-Policy, WS-Trust, WS-Privacy, Security Assertion Markup Language (SAML), Enterprise Privacy Authorization Language (EPAL). Furthermore, the Findhelp platform operates on the Google Cloud Platform, applying Google's expertise as a world leader in managing platform security. The Google data centers have undergone several security-related certifications including ISO 27001, NIST, and SOC 2 Type 2 Certification.
SPC-04	The bidder must agree to conduct an independent, third-party security and privacy controls assessment that aligns with the National Institute for Standards and Technology (NIST) SP 800-53 moderate standard, within one year prior to the go-live date. Identified security gaps must be classified by severity and additional information must be provided for any gap identified as medium and above. This must be conducted at no additional charge to the State. Bidder must conduct this assessment at the appropriate time and describe how the approach will meet these requirements
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp maintains our HITRUST r2 certification with a rigorous, complete audit every two years and interim assessment after the first year. Maintaining this certification entails no additional cost to the State. These HITRUST standards incorporate other known security frameworks such as HIPAA and NIST. Findhelp also undergoes an annual HIPAA assessment (HIPAA Report on Compliance) conducted by a third party to ensure that HIPAA standards are consistently met. This is complemented by an annual third-party NIST 800-53 attestation. Any Identified security gaps are classified by severity and additional information will be provided for any gap identified as medium and above. Furthermore, the Findhelp platform operates on the Google Cloud Platform, applying Google's expertise as a world leader in managing platform security. The Google data centers have undergone many security-related certifications including ISO 27001, NIST, and SOC 2 Type 2 Certification.
SPC-05	The bidder must agree to conduct an annual independent third-party security controls assessment that meets the National Institute for Standards and Technology (NIST) SP 800-53 moderate standard. The report must provide details of the critical, high, and medium findings and associated risks. This must be conducted at no additional charge to the State. Bidder must conduct this assessment at the appropriate time and describe how the approach will meet these requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp maintains our HITRUST r2 certification with a rigorous, complete audit every two years and interim assessment after the first year. These HITRUST standards incorporate other known security frameworks such as HIPAA and NIST. Findhelp also undergoes an annual HIPAA assessment (HIPAA Report on Compliance) conducted by a third party to ensure that HIPAA standards are consistently met. This is complemented by an annual third-party NIST 800-53 attestation. Furthermore, the Findhelp platform operates on the Google Cloud Platform, applying Google's expertise as a world leader in managing platform security. The Google data centers have undergone many security-related certifications including ISO 27001, NIST, and SOC 2 Type 2 Certification.

<table>
<tr><td rowspan="2">SPC-06</td><td>Describe the bidder solution for the following:

* Support for self-service password activities.
* Automatic log-off procedures after determined time of session inactivity.
* Automatic account disablement after 120 days of inactivity.
* Administrators' ability to lockout user(s).
* Support and approach for single sign-on with State Active Directory.
* Support and approach for Multi-Factor Authentication.
* Automatic locking of account after determined number of failed logon attempts.</td></tr>
<tr><td>Met the requirement: YES

Implementation Approach: Out of Box (OOB)</td></tr>
</table>

<table>
<tr><td></td><td>[Bidder's Response]
Support for self-service password activities. Users can reset their own passwords. If Single Sign-On (SSO) is configured for the Findhelp platform, then the authorized user will need to follow the company's protocols for resetting their password. If SSO is not configured through the Findhelp platform, authorized users will be required to comply with the following password requirements:
• Minimum of eight characters.
• One upper, one lowercase character.
• One special character.
• Passwords expire after 90 days.
• Password history enforced for the last three passwords.

Automatic log-off procedures after determined time of session inactivity. By default, the system logs a user off after 30 minutes of inactivity. A self-service field for Site Administrators allows them to configure this interval.

Automatic account disablement after 120 days of inactivity. Site administrators can determine a window for automatic account disablement.

Administrators' ability to lockout user(s). Site Administrators can lock out users if needed.

Support and approach for single sign-on with State Active Directory. Findhelp supports Single Sign-On (SSO), which allows our customers to control permissions granted to their authorized users in accessing the customer's branded and configured Findhelp platform. Findhelp provides technical guidance, if needed, as our customers set up SSO in the way that works best for them. Customers use the protocols SAML 2.0 or OAuth2 and leverage their own authentication methods — such as Microsoft Active Directory — including multi-factor authentication, if desired.

With SSO, a customer's authorized users don't need to remember another username and password to access the customer's branded and configured Findhelp platform. SSO also reduces the number of steps needed to gain access to the platform; authorized users simply need to log into the platform to establish their account credentials.

Support and approach for Multi-Factor Authentication. We ensure data is double protected requiring multi- factor authentication (MFA) through Perimeter 81 (VPN) and additional MFA through the Google Cloud ensuring all data is secured in all lower environments. Findhelp will specifically protect PII and PHI using tight security located throughout our services, applications, and databases. All stored data is encrypted with AES-256 bit encryption with SHA-256 hashing on the Google Cloud SQL. In addition, we deploy CloudFlare as a secure Web Application Firewall (WAF) with an Imperva Bot sitting behind the Firewall. Finally, Findhelp's Product and Engineering teams follow cloud security best practices in secure coding to keep the security of the platform up to date; we use SONAR and other tools to help ensure code is securely developed.</td></tr>
</table>

	Automatic locking of account after determined number of failed logon attempts. This is configurable by the Site Administrator.
SPC-07	The bidder solution must use role-based security. Bidder must describe how the approach will meet this requirement
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Consistent with the requirements of HIPAA (Minimum Necessary Standard) and NIST (Principle of Least Privilege), Findhelp uses Role-Based Access controls (RBAC) to help ensure assigned users only have access to the information in the Findhelp platform they need to serve their clients. There are no shared, generic, default, or system user accounts. Customers designate their own users and designate an internal staff person to act as the administrator of the site. The Site Administrator will set up and manage individual and group roles and access permissions, and manage CLRS configurations after implementation. Only users authorized and authenticated by the customer, including the Site Administrator and those managing workflows and reporting, will have elevated privileges. Findhelp logs and monitors all NM CLRS users, including those with elevated privileges, who access the sites—to ensure information is only used for approved business purposes. Findhelp uses strict identity management and access controls to help ensure appropriate, role-based access to the CLRS. Following the initial setup of their user profile, all users authorized by the State will be able to use SSO to securely log into the system. Findhelp has implemented and currently supports hundreds of SAML 2.0 and OAuth 2.0 workflows.
SPC-08	Describe the bidder solution for the following: * How user accounts are assigned and managed. * How the system provides usage reports, such as a listing of all users and their last usage date. * How the system supports authorization at an attribute/field level (e.g., edit, view).
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **Assigning and managing user accounts**. At Findhelp, five roles are assigned to the platform, each with different levels of access to a customer's functionality and data: Site Administrator, Group Manager, Site Worker, Business Stakeholder, and Client. Roles and permissions are established by each customer during implementation, with support from their Customer Success Manager. • The Site Administrator is the user with the highest-level privileges who sets up and manages the roles and permissions for your organization. Site Administrators also have access to a variety of tools to customize aspects of your platform site in real time. Every customer has at least one Site Administrator, although there is no limit to how many users may be granted these privileges. Findhelp provides thoughtful and thorough training specifically for the Site Administrator/s. • Some customers create Group Managers to assist the Site Administrator/s; group managers can add and remove users from their groups but don't have access to other Site Administrator privileges, which includes detailed analytics access to users outside their group(s). The Group Manager role helps relieve the workload for the Site Administrator and gives users control of permissions within their groups. • Virtually all customers provide permissions to their staff, who manage referral, navigation, care coordination, or case management support for their clients. This permission type, Site Workers, delivers access to the standard tools and information on the platform including: using configured assessments to help understand the client's needs, finding best-match community-based organization social services, making referrals, and then tracking the progress/status and outcome of those referrals. Site Worker roles typically also include managing communication with clients and even other members of the client's support team, when relevant. • Business Stakeholders have permission to access only reporting or other specialized functionality in the Findhelp platform.

	• Clients (the persons served by our customers) only have permission to see their profile, which includes their assessment and referral history. Clients always have permission to control access to their content. **Usage reports**: Findhelp's culture incorporates a "Data First" mentality in most aspects of our operations. This mentality extends to multiple event logs used to document data regarding usage and operations of the Findhelp software as a service (SaaS) solution. These include: • System events. • Application events. • Authentication events, including activities to grant, modify, or revoke access rights to include new user or group additions, user privilege modifications, file or database object permissions, firewall rules, and user password changes. • Access to the virtual data center hosted by Google. • Code changes. In addition, Findhelp's Audit Logging policy calls on the business to document the following platform activities: • Creating, reading, updating, or deleting confidential information including confidential authentication. • Initiating or accepting a network connection. • Irregularities or anomalies that may be indicative of a system malfunction or compromise. Findhelp uses Sophos DLP to monitor all system activities (represented in a detailed Audit Log report) within the Google Cloud Platform. We use AlienVault (SIEM) for log aggregation and correlation. We also use Google's Workspace DLP capabilities which alert security personnel and also funnel into our SIEM (Security Information and Event Management) system. Summarized and detailed reports on user activities are tracked throughout Findhelp's platform and are kept in our SQL logging. Detailed reports on all access and transaction logging ensure proper reporting can be provided for the products and services provided by Findhelp. All logs are kept for seven years to ensure the information is available and reportable. **Authorization at an attribute/field level**: Authorization to view and edit a given field or data element is governed by our Role-Based Access guardrails, described above.
SPC-09	Bidder shall review the State DHHS Information Technology (IT) Audit Standards located at: (https://www.dhhs.ne.gov/ITSecurity). Bidder must meet all the capabilities and/or requirements as outlined and indicate how the solution will meet such requirements. As a part of the bidder's response, at minimum, the State desires specific information regarding the following elements: · Detail the data elements that are audited. · Outline the level of audit tracking being maintained. · Provide a sample of their audit reports. · Capabilities for automated audit log evaluation to identify security issues. . How the bidder monitors, identifies, and reports on events impacting the system, such as attacks and other unauthorized use of the system.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **Data elements that are audited and level of tracking.** Findhelp monitors and audits both user access to the Findhelp platform and data use to ensure compliance with our own policies and protocols, as well as those needed for our HITRUST certification. Audit logs for a customer's users accessing their Findhelp platform include, for example, user IDs (for all users who have access to the system); date and time stamps; files accessed; addition of new users; and levels of access for all users, including new users, as well as changes in access (all controlled by the customer's Site Administrator). In addition, audit logs track all successful and unsuccessful

	attempts to access the platform and its different functionalities and additional access information related to systems, applications, and data. Some specific information monitored and audited related to data in a Findhelp platform includes search query data, search correlations, rules, and alerts. **Sample audit reports**. User activity in the system can be reconstructed as needed using viewable system data with appropriate permissions. The system does not generate a standard audit trail report. **Capabilities for automated audit log evaluation to identify security issues**. We support automated monitoring for events and notifying appropriate parties regarding event detection; this includes reviewing, categorizing, registering, and prioritizing events as well as routing event-related information all the while resolving all events. This includes full visibility into event management and incident management, which follows many of the same protocols as events with specific additional requirements related to HITRUST. **Monitoring, identifying, and reporting on events impacting the system**: Findhelp systems, services, application, and resources are monitored 24/7/365 with an external VSOC (virtual security operations center) combined with continuous on-call personnel. In parallel, we use an application and network security scanner (Nessus) and conduct scans monthly. Results are reported on and scored by an analyst for follow-up. We also receive threat feeds from multiple sources, that are then translated into tickets in our vulnerability ticketing system with a defect level assigned based on score.

OPERATIONS	
Number	**Requirement Description**
OM-01	Describe the Business Continuity and Disaster Recovery (BCDR) plan for the solution being offered. Bidder's response must describe, at a minimum, the plan to include the following information: * Procedures for data backup, restoration, communication to the State of Nebraska, and emergency mode operations in the event of: a. Hardware or Software Failures. b. Human Error. c. Natural Disaster; and/or d. Other unforeseeable emergencies.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] A hardware failure at a customer site, and/or an error by a user at a customer site, will not result in loss of data. All data critical to the site is stored within the Google Cloud data centers, using Google's CloudSQL service. Data is backed up automatically and daily to distributed, encrypted backup stores in the Google Cloud. These backups are also protected from a single site failure. We continually test our backups as part of our business continuity testing. An existing backup can be restored in less than 15 minutes, which allows for a quick recovery of data as needed. If one of the data centers experiences a disaster, Google automatically directs traffic to the functioning data centers, resulting in no down time for the site. Changes to the site made by the Findhelp team can be deployed without bringing the site down, and new versions can be rolled back immediately for quick recovery when needed.
OM-02	The bidder must agree to conduct a full disaster recovery test for the solution in which they are offering prior to the anticipated go-live date. The most recent test must be within one year prior to the Full Launch Date*. * This must be conducted at no additional charge to the State. Bidder must conduct this test at the appropriate time and describe how the approach will meet these requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] All data critical to the site is stored within the Google Cloud data centers, using Google's CloudSQL service. Data is backed up automatically and daily to distributed, encrypted backup stores in the Google Cloud. These backups are also protected from a single site failure. We continually test our backups as part of our business continuity testing. An existing backup can be restored in less than 15 minutes, which allows for a quick recovery of data as needed. **There is no additional charge to the State** for disaster recovery procedures or testing.
OM-03	The bidder must agree to conduct an annual disaster recovery test for the solution and submit the annual results to the designated individual for the State of Nebraska. This must be conducted at no additional charge to the State. Bidder must conduct this test at a mutually agreed time not to exceed 12 months from the previous run and describe how the approach will meet these requirements.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)

	[Bidder's Response] Findhelp has a documented Disaster Recovery/Business Continuity Plan that is updated annually. Findhelp's business continuity and disaster recovery (BC/DR) plan is aligned with NIST 800 34 "Contingency Planning Guide for Federal Information Systems." Our plan is inclusive of all our platform vendors, including Google. All data critical to the site is stored within the Google Cloud data centers, using Google's CloudSQL service. The CloudSQL environment is configured with automatic failover capability and transaction logging is in place to enable point-in-time recovery. Data is backed up automatically and daily to distributed, encrypted backup stores in the Google Cloud. These backups are also protected from a single site failure. We continually test our backups as part of our business continuity testing. An existing backup can be restored in less than 15 minutes, which allows for a quick recovery of data as needed. If one of the data centers experiences a disaster, Google automatically directs traffic to the functioning data centers, resulting in no down time for the site. Changes to the site made by the Findhelp team can be deployed without bringing the site down, and new versions can be rolled back immediately for quick recovery when needed.
OM-04	The bidder solution shall meet the following: * Compliance with the Recovery Time Objective (RTO) of within 24 hours when the system outage is declared as a disaster. * Compliance with the Recovery Point Objective (RPO) of four hours of data lost before the disaster event.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] Findhelp data is securely backed up with encryption and supports a **1-hour Recovery Point Objective (RPO)** and a **15 minute Response Time Objective (RTO)**. Findhelp understands that security of data means ensuring its availability for any unplanned incident or downtime and not just protecting it from malicious actors. We leverage the best-in-class services of the Google Cloud environment to ensure that our site and its information is available and recoverable, even during disasters. Findhelp operates on the Google Cloud platform, offering high availability, dynamic scaling, and redundant geographical locations. Our site is hosted on the Google App Engine cloud environment, which means customers do not need to install or set up any servers on their local network. All that is needed are clients running standard web browsers. Google App Engine allows the site to be presented from geographically separate locations within the United States and can scale up dynamically when usage increases. Google's data centers are protected with the best physical environmental controls in cloud computing and undergo frequent audits to ensure everything is secure.
OM-05	Describe the bidder solution for the following: * Overall testing strategy and support for the following testing types: unit testing, system testing, integration testing, regression testing, user acceptance testing (UAT), parallel testing, performance and load testing, manual and automated and/or scripted testing, and end-to-end integration testing. * Approach to planning and preparing the test/staging environment. * Approach to conducting each test level. * Approach for testing nonfunctional requirements (security, performance, etc.). * Approach to test documentation (e.g., test cases, test scripts, test case matrices added as the design configuration progresses). * Approach to quality control/quality assurance. * Approach to test results reporting, traceability, and metrics.
	Met the requirement: YES Implementation Approach: Out of Box (OOB)

[Bidder's Response]

Overall testing strategy and support: Findhelp's Engineering team works in partnership with our Product team to plan and execute functionality testing as part of the implementation process. Implementation functionality testing is a core part of all deployments prior to moving a client platform into production. This can include, but is not limited to:

- Automated regression testing to identify any areas of the product that may be unexpectedly impacted by new feature development.
- Security-specific regression testing to help reduce code vulnerability.
- Automated and manual feature-specific user acceptance testing performed by our Development and Quality Assurance teams exercising expected scenarios, including misuse scenarios, as well as edge cases for all new enhancements and fixes.
- Automated unit testing to ensure reliable code behavior over time.
- Accessibility testing and audits to ensure compliance with industry-standard WCAG (Web Content Accessibility Guidelines) criteria.
- Vulnerability scans and penetration testing to ensure security of the platform and adherence to cloud security best practices, including keeping our systems up to date.

Approach to planning and preparing the test/staging environment. We perform end-to-end UAT in a dedicated testing environment located within the United States.

Approach to conducting each test level. The team performs thorough UAT at each test level that helps us identify potential defects and confirm acceptance of each component of your platform. If defects are identified, Findhelp subject matter experts (SMEs) will work with you to determine a resolution plan. Upon completion of the resolution plan, users will re-test the scenario until acceptance is complete.

Approach for testing nonfunctional requirements (security, performance, etc.). Point-to-point System Integration Testing (SIT) ensures all secure integrations and other connections work as expected. This includes both functional testing (e.g. confirming that intended Launch or API integrations appropriately direct to Findhelp) and non-functional testing (e.g. confirming user security is allowing or blocking access to certain referral information as intended).

Approach to test documentation (e.g., test cases, test scripts, test case matrices added as the design configuration progresses). SIT typically incorporates the approved UAT test scripts so we can identify potential defects before migrating to the user acceptance training environment. Outcomes of any SIT we perform on the platform will be supplied to the customer for formal review and approval.

Approach to quality control/quality assurance. Findhelp's data governance standards help ensure the integrity, accuracy, and security of data. We believe in a culture of continuous improvement. Regular feedback loops ensure that our data quality approach evolves with changing business requirements, technology advancements, and regulatory updates. We have implemented a combination of automated and manual data quality audits to validate the effectiveness of our data quality processes. As a result, we track data quality metrics, aggregate them monthly, and include the results as a strategic objective on our company-wide performance scorecard. These metrics focus on data ownership, data logging, data dictionary maintenance, and data pipeline validation.

Approach to test results reporting, traceability, and metrics. UAT reporting will be supplied to your project leadership team for formal review and approval using approved document templates. We maintain system logs and thorough documentation of all tests and testing procedures.

OM-06	Describe the bidder solution for software maintenance processes that address the following: * Approach to managing software versions to ensure bidder support. * Approach to Change Management, including defects and enhancements. * Approach to testing and release management. * Approach to maintaining integrations with external and internal trading partners.

	Met the requirement: YES Implementation Approach: Out of Box (OOB)
	[Bidder's Response] **Approach to managing software versions to ensure bidder support:** Findhelp's SaaS solution is built upon a technology framework that does not require regular maintenance windows to maintain security standards, deploy new features, or resolve issues. Instead, Findhelp deploys changes on an ongoing basis— while ensuring system usage is unimpeded for all customers. This means our software and underlying infrastructure is continually kept up to date and maintained by the Findhelp team. Your system administrators will not need to manage or perform any software upgrades or keep track of the software lifecycle. Leveraging the Agile methodology, we deploy multiple releases each month. Deployments preserve customizations, mitigate service disruptions, and negate the need for backward compatibility. Our uptime guarantee is 99.9%. **Approach to Change Management, including defects and enhancements:** To ensure that all an organization's stakeholders are on-board with implementing and learning the new solution, we establish solid project governance early on, and reach out to an organization's user community to introduce the platform, schedule trainings at a cadence that best suits an organization's needs, and help ensure that change management best practices and transparent communication are maintained throughout the project. **Approach to testing and release management.** We begin end-to-end User Acceptance Testing (UAT) in a dedicated testing environment located within the United States. UAT helps us identify potential defects and confirm acceptance of each component of your platform. If defects are identified, Findhelp subject matter experts (SMEs) will work with you to determine a resolution plan. Upon completion of the resolution plan, users will re-test the scenario until acceptance is complete. UAT reporting will be supplied to your project leadership team for formal review and approval using approved document templates. In this phase, we also put the finishing touches on your configured workflows, and host training documentation on your system. **Approach to maintaining integrations with external and internal trading partners.** Findhelp's platform is designed to integrate with unlimited third-party systems through our internally-developed native integrations—primarily SMART on FHIR Launch integrations — and our external APIs. Findhelp supports 200+ live integrations with more than 40 systems, with the majority being electronic health records (EHRs) and case management/care coordination systems. We continually monitor the viability of our integrations, and maintain them at full functionality in compliance with our SLAs for system support.
OM-07	Describe the incident management process that will be used to report business and security incidents (such as any unauthorized access to, or incidents where data may have been compromised
	Met the requirement: YES Implementation Approach: Out of Box (OOB)

	[Bidder's Response] Our SLA for incident response stipulates that Findhelp will provide relevant information in an incident management report within 72 hours if there is an incident regarding PHI disclosure. Findhelp continuously monitors platform usage, privacy, and security. For example, Findhelp uses a security information and event management (SIEM) system for security maintenance and reporting including: • Documenting the platform at a high level regarding administrative functions of cataloging and monitoring all jobs and queries, inclusive of the approach and process in remediating jobs or queries. • Monitoring and configuring alerts and notifications. • Monitoring and tracking infrastructure space and storage trends. • Supporting event management which includes automated monitoring for events and notifying appropriate parties regarding event detection; this includes reviewing, categorizing, registering, and prioritizing events as well as routing event-related information all the while resolving all events. This includes full visibility into event management and incident management, which follows many of the same protocols as events with specific additional requirements related to HITRUST.

1229 Millwork Ave., Suite 402
Omaha, NE 68102-4277
P: 402.342.8232
UnitedWayMidlands.org

3. Appendix

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3. APPENDIX

a. **Contractual Agreement Form**
b. **Completed Attachment 1**
c. **Responses to Sections II through IV. Resumes**
d. **Any license, user agreement service level agreement, or similar document**

CONTRACTUAL AGREEMENT FORM

BIDDER MUST COMPLETE THE FOLLOWING

By signing this Contractual Agreement Form, the bidder guarantees compliance with the provisions stated in this solicitation and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder is not owned by the Chinese Communist Party.

Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

_X_ NEBRASKA VENDOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Vendor. "Nebraska Vendor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this Solicitation. All vendors who are not a Nebraska Vendor are considered Foreign Vendors under Neb. Rev Stat § 73-603 (c).

_____ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

_____ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. § 71-8611 and wish to have preference considered in the award of this contract.

THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

COMPANY:	United Way of the Midlands
ADDRESS:	1229 Millwork Ave. Ste 402, Omaha, NE, 68102
PHONE:	402.522.7950
EMAIL:	mwallen@uwmidlands.org
BIDDER NAME & TITLE:	Matthew Wallen, Chief Operating Officer
SIGNATURE:	Matthew Wallen
DATE:	10/21/2025

VENDOR COMMUNICATION WITH THE STATE CONTACT INFORMATION (IF DIFFERENT FROM ABOVE)	
NAME:	
TITLE:	
PHONE:	
EMAIL:	

Attachment 1
Minimum Qualifications
RFP 123190 O3
Third Party Warmline Services

If Bidder meets the minimum requirements as outlined in this RFP under **Section V. (C). MINIMUM QUALIFICATIONS,** please complete this form and include in the Appendix section of your RFP response. Fill in your company name in the two areas listed below, sign and date.

I have read and understand the **MINIMUM QUALIFICATIONS as indicated in Section V. (C.) of the RFP**, which reads:

MINIMUM QUALIFICATIONS:
The State is seeking a vendor with the following minimum qualifications to be deemed responsible and eligible for evaluation. If your company does not meet and/or exceed all qualifications, experience, and/or capabilities as listed herein, your company is advised not to proceed with preparing and submitting an RFP response to this solicitation.

Confirmation that your company has read, understands, and meets the minimum qualifications, experience, and/or capabilities is to be included in your proposal submission – **see Attachment 1 Minimum Qualifications.**

Failure to include a signed Attachment 1 in your proposal submission may result in the proposal being deemed as a "Non-Responsive Solicitation Response" and disqualification from consideration. Meeting the minimum essential qualifications, experience and/or capabilities is a required element to be deemed responsible and eligible for evaluation.

1. The Vendor shall have a minimum of five years' experience implementing, operating, and managing similar size and scope of work as outlined herein this RFP.
2. The Vendor shall have a minimum of three clients utilizing similar community-based prevention support and resources.
3. The Vendor must have company experience handling an annual minimum intake and support to 5,000 families in similar performance of all functions as outlined herein this RFP and any related attachments.

I declare that United Way of the Midlands meets all said requirements in the capacity of the company and not through the experience of our sub-contractors or staff's experience acquired through previous employment at other companies.

Further, our company understands and agrees that this form does not represent or replace any other submissions requested under RFP section (VII)(A)(1)(h) through (j) for EXPERIENCE, PROPOSED STAFF MANAGEMENT APPROACH AND SUBCONTRACTORS for the evaluation. The sole purpose of this form is to declare our company meets the minimum requirements for acting in the capacity of the responsible party and to ascertain our company, regardless of sub-contractors and former experience of employees, is eligible for consideration in this RFP process.

I am an authorized signer to make this proclamation.

Matthew Wallen

Authorized Company Representative Signature

Matthew Wallen

Printed Name

Chief Operating Officer

Title

II. TERMS AND CONDITIONS

Bidder should read the Terms and Conditions within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Terms and Conditions Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Terms and Conditions Within Section as Written (Initial)	Exceptions Taken to Terms and Conditions Within Section as Written (Initial)	**Exceptions:** (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
MW		

The bidders should submit with their solicitation response any license, user agreement, service level agreement, or similar documents that the bidder wants incorporated in the Contract. The State will not consider incorporation of any document not submitted with the solicitation response as the document will not have been included in the evaluation process. These documents shall be subject to negotiation and will be incorporated as addendums if agreed to by the Parties.

If a conflict or ambiguity arises after the Addendum to Contract Award has been negotiated and agreed to, the Addendum to Contract Award shall be interpreted as follows:

1. If only one (1) Party has a particular clause, then that clause shall control,
2. If both Parties have a similar clause, but the clauses do not conflict, the clauses shall be read together,
3. If both Parties have a similar clause, but the clauses conflict, the State's clause shall control.

A. GENERAL

1. The contract resulting from this Solicitation shall incorporate the following documents:

   a. Solicitation, including any attachments and addenda;
   b. Questions and Answers;
   c. Bidder's properly submitted solicitation response, including any terms and conditions or agreements submitted by the bidder;
   d. Addendum to Contract Award (if applicable); and
   e. Amendments to the Contract. (if applicable)

These documents constitute the entirety of the contract.

Unless otherwise specifically stated in a future contract amendment, in case of any conflict between the incorporated documents, the documents shall govern in the following order of preference with number one (1) receiving preference over all other documents and with each lower numbered document having preference over any higher numbered document: 1) Amendment to the executed Contract with the most recent dated amendment having the highest priority, 2) Executed Contract and any attached Addenda 3) Addendums to the solicitation and any Questions and Answers, 4) the original solicitation document and any Addenda or attachments, and 5) the Vendor's submitted solicitation response, including any terms and conditions or agreements that are accepted by the State.

Unless otherwise specifically agreed to in writing by the State, the State's standard terms and conditions, as executed by the State, shall always control over any terms and conditions or agreements submitted or included by the Vendor.

Any ambiguity or conflict in the contract discovered after its execution, not otherwise addressed herein, shall be resolved in accordance with the rules of contract interpretation as established in the State of Nebraska.

B. NOTIFICATION

Bidder and State shall identify the contract manager who shall serve as the point of contact for the executed contract.

Communications regarding the executed contract shall be in writing and shall be deemed to have been given if delivered personally; electronically, return receipt requested; or mailed, return receipt requested. All notices, requests, or communications shall be deemed effective upon receipt.

Either party may change its address for notification purposes by giving notice of the change and setting forth the new address and an effective date.

C. BUYER'S REPRESENTATIVE

The State reserves the right to appoint a Buyer's Representative to manage or assist the Buyer in managing the contract on behalf of the State. The Buyer's Representative will be appointed in writing, and the appointment document will specify the extent of the Buyer's Representative authority and responsibilities. If a Buyer's Representative is appointed, the bidder will be provided a copy of the appointment document and is expected to cooperate accordingly with the Buyer's Representative. The Buyer's Representative has no authority to bind the State to a contract, amendment, addendum, or other change or addition to the contract.

D. GOVERNING LAW (Nonnegotiable)

Notwithstanding any other provision of this contract, or any amendment or addendum(s) entered into contemporaneously or at a later time, the parties understand and agree that, (1) the State of Nebraska is a sovereign state and its authority to contract is therefore subject to limitation by the State's Constitution, statutes, common law, and regulation; (2) this contract will be interpreted and enforced under the laws of the State of Nebraska; (3) any action to enforce the provisions of this agreement must be brought in the State of Nebraska per state law; (4) the person signing this contract on behalf of the State of Nebraska does not have the authority to waive the State's sovereign immunity, statutes, common law, or regulations; (5) the indemnity, limitation of liability, remedy, and other similar provisions of the final contract, if any, are entered into subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity; and, (6) all terms and conditions of the final contract, including but not limited to the clauses concerning third party use, licenses, warranties, limitations of liability, governing law and venue, usage verification, indemnity, liability, remedy or other similar provisions of the final contract are entered into specifically subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity.

The Parties must comply with all applicable local, state, and federal laws, ordinances, rules, orders, and regulations.

E. BEGINNING OF WORK & SUSPENSION OF SERVICES

The bidder shall not commence any billable work until a valid contract has been fully executed by the State and the successful Vendor. The Vendor will be notified in writing when work may begin.

The State may, at any time and without advance notice, require the Vendor to suspend any or all performance or deliverables provided under this Contract. In the event of such suspension, the Contract Manager or POC, or their designee, will issue a written order to stop work. The written order will specify which activities are to be immediately suspended and the reason(s) for the suspension. Upon receipt of such order, the Vendor shall immediately comply with its terms and take all necessary steps to mitigate and eliminate the incurrence of costs allocable to the work affected by the order during the period of suspension. The suspended performance or deliverables may only resume when the State provides the Vendor with written notice that such performance or deliverables may resume, in whole or in part.

F. AMENDMENT

This Contract may be amended in writing, within scope, upon the agreement of both parties.

G. CHANGE ORDERS OR SUBSTITUTIONS

The State and the Vendor, upon the written agreement, may make changes to the contract within the general scope of the solicitation. Changes may involve specifications, the quantity of work, or such other items as the State may find necessary or desirable. Corrections of any deliverable, service, or work required pursuant to the contract shall not be deemed a change. The Vendor may not claim forfeiture of the contract by reasons of such changes.
The Vendor shall prepare a written description of the work required due to the change and an itemized cost sheet for the change. Changes in work and the amount of compensation to be paid to the Vendor shall be determined in

accordance with applicable unit prices if any, a pro-rated value, or through negotiations. The State shall not incur a price increase for changes that should have been included in the Vendor's solicitation response, were foreseeable, or result from difficulties with or failure of the Vendor's solicitation response or performance.

No change shall be implemented by the Vendor until approved by the State, and the Contract is amended to reflect the change and associated costs, if any. If there is a dispute regarding the cost, but both parties agree that immediate implementation is necessary, the change may be implemented, and cost negotiations may continue with both Parties retaining all remedies under the contract and law.

In the event any good or service is discontinued or replaced upon mutual consent during the contract period or prior to delivery, the State reserves the right to amend the contract to include the alternate product at the same price.

*****Vendor will not substitute any item that has been awarded without prior written approval of DHHS*****

H. RECORD OF VENDOR PERFORMANCE

The State may document the vendor's performance, which may include, but is not limited to, the customer service provided by the vendor, the ability of the vendor, the skill of the vendor, and any instance(s) of products or services delivered or performed which fail to meet the terms of the purchase order, contract, and/or specifications. In addition to other remedies and options available to the State, the State may issue one or more notices to the vendor outlining any issues the State has regarding the vendor's performance for a specific contract ("Contract Compliance Request"). The State may also document the Vendor's performance in a report, which may or may not be provided to the vendor ("Contract Non-Compliance Notice"). The Vendor shall respond to any Contract Compliance Request or Contract Non-Compliance Notice in accordance with such notice or request. At the sole discretion of the State, such Contract Compliance Requests and Contract Non-Compliance Notices may be placed in the State's records regarding the vendor and may be considered by the State and held against the vendor in any future contract or award opportunity. The record of vendor performance will be considered in any suspension or debarment action.

I. NOTICE OF POTENTIAL VENDOR BREACH

If Vendor breaches the contract or anticipates breaching the contract, the Vendor shall immediately give written notice to the State. The notice shall explain the breach or potential breach, a proposed cure, and may include a request for a waiver of the breach if so desired. The State may, in its discretion, temporarily or permanently waive the breach. By granting a waiver, the State does not forfeit any rights or remedies to which the State is entitled by law or equity, or pursuant to the provisions of the contract. Failure to give immediate notice, however, may be grounds for denial of any request for a waiver of a breach.

J. BREACH

Either Party may terminate the contract, in whole or in part, if the other Party breaches its duty to perform its obligations under the contract in a timely and proper manner. Termination requires written notice of default and a thirty (30) calendar day (or longer at the non-breaching Party's discretion considering the gravity and nature of the default) cure period. Said notice shall be delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery. Allowing time to cure a failure or breach of contract does not waive the right to immediately terminate the contract for the same or different contract breach which may occur at a different time.

The State's failure to make payment shall not be a breach, and the Vendor shall retain all available statutory remedies.

K. NON-WAIVER OF BREACH

The acceptance of late performance with or without objection or reservation by a Party shall not waive any rights of the Party nor constitute a waiver of the requirement of timely performance of any obligations remaining to be performed.

L. SEVERABILITY

If any term or condition of the contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and conditions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the provision held to be invalid or illegal.

M. INDEMNIFICATION

1. GENERAL

The Vendor agrees to defend, indemnify, and hold harmless the State and its employees, volunteers, agents, and its elected and appointed officials ("the indemnified parties") from and against any and all third party claims, liens, demands, damages, liability, actions, causes of action, losses, judgments, costs, and expenses of every nature, including investigation costs and expenses, settlement costs, and attorney fees and expenses ("the claims"), sustained or asserted against the State for personal injury, death, or property loss or damage, arising out of, resulting from, or attributable to the willful misconduct, negligence, error, or omission of the Vendor, its employees, Subcontractors, consultants, representatives, and agents, resulting from this contract, except to the extent such Vendor liability is attenuated by any action of the State which directly and proximately contributed to the claims.

2. INTELLECTUAL PROPERTY
The Vendor agrees it will, at its sole cost and expense, defend, indemnify, and hold harmless the indemnified parties from and against any and all claims, to the extent such claims arise out of, result from, or are attributable to, the actual or alleged infringement or misappropriation of any patent, copyright, trade secret, trademark, or confidential information of any third party by the Vendor or its employees, Subcontractors, consultants, representatives, and agents; provided, however, the State gives the Vendor prompt notice in writing of the claim. The Vendor may not settle any infringement claim that will affect the State's use of the Licensed Software without the State's prior written consent, which consent may be withheld for any reason.

If a judgment or settlement is obtained or reasonably anticipated against the State's use of any intellectual property for which the Vendor has indemnified the State, the Vendor shall, at the Vendor's sole cost and expense, promptly modify the item or items which were determined to be infringing, acquire a license or licenses on the State's behalf to provide the necessary rights to the State to eliminate the infringement, or provide the State with a non-infringing substitute that provides the State the same functionality. At the State's election, the actual or anticipated judgment may be treated as a breach of warranty by the Vendor, and the State may receive the remedies provided under this Solicitation.

3. PERSONNEL
The Vendor shall, at its expense, indemnify and hold harmless the indemnified parties from and against any claim with respect to withholding taxes, worker's compensation, employee benefits, or any other claim, demand, liability, damage, or loss of any nature relating to any of the personnel, including subcontractor's and their employees, provided by the Vendor.

4. SELF-INSURANCE
The State of Nebraska is self-insured for any loss and purchases excess insurance coverage pursuant to Neb. Rev. Stat. § 81-8,239.01. If there is a presumed loss under the provisions of this agreement, Vendor may file a claim with the Office of Risk Management pursuant to Neb. Rev. Stat. §§ 81-8,239.01 to 81-8,306 for review by the State Claims Board. The State retains all rights and immunities under the State Miscellaneous (Neb. Rev. Stat. § 81-8,294), Tort (Neb. Rev. Stat. § 81-8,209), and Contract Claim Acts (Neb. Rev. Stat. § 81-8,302), as outlined in state law and accepts liability under this agreement only to the extent provided by law.

5. The Parties acknowledge that Attorney General for the State of Nebraska is required by statute to represent the legal interests of the State, and that any provision of this indemnity clause is subject to the statutory authority of the Attorney General.

N. ATTORNEY'S FEES
In the event of any litigation, appeal, or other legal action to enforce any provision of the contract, the Parties agree to pay all expenses of such action, as permitted by law and if ordered by the court, including attorney's fees and costs, if the other Party prevails.

O. ASSIGNMENT, SALE, OR MERGER
Either Party may assign the contract upon mutual written agreement of the other Party. Such agreement shall not be unreasonably withheld.

The Vendor retains the right to enter into a sale, merger, acquisition, internal reorganization, or similar transaction involving Vendor's business. Vendor agrees to cooperate with the State in executing amendments to the contract to allow for the transaction. If a third party or entity is involved in the transaction, the Vendor will remain responsible for performance of the contract until such time as the person or entity involved in the transaction agrees in writing to be contractually bound by this contract and performs all obligations of the contract.

P. CONTRACTING WITH OTHER NEBRASKA POLITICAL SUBDIVISIONS OF THE STATE OR ANOTHER STATE
The Vendor may, but shall not be required to, allow agencies, as defined in Neb. Rev. Stat. § 81-145(2), to use this contract. The terms and conditions, including the price contract, contract may not be amended. The State shall not be contractually obligated or liable for any contract entered into pursuant to this clause. A listing of Nebraska political subdivisions may be found at the website of the Nebraska Auditor of Public Accounts.

The Vendor may, but shall not be required to, allow other states, agencies or divisions of other states, or political subdivisions of other states to use this contract. The terms and conditions, including price, of this contract shall apply to any such contract, but may be amended upon mutual consent of the Parties. The State of Nebraska shall not be contractually or otherwise obligated or liable under any contract entered into pursuant to this clause. The State shall be notified if a contract is executed based upon this contract.

Q. FORCE MAJEURE

Neither Party shall be liable for any costs or damages, or for default resulting from its inability to perform any of its obligations under the contract due to a natural or manmade event outside the control and not the fault of the affected Party ("Force Majeure Event") that was not foreseeable at the time the Contract was executed. The Party so affected shall immediately make a written request for relief to the other Party and shall have the burden of proof to justify the request. The other Party may grant the relief requested; relief may not be unreasonably withheld. Labor disputes with the impacted Party's own employees will not be considered a Force Majeure Event.

R. CONFIDENTIALITY

All materials and information provided by the Parties or acquired by a Party on behalf of the other Party shall be regarded as confidential information. All materials and information provided or acquired shall be handled in accordance with federal and state law, and ethical standards. Should said confidentiality be breached by a Party, the Party shall notify the other Party immediately of said breach and take immediate corrective action.

It is incumbent upon the Parties to inform their officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a. Specifically, 5 U.S.C. 552a (i)(1), which is made applicable by 5 U.S.C. 552a (m)(1), provides that any officer or employee, who by virtue of his/her employment or official position has possession of or access to agency records which contain individually identifiable information, the disclosure of which is prohibited by the Privacy Act or regulations established thereunder, and who knowing that disclosure of the specific material is prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than $5,000.

S. EARLY TERMINATION

The contract may be terminated as follows:

1. The State and the Vendor, by mutual written agreement, may terminate the contract, in whole or in part, at any time.
2. The State, in its sole discretion, may terminate the contract, in whole or in part, for any reason upon thirty (30) calendar day's written notice which is delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery to the Vendor. Such termination shall not relieve the Vendor of warranty or other service obligations incurred under the terms of the contract. In the event of termination, the Vendor shall be entitled to payment, determined on a pro rata basis, for products or services satisfactorily performed or provided.
3. The State may terminate the contract, in whole or in part, immediately for the following reasons:

    a. if directed to do so by statute,
    b. Vendor has made an assignment for the benefit of creditors, has admitted in writing its inability to pay debts as they mature, or has ceased operating in the normal course of business,
    c. a trustee or receiver of the Vendor or of any substantial part of the Vendor's assets has been appointed by a court,
    d. fraud, misappropriation, embezzlement, malfeasance, misfeasance, or illegal conduct pertaining to performance under the contract by its Vendor, its employees, officers, directors, or shareholders,
    e. an involuntary proceeding has been commenced by any Party against the Vendor under any one of the chapters of Title 11 of the United States Code and (i) the proceeding has been pending for at least sixty (60) calendar days; or (ii) the Vendor has consented, either expressly or by operation of law, to the entry of an order for relief; or (iii) the Vendor has been decreed or adjudged a debtor,
    f. a voluntary petition has been filed by the Vendor under any of the chapters of Title 11 of the United States Code,
    g. Vendor intentionally discloses confidential information,
    h. Vendor has or announces it will discontinue support of the deliverable; and,
    i. In the event funding is no longer available.

T. CONTRACT CLOSEOUT

Upon termination of the contract for any reason the Vendor shall within thirty (30) days, unless stated otherwise herein:

1. Transfer all completed or partially completed deliverables to the State,
2. Transfer ownership and title to all completed or partially completed deliverables to the State,
3. Return to the State all information and data unless the Vendor is permitted to keep the information or data by contract or rule of law. Vendor may retain one copy of any information or data as required to comply

with applicable work product documentation standards or as are automatically retained in the course of Vendor's routine back up procedures,

4. Cooperate with any successor Contactor, person, or entity in the assumption of any or all of the obligations of this contract,
5. Cooperate with any successor Contactor, person, or entity with the transfer of information or data related to this contract,
6. Return or vacate any state owned real or personal property; and,
7. Return all data in a mutually acceptable format and manner.

Nothing in this section should be construed to require the Vendor to surrender intellectual property, real or personal property, or information or data owned by the Vendor for which the State has no legal claim.

U. AMERICANS WITH DISABILITIES ACT

Vendor shall comply with all applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12131–12134), as amended by the ADA Amendments Act of 2008 (ADA Amendments Act) (Pub.L. 110–325, 122 Stat. 3553 (2008)), which prohibits discrimination on the basis of disability by public entities.

V. LONG-TERM CARE OMBUDSMAN (Nonnegotiable)

Vendor must comply with the Long-Term Care Ombudsman Act, per Neb. Rev. Stat. § 81-2237 et seq. This section shall survive the termination of this contract.

W. OFFICE OF PUBLIC COUNSEL (Nonnegotiable)

If it provides, under the terms of this contract and on behalf of the State of Nebraska, health and human services to individuals; service delivery; service coordination; or case management, Vendor shall submit to the jurisdiction of the Office of Public Counsel, pursuant to Neb. Rev. Stat. § 81-8,240 et seq. This section shall survive the termination of this contract.

X. LOBBYING

1. No federal or state funds paid under this RFP shall be paid for any lobbying costs as set forth herein.

2. Lobbying Prohibited by 31 U.S.C. § 1352 and 45 CFR §§ 93 et seq, and Required Disclosures.

   a. Contractor certifies that no federal or state appropriated funds shall be paid, by or on behalf of Contractor, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this award for: (a) the awarding of any federal agreement; (b) the making of any federal grant; (c) the entering into of any cooperative agreement; and (d) the extension, continuation, renewal, amendment, or modification of any federal agreement, grant, loan, or cooperative agreement.

   b. If any funds, other than federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence: an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with Contractor, Contractor shall complete and submit Federal Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

3. Lobbying Activities Prohibited under Federal Appropriations Bills.

   a. No funds paid under this RFP shall be used, other than for normal and recognized executive-legislative relationships, for publicity or propaganda purposes, for the preparation, distribution, or use of any kit, pamphlet, booklet, publication, electronic communication, radio, television, or video presentation designed to support or defeat the enactment of legislation before the Congress or any State or local legislature or legislative body, except in presentation of the Congress or any State or local legislature itself, or designed to support or defeat any proposed or pending regulation, administrative action, or order issued by the executive branch of any state or local government itself.

   b. No funds paid under this RFP shall be used to pay the salary or expenses of any grant or contract recipient, or agent acting for such recipient, related to any activity designed to influence the enactment of legislation, appropriations, regulation, administrative action, or Executive order proposed or pending before the Congress or any State government, State legislature or local legislature or legislative body, other than normal and recognized executive legislative relationships or participation by an agency or officer of an State, local or tribal government in policymaking and administrative processes within the executive branch of that government.

c. The prohibitions in the two sections immediately above shall include any activity to advocate or promote any proposed, pending, or future federal, state or local tax increase, or any proposed, pending, or future requirement or restriction on any legal consumer product, including its sale of marketing, including but not limited to the advocacy or promotion of gun control.

4. Lobbying Costs Unallowable Under the Cost Principles. In addition to the above, no funds shall be paid for executive lobbying costs as set forth in 45 CFR § 75.450(b). If Contractor is a nonprofit organization or an Institute of Higher Education, other costs of lobbying are also unallowable as set forth in 45 CFR § 75.450(c).

III. VENDOR DUTIES

Bidder should read the Vendor Duties within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Vendor Duties Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Vendor Duties Within Section as Written (Initial)	Exceptions Taken to Vendor Duties Within Section as Written (Initial)	**Exceptions:** (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
MW		

A. INDEPENDENT VENDOR / OBLIGATIONS

It is agreed that the Vendor is an independent Vendor and that nothing contained herein is intended or should be construed as creating or establishing a relationship of employment, agency, or a partnership.

The Vendor is solely responsible for fulfilling the contract. The Vendor or the Vendor's representative shall be the sole point of contact regarding all contractual matters.

The Vendor shall secure, at its own expense, all personnel required to perform the services under the contract. The personnel the Vendor uses to fulfill the contract shall have no contractual or other legal relationship with the State; they shall not be considered employees of the State and shall not be entitled to any compensation, rights or benefits from the State, including but not limited to, tenure rights, medical and hospital care, sick and vacation leave, severance pay, or retirement benefits.

By-name personnel commitments made in the bidder's solicitation response shall not be changed without the prior written approval of the State. Replacement of these personnel, if approved by the State, shall be with personnel of equal or greater ability and qualifications.

All personnel assigned by the Vendor to the contract shall be employees of the Vendor or a subcontractor and shall be fully qualified to perform the work required herein. Personnel employed by the Vendor or a subcontractor to fulfill the terms of the contract shall remain under the sole direction and control of the Vendor or the subcontractor respectively.

With respect to its employees, the Vendor agrees to be solely responsible for the following:

1. Any and all pay, benefits, employment taxes and/or other payroll withholding,
2. Any and all vehicles used by the Vendor's employees, including all insurance required by state law,
3. Damages incurred by Vendor's employees within the scope of their duties under the contract,
4. Maintaining Workers' Compensation and health insurance that complies with state and federal law and submitting any reports on such insurance to the extent required by governing law,
5. Determining the hours to be worked and the duties to be performed by the Vendor's employees; and,
6. All claims on behalf of any person arising out of employment or alleged employment (including without limit claims of discrimination alleged against the Vendor, its officers, agents, or subcontractors or subcontractor's employees).

If the Vendor intends to utilize any subcontractor, the subcontractor's level of effort, tasks, and time allocation should be clearly defined in the solicitation response. The Vendor shall agree that it will not utilize any subcontractors not specifically included in its solicitation response in the performance of the contract without the prior written authorization of the State. If the Vendor subcontracts any of the work, the Vendor agrees to pay any and all subcontractors in accordance with the Vendor's agreement with the respective subcontractor(s).

The State reserves the right to require the Vendor to reassign or remove from the project any Vendor or subcontractor employee.

The Vendor shall ensure that the terms and conditions contained in any contract with a subcontractor do not conflict with the terms and conditions of this contract.

The Vendor shall include a similar provision, for the protection of the State, in the contract with any Subcontractor engaged to perform work on this contract.

B. FOREIGN ADVERSARY CONTRACTING PROHIBITION ACT CERTIFICATION (Nonnegotiable)

The Vendor certifies that it is not a scrutinized company as defined under the Foreign Adversary Contracting Prohibition Act, Neb. Rev. Stat. Sec. § 73-903 (5); that it will not subcontract with any scrutinized company for any aspect of performance of the contemplated contract; and that any products or services to be provided do not originate with a scrutinized company.

C. EMPLOYEE WORK ELIGIBILITY STATUS

The Vendor is required and hereby agrees to use a federal immigration verification system to determine the work eligibility status of employees physically performing services within the State of Nebraska. A federal immigration verification system means the electronic verification of the work authorization program authorized by the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of an employee.

If the Vendor is an individual or sole proprietorship, the following applies:

1. The Vendor must complete the United States Citizenship Attestation Form, available on the Department of Administrative Services website at https://das.nebraska.gov/materiel/docs/pdf/Individual%20or%20Sole%20Proprietor%20United%20States%20Attestation%20Form%20English%20and%20Spanish.pdf
2. The completed United States Attestation Form should be submitted with the Solicitation response.
3. If the Vendor indicates on such attestation form that he or she is a qualified alien, the Vendor agrees to provide the US Citizenship and Immigration Services documentation required to verify the Vendor's lawful presence in the United States using the Systematic Alien Verification for Entitlements (SAVE) Program.
4. The Vendor understands and agrees that lawful presence in the United States is required, and the Vendor may be disqualified or the contract terminated if such lawful presence cannot be verified as required by Neb. Rev. Stat. § 4-108.

D. COMPLIANCE WITH CIVIL RIGHTS LAWS AND EQUAL OPPORTUNITY EMPLOYMENT / NONDISCRIMINATION (Nonnegotiable)

The Vendor shall comply with all applicable local, state, and federal statutes and regulations regarding civil rights laws and equal opportunity employment. The Nebraska Fair Employment Practice Act prohibits Vendors of the State of Nebraska, and their Subcontractors, from discriminating against any employee or applicant for employment, with respect to hire, tenure, terms, conditions, compensation, or privileges of employment because of race, color, religion, sex, disability, marital status, or national origin (Neb. Rev. Stat. §§ 48-1101 to 48-1125). The Vendor guarantees compliance with the Nebraska Fair Employment Practice Act, and breach of this provision shall be regarded as a material breach of contract. The Vendor shall insert a similar provision in all Subcontracts for goods and services to be covered by any contract resulting from this Solicitation.

E. COOPERATION WITH OTHER VENDORS

Vendor may be required to work with or in close proximity to other Vendors or individuals that may be working on same or different projects. The Vendor shall agree to cooperate with such other Vendors or individuals and shall not commit or permit any act which may interfere with the performance of work by any other Vendor or individual. Vendor is not required to compromise Vendor's intellectual property or proprietary information unless expressly required to do so by this contract.

F. **DISCOUNTS**

Prices quoted shall be inclusive of ALL trade discounts. Cash discount terms of less than thirty (30) days will not be considered as part of the solicitation response. Cash discount periods will be computed from the date of receipt of a properly executed claim voucher or the date of completion of delivery of all items in satisfactory condition, whichever is later.

G. **PRICES**

Prices quoted shall be net, including transportation and delivery charges fully prepaid by the bidder, F.O.B. destination named in the Solicitation. No additional charges will be allowed for packing, packages, or partial delivery costs. When an arithmetic error has been made in the extended total, the unit price will govern.

All prices, costs, and terms and conditions submitted in the solicitation response shall remain fixed and valid commencing on the opening date of the solicitation until the contract terminates or expires.

The State reserves the right to deny any requested price increase. No price increases are to be billed to any State Agencies prior to written amendment of the contract by the parties.

The State will be given full proportionate benefit of any decreases for the term of the contract.

H. **PERMITS, REGULATIONS, LAWS**

The contract price shall include the cost of all royalties, licenses, permits, and approvals, whether arising from patents, trademarks, copyrights or otherwise, that are in any way involved in the contract. The Vendor shall obtain and pay for all royalties, licenses, and permits, and approvals necessary for the execution of the contract. The Vendor must guarantee that it has the full legal right to the materials, supplies, equipment, software, and other items used to execute this contract.

I. **OWNERSHIP OF INFORMATION AND DATA / DELIVERABLES**

The State shall have the unlimited right to publish, duplicate, use, and disclose all information and data developed or obtained by the Vendor on behalf of the State pursuant to this contract.

The State shall own and hold exclusive title to any deliverable developed as a result of this contract. Vendor shall have no ownership interest or title, and shall not patent, license, or copyright, duplicate, transfer, sell, or exchange, the design, specifications, concept, or deliverable.

J. **INSURANCE REQUIREMENTS**

The Vendor shall throughout the term of the contract maintain insurance as specified herein and provide the State with a current Certificate of Insurance/Acord Form (COI) verifying the coverage. The Vendor shall not commence work on the contract until the insurance is in place. If Vendor subcontracts any portion of the Contract the Vendor must, throughout the term of the contract, either:

1. Provide equivalent insurance for each subcontractor and provide a COI verifying the coverage for the subcontractor,
2. Require each subcontractor to have equivalent insurance and provide written notice to the State that the Vendor has verified that each subcontractor has the required coverage; or,
3. Provide the State with copies of each subcontractor's Certificate of Insurance, evidencing the required coverage.

The Vendor shall not allow any Subcontractor to commence work until the Subcontractor has equivalent insurance. The failure of the State to require a COI, or the failure of the Vendor to provide a COI or require subcontractor insurance shall not limit, relieve, or decrease the liability of the Vendor hereunder.

In the event that any policy written on a claims-made basis terminates or is canceled during the term of the contract or within four (4) years of termination or expiration of the contract, the Vendor shall obtain an extended discovery or reporting period, or a new insurance policy, providing coverage required by this contract for the term of the contract and four (4) years following termination or expiration of the contract.

If by the terms of any insurance a mandatory deductible is required, or if the Vendor elects to increase the mandatory deductible amount, the Vendor shall be responsible for payment of the amount of the deductible in the event of a paid claim.

Notwithstanding any other clause in this Contract, the State may recover up to the liability limits of the insurance policies required herein.

1. **WORKERS' COMPENSATION INSURANCE**

The Vendor shall take out and maintain during the life of this contract the statutory Workers' Compensation and Employer's Liability Insurance for all of the contactors' employees to be engaged in work on the project under this contract and, in case any such work is sublet, the Vendor shall require the Subcontractor similarly to provide Worker's Compensation and Employer's Liability Insurance for all of the Subcontractor's employees to be engaged in such work. This policy shall be written to meet the statutory requirements for the state in which the work is to be performed, including Occupational Disease. **The policy shall include a waiver of subrogation in favor of the State. The COI shall contain the mandatory COI subrogation waiver language found hereinafter**. The amounts of such insurance shall not be less than the limits stated hereinafter. For employees working in the State of Nebraska, the policy must be written by an entity authorized by the State of Nebraska Department of Insurance to write Workers' Compensation and Employer's Liability Insurance for Nebraska employees.

2. **COMMERCIAL GENERAL LIABILITY INSURANCE AND COMMERCIAL AUTOMOBILE LIABILITY INSURANCE**

The Vendor shall take out and maintain during the life of this contract such Commercial General Liability Insurance and Commercial Automobile Liability Insurance as shall protect Vendor and any Subcontractor performing work covered by this contract from claims for damages for bodily injury, including death, as well as from claims for property damage, which may arise from operations under this contract, whether such operation be by the Vendor or by any Subcontractor or by anyone directly or indirectly employed by either of them, and the amounts of such insurance shall not be less than limits stated hereinafter.

The Commercial General Liability Insurance shall be written on an **occurrence basis**, and provide Premises/Operations, Products/Completed Operations, Independent Vendors, Personal Injury, and Contractual Liability coverage. **The policy shall include the State, and others as required by the contract documents, as Additional Insured(s). This policy shall be primary, and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory. The COI shall contain the mandatory COI liability waiver language found hereinafter.** The Commercial Automobile Liability Insurance shall be written to cover all Owned, Non-owned, and Hired vehicles.

REQUIRED INSURANCE COVERAGE	
COMMERCIAL GENERAL LIABILITY	
General Aggregate	$2,000,000
Products/Completed Operations Aggregate	$2,000,000
Personal/Advertising Injury	$1,000,000 per occurrence
Bodily Injury/Property Damage	$1,000,000 per occurrence
Medical Payments	$10,000 any one person
Damage to Rented Premises (Fire)	$300,000 each occurrence
Contractual	Included
XCU Liability (Explosion, Collapse, and Underground Damage)	Included
Independent Vendors	Included
Abuse & Molestation	Included
If higher limits are required, the Umbrella/Excess Liability limits are allowed to satisfy the higher limit.	
WORKER'S COMPENSATION	
Employers Liability Limits	$500K/$500K/$500K
Statutory Limits- All States	Statutory - State of Nebraska
Voluntary Compensation	Statutory
COMMERCIAL AUTOMOBILE LIABILITY	
Bodily Injury/Property Damage	$1,000,000 combined single limit
Include All Owned, Hired & Non-Owned Automobile liability	Included
Motor Carrier Act Endorsement	Where Applicable
UMBRELLA/EXCESS LIABILITY	
Over Primary Insurance	$5,000,000 per occurrence
PROFESSIONAL LIABILITY	
All Other Professional Liability (Errors & Omissions)	$1,000,000 Per Claim / Aggregate
COMMERCIAL CRIME	
Crime/Employee Dishonesty Including 3rd Party Fidelity	$1,000,000
CYBER LIABILITY	
Breach of Privacy, Security Breach, Denial of Service, Remediation, Fines and Penalties	$5,000,000
MANDATORY COI SUBROGATION WAIVER LANGUAGE	
"Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska."	
MANDATORY COI LIABILITY WAIVER LANGUAGE	
"Commercial General Liability & Commercial Automobile Liability policies shall name the State of Nebraska as an Additional Insured and the policies shall be primary and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory as additionally insured."	

3. EVIDENCE OF COVERAGE

The Vendor shall furnish the Contract Manager, via email, with a certificate of insurance coverage complying with the above requirements prior to beginning work at:

123190 O3

Department of Health and Human Services
Attn: Bradley Murphy, Procurement Contracts Officer
301 Centennial Mall South, 5th Floor
Lincoln, NE 68508
dhhs.procurement@nebraska.gov

These certificates or the cover sheet shall reference the solicitation number, and the certificates shall include the name of the company, policy numbers, effective dates, dates of expiration, and amounts and types of coverage afforded. If the State is damaged by the failure of the Vendor to maintain such insurance, then the Vendor shall be responsible for all reasonable costs properly attributable thereto.

Reasonable notice of cancellation of any required insurance policy must be submitted to the contract manager as listed above when issued and a new coverage binder shall be submitted immediately to ensure no break in coverage.

4. **DEVIATIONS**
The insurance requirements are subject to limited negotiation. Negotiation typically includes, but is not necessarily limited to, the correct type of coverage, necessity for Workers' Compensation, and the type of automobile coverage carried by the Vendor.

K. ANTITRUST
The Vendor hereby assigns to the State any and all claims for overcharges as to goods and/or services provided in connection with this contract resulting from antitrust violations which arise under antitrust laws of the United States and the antitrust laws of the State.

L. CONFLICT OF INTEREST
By submitting a solicitation response, vendor certifies that no relationship exists between the vendor and any person or entity which either is, or gives the appearance of, a conflict of interest related to this solicitation or project.

Vendor further certifies that vendor will not employ any individual known by vendor to have a conflict of interest nor shall vendor take any action or acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its contractual obligations hereunder or which creates an actual or appearance of conflict of interest.

If there is an actual or perceived conflict of interest, vendor shall provide with its solicitation response a full disclosure of the facts describing such actual or perceived conflict of interest and a proposed mitigation plan for consideration. The State will then consider such disclosure and proposed mitigation plan and either approve or reject as part of the overall solicitation response evaluation.

M. ADVERTISING
The Vendor agrees not to refer to the contract award in advertising in such a manner as to state or imply that the company or its goods or services are endorsed or preferred by the State. Any publicity releases pertaining to the project shall not be issued without prior written approval from the State.

N. NEBRASKA TECHNOLOGY ACCESS STANDARDS (Nonnegotiable)

1. The State of Nebraska is committed to ensuring that all information and communication technology (ICT), developed, leased, or owned by the State of Nebraska, affords equivalent access to employees, program participants and members of the public with disabilities, as it affords to employees, program participants and members of the public who are not persons with disabilities.

2. By entering into this Contract, Vendor understands and agrees that if the Vendor is providing a product or service that contains ICT, as defined in subsection 3 below and such ICT is intended to be directly interacted with by the user or is public facing, such ICT must provide equivalent access, or be modified during implementation to afford equivalent access, to employees, program participants, and members of the public who have and who do not have disabilities. The Vendor may comply with this section by complying with Section 508 of the Rehabilitation Act of 1973, as amended, and its implementing standards adopted and promulgated by the U.S. Access Board.

3. ICT means information technology and other equipment, systems, technologies, or processes, for which the principal function is the creation, manipulation, storage, display, receipt, or transmission of electronic data and information, as well as any associated content. Vendor hereby agrees ICT includes computers and peripheral equipment, information kiosks and transaction machines, telecommunications equipment, customer premises equipment, multifunction office machines, software, applications, web sites, videos, and electronic documents. For the purposes of these assurances, ICT does not include ICT that is used exclusively by a Vendor.

O. DISASTER RECOVERY/BACK UP PLAN
The Vendor shall have a disaster recovery and back-up plan, of which a copy should be provided upon request to the State, which includes, but is not limited to equipment, personnel, facilities, and transportation, in order to continue delivery of goods and services as specified under the specifications in the contract in the event of a disaster.

P. DRUG POLICY
Vendor certifies it maintains a drug free workplace environment to ensure worker safety and workplace integrity. Vendor agrees to provide a copy of its drug free workplace policy at any time upon request by the State.

Q. WARRANTY
Despite any clause to the contrary, the Vendor represents and warrants that its services hereunder shall be performed by competent personnel and shall be of professional quality consistent with generally accepted industry standards for

the performance of such services and shall comply in all respects with the requirements of this Agreement. For any breach of this warranty, the Vendor shall, for a period of ninety (90) days from performance of the service, perform the services again, at no cost to the State, or if Vendor is unable to perform the services as warranted, Vendor shall reimburse the State all fees paid to Vendor for the unsatisfactory services. The rights and remedies of the parties under this warranty are in addition to any other rights and remedies of the parties provided by law or equity, including, without limitation actual damages, and, as applicable and awarded under the law, to a prevailing party, reasonable attorneys' fees and costs.

R. TIME IS OF THE ESSENCE

Time is of the essence with respect to Vendor's performance and deliverables pursuant to this Contract.

S. BUSINESS ASSOCIATE PROVISIONS

1. BUSINESS ASSOCIATE. "Business Associate" shall generally have the same meaning as the term "business associate" at 45 CFR § 160.103, and in reference to the party to the Contract, shall mean Vendor or Contractor.

2. COVERED ENTITY. "Covered Entity" shall generally have the same meaning as the term "covered entity" at 45 CFR § 160.103, and in reference to the party to the Contract, shall mean DHHS.

3. HIPAA RULES. "HIPAA Rules" shall mean the Privacy, Security, Breach Notification, and Enforcement Rules at 45 CFR Part 160 and Part 164.

4. SECURITY INCIDENT. "Security Incident" shall mean the attempted or successful unauthorized access, use, disclosure, modification, or destruction of information, or interference with system operations in an information system.

5. OTHER TERMS. For purposes of these Business Associate Provisions, the following terms shall have the same meaning as those terms in the HIPAA Rules: Breach, Data Aggregation, Designated Record Set, Disclosure, Health Care Operations, Individual, Minimum Necessary, Notice of Privacy Practices, Protected Health Information, Required by Law, Secretary, Subcontractor, Unsecured Protected Health Information, and Use.

6. THE VENDOR shall do the following:
   - **a.** Not use or disclose Protected Health Information other than as permitted or required by the Contract or as required by law. Vendor may use Protected Health Information for the purposes of managing its internal business processes relating to its functions and performance under the Contract. Use or disclosure must be consistent with DHHS' minimum necessary policies and procedures.
   - **b.** Implement and maintain appropriate administrative, physical, and technical safeguards to prevent access to, and the unauthorized use and disclosure of Protected Health Information. Comply with Subpart C of 45 CFR Part 164 with respect to electronic Protected Health Information, to prevent use or disclosure of Protected Health Information other than as provided for in the Contract and assess potential risks and vulnerabilities to the individual health data in its care and custody and develop, implement, and maintain reasonable security measures.
   - **c.** To the extent Vendor is to carry out one or more of the DHHS' obligations under Subpart E of 45 CFR Part 164, comply with the requirements of Subpart E that apply to DHHS in the performance of such obligations. Contractor may not use or disclosure Protected Health Information in a manner that would violate Subpart E of 45 CFR Part 164 if done by DHHS.
   - **d.** In accordance with 45 CFR §§ 164.502(e)(1)(ii) and 164.308(b)(2), if applicable, ensure that any agents and subcontractors that create, receive, maintain, or transmit Protected Health Information received from DHHS, or created by or received from Vendor on behalf of DHHS, agree in writing to the same restrictions, conditions, and requirements relating to the confidentiality, care, custody, and minimum use of Protected Health Information that apply to the Contractor with respect to such information.
   - **e.** Obtain reasonable assurances from the person to whom the information is disclosed that the information will remain confidential and be used or further disclosed only as required by law or for the purposes for which it was disclosed to the person, and that the person shall notify Vendor of any instances of which the person is aware that the confidentiality of the information has been breached.
   - **f.** Vendor shall maintain and make available within fifteen (15) days in a commonly used electronic format:
     - **i.** Protected Health Information to DHHS, as necessary to satisfy DHHS' obligations under 45 CFR § 164.524;
     - **ii.** Any amendment(s) to Protected Health Information, as directed or agreed to by DHHS, pursuant to 45 CFR § 164.526, or take other measures as necessary to satisfy DHHS' obligations under 45 CFR § 164.526;
     - **iii.** The information required to provide an accounting of disclosures to DHHS, as necessary to satisfy DHHS' obligations under 45 CFR § 164.528.
   - **g.** Make its internal practices, books, and records relating to the use and disclosure of Protected Heath Information received from or created or received by Vendor on behalf of DHHS available to the Secretary

or DHHS for purposes of determining compliance with the HIPAA Rules. Vendor shall provide DHHS with copies of the information it has made available to the Secretary at the same time as it was made available to the Secretary.

h. Report to DHHS within fifteen (15) days of when Vendor becomes aware, any unauthorized use or disclosure of Protected Health Information made in violation of the Contract or the HIPAA Rules, including any security incident that may put electronic Protected Health Information at risk. Vendor shall, as instructed by DHHS, take immediate steps to mitigate any harmful effect of such unauthorized disclosure of Protected Health Information pursuant to the conditions of the Contract through the preparation and completion of a written Corrective Action Plan that is subject to review and approval by DHHS. Vendor shall be responsible for all breach notifications in accordance with HIPAA rules and regulations, and all costs associated with security incident investigations and breach notification procedures.

i. Business Associate shall indemnify, defend, and hold harmless DHHS for any financial loss as a result of claims brought by third parties and which are caused by the failure of Vendor, its officers, directors, agents, or subcontractors to comply with the terms of the Contract, or for penalties imposed by the HHS Office of Civil Rights for any violations of the HIPAA Rules caused by Vendor, its officers, directors, agents, or subcontractors. Additionally, Vendor shall indemnify DHHS for any time and expenses it may incur from breach notifications that are necessary under the HIPAA Breach Notification Rule, which are caused by a failure of Vendor, its officers, directors, agents, or subcontractors to comply with the terms of the Contract.

7. <u>TERMINATION FOR VIOLATION OF BUSINESS ASSOCIATE PROVISIONS.</u>

a. In addition to other termination provisions provided for herein, DHHS may immediately terminate the Contract, and any and all associated contracts, if DHHS determines that Vendor has violated a material term of these section III. U. Business Associate Provisions.

b. Within thirty (30) days of expiration or termination of the Contract, or as agreed, unless Vendor requests and DHHS authorizes a longer period of time, Vendor shall return. or at the written direction of DHHS, destroy all Protected Health Information received from DHHS (or created or received by Vendor on behalf of DHHS) that Vendor still maintains in any form, and shall retain no copies of such Protected Health Information. Vendor shall provide a written certification to DHHS that all such Protected Health Information has been returned or destroyed (if so instructed), whichever is deemed appropriate. If such return or destruction is determined by DHHS to be infeasible, Vendor shall use such Protected Health Information only for purposes that makes such return or destruction infeasible, and the provisions of the Contract shall survive with respect to such Protected Health Information.

c. The obligations of the Vendor under this Termination section shall survive the termination of the Contract.

IV. PAYMENT

Bidder should read the Payment clauses within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Payment clauses Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Payment Clauses Within Section as Written (Initial)	Exceptions Taken to Payment Clauses Within Section as Written (Initial)	**Exceptions:** (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
MW		

A. PROHIBITION AGAINST ADVANCE PAYMENT (Nonnegotiable)
Pursuant to Neb. Rev. Stat. § 81-2403, "no goods or services shall be deemed to be received by an agency until all such goods or services are completely delivered and finally accepted by the agency."

B. TAXES (Nonnegotiable)
The State is not required to pay taxes and assumes no such liability as a result of this Solicitation. The Vendor may request a copy of the Nebraska Department of Revenue, Nebraska Resale or Exempt Sale Certificate for Sales Tax Exemption, Form 13 for their records. Any property tax payable on the Vendor's equipment which may be installed in a state-owned facility is the responsibility of the Vendor.

C. INVOICES
Invoices for payments must be submitted by the Vendor to the agency requesting the services with sufficient detail to support payment. Upon approval of deliverables, invoices shall be sent to dhhs.subrecipientbilling@nebraska.gov and assigned contract monitor.

A. All invoices before the beginning of operations shall be submitted upon completion and sign-off of each respective phase as outlined in the Cost Sheet.

B. Operations shall be billed quarterly, following the final sign-off of the post-implementation period, throughout the duration of the contract.

C. <u>The Vendors invoice should include the following</u>:
   1. The invoices shall be submitted in non-modifiable (PDF or equivalent) format and at a minimum, contain the following:
   2. Vendor name
   3. Remittance address
   4. Tax ID number
   5. Contract number
   6. A unique invoice number
   7. Breakdown of deliverables and rate
   8. Budgeted, actual, and cumulative expenditures by deliverable

9. Unexpended budget balance remaining on contract

The terms and conditions included in the Vendor's invoice shall be deemed to be solely for the convenience of the parties. No terms or conditions of any such invoice shall be binding upon the State, and no action by the State, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping the State with respect to any such term or condition, unless the invoice term or condition has been previously agreed to by the State as an amendment to the contract. **The State shall have forty-five (45) calendar days to pay after a valid and accurate invoice is received by the State.**

D. INSPECTION AND APPROVAL

Final inspection and approval of all work required under the contract shall be performed by the designated State officials.

The State and/or its authorized representatives shall have the right to enter any premises where the Vendor or Subcontractor duties under the contract are being performed, and to inspect, monitor or otherwise evaluate the work being performed. All inspections and evaluations shall be at reasonable times and in a manner that will not unreasonably delay work.

E. PAYMENT (Nonnegotiable)

Payment will be made by the responsible agency in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. § 81-2403). The State may require the Vendor to accept payment by electronic means such as ACH deposit. In no event shall the State be responsible or liable to pay for any goods and services provided by the Vendor prior to the Effective Date of the contract, and the Vendor hereby waives any claim or cause of action for any such goods or services.

F. LATE PAYMENT (Nonnegotiable)

The Vendor may charge the responsible agency interest for late payment in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §§ 81-2401 through 81-2408).

G. SUBJECT TO FUNDING / FUNDING OUT CLAUSE FOR LOSS OF APPROPRIATIONS (Nonnegotiable)

The State's obligation to pay amounts due on the Contract for fiscal years following the current fiscal year is contingent upon legislative or federal appropriation of funds. Should said funds not be appropriated, the State may terminate the contract with respect to those payments for the fiscal year(s) for which such funds are not appropriated. The State will give the Vendor reasonable written notice prior to the effective date of termination. All obligations of the State to make payments after the termination date will cease. The Vendor shall be entitled to receive just and equitable compensation for any authorized work which has been satisfactorily completed as of the termination date. In no event shall the Vendor be paid for a loss of anticipated profit.

H. RIGHT TO AUDIT (First Paragraph is Nonnegotiable)

The State shall have the right to audit the Vendor's performance of this contract upon a thirty (30) days' written notice. Vendor shall utilize generally accepted accounting principles, and shall maintain the accounting records, and other records and information relevant to the contract (Information) to enable the State to audit the contract. (Neb. Rev. Stat. § 84-304 et seq.) The State may audit, and the Vendor shall maintain, the Information during the term of the contract and for a period of five (5) years after the completion of this contract or until all issues or litigation are resolved, whichever is later. The Vendor shall make the Information available to the State at Vendor's place of business or a location acceptable to both Parties during normal business hours. If this is not practical or the Vendor so elects, the Vendor may provide electronic or paper copies of the Information. The State reserves the right to examine, make copies of, and take notes on any Information relevant to this contract, regardless of the form or the Information, how it is stored, or who possesses the Information. Under no circumstance will the Vendor be required to create or maintain documents not kept in the ordinary course of Vendor's business operations, nor will Vendor be required to disclose any information, including but not limited to product cost data, which is confidential or proprietary to Vendor.

The Parties shall pay their own costs of the audit unless the audit finds a previously undisclosed overpayment by the State. If a previously undisclosed overpayment exceeds one-half of one percent (0.005) of the total contract billings, or if fraud, material misrepresentations, or non-performance is discovered on the part of the Vendor, the Vendor shall reimburse the State for the total costs of the audit. Overpayments and audit costs owed to the State shall be paid within ninety (90) days of written notice of the claim. The Vendor agrees to correct any material weaknesses or conditions found as a result of the audit.

This Partnership Agreement ("Agreement") is made and entered into by and between the following organizations forming a coalition to provide service and administration of a third-party statewide single access point 24/7, referred to as the 'Warmline" in response to Request for Proposal (RFP) 123190 O3 issued by the Nebraska Department of Health and Human Services on September 29, 2025:

- **United Way of the Midlands**, with its principal place of business at 1229 Millwork Ave., Ste 402, Omaha, NE 68102-4277
- **Boys Town,** with its principal place of business at 14100 Crawford St., Boys Town, NE 68010

Hereinafter, the above organizations shall be referred to as a member of the "Coalition."

Governing Law

This Agreement shall be governed by and construed in accordance with the laws of the State of Nebraska, Nebraska Department of Health and Human Services, and requirements of the Third-Party Warmline scope of work.

Oversight and Amendments

Representatives from each organization will oversee the coordination, decision-making, and implementation of activities related to the program. Partners can assign their interests in the partnership and the rights and obligations to successors, and/or delegate responsibilities to employees.

This agreement may be revised as necessary with the mutual consent of the parties involved by the adoption of a written amendment signed and dated by all parties.

Purpose of Consortium

United Way of the Midlands will serve as the lead applicant in response to RFP 123190 O3. The purpose of the Consortium is to collaboratively respond to and administer Third Party Warmline Services in Nebraska. The Warmline will provide Nebraska families with a 24/7 centralized access point for intake and referral support to local services.

The goal is to expand prevention-focused services outside of formal child welfare involvement, ensuring families get the right help at the right time. Currently, most services are triggered only after abuse or neglect reports, and a lack of coordination limits awareness of available resources. A Warmline would centralize referrals and improve access, reducing barriers caused by scattered information and stigma around contacting CFS directly. By contracting a third-party to operate the Warmline, Nebraska can strengthen upstream prevention, relieve CFS to focus on core protection duties, and improve family outcomes statewide.

The Consortium leverages the specialized expertise of each participating organization to efficiently utilize state funds. By pooling our resources and knowledge, we aim to streamline the administration of the Warmline, ensuring optimal utilization of state funds. Through our collaborative efforts, we not only enhance well-being of families, but also provide comprehensive support to vulnerable populations, effectively addressing their unique needs while fostering a stronger, more resilient community.

Roles and Responsibilities

Each organization within the Consortium shall contribute its expertise, resources, and capabilities towards the successful administration of the program in accordance with state requirements outlined in RFP 123190 O3.

Term and Termination

This Agreement shall commence upon the date of execution when all parties have signed and shall continue until the completion of the final reporting for the Warmline. Parties may terminate this Agreement upon written notice to the other parties in the event of a material breach by any party. Additionally, parties may terminate this Agreement upon providing written notice to the other parties at least 30 days in advance of the intended termination date. Termination notices shall be delivered to each party's designated representative.

This Agreement constitutes the entire understanding and agreement between the parties concerning the subject matter hereof and supersedes all prior agreements and understandings, whether written or oral.

SIGNATURE

Matthew T. Waller

Matthew T. Wallen, Chief Operating Officer
United Way of the Midlands
October 3, 2025

Robby Simard, executive Vice President,
Youth Care
Boys Town
October 3, 2025

United Way of the Midlands

Third Party Warmline Services Agreement

This Partnership Agreement ("Agreement") is made and entered into by and between the following organizations forming a coalition to provide service and administration of a third-party statewide single access point 24/7, referred to as the 'Warmline" in response to Request for Proposal (RFP) 123190 O3 issued by the Nebraska Department of Health and Human Services on September 29, 2025:

- **United Way of the Midlands**, with its principal place of business at 1229 Millwork Ave., Ste 402, Omaha, NE 68102-4277
- **Nebraska Children and Families Foundation,** with its principal place of business at 215 Centennial Mall S, Ste 200, Lincoln, NE 68508

Hereinafter, the above organizations shall be referred to as a member of the "Coalition."

Governing Law

This Agreement shall be governed by and construed in accordance with the laws of the State of Nebraska, Nebraska Department of Health and Human Services, and requirements of the Third-Party Warmline scope of work.

Oversight and Amendments

Representatives from each organization will oversee the coordination, decision-making, and implementation of activities related to the program. Partners can assign their interests in the partnership and the rights and obligations to successors, and/or delegate responsibilities to employees.

This agreement may be revised as necessary with the mutual consent of the parties involved by the adoption of a written amendment signed and dated by all parties.

Purpose of Consortium

United Way of the Midlands will serve as the lead applicant in response to RFP 123190 O3. The purpose of the Consortium is to collaboratively respond to and administer Third Party Warmline Services in Nebraska. The Warmline will provide Nebraska families with a 24/7 centralized access point for intake and referral support to local services.

The goal is to expand prevention-focused services outside of formal child welfare involvement, ensuring families get the right help at the right time. Currently, most services are triggered only after abuse or neglect reports, and a lack of coordination limits awareness of available resources. A Warmline would centralize referrals and improve access, reducing barriers caused by scattered information and stigma around contacting CFS directly. By contracting a third-party to operate the Warmline, Nebraska can strengthen upstream prevention, relieve CFS to focus on core protection duties, and improve family outcomes statewide.

The Consortium leverages the specialized expertise of each participating organization to efficiently utilize state funds. By pooling our resources and knowledge, we aim to streamline the administration of the Warmline, ensuring optimal utilization of state funds. Through our collaborative efforts, we not only enhance well-being of families, but also provide comprehensive support to vulnerable populations, effectively addressing their unique needs while fostering a stronger, more resilient community.

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Each organization within the Consortium shall contribute its expertise, resources, and capabilities towards the successful administration of the program in accordance with state requirements outlined in RFP 123190 O3.

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This Agreement shall commence upon the date of execution when all parties have signed and shall continue until the completion of the final reporting for the Warmline. Parties may terminate this Agreement upon written notice to the other parties in the event of a material breach by any party. Additionally, parties may terminate this Agreement upon providing written notice to the other parties at least 30 days in advance of the intended termination date. Termination notices shall be delivered to each party's designated representative.

This Agreement constitutes the entire understanding and agreement between the parties concerning the subject matter hereof and supersedes all prior agreements and understandings, whether written or oral.

SIGNATURE

Matthew Wallen

Matthew T. Wallen, Chief Operating Officer
United Way of the Midlands
October 2, 2025

Jennifer L Skala

Jennifer Skala, Executive Vice President
Nebraska Child and Families Foundation
October 2, 2025

Matthew Thomas Wallen

402-522-7950 **mwallen@uwmidlands.org**

United Way of the Midlands Community Programs
Chief Operating Officer (September 2019 –)

- Senior member of the executive leadership team providing strategic guidance on public policy issues, marketing and communications, fund development, grant making, program development, operations and program expansion.
- Lead the Community Investments and Programs Department by developing and implementing strategies to achieve financial (revenue) and impact (community improvement) goals.
- Responsible for leading the strategic investment work of United Way's financial and non- financial resources to create the greatest possible impact helping to improve overall well- being for low-income individuals and families, by maintaining strong community partnerships with federal, state and local elected officials and more than 150 nonprofit agencies.
- Recruit members to serve on and lead United Way's Community Impact Committee, Public Policy Committee, 2-1-1 Committee and Jobs for America's Graduates Nebraska Committee.
- Recruit and organize over 150 community volunteers to review, rank and score hundreds of grant applications as part of the community investment review team process.
- Lead the Jobs for America's Graduates program located in 34 schools across Nebraska, by working with local school administrators and superintendents.
- Lead 2-1-1 Contact Center operations, partnerships and fund development. 2-1-1 provides information and referral services for all of Nebraska and Iowa. The contact center received over 313,000 calls, texts and web sessions during FY 2023.
- Developed 2-1-1 Contact Center program work by becoming an Aging and Disability Resource Center (ADRC) and implementing Medicaid Administrative Claiming (MAC) protocols.
- Implemented the Save our Seniors Program with funding support from the Nebraska Crime Commission and the U.S. Department of Justice.
- Lead United Way's strategic plan work every 3 years, which leads to the development of new operational objectives and guiding principles.
- Present new initiatives and updates to United Way's Board of Directors and Executive Committee.
- Represent all 14 Local United Ways of Nebraska on United Way Worldwide Council of State Affiliates Committee.
- Member of United Way Worldwide Community of Practice, Public Policy Workgroup.
- Represent 2-1-1 on behalf of the entire states of Nebraska and Iowa on the United Way
- Worldwide 2-1-1 State Leadership Collaborative.

State of Nebraska
Department of Health and Human Services
Division of Children and Family Services
Director (August 2017 – August 2019)

- Appointed by Governor Ricketts and confirmed by the Nebraska Legislature to lead the division responsible for child and adult protective services, economic assistance services, and juvenile rehabilitation and treatment services.
- Implemented policy and budget priorities to annually provide services to more than 200,000 of Nebraska's most vulnerable citizens.
- Successfully reduced the number of children in out of home care by 10 percent, implemented policy changes to be trauma informed, improved caseworker retention rate by over 10 percent, implemented

policy changes to assist SNAP beneficiaries to achieve sustainable employment, and improved accuracy and timeliness of ACCESSNebraska eligibility determinations.

State of Nebraska
Department of Health and Human Services
Chief of Staff (December 2015 – August 2017)

- Worked directly with the Chief Executive Officer to lead six divisions and operations functions with a combined annual budget of $3.5 billion.
- Lead priority projects and legislative initiatives within the Department while aligning division actions and communications in support of achieving specific policy outcomes.
- Advanced change management to create a workplace culture that promotes Governor Ricketts' mission, the DHHS values, core competencies, and mission of helping people live better lives.

Midwest Campaign Solutions, LLC ***Principal***
(February 2014 – December 2015)
Heartland Campaign Management
Vice President of Client Services (April 2015 – November 2015)

- Served as Field Director for a statewide campaign in Nebraska.
- Consulted for a Congressman to enable him to cultivate new dialogue with think tanks, associations, interest groups and industry leading academicians to advance specific public policy positions.
- Successfully managed accounts for several state and federal legislators simultaneously across multiple states, by developing a strategic plan, managing workflow, and coordinating internal staffing to ensure project fulfillment was consistent with the scope of work while exceeding client expectations.

United States Senate
The Honorable Ben Sasse
Director of Constituent Services (January 2015 – April 2015)

- Managed and directed a team that responded to constituent requests for assistance with federal and state agencies, including performance metrics and tracking responses.
- Conducted meetings with constituents, associations, private business representatives and government officials on behalf of the Senator.
- Established operations for the two statewide offices, including staff recruitment.

Union Pacific Railroad
Marketing and Sales
Director Market and Resource Planning (July 2011 – February 2014)

- Managed cross-functional teams that promoted commercial initiatives to enhance Union Pacific's value proposition.
- Lead industry-wide association meetings that analyzed and improved railcar utilization efficiencies.
- Directly supported the Vice President at Board of Directors meetings and on special projects as needed.

United States Department of Transportation
Surface Transportation Board
Office of Public Assistance, Governmental Affairs, and Compliance
Director - Career Senior Executive Service (August 2007 – July 2011)

- Managed a diverse office of government affairs managers, transportation industry analysts, attorneys, communications experts, mediators and records specialists.
- Communicated Board decisions, activities, and initiatives to stakeholders (primarily Congress, state, local and federal government officials, associations/trade groups, and labor organizations) and

guided Presidential appointees through the U.S. Senate confirmation process.
- Provided overall executive leadership in support of the Board's mission, values and strategic goals.

U.S. House of Representatives
The Honorable Steven C. LaTourette
Chief of Staff (April 2003 – August 2007)

- Managed and directed all staff and activities in the Congressman's Washington, DC and Ohio offices.
- Developed and drafted legislation to implement the Congressman's policy objectives and legislative priorities with a focus on healthcare, financial services, and transportation and infrastructure.
- Coordinated the Congressman's legislative priorities with the White House, federal agencies, House of Representatives Leadership, Committees, Senate counterparts, state and local governments, associations, coalitions and interest groups.

U.S. House of Representatives
Committee on Transportation and Infrastructure
Subcommittee Staff Director, Professional Staff, Staff Assistant (May 1997 – April 2003)

- Advised the committee Chairman, subcommittee Chairman, and senior staff on legislative matters before the subcommittee.
- Formulated subcommittee legislative agenda, developed policy alternatives and coordinated authorizing legislation with the relevant appropriations committees.
- Created and executed bi-annual subcommittee oversight plans and jurisdictional review.

Education

State University of New York at Fredonia
Bachelor of Arts Degree *cum laude*
Political Science

The George Washington University
Master's Degree
Political Management

References

Shawna Forsberg, United Way of the Midlands - CEO
1229 Millwork Ave
Omaha, NE 68102
402.522.7964

Katie Thurber, Nebraska Department of Labor - Commissioner
P.O. Box 94600 550 S. 16th St
Lincoln, NE 68509
402-471-3405

Brian Woolfolk Pacific Life Insurance, EVP
6750 Mercy Rd
Omaha, NE 68509
949-219-4131

Karen Heng

402.326.1297 **kheng@uwmidlands.org**

United Way of the Midlands
Community Investments & Programs
Program/Project Manager (Consultant)
(January 2022 – present)

- Program Management experience with United Way of Midlands 211 Information and Referral. This is a 24/7 call center operation providing human service information and referral. Assisted with the development of screening tool to assess for needs related to Social Determinants of Health
- Provided Program Management for the implementation and ongoing management support to the 211 Nebraska Coordination Center on Unite Nebraska platform. This platform facilitates referrals between healthcare and community-based organizations. Unite Nebraska assists in screening for Social Determinants of Health and helping assist Nebraskans in getting basic needs met to improve quality of life.
- Provided Program Management for Help Me Grow Nebraska. This program assists children 0-8 to achieve optimal development. Lead the Centralized Access Point Workgroup. Our functions include providing resource navigation, developmental screenings and service coordination.
- Lead implementation of 211 as an Aging Disabled Resource Center (ADRC) for Nebraska. Partnered with Nebraska State Unit on Aging and Nebraska Medicaid on Medicaid Administrative Claiming. Provided ADRC program administration and support.
- Nebraska Save Our Seniors an elder victims of crime prevention and intervention program funded by Nebraska Crime Commission via federal Victims of Crime Administration Grant. Lead development, implementation, funding and administration efforts.

Nebraska Department of Health and Human Services
Children and Family Services/Medicaid and Long-term Care
Deputy Director Eligibility Operations
(November 2015 – January 2021)

- Executive Leader Eligibility and Enrollment Economic Assistance and Medicaid and Long-term Care Program Service Delivery (Over 350,000 Nebraskans served by 1,250 team members)
- Leader ACCESSNebraska Cross-Functional Leadership Team
- Multi-site operations including call centers, customer Service Offices, Centralized Mail and Imaging Center
- Expert experience leading integrated program service delivery utilizing interoperable system technology
- Utilized strategic planning and organizational change management principles to develop, modernize and enhance service delivery via project planning and roadmaps
- Business Lead Heritage Health Adult Medicaid Expansion Implementation
- Executive Sponsor Home and Community Based Services Electronic Visit Verification Implementation
- Executive Sponsor Child Care Subsidy Billing Portal
- DHHS iServe Integrated Portal Business Sponsor
- Integrated Benefit Enrollment and Eligibility Management System Business Sponsor
- Business Lead 24 Hour Abuse Hotline Modernization
- Administered IV-D Child Support Program
- Administered IV-E Foster Care, Guardianship and Adoption Subsidy
- Lead design, development, implementation, operation and evaluation for SNAP NEXT STEP Employment and Training Program

- Lead design, development, implementation, operation and evaluation for Family Focused Case Management and Family Action Support Team
- Expert knowledge of program regulations for the following federal and state programs: Medicaid and Long-term Care, SNAP, TANF, Child Care, LIHEAP and Aid to Aged Blind and Disabled.
- Utilized integrated eligibility service delivery system for Medicaid and Economic Assistance Programs
- Extensive experience with Call Center development, integration and operations including Integrated Voice Response System
- Extensive experience with Document Imaging and Document Management System development, implementation and system integration
- Lead Temporary Assistance for Needy Families (TANF) Employment First Program design, development, implementation, operation and evaluation
- Lead successful grant application USDA SNAP Technology Grant 2017
- Lead successful grant application USDA SNAP Outreach Grant 2010

Education

University of Nebraska
Master of Business Administration
May 1993

Bachelor of Science Business Administration
Finance/Agriculture
May 1986

Honors and Awards

NEBRASKA FLOOD HERO
Governor Pete Ricketts
December 2019

ACCESSNebraska Day Proclamation
Governor Pete Ricketts
June 2018

USDA SNAP STATE PERFORMANCE BONUS PAYMENT AWARD
$639,063 FEDERAL FISCAL YEAR 2016

USDA SNAP STATE PERFORMANCE BONUS CASE AND PROCEDURAL ACCURACY AWARD
$1,685,337 FEDERAL FISCAL YEARS 2016 AND 2017

References

Shawna Forsberg, United Way of the Midlands – President/ CEO
1229 Millwork Ave
Omaha, NE 68102
402.522.7964

Matthew Wallen, United Way of the Midlands – COO
1229 Millwork Ave
Omaha, NE 68102
402.522.7950

Steve Rippe, United Way of the Midlands – VP, 211
1229 Millwork Ave
Omaha, NE 68102
402.669.7414

Oscar Gonzalez

Education
2016 • ITILv4 Foundation • Lean Six Sigma • Project Management Professional
2008 • Norwich University • Bachelor of Arts: Criminal Justice/English

Professional Experience
2023 to Present • Father Flanagan's Boys' Home • Director, National Hotline

- Leads a diverse leadership team with the sensitive mission to help callers at their most vulnerable times to save lives.
- Directs management staffs over five distinct programs to ensure KPI delivery.
- Negotiates contract procurement and delivery across several contracts.
- Interfaces with state and federal law makers for advocacy around key topic areas related to subordinate programs
- Participates in media engagements to inform the public about programmatic themes.
- Plans and develops annual budget for 130 staff, 5 programs, and several contracts.
- Develop managers to ensure quality leadership staff with succession planning.
- Works with marketing to develop a marketing approach to broaden the outreach of respective programs.

2020 – 2023 • Father Flanagan's Boys' Home • IT Manager

- Consults with internal IT leadership and greater organization for issue resolution and IT improvement efforts.
- Supervise the short and long-range planning for division and organizational operations.
- Increased and maintained IT contact center's reputation for delivering service and organizational outcomes.
- Develops and maintains IT contact center's budget to meet financial goals.
- Manage a decentralized team while delivering technical support across a regionally dispersed organization.
- Built Problem Management process from the ground up to fit organizational needs addressing a historically missing key ITSM component.
- Negotiate large-scale contracts that reflect needs and yield best organizational outcomes that correspond with cost prudence without sacrificing quality.
- Manages organizational Major Incident management to include response team coordination, executive communications, and policy development.
- Manages IT contact center through meaningful metrics, workflow analytics, and adherence to performance standards.
- Ensure continuous delivery of quality IT services through oversight of service level agreements and monitoring of IT systems and network performance.
- Develops and maintains relationships with external vendors, entities, and organizations.
- Ensure decisions made, actions taken, and obtained results are tenable, cost effective, and within established policy, standards, and guidelines.

2019 – 2020 • Gallup • Technology Manager

- Directs front and back-end software development for proprietary externally facing client platform.
- Managed team of full stack developers responsible for project delivery, customer needs.
- Plan, assign, and coordinate the work of multiple functional areas to ensure that day-to-day, week-to-week and long-term goals and objectives are met.
- Maintains business relationships with customers, staff, and stakeholders to identify direction and plans for strategic goals.
- Ensures that decisions made, actions taken, and results obtained are tenable, cost effective, and within established policy, standards, and guidelines.
- Supervise the short and long-range planning for division and organizational operations.
- Leads software development teams in Agile environment leveraging SDLC principles.
- Review technical feasibility and work with team to develop timelines for product development.
- Drives process improvement efforts to optimize software development in an Agile and Waterfall based environment.
- Executed C suite level presentations for product and project progress.

2016 – 2019 • HM Health Solutions • Sr. Manager, IT

- Directs and consults multiple teams on strategies and tactics for the use and integration of applied technologies.
- Led organizational transformation efforts focused on the tenants of people, process, and technology.
- Developed mission and vision for platform evolution which governed a $900M book of business.
- Managed development and maintenance of a crucial business platform.
- Managed international subsidiary teams and relationships in India.
- Program led team for enterprise-wide cloud ERP implementation and adoption for 4,500 personnel.
- Maintains business relationships with customers, staff, and stakeholders to identify direction and plans for strategic goals.
- Supervise the short and long-range planning for division and organizational operations.
- Mentored and coached subordinate team managers for goals and career growth.
- Managed contact center which supported over 10 thousand users organization wide.
- Supervise, manage, coordinate, and direct a division to ensure accomplishment of support services for assigned systems and networks.
- Ensure continuous delivery of quality IT services through oversight of service level agreements and monitoring of IT systems and network performance.
- Plan, assign, and coordinate the work of multiple functional areas to ensure that day-to-day, week-to-week and long-term goals and objectives are met.

2014 – 2016 • 2nd Infantry Division, Camp Bonfias – Korea • IT Division Lead

- Managed all Information Technology related staff and projects for an 800 staffed, multi-functional organization.
- Supervise, manage, coordinate, and direct a division to ensure the accomplishment of support services for assigned systems and networks.

- Translated technical vision with organizational strategy and developed, implemented, and maintained an efficient and evolving IT infrastructure, telephony and network communications solutions, and data center.
- Analyze unique technical problems and develop solutions or recommend corrective actions for efforts involving multiple echelons.
- Optimized user experience including the building of a success plan for users and identifying areas for continuous improvement.
- Plan, assign, and coordinate the work of multiple functional areas to ensure that day-to-day, week-to-week and long-term goals and objectives are met.
- Coached and developed 25 staff members including conducting performance reviews.
- Managed the modernization of a complex communications infrastructure.
- Optimized organizational IT processes to better align with leadership goals.
- Supervise the short and long-range planning for division and organizational operations.
- Maintains business relationships with customers, staff, and stakeholders to identify direction and plans for strategic goals.

2012 – 2013 • Joint Special Operations Command • IT Systems & Operations Manager

- Managed a complex communications network infrastructure across 25 locations.
- Translated technical vision with organizational strategy and developed, implemented, and maintained an efficient and evolving IT infrastructure, telephony and network communications solutions, and data center architecture.
- Maintains business relationships with customers, staff, and stakeholders to identify direction and plans for strategic goals.
- Owned IT initiatives and drove process improvements to further organizational outcomes.
- Ensured continuous delivery of quality IT services through oversight of service level agreements and monitoring of IT systems and network performance.
- Defined functional priorities and balance resources to ensure critical business projects are delivered while maintaining a high level of ongoing IT support to internal customers.

2010 – 2012 • Echo Forward Support Company, 3rd Infantry Division • Executive Officer

- Led a maintenance force of 107 personnel to ensure a 21-vehicle fleet worth $48M was maintained and ready for use.

2009 – 2010 • Charlie Company, 3rd Infantry Division • Platoon Leader

- Led a force of 16 men in direct combat operations.

Kristine Bosiljevac

Education
Bellevue University • Criminal Justice
Licenses/Certifications/Affiliations
American Association of Suicidology Crisis Worker Certification • Active member of National Association of Crisis Center Organization Directors (NASCOD)

Professional Experience
11.2000 to Present • Boys Town National Hotline • Manager, Boys Town National Hotline
- Develop and monitor policies and procedures including reporting guidelines and risk assessments; update guidelines for handling calls and web contacts.
- Develop procedures and counseling approaches to best meet the needs of all contacts to the BTNHL to include: teens and adults.
- Staff development and supervision provided to Hotline Supervisors and Hotline Counselors.
- Hire, manage, and evaluate staff.
- Establish and monitor quality assurance measures and reports to ensure calls are being handled appropriately; coordinate data collection and analysis.
- Daily review of significant Hotline call and web contacts to ensure quality counseling and best practices are being implemented.
- Develop, review, and update policies, procedures, and protocols to ensure best practices are clearly communicated with staff.
- Responsible for maintaining ongoing accreditation standards—AAS (American Association of Suicidology, COA (Counsel on Accreditation).
- Liaison between internal staff and external organizations to resolve concerns, measure satisfaction, and follow through.

5.1997 – 11.2000 • Boys Town National Hotline • Hotline Training Coordinator/Supervisor
- Interview applicants for Crisis Counselor positions
- Coordinate and provide training for new employees.
- Develop ongoing staff training opportunities
- Evaluate & update training materials. Maintain staff training records.

11.1994 – 5.1997 • Boys Town National Hotline • Hotline Crisis Counselor
- Provide short term crisis counseling and information & referral services to callers
- Crisis Counselor Support Personnel- monitor calls & provide support and initiate outside intervention for other Crisis Counselors

8.1990 – 10.1994 • Boys Town Family Home Program • Certified Family Teacher
- Taught social skills, independent living skills, and academics to adolescent boys in a family style environment through the use of behavior modification techniques
- Provided counseling, moral & spiritual development of diverse population of youth
- Write progress reports on youth development
- Provided ongoing communication with families, teachers, employers, probation officers, etc.

Jennifer L. Skala, MEd, CHES

Education

University of Nebraska–Lincoln

M.Ed., Public Health Education (1996–1999)

B.S., Human Resources and Family Science – Nutrition (1991–1996)

Professional Experience

Nebraska Children and Families Foundation

- Executive Vice President (2021–Present)
- Senior Vice President (2018–2021)
- Vice President (2016–2018)
- Associate Vice President of Community Impact (2012 - 2016)
- Director of Programs and Evaluation (Prior to 2012)

Leadership, Strategic Oversight, Initiative and System development

- Executive team leadership, strategic planning, and oversight of community programs
- Responsible for progress monitoring, funder relations and stewardship, organizational reporting, and goal attainment
- Enhancing internal processes and infrastructure to support organizational effectiveness
- Representative for Nebraska's prevention system work on National Boards and Committees (e.g. Children's Alliance, FRIENDS, BUILD Initiative, Nation of Communities, Youth in Transition Funders Group, ASPEN Institute, Jim Casey Youth Initiative State Liaison, etc.)
- Oversight and supervision of research and evaluation staff
- Fiscal oversight for key initiatives and partner contracts
- Leader of the Bring Up Nebraska Partner Network, engaging over 500 partners statewide
- Principle Investigator/Program Director of Multiple Federal Grants (e.g. awards from Children's Bureau, Administration of Children and Families, Centers for Disease Control, Social Innovation Fund, Health and Human Services, etc.)
- Facilitator of the Bring Up Nebraska Steering Committee
- Liaison with 12 local and national funders to build a statewide public and private collaborative prevention network and infrastructure
- Supervises Bring Up Nebraska staff
- Facilitated development of fiscal map and Well-Being Results and Indicators, Community Opportunity Map.

- Responsible for receiving and sustaining $20M per year in funding to support prevention system
- Oversight and supervisor of administrator of Child Abuse Prevention Chapter, staff administration of DHHS/Nebraska Child Abuse Prevention Fund Board's Prevention Partnership
- Developed Community Well Being Collaborative Model and planning and implementation toolkit
- Developed NCFF Initiatives (e.g. Omaha Independent Living Plan/Project Everlast Omaha, Weigh Cool, Permanency Plan, Call to Action, Youth Councils, Youth Leadership Board, Community Response, etc)
- Facilitated and co-led NCFF/DHHS partnership in first cohort of Children's Bureau's Thriving Families, Safer Children initiative
- Registered Lobbyist for LB 216: Bridge 2 Independence program
- Member of multiple Commissions and Committees (e.g. Nebraska's PN-3 Committee, Children's Commission - Child Well Being Committee, Community Response Committee, Bridge to Independence Committee, Re-imagine Well- Being 1173 Group, Service Array Assessment, Plan to Prevent Maltreatment Group, Alternative Response Director's Advisory Committee, Parent/Care Giver Advisory Committee, Bridge 2 Independence Advisory Committee, Families First Prevention Service Act (FFPSA) Committee, Court Improvement Project: Upstream Committee, FFPSA Evaluation Committee, Plans of Safe Care Committee, etc.)

University of Nebraska Medical Center (UNMC)

- Managing Coordinator of Education and Training, CityMatCH (2001–2006)
- Project Coordinator, Data Use Institute, CityMatCH and Nebraska (1999–2001)

Prevention Program Leadership and Data Utilization

- Supervised staff and CDC Fellows
- Managed the Maternal and Child Health Annual Leadership Conference
- Developed the national Women's Health Partnership
- Led initiatives on Healthy Weight, Mental Health, Youth Violence, and Preconception Health
- Managed grants from CDC, HRSA, March of Dimes, and the Kellogg Foundation
- Served as faculty for the Data Institute and Public Health Leadership Institute
- Authored articles for the *CityLights* newsletter
- Coordinated national collaboratives on infant mortality prevention and data use
- Secured funding for reproductive health initiatives

University of Nebraska–Lincoln and Other Roles

- Health Education Department Staff, Health Aide Program , UNL (1997–1999)
- Graduate Teaching Assistant, UNL (1997–1999)
- Dietary Aide, Eastmount Towers (1995–1996)
- After School Teacher and Capstone Teacher, Huntington Elementary (1994–1995)
- Health Educator, Lincoln Lancaster Health Department (1992–1994)
- Health Aide, UNL (1993–1996)

Relevant Research & Publications

- Re-imagining a Community -Based Child and Family System in Nebraska – Family Integrity and Justice Quarterly – 2022
- Bring Up Nebraska as exemplary prevention efforts in the U.S. Children's Bureau Memorandum (ACYF-CB-IM-18-05) on reshaping child welfare in the United States - 2020
- Nebraska's Blueprint for Child Welfare Reform and Bring Up NE Strategic Plan – Child Focus, 2018
- Nebraska Child Welfare Financing Primer – Child Focus, 2017
- Practice Pathways Tool: Helping Young People Transitioning from Foster Care to Adulthood, Jim Casey Youth Opportunities Initiative -2016
- Evidence-Based and Evidence-Informed Policy and Practice in Community-Based Child Abuse Prevention – Families in Society, 2013
- Perinatal Periods of Risk: A Community Approach – Maternal Child Health Journal, 2010
- A Cognitive Approach to College Alcohol Education Programs – UNL

// ZACHARY NELSON

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TURNING STRATEGIC PLANS INTO OPERATIONAL REALITY

PROCESS ARCHITECTURE | OPERATIONAL RISK MITIGATION | CONTINUOUS IMPROVEMENT
COST OPTIMIZATION | DIGITAL TRANSFORMATION | AI INTEGRATION

Operations executive with proven ability to architect processes from scratch, including scaling operations from 4 to 350 people in 7 months while managing a $6M budget. Expert at building adaptive operational systems with embedded feedback loops that respond to changing organizational needs. Reduced technology spend by $84K annually while improving efficiency and staff satisfaction. Consistently mitigates operational risk through systematic process design and maintains compliance across HIPAA, SOC2, and NIST frameworks. Specializes in translating strategic vision into sustainable operational infrastructure without enterprise-level overhead.

EXPERIENCE

NEBRASKA CHILDREN AND FAMILIES FOUNDATION — **SEPT 2022 - PRESENT**

Associate Vice President of Operations & IT Solutions

OPERATIONS ARCHITECTURE & PROCESS DESIGN:

- Architected comprehensive IT infrastructure modernization eliminating 30+ years of technology debt
- Modernized SharePoint implementation enhancing collaboration capabilities, eliminating shadow IT and reducing subscription redundancies saving $13K annually
- Designed and implemented enterprise ELT data pipeline and warehouse architecture optimized for maintainability and cost efficiency
- Designed and developed 4 custom applications eliminating vendor dependencies and saving $200K+ in third-party developer costs while improving operational control
- Created automated federal funding scanner using Power Automate and AI Builder, reducing NOFO review time from 20 hours to 2 hours weekly

RISK MITIGATION & COMPLIANCE:

- Maintained HIPAA, SOC2, NIST SP 800-53, and NIST SP 800-171 compliance across all systems and processes
- Established enterprise AI governance framework balancing innovation with data protection, achieving sustained staff compliance through change management program
- Implemented clear operational guidelines distinguishing business-sensitive from AI-appropriate data

COST OPTIMIZATION & EFFICIENCY:

- Reduced technology spend by $84K while improving operational efficiency and staff satisfaction
- Eliminated operational silos through successful Microsoft 365 implementation, improving cross-functional workflows
- Deployed knowledge management systems (WikiJS, Moodle) creating self-service operational resources
- Managed MSP and vendor relationships, optimizing contracts and service delivery across technology stack

LANTERN STRATEGIC — **JAN 2013 - PRESENT**

Freelance Consultant

- Built and managed profitable consulting practice for 12+ years, demonstrating P&L management and business development capabilities
- Designed operational frameworks for new nonprofits, creating sustainable processes from inception
- Provided organizational development and strategic planning services to 13 long-term disaster recovery groups
- Developed strategic planning and implementation roadmaps for organizations navigating transitions
- Facilitated board retreats and strategic visioning sessions, translating high-level goals into actionable operational plans.

WELLSPRING MARKETING, LLC **JAN 2019 – AUG 2025**

Owner & Fractional Marketing Executive

- Built operational framework supporting 13 client engagements simultaneously as a solo practitioner
- Designed repeatable processes for brand development, reducing delivery time by two weeks.
- Created systematic content production workflows driving 30% organic traffic increase

RISEMARK BRANDS **FEB 2014 – DEC 2018**

Brand Marketing Manager – IKOR (May 2016 – December 2018)

- Streamlined franchisee onboarding including automated account creation and training workflows
- Reduced costs on location opening marketing kits by 50%
- Initiated vendor change that saved franchisees 32% on marketing costs and improved satisfaction
- Managed crisis communication protocols protecting brand operations across 60 territories

ONLINE MARKETING SPECIALIST – RIGHT HOME (FEB 2014 -MAY 2016)

- Supported 57 Franchisees with the implementation of a digital strategy to drive brand awareness
- Helped Franchisees understand their key digital metrics and develop a data-driven digital marketing strategy based on customer behavior.

2012 NEBRASKA COORDINATED CAMPAIGN **MAR 2012 – DEC 2012**

Director

- Scaled operations from 4 to 350 employees in 7 months
- Established operational infrastructure across 28 field offices with $6M budget
- Created Information Director position to build feedback loops between field operations and strategy
- Designed training systems and materials ensuring consistent operational execution

U.S. SENATOR BEN NELSON **MAY 2007 – MAR 2012**

Field Representative

- Developed a presentation and research book at the request of mayors, economic developers, and Chamber of Commerce executives, providing information on funding agencies and federal grant application writing
- Spoke on behalf of Sen. Nelson at functions and various community events when he was unable to attend
- Conducted in-depth research for a white paper on wind energy proposing policy recommendations

EDUCATION

UNIVERSITY OF NEBRASKA – KEARNEY, 2006

- Bachelor of Science, Speech Communications
- Bachelor of Science, Political Science

COMMUNITY ENGAGEMENT

GREATER OMAHA SCORE	*MAR 2018 – Present*
NEBRASKA VOAD	*JAN 2022 – MAR 2023*
OMAHA DO SPACE	*NOV 2017 – MAR 2020*

OPERATIONAL IMPACT BY THE NUMBERS

- **8,750% operational scaling** achieved (4 to 350 staff) in 7 months
- **More than $100K annual cost reduction** with improved satisfaction metrics
- **Eliminated 30+ years of process and technology debt** through systematic organizational redesign
- **100+ franchise territories supported** with standardized operational frameworks
- **Zero compliance violations** maintained across multiple regulatory frameworks

KEY SKILLS & COMPETENCIES

- **Process Architecture:** Workflow design, requirements gathering, ELT/data pipelines, feedback loop implementation, business logic design
- **Operational Excellence:** Scaling operations, resource optimization, continuous improvement, change management, cost reduction
- **Digital Transformation:** Custom application development, build vs. buy analysis, AI integration, process automation, system modernization
- **Risk & Compliance:** HIPAA, SOC2, NIST 800-53, NIST 800-171, NIST AI Risk Management Framework, data governance, privacy policy evaluation, AI governance
- **Technical Proficiency:** Python/Django, JavaScript/Vue/Nuxt, PostgreSQL/MySQL, Directus, Supabase, Fivetran, dbt
- **Platforms & Tools:** Microsoft 365 suite, Entra administration, SharePoint administration, Teams, Power Automate, Power BI, AI Builder, WikiJS, Moodle, AI/LLM platforms, cloud infrastructure

Selected Projects

Custom-Built Operational Platforms | *Nebraska Children and Families Foundation*

- **Statewide Plan Portal**: Replaced unmanageable 60+ partner Google Doc collaboration with custom Django/Nuxt platform, ensuring data integrity and operational control for Nebraska's primary prevention system. Delivered in 1 month vs. 6-month vendor timeline, saving ~$150K.
- **Meeting Operations System**: Built automated platform managing 500+ attendees across multiple privacy-sensitive meetings, eliminating 10+ hours weekly manual coordination while ensuring data security compliance.
- **Federal Funding Scanner:** Automated NOFO review process using Power Automate and AI Builder, reducing staff review time from 20 hours to 2 hours weekly - 90% efficiency gain enabling focus on high-value opportunities.
- **AI-Powered Claims Review** *(In Development)*: Architecting automated allowability review system for contractor expenses, projecting 75% reduction in manual review time while maintaining compliance through human validation loops.
- **Collective Impact Manager** *(In Development)*: Creating unified operational dashboard consolidating data from multiple CRMs, Excel, and legacy systems into single source of truth for $30M portfolio operations.

AI Integration for Operational Excellence | *Nebraska Children and Families Foundation*

- **Led organization-wide AI transformation** through 8 comprehensive training sessions covering AI as research assistant, writing partner, and digital teammate
- **Developed and implemented AI governance policies** preventing data leakage while enabling innovation
- **Founded AI Community of Practice** for Nebraska SMBs, focusing on operational efficiency, pilot program design, and AI risk mitigation

Technical Architecture Leadership

- **Evaluated and selected optimal technology stacks** based on operational requirements, security needs, and cost-effectiveness
- **Reduced vendor dependency** by 80% through strategic build vs. buy decisions
- **Implemented security-first architecture** using modern authentication and encryption frameworks

Findhelp Staff: Director, Government Delivery

Erin Gurak, Director, Government Delivery

Professional Summary

Mission-driven professional with 14 years of blended experience in nonprofit, government, and social advocacy. Effective leader and manager of teams and programs in complex organizations. Experienced Project Manager with proven results in successful implementations and delivery.

Experience Summary

Findhelp, Austin, TX *(Oct. 2021—Present)*

- Director, Government Delivery *(June 2023—Present)*
  - Lead the delivery and implementation of Government Projects.
  - Build and manage implementation timelines for multiple state accounts.
  - Oversee project management for multiple ongoing projects.
  - Clearly communicate expectations to stakeholders.
  - Manage the Government Delivery team.
- Senior Marketplace Analyst, Partnerships *(October 2021—June 2023)*
  - Support product-line innovation and business development processes to scale the future of social care delivery.
  - Led strategic partnerships, project management, and implementation for the Findhelp Social Care Marketplace.
  - Worked closely with healthcare, foundations, and tech companies on mutual partnership opportunities.

U.S. House of Representatives, Austin, TX *(May 2018—October 2021)*

- District Director for U.S. Congressman Lloyd Doggett (TX-35)
  - Key Advisor and External Liaison to U.S. Congressman.
  - Guided strategic plans for district engagement.
  - Maintained and developed relationships with C-Suite executives, state and local policymakers, and community-based organizations.
  - Nimbly balanced competing priorities in ever-changing, fast-paced circumstances.
  - Managed a team of up to six staff and 30 interns annually.

TreeFolks, Austin, TX *(June 2016—May 2018)*

- Development Director
  - Principal fundraiser for urban forestry nonprofit.
  - Wrote and implemented the agency's first strategic fundraising program.
  - Served as organizational lead for community relations.
  - Managed corporate and community partnerships.
  - Planned all fundraising events and campaigns.

Licenses and Certifications

- IBM Design Thinking Practitioner, IBM

Education

- BA, International Relations and Latin American Studies, Beloit College, *Beloit, WI*
- Regional integration, Development and Social Change, School for International Training, *Buenos Aires, Argentina*

findhelp

Findhelp Staff: Senior Customer Success Manager

Lisa Boyle, Senior Customer Success Manager

Professional Summary

Customer Success Management professional with 20+ years of comprehensive experience at the intersection of healthcare technology, social services, and compliance. Expertise spans the full product and customer lifecycle, including Product Management, engineering project oversight, and large-scale EHR/case management system implementation for diverse health and social service agencies. Proven success as a Senior Customer Success Manager driving national rollouts and designing integrated workflows that connect clients to community resources, focusing on Social Drivers of Health (SDOH) and community health equity goals. Established leader adept at strategic stakeholder engagement, regulatory compliance, and executive relationship management.

Experience

Findhelp, Austin, TX *(December 2024—Present)*

- Senior Customer Success Manager
    - Implemented national and multi-region rollouts for healthcare, payer, and housing customers
    - Engaged executive leadership, clinical stakeholders, and technology partners to align with and achieve customer goals
    - Designed workflows with executive leaders so that customer staff navigators and communities are able to successfully connect their clients/members/patients to community resources
    - Partnered with customers to ensure that their Findhelp platforms are part of their larger social drivers of health and community health equity goals

KCare, Austin, TX *(April 2010—August 2024)*

- Project Manager *(January 2024—August 2024)*
    - Accountable for the success of company-defined engineering projects
    - Relationship building with stakeholders that assured alignment on scope, goals and deliverables
    - Risk management that kept projects on time and within budget
    - Cross-disciplinary coordination that assured smooth release and implementation of new features
- Product Manager *(April 2010—December 2023))*
    - Accountable for driving feature development of a case management and billing EHR
    - Translated customer requirements into actionable technical solutions
    - Fostered strategic stakeholder engagement
    - Partnered with UI/UX developers to enhance user experience

Legacy, Inc., Austin, TX *(December 2005—March 2010)*

- Director of Managed Information Systems
    - In support of a multi-department approach to provide back-office services to social service agencies, led the Managed Information department
    - Oversaw the implementation of a clinical EHR software system for social service agencies

- Acted as the system administrator for all customers, ensuring secure user access, accurate workflow configuration, and regulatory compliance

KCare, Austin, TX *(May 2000—December 2005)*

- Account Manager
    - Served as a clinical subject matter expert during early design and testing phases of Electronic Health Record system
    - Responsible for retention of assigned accounts and sale of new accounts
    - Provided implementation, training and support to 40-50 Foster Care and Behavioral Health agencies
    - Team Leader for Software testing from Jan 2003 to Dec 2005

Charter Hospital, Austin, TX *(August 1996—January 2000)*

- Lead Assessment Counselor
    - Assessed clients' mental and emotional health and prepared assessment reports
    - Conducted diagnostic evaluations and ensured compliance with healthcare regulations

Education

- MSW, Social Work, The University of Texas at Austin, *Austin, TX*
- BA, Psychology, Emory University, *Atlanta, GA*
- AA, Associate of Arts, Oxford College of Emory University, *Atlanta, GA*

Johana Fellers

402.452.8695 **jfellers@uwmidlands.org**

United Way of the Midlands

211 Department

Director of Community Programs
(November 2024 – present)

- Provide supervision, support, and guidance to program staff
- Provide overall leadership and direction for the development and delivery of UWM's community programs
- Lead the design, implementation, and evaluation of programs that address the needs of diverse populations across Nebraska and Iowa
- Develop long-term strategies to increase the reach and impact of the 211 Helpline, ensuring that it remains a vital resource for individuals seeking assistance
- Ensure the database is comprehensive, up-to-date, and reflective of all available community resources and services
- Monitor program effectiveness through key performance indicators (KPIs) and data analysis to drive continuous improvement

CEADRS Youth Services
Assistant Program Director
(May 2023 – November 2024)

- Provide supervision, support, and guidance to program staff
- Ensure that program operations adhere to organizational policies, procedures, and legal requirements, including confidentiality and ethical standards
- Review applications for posted positions in the programs supervised, interview potential candidates, make hiring decisions and onboard new employees

CEADRS Youth Services
Family Partner
(November 2022 – May 2023)

- Provided direct-care and individualized coaching in the homes of youth and their families
- Provided frequent, meaningful, and intentional contact with assigned youth to develop a mentoring relationship and influence positive behavior change
- Assisted the youth and family in the identification and access of informal supports and other community-based resources

Department of Health and Human Services
Bilingual Medicaid and Long Term Care Social Service Worker
(July 2018 – July 2020)

- Participated in telephone interaction with people of varied social-economic levels
- Assessed individual client situations and made referrals for community resources and services
- Determined Medicaid eligibility

Education

University of Nebraska
<u>Bachelor of Arts</u>
Psychology/Spanish
May 2018

References

Shawna Forsberg, United Way of the Midlands – President/ CEO
1229 Millwork Ave
Omaha, NE 68102
402.522.7964

Matthew Wallen, United Way of the Midlands – COO
1229 Millwork Ave
Omaha, NE 68102
402.522.7950

Steve Rippe, United Way of the Midlands – VP, 211
1229 Millwork Ave
Omaha, NE 68102
402.669.7414

Myria Ming

402.348.9325 **mming@uwmidlands.org**

United Way of the Midlands
211 Helpline
Director (March 2025 –)

- Develop and implement strategic plans to enhance the effectiveness and reach of the 211 Helpline.
- Establish program goals, objectives, and performance metrics aligned with community needs and organizational priorities.
- Oversee day-to-day operations of the 211 Helpline, ensuring efficiency and excellence in service delivery.
- Recruit, train, and supervise a team of call specialists, supervisors, and support staff.
- Foster a positive and inclusive workplace culture that promotes teamwork, innovation, and professional growth.
- Implement quality assurance measures, including monitoring calls and evaluating performance metrics.
- Represent the 211 Helpline in community meetings, conferences, and advocacy efforts.
- This individual will supervise Supervisors which will have a team of Community Resource Specialist

Senior Manager (Oct 2022 – March 2025)

- Hire, train, and prepare call center specialist to understand and comply with all call center objectives, performance standards, and policies
- Lead team meetings, answer specialist' questions, guide them through difficult calls diffuse angry clients, and handle issues that cannot be fielded by specialists
- Creates and updates 211 team schedules
- Conducts performance appraisals; rewards and disciplines employees; addresses complaints and resolve problems
- Mentors CRS's to build a positive culture and environment

Walmart eCommerce
***Operations Team Manager* (Feb 2020 – Oct 2022)**

- CRT POC for Training and Nesting
  - Graduated over 455 new hires during Peak FY22
  - Updated Nesting training decks and agenda
- Currently working to update email templates used by CRT
- Helped standup Spotify campaign and Indianapolis Claim Services support with very little notice by creating a training deck, huddle tracker, mapping out training sessions and facilitating multiple training sessions (March 2022)
- Increased team engagement score (81%) by 10% on October 2021 AES survey

Hayneedle
***Operations Team Manager* (Sept 2017 – Feb 2020)**

- Collaborated on a project to improve metrics by developing a consistent coaching program which resulted in deceasing AHT in all channels; Chat by 42 seconds, Phone by 80 seconds, and Email by 93 seconds.
- Led project to increase the number of email templates by 160% and significantly reduced spelling and grammar errors

Additional experience includes roles as **Quality Assurance Specialist** (Sept. 2017 – Aug. 2016) and Email **Associate** (May 2016 – Aug. 2016).

Education

University of Nebraska Omaha
Bachelor of Science – BS, Management Information Systems

Bellevue University
Master of Business Administration – MBA
Concentration in Accounting and Marketing

Bellevue University
Bachelor of Science – BS, Business Information Systems

Metropolitan Community College
Associate of Science – AS, Accounting

References

Steve Rippe, United Way of the Midlands – Director, 211 Call Center
1229 Millwork Ave
Omaha, NE 68102
402.669.7414

Kevin Richardson

217.898.5467 **jrichardson@uwmidlands.org**

United Way of the Midlands
211
Manager, Training and Quality Assurance (Feb. 2025 –)

- Developing and implementing training programs
- Assessing training needs across the organization to design and deliver effective learning programs
- Creating and maintaining a comprehensive training curriculum, including onboarding, technical skills, soft skills, and leadership development
- Utilizing various training methodologies and platforms (e.g., e-learning, simulations) to enhance learning outcomes
- Evaluating the effectiveness of training programs through feedback, assessments, and performance metrics
- Developing and overseeing quality standards and performance metrics for employees and processes
- Conducting regular audits (call monitoring), reviews, and assessments to identify gaps and ensure adherence to established quality benchmarks
- Implement corrective actions and improvement plans in collaboration with relevant teams
- Monitor customer feedback and other data sources to identify trends and areas for improvement
- Collaborate with leadership to set and maintain performance benchmarks and KPI's
- Lead calibration sessions to ensure consistency in quality evaluations
- Prepare and present reports on training outcomes, quality performance, and key initiatives
- Use data-driven insights to recommend and implement strategies for improvement

Marriot Customer Engagement Center
Marriot Hotels
Senior Service Manager (April 2008 – Jan. 2025)

- Designed, implemented, and managed training programs and quality assurance processes to ensure employees have the knowledge and skills to meet organizational goals.
- Created and maintained a comprehensive training curriculum, including onboarding, technical skills, soft skills, and leadership development using various training methodologies and platforms to enhance learning outcomes
- Enhanced team performance by driving innovation and fostering a culture of engagement and collaboration across departments to develop standardized practices to consistently surpass business goals through constant evaluation of training programs through feedback, assessments, and performance metrics.
- Executed key initiatives and focus on continuous improvement, while modeling resilience and adaptability in high-pressure situations.
- Provided strategic guidance on adapting to evolving business needs, leveraging change management principles to realign priorities and sustain operational focus by developing and overseeing quality standards and performance.
- Conducted regular audits, reviews, and assessments to identify gaps in learning and ensure adherence to established quality benchmarks through coaching for improvement, written improvement plans, and corrective action including disciplinary action up to suspension pending termination where needed.
- Collaborated with all levels of leadership to set and maintain performance benchmarks and Key Performance Indicators to ensure compliance with standards through reports on training outcomes, quality performance, and data driven insights to recommend and implement strategies for improvement.
- Strong organizational and project management skills using adult learning principles and quality frameworks while managing multiple programs simultaneously.
- Excellent interpersonal skills working with diverse groups while consistently maintaining high standards of quality and professionalism with a team-oriented mindset and a commitment to remaining caring, supportive, and respectful.

X.com/PayPal/Ebay
Training Developer and Facilitator (April 2000 – April 2008)

- Developed and facilitated new hire onboarding and department-specific training in collaboration with HR and department managers for over 200 associates, ensuring consistency and effectiveness across eight specialty teams.
- Administrated product assessment platform training virtually and in-person and overseeing creation of new assessments and evaluation tools as needed.
- Trained Subject Matter Experts (SMEs) in customer service, problem resolution, and systems across multiple departments, equipping them to deliver targeted, impactful training tailored to their teams' needs. Enhanced team performance by accelerating new-hire adaptability and confidence, enabling leadership to focus on achieving team goals and driving results.

Strategic Marketing Co

Director of Program Integration (May 1995 – April 2000)

- Coordinated seamless integration of client accounts, working directly with President, Sales Leaders, Clients, and subcontracted affiliates to ensure smooth transitions and timely project execution.
- Delivered a high-priority outreach campaign for Time Incorporated, contacting over 10,000 customers to promote the *Most Influential People* book featuring Princess Diana. Achieved a 37% sales conversion rate within two weeks, exceeding client expectations through effective collaboration and exceptional execution.
- Oversaw end-to-end contract management, from preparation and execution to billing and payment collection, ensuring accuracy and efficiency in collaboration with accounting team.

Education

Bachelor of Science in Business Administration (BSBA)
Emphasis: Human Resources
University of Nebraska at Omaha, Omaha, NE

References

Matthew Wallen, United Way of the Midlands – COO
1229 Millwork Ave. Suite 402 Bellevue, NE 68102
402.522.7950

Steve Rippe, United Way of the Midlands – VP of 211
Supervisor
1229 Millwork Ave. Suite 402 Bellevue, NE 68102
402.522.7965

Bethany Medeiros- Czurak – Marriot International
Sr. Operations Manager
1818 North 90th St. Omaha, NE 68111
774.451.1313

Maret Wibel

402-342-8232 **mwibel@uwmidlands.org**

United Way of The Midlands
211 Community Research and Data Analyst (*Feb 2023 –)*

- Build and manage all 211-call center and partnership reporting including for Unite Us, Help Me Grow, Save Our Seniors, and ADRC Nebraska
- Manage and create Power Bi reporting for 211 call center, 211 partnerships including Peer place and ADRC Nebraska, all outreach activities, and the 211 public dashboard
- Create talking points and research for press releases, marketing materials, and external presentations and meetings
- Conduct data analysis for organization wide community needs assessment
- Collaborate with agency partners to create interagency data analysis on community needs and provide UWM data resources to partners

Democratic Congressional Campaign Committee
Research - Tracker (IA 01, 02, 03, NE 02) (*Oct 2021 – Nov 2022)*

- Coordinated with campaign and DCCC staff to identify the opposition candidate's weaknesses and develop the communications strategy against them
- Wrote and disseminated rapid response research reports to senior DCCC staff and campaign officials for all in-person events and media appearances by the opposition
- Produced 84 research bullets from 30 events that informed polling memos, ad backups, red boxes, press pitches and contributed to research backups for 2 DCCC research books

Omaha Healthy Kids Alliance
Administrative and Grant Coordinator (*Jan 2021 - Oct 2021)*

- Built relationships with local housing advocacy groups, drafted letters of support for NE state legislature bills, and tracked relevant NE state legislature bills
- Managed all funding requests and drafted 21 grants to fund community engagement, programs, and operations for the organization's 1.5 million dollar yearly budget
- Managed all operations and program grant reporting, monthly reimbursement requests and weekly billing for EPA and HUD federal subcontracts
- Managed application for 2 million dollar HUD grant allowing the organization to hire 1 additional direct service staff, increased dollars allocated for each family served through direct service programming and funded program outreach efforts over a 48 month period

Omaha Healthy Kids Alliance
Administrative Coordinator (*Feb 2020 - Jan 2021)*

- Created the organization's centralized scheduling system, performed 3 weekly intakes for clients, scheduled all client home visits, and managed client waitlist and post service evaluation list
- Created and organized 2 social media posts per week, started the organization's monthly newsletter, and executed social media campaigns for Omaha Gives and Healthy Homes month in collaboration with the Manager of Community Engagement

Education

Concordia College; Moorhead, MN — Graduation: May 2019
Bachelor of Arts - Political Science and Global Studies: Development

References

Lauren Kimball, United Way of the Midlands – CSO
1229 Millwork Ave
Omaha, NE 68102
402.522.7414

Matthew Wallen, United Way of the Midlands – COO
1229 Millwork Ave
Omaha, NE 68102
402.522.7950

Steve Rippe, United Way of the Midlands – VP, 211
1229 Millwork Ave
Omaha, NE 68102
402.669.7414

Darienne Pokorny

402-920-0566 **dlpokorny13@gmail.com**

United Way of the Midlands
Director, Grants Accounting *(Oct.2023 –)*

- Develops analytical processes and reporting to provide feedback to leadership on key indicators and metrics, specifically grants tracking, reporting, and analysis
- Designs and prepares budgets & forecasts and explains variances for fiscal financial reporting, grant reporting, and other financial reporting functions
- Prepares complex financial analysis including overhead and efficiency rate analysis based on forecast and budget results and community care fund availability
- Understands and performs complex accounting and financial analysis of accounting for grant funding, and other forms of revenue, expense, and net assets
- Plans, organizes, and coordinates the accounting and financial reporting for all grants, including preparing annual and project budgets, forecasting revenue, and estimating any carry-over of funds from one year to the next
- Prepares or assists in the preparation of all applicable fiscal reports for sponsored programs and ensures the timely submission thereof
- Compiles documentation and supporting schedules for the preparation of the single audit
- Develops accounting policies and procedures in compliance with the Code of Federal Regulations including procurement policies, internal controls, and allowable costs

White Lotus Group
Senior Accountant (Nov.2020 – Sept.2023)

- Maintained trial balances for 70 plus entities in varying industries which includes commercial, residential, self-storage, and development assets
- Created and implemented policies, procedures, and internal controls to effectively manage accounting function as company grew from $165 million to $270 million in total real estate (market value)
- Developed monthly financial statement close procedure to ensure timely reporting of results to executive team, outside investors, and financial institutions
    - Bank reconciliations for 50 plus accounts
    - Posting of monthly accruals and related party activity
    - Balance sheet review and account reconciliations to source documents
    - Income statement analysis which includes budget to actual comparison
    - Maintain and review total portfolio debt schedule
- Executed monthly loan draw process to ensure timely funding for vendor payments and monitor development budget against available funds
- Managed external compliance reporting across all entities to include trial balance prep for tax returns, audit and attest reporting, sales tax reporting, and any ad hoc requirements
- Managed annual budget preparation across all entities to create a comprehensive, enterprise-wide reporting document
- Processed bi-weekly payroll for multiple entities as well as filing quarterly and annual payroll reports
- Oversaw software conversions for both accounting and payroll systems to ensure accurate transfer of data and smooth transition for staff
- Spearheaded amendment to company 401k plan to include an employer match

BerganKVD – Omaha, NE Branch
Senior Audit Associate (Jun.2017 – Oct.2020)

- Planned, executed and completed financial statement audits in addition to yellow book, single, HUD (Housing and Urban Development) and ERISA (Employee Retirement Income Securities Act) audits
- Experience in a wide variety of industries including real estate, manufacturing, not-for-profit, local governments, school districts and employee benefit plans
- Executed all phases of the audit process including planning, substantive testing, financial analysis, present audit findings to management, prepare financial statements and issuance of opinion
- Planned, developed strategies and supervised fieldwork teams through all phases of audit engagement
- Identified, researched and resolved various technical accounting issues to ensure proper accounting treatment and financial statement disclosures
- Maintained effective time management while simultaneously leading multiple engagements and monitoring project budgets

Certifications

CPA, Nebraska Board of Public Accountancy *(Dec.2019 -)*

Education

Wayne State College
B.S., Business Administration
Concentration: Public Accounting

References

Travis Klein, United Way of the Midlands – SVP, Finance & Operations
1229 Millwork Ave
Omaha, NE 68102
402.830.1942

Rebecca Blum, United Way of the Midlands – Director, Finance
1229 Millwork Ave
Omaha, NE 68102
402.830.1942

Shawna Forsberg, United Way of the Midlands – CEO & President
1229 Millwork Ave
Omaha, NE 68102
402.522.7964

Jen Hale
6305 Decatur Street, Omaha, NE 68104
402.639.6671 jenniferLhale@hotmail.com

SUMMARY

Nonprofit and foundation relations project manager with a decade of experience building cross-sector partnerships. Skilled in Collective Impact, technology implementation, compliance, and funder stewardship. Adept at cultivating relationships and aligning investments with measurable impacts.

PROFESSIONAL EXPERIENCE

Nebraska Children and Families Foundation: Jan 2021- Present (various roles)

Associate Vice President of Community Infrastructure: Nov 2023 – Present
Associate Vice President of Community Investments: Nov 2022- Oct 2023
Director of Community Contracts: Jan 2021- Nov 2022

- Spearheaded statewide Collaborative implementation of Findhelp as Nebraska's unified Bring Up Nebraska referral tracking system, ensuring interoperability common data practices.
- Served as primary implementation project manager for Bring Up Nebraska Collaborative Findhelp rollout, overseeing training, onboarding, and stakeholder engagement across the region.
- Directed project management monitoring team for infrastructure contracts supporting over $10M in annual collaborative funding, with emphasis on accountability, equity, and impact.
- Led cross-sector coordination with state agencies and local partners to strengthen family support systems and emergency response networks.
- Designed and delivered technical assistance, capacity-building workshops, and documentation to enhance partner readiness and compliance.
- Managed grant reporting and stewardship across diverse funding streams, including federal, state, and philanthropic sources.
- Systems expertise: Findhelp, WebGrants, Sam.gov, Microsoft Office Suite, Paylocity.

University of Nebraska at Omaha/ NARI (Nebraska Applied Research Institute): Jan 2018- Jan 2021/ Omaha, NE

Business Specialist/ Administrator

- Directed operations for federally funded research center, including planning, reporting, and evaluation.
- Supported Institutional Review Board (IRB) study compliance, including documentation, protocol submissions, and coordination with principal investigators.
- Provided administrative inputs for human subjects research, ensuring ethical standards and federal regulations were met.
- Built and sustained stakeholder relationships across university, private, and government sectors using a Collective Impact framework.
- Oversaw federal grant compliance (CFR 200), subaward management, and legal agreement development.
- Led public outreach and stakeholder engagement strategies to elevate research visibility and community relevance.
- Systems expertise: SAP, T-Sheets, Adobe Sign, QuickBooks Online, Salesforce Admin, Microsoft Office Suite, Sam.gov Admin.

Korn Ferry @ Paypal: Oct 2016 - Dec 2018/ Omaha, NE

Talent Acquisition Coordinator:

- Supported PayPal's hiring and workforce development initiatives through Korn Ferry's strategic staffing partnership.
- Coordinated recruitment logistics, candidate communications, and onboarding processes across multiple departments.
- Partnered with nonprofit and government organizations to align hiring strategies with community workforce programs.
- Systems: BrassRing, Salesforce, Microsoft Excel.

PayPal: Nov 2015 - Oct 2016/ Omaha, NE

Limitations/ Fraud Associate

- Delivered team training and compliance documentation to strengthen risk prevention systems.
- Documented & filed SAR (Suspicious Activity Report) for risk team investigative review
- Systems: Fraud One Page, Microsoft Excel, BrassRing, SalesForce

Goodwill Industries: Sept 2012- June 2015/ Omaha, NE

Business Outreach Coordinator

- Supported PayPal's hiring and workforce development initiatives through Korn Ferry's strategic staffing partnership.
- Coordinated recruitment logistics, candidate communications, and onboarding processes across multiple departments.
- Partnered with nonprofit and government organizations to align hiring strategies with community workforce programs.
- Systems: BrassRing, Salesforce, Microsoft Excel.

EDUCATION & CERTIFICATIONS

Master of Science in Management: Oct 2012
Master of Business Administration Certification: Oct 2020
Bachelor of Science in Professional Aeronautics: Business Management (Minor), Oct 2008
Certified Associate in Project Management, CAPM, earned Nov 2019
Agile Project Management Certificate, ICP-APM, IC Agile, Sep 2019

CONTACT DETAILS

(402) 980-2276
mary.sell@gmail.com

MARY PINKER

NON-PROFIT LEADER AND COMMUNITY BUILDER

WORK EXPERIENCE

NEBRASKA CHILDREN AND FAMILIES FOUNDATION
Vice President of Community Well-Being | Jan 2020-present

- Engage public and private stakeholders in a statewide Collective Impact model to support community-based primary prevention initiatives across the lifespan
- Manage over 25 downstream entities with a combined total budget of over $10 million
- Sustain public/private blended budget to support primary prevention statewide
- Work across all organizational leaders to align resources and communication pathways

Assistant Vice President of Community Response |Apr 2016-Jan 2020

- Project Management for internal Community Well-Being initiative, Community Response
- Partnered to coordinate evaluation efforts toward primary prevention
- Implemented public/private budget and contract process to support primary prevention collaboratives statewide
- Provided technical assistance in fund development and establishment of 501c3 status

NEBRASKA FAMILIES COLLABORATIVE
CQI and Data Outcome Coordinator | Nov 2012 - Apr 2016

- Lead project manager for internal case management database
- Coordinated process for implementing Child and Family Service Review outcomes in order to evaluate effectiveness of NFC deliverables
- Achieved and maintained Council on Accreditation status

Utilization Management Supervisor | Jun 2011 - Nov 2012

- Oversight of Utilization Management team which accessed child welfare services, gathered and reported data on utilization and outcomes
- Managed stakeholder relationships and developed referral processes to Contractors
- Conducted Medicaid Managed Care access review calls to support mental and behavioral health needs of state wards and their families
- Collaborated with cross-sector, statewide, and national organizations to address gaps in service delivery

PROFESSIONAL SKILLS

Non-Profit program management
Non-Profit fund development and infrastructure needs
Grant management, training and technical assistance
Project planning, design, and implementation
Portfolio management across multiple projects
Consultation
Behavioral Health professional with a trauma-informed approach
Cultural Competency

AREAS OF FOCUS

Collective Impact Collaboration
Fund Development
Project Management
Research and Evaluation
Primary Prevention
Community Building
Social Impact

EDUCATION

UNIVERSITY OF NEBRASKA AT OMAHA

Master of Science
Community Counseling, 2008

Bachelor of Arts
Sociology/Social Inequality, 2005

PERSONAL SKILLS

Servant Leader
Relational
Collaborator
Individuation and interpersonal communication
Reliable and professional
Analytical and structured
Fast learner
Self-motivated

402-973-8309 | REBECCARMONNIER@GMAIL.COM

Rebecca Monnier
Accomplished evaluation executive with 12+ years of experience leading evaluation, and CQI initiatives across public, nonprofit, and global settings. Expertise in developing evaluation systems that drive organizational learning, secure funding, and demonstrate impact, from local pilot programs to statewide initiatives and federally funded efforts. Skilled in stakeholder engagement, strategic planning, and cross-sector collaboration. Proven ability to build and lead high-performing teams, manage complex evaluation portfolios, and operationalize data use for service improvement and sustainability.

EDUCATION

Master of Arts in International Development | *Saint Mary's University of Minnesota* | Minneapolis, MN

- Field concentration in rural education

Bachelor of Science in Business Administration | *Concordia University Nebraska* | Seward, NE

- Immersive work and travel internationally; Zambia, Tanzania, China, Costa Rica
- Phi Beta Lambda Leadership

ADDITIONAL TRAINING AND SERVICE

- Member of the Opportunity Education Foundation Tanzania Board of Directors, founded by Mr. Joe Ricketts
- Monitoring, Evaluation and Learning Certification from New York University
- Participated in an intensive Applied Data Science program at Massachusetts Institute of Technology
- Lutheran Malaria Initiative Fellow

EXPERIENCE

Managing Director for Evaluation, Research and Continuous Quality Improvement | *Nebraska Children and Families Foundation | Omaha, NE*

February 2025-present

- Lead a 6-person Research & Evaluation (R&E) team responsible for evaluation and data efforts across NCFF's statewide initiatives focused on children, youth, families, and community well-being.
- Provide strategic direction for evaluation planning, data use, and continuous quality improvement aligned with NCFF's mission and the Statewide Plan for Community Well-Being.
- Oversee evaluation budgets, contracts, and partnerships—including federal, state, and philanthropic funding streams.
- Guide the development of shared evaluation frameworks, indicators, and outcome measures across programs and initiatives.
- Lead the design and implementation of technical data systems (e.g., FindHelp, Metabase) to improve data access, visualization, and use in decision-making.
- Build internal evaluation capacity through team development, technical assistance, and cross-initiative collaboration.

Lead Scientist for Evaluation Processes and Systems

April 2023-Febuary 2025

- Designed integrated systems approach to internal evaluation across all NCFF initiatives.
- Built processes for aligned data collection, analysis, and reporting for programs, grants, and collaboratives.
- Supported internal team growth, onboarding, and cross-training

Director of Community Evaluation

May 2022 – April 2023

- Support a wide range of evaluation projects across the organization, specifically focusing on the Community Well Being Initiative and educational strategy projects
- Assist with qualitative and quantitative data collection efforts for the foundation
- Responsible for all individual level data collection efforts
- Partner with external evaluation consultants to assist evaluation execution and data collection

Program Director for Rubicon Academies | *Opportunity Education Foundation | Omaha, NE*
October 2020 - December 2021

- Designed, launched, and led a pilot home school program, managed daily operations, staff, and community partnerships.
- Recruited first student cohort and oversaw branding, outreach, partnership development and digital content creation.
- Managed the hiring, onboarding, and ongoing professional development of new team members
- students

Business Operations Auditor | *Opportunity Education Foundation | Omaha, NE*
August 2019 - October 2020

- Sole evaluator working directly for Mr. Joe Ricketts; developed internal audit and M&E protocols.
- Performed programmatic, operational, Human Resources, and financial, data-based audits and reviews
- Evaluated 20 school across the US and Tanzania for their implementation of a digital high school curriculum.
- Advised the foundations' founder and funder on recommendations for improvement and partnered with C-Suite executives to implement recommendations
- Collaborated across multiple teams to implement recommendations including training, curriculum, learning platform, and implementation teams,

Administrator and Program Manager | *Partner Liberia | Monrovia, Liberia*
August 2018 – May 2019

- Key Victories: Laid the foundation for the launch of a specialty hospital in Liberia, supported hiring of nursing staff with the assistant of a clinical director, restarted the organizations training institute, and managed organizational finances.

Education Coordinator | *Peace Corps | Liberia*
June 2016 – June 2018

- Taught over 400 students: science, math, and literacy
- Designed and led 25 local training events to support teaching and classroom environments.
- Managed a grant to support the creation of a school library
- Designed and facilitated training to assist new volunteer onboarding during the first 3 months of service.

Interim Director of Student Services | *Nebraska Christian College | Omaha, NE*
September 2015 – June 2016

- Led the residential life team of 8 on-campus staff members
- Other duties: Modernized emergency preparedness protocol, managed all student life activities and events, directed the adjustment of student life policies to support the current student body, handled all Department of Education Compliance

Interim Supervisor | *City of Omaha | Omaha, NE*
January 2015 – October 2015

- Responsible for hiring and managing a team of 10 recreation programmers at a City of Omaha community center
- Created events and activities to support over 200 students during after school and summer programs
- Collaborated with community organization to analyze community needs to create high impact events for students and families in Omaha

findhelp

Findhelp Staff: Manager, Customer and Community Success

Savannah Cleveland Queen, Manager, Customer and Community Success

Professional Summary

Highly dynamic and motivated professional with a passion for fostering relationships, bridging gaps, and empowering others through strategic community development and financial literacy. Skilled in creative problem solving and solution execution. Driven entrepreneur, an enthusiastic advocate, and a continuous student.

Experience Summary

Findhelp, Nashville, TN *(November 2021—Present)*

- Manager, Customer and Community Success *(January 2023—Present)*
- Senior Community Engagement Manager *(November 2021—December 2022)*
    - Manage customer and organization relationships across a six-state region: AL, AR, LA, MS, OK, TN
    - Drive engagement and platform adoption in assigned states
    - Facilitate working groups and conversations around social determinants of health
    - Strategically guide hospital, government, and insurance systems in developing community networks

Unity PPE, Nashville, TN *(April 2020—Present)*

- Cofounder/CEO
    - Provide strategic oversight of operational and financial functions for a PPE company that provides cloth masks developed here in the USA, including the establishment of monthly planning processes, profit, and operations reporting, and Human Resources functions
    - Lead all relational activities with major vendor service contacts
    - Engineered transition to a women-owned business with the support of all founders
    - Developed operating online presence through sites such as Amazon, Shopify, WooCommerce, and Ample Market to generate sales and actionable campaign
    - Spearheaded and launched a first-in-class innovative product with patent: SEALS
    - Drove company to profitability in the first year

Hytch, LLC, Nashville, TN *(April 2021—July 2021)*

- Technical and Design Consultant
    - Managed project timelines for various extension development opportunities within the platform
    - Worked closely with engineers to ensure understanding in development across departments
    - Provided strategic oversight for development and product management
    - Managed tasks through JIRA through the use of Epics, Stories, and Tasks
    - Developed design documentation for current and future product design possibilities on product roadmap

Manhattan Associates, Boston, MA *(August 2016—May 2018)*

- Professional Services Consultant
    - Issue triaging and development for all extensions
    - Client technical training
    - Assisted in programming for release of product to all store managers

- Provided clients necessary documentation and assistance in both English and Spanish
- Assisted in design for client specific software extensions
- Served as Volunteer Services Team Lead, managing 400 volunteers

Education

- Masters, International Relations, The American University, *Washington, DC*
- Graduate Certificate, Global Social Impact, The American University, *Washington, DC*
- BS, International Business, University of South Carolina, *Columbia, SC*

Other Accomplishments

- Peace Corps Volunteer, Colombia

Findhelp Staff: Customer Training Program Manager

Heather Dender, Customer Training Program Manager

Professional Summary

Hard-working and creative professional with a passion for leading teams, managing projects, and using all available resources to make things work for a given situation. Skilled in adapting learning materials for the intended audience. Committed to being a very positive influence and demonstrating creative problem-solving in tackling challenges.

Experience Summary

Findhelp, Austin, TX *(July 2022—Present)*

- Customer Training Program Manager *(January 2024—Present)*
    - Lead and support Findhelp's customer training program by creating impactful learning experiences that meet our customers' needs
    - Develop specific training methodologies and materials for multiple States using the Findhelp platform to achieve goals related to Social Drivers of Health (SDOH), Community Information Exchanges/Health Information Exchanges, health equity, and other goals related to health and wellness
    - Continually improve our Train-the-Trainer training model used by Findhelp customers
    - Manage any customer integrations needed related to platform training needs, such as integrations with a LMS or System of Record
    - Create, manage, and support training methods and content for new customers, including both those that meet many customers' needs and those that are customized to meet very specific customers' needs during implementation and for ongoing training support
    - Provide new and updated content for training materials, resources, and videos found in Findhelp's online Support Portal
    - Provide internal training to Findhelp teams directly supporting customers, including through education and guidance to available resources
    Collaborate with multiple teams and stakeholders to provide training resources and methods that meet the company's standards of quality

- Data Curation Manager *(July 2022—December 2023)*
    - Support and help manage Findhelp's Curation Team, which is responsible for developing, curating, and updating the nationwide network of social care programs available to people seeking free and reduced-cost services related to Social Drivers of Health (SDOH)
    - Coach, support career development, and manage time and attendance for the Curation team, including addressing HR concerns and participating in staff improvement initiatives
    - Establish Curator cohort structure that addresses needs for continuing education, new hire training, and weekly department meetings
    - Provide leadership in training and awareness of Curation's work within Findhelp, including educating staff and stakeholders as well as developing the training for the company-wide Curator for a Day program; this program provides the opportunity for each staff person to have an immersion experience in Curation work for a day

    - Designed the Curator interview process to reflect updated job roles and growing business needs reflecting Findhelp's growth
    - Provide technical leadership which included navigation support for a Jira migration process that entailed creating a macro directory resource, leading troubleshooting sessions, and partnering with Findhelp's Project Management team to establish needed workflows to increase productivity

Apple, Inc., Sacramento, CA *(September 2012—November 2021)*

- Apple Store Retail Manager/Operations Manager *(August 2018—November 2021)*
    - Partnered with Global Program Managers and Product Launch coordinators to update training and communication around device setup—which was distributed to all retail stores globally.
    - Proposed updates to global-wide communication around securing personal data and passwords before a visit to a retail store
    - Created a mobile kit to allow the setup program to take place away from stationary table locations implemented in Asia-Pacific (APAC) stores
    - Partnered with the AppleCare Call Center team to share training and resource guides across company departments
    - Was the designated point of contact for a program that partnered the personal setup program with a contractor who did home delivery of Apple products in seven states
    - Facilitated store-level training for technology updates and development workshops, as well as topics reflecting business priorities
    - Managed and coached multiple Connection teams (each including up to 35+ members) and developed 60+ technical advisors

- AppleCare Team Manager *(September 2012—August 2018)*
    - Onboarded new AppleCare managers responsible for tier 1 and tier 2 Support, iOS, iTunes, Mac, Phone, and Chat
    - Created and facilitated an annual self-review roundtable, attended by 130 managers across multiple departments, designed around specific self-assessments for managers' self-reviews
    - Managed timecards, annual performance review writing, and HR duties for multiple teams
    - Established a quality assurance audit and reward program for managers within the iTunes department to increase accountability in coaching completion
    - Backfilled Area Manager duties, including project managing monthly deliverables, providing guidance to Support team managers, and managing leaves of absence and terminations

Education

- BA, English, Fresno Pacific University, *Fresno, CA*

United Way of the Midlands
Omaha, Nebraska

June 30, 2024
With Comparative Totals for
2023

Financial Statements
and
Independent Auditor's Report

HBE
CPAs & Consultants | Wealth Management

United Way of the Midlands

Years ended June 30, 2024 and 2023

TABLE OF CONTENTS

CPAs & Consultants | Wealth Management

INDEPENDENT AUDITOR'S REPORT

The Board of Directors
United Way of the Midlands
Omaha, Nebraska

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of United Way of the Midlands, which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of United Way of the Midlands, as of June 30, 2024, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of United Way of the Midlands, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Change in Accounting Principle

As discussed in Note Q to the financial statements, in 2024, the entity adopted new accounting guidance ASU 2016-13, *Financial Instruments – Credit Losses(Topic 326)*. Our opinion is not modified with respect to this matter.

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1314 Andrews Drive | Norfolk, NE | 68701 | p: 402.379.9294 | f: 402.379.2338
1121 N 102nd Court, #100 | Omaha, NE | 68114 | p: 402.895.5050 | f: 402.895.5723

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about United Way of the Midlands's ability to continue as a going concern for one year after the date that the financial statements are issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and Government Accounting Standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and Government Accounting Standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of United Way of the Midlands's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about United Way of the Midlands's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control–related matters that we identified during the audit.

Report on Summarized Comparative Information

We have previously audited United Way of the Midlands's June 30, 2023 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated October 6, 2023. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2023 is consistent, in all material respects, with the audited financial statements from which it has been derived.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the accompanying schedule of expenditures of federal awards is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with Government Auditing Standards, we have also issued our report dated October 8, 2024 on our consideration of United Way of the Midlands's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of United Way of the Midlands's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering United Way of the Midlands's internal control over financial reporting and compliance.

HBE LLP

Lincoln, Nebraska
October 8, 2024

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United Way of the Midlands

STATEMENT OF FINANCIAL POSITION

June 30, 2024
(With comparative totals as of June 30, 2023)

ASSETS

	2024	2023
ASSETS		
Cash and cash equivalents (note A)	$ 1,266,064	$ 1,888,108
Contributions receivable, 2026 campaign (less uncollectible allowance of $0)	30,000	-
Contributions receivable, 2025 campaign (less uncollectible allowance of $0)	30,000	-
Contributions receivable, 2024 campaign (less uncollectible allowance of $0)	134,390	-
Contributions receivable, 2023 campaign (less uncollectible allowance of $392,379 and $0)	4,666,181	303,419
Contributions receivable, 2022 campaign (less uncollectible allowance of $0 and $442,085)	267,879	4,740,176
Contributions receivable, 2021 campaign (less uncollectible allowance of $0)	45,204	102,501
Contributions receivable, 2020 campaign (less uncollectible allowance of $0)	-	117,385
Grants receivable (note A)	666,796	133,556
Other receivables (note A)	490,404	135,995
Contributed nonfinancial assets receivable (notes A and F)	2,154,244	-
Other assets and prepaid expenses	211,242	309,849
Investments (notes A, B and C)	7,529,491	12,012,171
Beneficial interest in net assets held by the Omaha Community Foundation (notes B and C)	1,993,172	1,887,014
Leasehold improvements and equipment, net (notes A and E)	1,902,418	1,441,415
Operating lease right-of-use assets (notes A and F)	3,814,263	3,209,168
Total assets	$ 25,201,748	$ 26,280,757

LIABILITIES AND NET ASSETS

	2024	2023
LIABILITIES		
Accounts payable and accrued expenses	$ 325,363	$ 309,390
Accrued payroll and related liabilities	1,075,713	722,236
Refundable advances	386,469	2,677,817
Deferred revenue	65,090	74,692
Operating lease obligations (notes A and F)	4,048,107	3,793,182
Goodfellows undistributed allocations and designations payable	-	75,000
Undistributed allocations and designations payable for the prior period campaign	391,282	77,389
Undistributed allocations and designations payable for the current period campaign	7,769,280	10,251,971
Total liabilities	14,061,304	17,981,677
NET ASSETS (note A)		
Without donor restrictions		
Board designated reserves (note H)	5,274,137	6,608,101
Board designated reserves for Goodfellows (note H)	228,241	254,504
Board designated for Goodfellows (note H)	387,592	391,372
Quasi endowment (note H)	4,299,133	3,803,883
Operating	(6,454,385)	(6,742,562)
Total net assets without donor restrictions	3,734,718	4,315,298
With donor restrictions (notes A and H)		
Perpetual in nature	3,430,544	3,427,544
Purpose restrictions	1,808,438	506,238
Time-restricted for future periods	2,166,744	50,000
Total net assets with donor restrictions	7,405,726	3,983,782
Total net assets	11,140,444	8,299,080
Total liabilities and net assets	$ 25,201,748	$ 26,280,757

See accompanying notes to financial statements.

United Way of the Midlands

STATEMENT OF ACTIVITIES

Year ended June 30, 2024
(With comparative totals for the year ended June 30, 2023)

	Without Donor Restrictions	With Donor Restrictions	Total 2024	2023
REVENUE AND OTHER SUPPORT				
Contributions				
Campaign contributions for the Fall Campaign				
Contributions received for the current period	$ 13,386,375	$ 2,290,117	$ 15,676,492	$ 16,880,585
Contributions received for the prior period (net assets released from restriction)	1,316,776	(1,316,776)	-	-
Gross campaign results	14,703,151	973,341	15,676,492	16,880,585
Less donor designations	(1,619,061)	-	(1,619,061)	(1,830,096)
Less allowance for uncollectible pledges	(437,001)	-	(437,001)	(314,610)
Total campaign contributions for the current allocation period	12,647,089	973,341	13,620,430	14,735,879
Other contributions				
Contributions restricted for offsetting campaign expenses	-	-	-	19,750
Contributions for special events and miscellaneous	782,473	-	782,473	742,552
Contributions of quasi-endowed gifts	-	-	-	250,000
Contributed nonfinancial assets (notes A and J)	1,400,007	2,154,244	3,554,251	567,957
Total other contributions	2,182,480	2,154,244	4,336,724	1,580,259
Total contributions	14,829,569	3,127,585	17,957,154	16,316,138
Government grants	7,459,420	-	7,459,420	5,186,470
Private grants	268,625	-	268,625	14,976,720
Disaster relief	1,453,441	-	1,453,441	-
Investment return, net (note B)	931,605	294,359	1,225,964	739,770
Donor designation fees	106,145	-	106,145	130,661
Contract fees	1,512,274	-	1,512,274	823,975
Gain on lease termination	460,156	-	460,156	-
Other income	40,348	-	40,348	1,686
Total revenues and other support	27,061,583	3,421,944	30,483,527	38,175,420
ALLOCATIONS AND OTHER FUNCTIONAL EXPENSES				
Allocations and designations to agencies	12,780,224	-	12,780,224	29,298,096
Less donor designations	(1,619,061)	-	(1,619,061)	(1,830,096)
Total allocations	11,161,163	-	11,161,163	27,468,000
Direct community services provided by United Way	12,904,688	-	12,904,688	9,164,816
Total allocations and direct community services	24,065,851	-	24,065,851	36,632,816
Other functional expenses				
Fundraising	1,531,429	-	1,531,429	2,982,191
Management and general	2,044,883	-	2,044,883	111,647
Total other functional expenses	3,576,312	-	3,576,312	3,093,838
Total allocations, designations, direct community services and other functional expenses	27,642,163	-	27,642,163	39,726,654
INCREASE (DECREASE) IN NET ASSETS	(580,580)	3,421,944	2,841,364	(1,551,234)
Net assets, beginning of year	4,315,298	3,983,782	8,299,080	9,850,314
Net assets, end of year	$ 3,734,718	$ 7,405,726	$ 11,140,444	$ 8,299,080

See accompanying notes to financial statements.

United Way of the Midlands

STATEMENT OF FUNCTIONAL EXPENSES

Year ended June 30, 2024
(With comparative totals for the year ended June 30, 2023)

	Program Services			Supporting Services			Total	
	Community Impact	Other Program Services	Total Program Services	Fundraising	Management and General	Totals Support Services	2024	2023
Allocations and designation to agencies								
Total allocations and designations to agencies	$ 12,780,224	$ -	$ 12,780,224	$ -	$ -	$ -	$ 12,780,224	$29,298,096
Less donor designations	(1,619,061)	-	(1,619,061)	-	-	-	(1,619,061)	(1,830,096)
Net allocations to agencies	11,161,163	-	11,161,163	-	-	-	11,161,163	27,468,000
Compensation								
Salaries	$ 784,276	$ 6,078,403	$ 6,862,679	$ 949,408	$ 691,761	$ 1,641,169	$ 8,503,848	$ 6,962,199
Employee benefits	134,346	962,454	1,096,800	137,795	107,152	244,947	1,341,747	988,668
Payroll taxes	62,229	429,092	491,321	66,694	43,346	110,040	601,361	504,294
Total personnel costs	980,851	7,469,949	8,450,800	1,153,897	842,259	1,996,156	10,446,956	8,455,161
Professional fees	29,992	585,265	615,257	46,987	111,944	158,931	774,188	692,985
Personnel costs	6,213	91,372	97,585	7,370	28,008	35,378	132,963	134,961
Supplies	24,731	601,517	626,248	31,066	22,233	53,299	679,547	300,147
Telephone	1,430	90,428	91,858	1,859	8,005	9,864	101,722	84,935
Postage and shipping	661	9,126	9,787	9,650	3,030	12,680	22,467	31,498
Occupancy	50,387	623,683	674,070	65,728	282,167	347,895	1,021,965	319,881
Repairs and maintenance	38,321	119,335	157,656	8,254	35,555	43,809	201,465	194,372
Printing, publications, and promotion	31,758	480,074	511,832	43,611	155,675	199,286	711,118	715,122
Travel and transportation	18,895	215,385	234,280	4,709	4,869	9,578	243,858	136,281
Events, conferences, and meetings	15,485	232,218	247,703	48,004	85,263	133,267	380,970	537,023
Organizational dues	4,811	44,120	48,931	4,936	12,172	17,108	66,039	52,704
Awards and gifts	1,116	19,849	20,965	1,451	6,251	7,702	28,667	31,532
Insurance	1,855	26,137	27,992	2,411	10,387	12,798	40,790	87,045
United Way Worldwide membership fee	7,713	93,327	101,040	10,027	43,192	53,219	154,259	189,304
Miscellaneous	3,302	30,559	33,861	3,317	14,143	17,460	51,321	2,137
Loss on disposal of property and equipment	51,417	659,426	710,843	66,842	287,932	354,774	1,065,617	-
Depreciation	16,393	227,587	243,980	21,310	91,798	113,108	357,088	293,566
Total non-personnel expenses	304,480	4,149,408	4,453,888	377,532	1,202,624	1,580,156	6,034,044	3,803,493
TOTAL FUNCTIONAL EXPENSES	$ 12,446,494	$ 11,619,357	$ 24,065,851	$ 1,531,429	$ 2,044,883	$ 3,576,312	$ 27,642,163	$39,726,654

See accompanying notes to financial statements.

United Way of the Midlands

STATEMENT OF CASH FLOWS

Year ended June 30, 2024
(With comparative totals for the year ended June 30, 2023)

	2024	2023
Cash flows from operating activities		
Increase (decrease) in net assets	$ 2,841,364	$ (1,551,234)
Adjustments to reconcile increase (decrease) in net assets to net cash provided (used) by operating activities		
Depreciation	357,088	293,566
Reduction in the carrying amount of right-of-use assets	396,441	209,707
Reinvested investment income	(394,095)	(363,772)
Realized and unrealized gain on investments	(898,906)	(443,986)
Gain on lease termination	(460,156)	-
Loss on disposal of property and equipment	1,065,617	-
Contributed nonfinancial assets receivable	(2,154,244)	-
(Increase) decrease in assets		
Contributions receivable	89,827	(784,320)
Grants receivable	(533,240)	398,893
Other receivables	(354,409)	(135,995)
Other assets and prepaid expenses	98,607	740,282
Beneficial interests	(106,158)	(64,652)
Increase (decrease) in liabilities		
Accounts payable and accrued expenses	15,973	(105,906)
Accrued payroll and related liabilities	353,477	79,478
Refundable advances	(2,291,348)	1,945,907
Deferred revenue	(9,602)	26,872
Operating lease obligations	(286,455)	(241,054)
Undistributed allocations and designations	(2,243,798)	57,875
Net cash provided (used) by operating activities	(4,514,017)	61,661
Cash flows from investing activities		
Purchase of property and equipment	(1,883,708)	(124,719)
Purchase of investments	(10,560,438)	(7,396,409)
Proceeds from sale of investments	16,336,119	6,494,833
Net cash provided (used) by investing activities	3,891,973	(1,026,295)
Net decrease in cash	(622,044)	(964,634)
Cash and cash equivalents, beginning of year	1,888,108	2,852,742
Cash and cash equivalents, end of year	$ 1,266,064	$ 1,888,108
Supplemental cash flows information:		
Right-of-use assets obtained in exchange for operating lease obligations upon ASC 842 implementation	$ -	$ 3,975,649
Right-of-use assets obtained in exchange for operating lease obligations post ASC 842 implementation	$ 4,131,243	$ 58,587

See accompanying notes to financial statements.

The United Way of the Midlands (the Organization) is a not-for-profit corporation which incorporated in 1923 and is governed by a volunteer Board of Directors. The mission of United Way of the Midlands is We *UNITE* our community's *CARING SPIRIT* to build a *STRONGER* tomorrow. The guiding principles of United Way of the Midlands are to build trust in everything we do, extend grace by thinking by yourself, show grit by bringing it every day, be open to embracing others' differences, actively engage by listening and sharing, and live curiously to learn constantly. United Way of the Midlands is a powerful partnership of people and organizations that care about our community's future. United Way of the Midlands recruits those who have the passion, expertise and resources we need to get things done. Together, we create life-changing opportunities in education, financial stability and health, the building blocks of a good life, so our neighbors can grow stronger and remain independent.

NOTE A - SUMMARY OF ACCOUNTING POLICIES

A summary of significant accounting policies consistently applied in the preparation of the accompanying financial statements follows:

Method of Accounting. The accompanying financial statements of the Organization have been prepared on the accrual basis of accounting.

Comparative Financial Information. The financial statements include certain prior year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP. Accordingly, such information should be read in conjunction with the Organization's financial statements for the year ended June 30, 2023, from which summarized information was derived.

Cash and Cash Equivalents. For purposes of the statements of cash flows, the Organization considers all highly liquid investments with a maturity of three months or less to be cash equivalents. Cash and cash equivalents are measured at amortized cost, thus, evaluated for expected credit losses. Based on management's review of historical data in addition to current conditions and forecasts, The Organization has not recognized an expected credit loss.

Contributions Receivable. Contributions are recognized when the donor makes a promise to give that is, in substance, unconditional. Unconditional promises to give that are expected to be collected or paid in more than one year are recognized at the present value of estimated future cash flows. Management provides for probable uncollectible unconditional promises receivable through a charge to net assets and a credit to a valuation allowance based on a 5-year historical average, adjusted by managements estimate of current economic factors, and applied to gross campaign contributions, including donor designations. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a credit to unconditional promises receivable. Changes in the valuation allowance have not been material to the financial statements.

Grants Receivable. Grants receivable are stated at the amount management expects to collect from balances outstanding at year-end. Based on management's assessment of the credit history of grantors having outstanding balances and current relationships with them, it has concluded that realization losses on balances outstanding at year-end will be immaterial.

NOTE A - SUMMARY OF ACCOUNTING POLICIES - CONTINUED

Other Receivables. Other receivables are stated at the amount management expects to collect from balances outstanding at year-end. Based on management's assessment of the credit history of donors having outstanding balances and current relationships with them, it has concluded that realization losses on balances outstanding at year-end will be immaterial.

Investments. Investments in marketable securities, including equity and debt securities, with readily determinable fair values are reported at their fair values in the statement of financial position. Unrealized gains and losses are included in the statements of activities. Donated securities are recorded as contributions equal to the fair market value of the securities at the date of gift.

Fair Value Measurements. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at measurement date. The Organization utilizes a framework to prioritize the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and the lowest priority to unobservable inputs (level 3 measurements). The three levels of the fair value hierarchy are described as follows:

Level 1 — Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Organization has the ability to access.

Level 2 — Inputs to the valuation methodology include:

- quoted prices for similar assets or liabilities in active markets;
- quoted prices for identical or similar assets or liabilities in inactive markets;
- inputs other than quoted prices that are observable for the asset or liability;
- inputs that are derived principally from or corroborated by observable market data by correlation or other means.

If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.

Level 3 — Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Leasehold improvements and Equipment and Depreciation. Leasehold improvements and equipment are carried at cost, if purchased and at fair market value at the date of contribution, if received by donation, less accumulated depreciation. Depreciation is provided for in amounts sufficient to relate the cost of depreciable assets to operations over their estimated useful lives computed primarily on the straight-line method. Property and equipment are depreciated over estimated useful lives as follows:

Buildings and improvements	7 - 20 years
Furniture, equipment and software	3 - 10 years
Vehicles	10 years

It is the Organization's policy to capitalize property and equipment over $5,000. Lesser amounts are expensed.

NOTE A - SUMMARY OF ACCOUNTING POLICIES - CONTINUED

Leases. At inception, the Organization determines if a contract is or includes a lease arrangement. The Organization's lease commitments include office space and equipment. The following describes the Organization's accounting policies related to its leasing arrangements:

<u>As lessee</u>

Leased assets represent the right to control the use of an identified asset for the lease term and lease obligations represent the obligation to make lease payments arising from the lease. The Organization recognizes a right-of-use asset and related obligation at the commencement date, generally based on the present value of lease payments over the lease term using the Organization's risk free rate. Leases with an initial term of 12 months or less, including month to month leases, are not recorded on the balance sheet and are expensed on a straight-line basis.

Operating Leases

Operating lease assets and liabilities are recognized separately on the Organization's statement of financial position. The Organization recognizes a single lease expense on a straight-line basis over the lease term. Nonlease components are expensed as incurred.

Accrued Vacation. The Organization's vacation policy allows full-time employees 160 hours of vacation time. Vacation time is also available on a pro-rata basis for part-time employees. Up to 240 hours of accrued vacation time may be carried into a new fiscal year but no more than 240 hours may be accumulated and unused at any time. All accumulated vacation time is paid out upon termination. Accrued vacation for the years ended June 30, 2024 and 2023, was $585,274 and $433,887, respectfully.

Net Asset Classification. Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Without donor restrictions. Net assets available for use in general operations and not subject to donor or grantor restrictions. The governing board has designated, from net assets without donor restrictions, net assets for an operating reserve and board-designated endowment.

With donor restrictions. Net assets subject to donor- or grantor-imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Gifts of long-lived assets and gifts of cash restricted for the acquisition of long-lived assets are recognized as revenue when the assets are placed in service. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both, and are reported in the statements of activities as net assets released from restrictions.

Contributions restricted by donors received in the same period when the associated stipulated time or purpose restriction is accomplished are reported as increases in net assets without donor restrictions. All other donor-restricted contributions are reported as increases in net assets with donor restrictions, depending on the nature of the restrictions.

NOTE A - SUMMARY OF ACCOUNTING POLICIES - CONTINUED

With donor restrictions. - Continued The State of Nebraska adopted UPMIFA effective September 1, 2007. The Organization adopted the Financial Accounting Standards Board's guidance and required disclosures for the year ended June 30, 2010. The Board of Directors has interpreted UPMIFA as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent donor stipulations to the contrary. As a result of this interpretation, the Organization classifies as net assets with donor restrictions to be held in perpetuity, the original value of the gifts donated and subsequent gifts to the permanent endowment. The accumulations to the donor-restricted endowment that are not classified as net assets with donor restrictions to be held in perpetuity are classified as purpose restricted net assets with donor restrictions until those amounts are appropriated for expenditure by The Organization in a manner consistent with the standard of prudence prescribed by UPMIFA. Purpose restricted net assets also include general limitation endowment funds with an unfulfilled restriction on the purpose for which the monies from the fund may be applied and the specific limitation endowment funds for which the donor allows some principal invasions in the gift instrument.

In accordance with UPMIFA, the Organization considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

(1) The duration and preservation of the fund

(2) The purposes of the Organization and the donor-restricted endowment fund

(3) General economic conditions

(4) The possible effect of inflation and deflation

(5) The expected total return from income and the appreciation of investments

(6) Other resources of the Organization

(7) The investment policies of the Organization

Endowment Investment and Payout Policies. The Organization has adopted investment and payout policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowment funds while seeking to maintain the purchasing power of the endowment assets. The Organization's investment and payout policies, which have been approved by the Organization's Board of Directors, work together to achieve this objective. The investment policy establishes an achievable return objective through diversification of asset classes. The current investment objective is to achieve an average rate of return of approximately 8% annually.

To satisfy its objectives, the Organization relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Organization targets a diversified asset allocation between equity and debt securities to achieve its return objectives within prudent risk parameters.

The Organization has a policy for the assets held by the Omaha Community Foundation of appropriating for distribution each year 4.5% of its endowment fund's market value as of December 31 of the year preceding the calendar year in which the distribution is planned. This amount is restricted to be utilized as a perpetual gift to the annual United Way of the Midlands campaign drive.

NOTE A - SUMMARY OF ACCOUNTING POLICIES - CONTINUED

Endowment Investment and Payout Policies. – Continued The Organization has a trust which must be maintained in perpetuity. The Organization has a policy for the assets held by the bank under the trust of appropriating for distribution each year 4.5% of its market value as of June 30 of the year preceding the fiscal year in which the distribution is planned. This amount is restricted to serve those with developmental and intellectual disabilities.

Revenue Recognition. The following is a description of the Organization's principal sources of revenue:

Contributions: Contributions are recognized when a donor makes a promise to give that is, in substance, unconditional. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met. At June 30, 2023, the Organization has conditional grants totaling $250,000 for which no amounts had been received in advance and they have not yet been recognized in the accompanying financial statements. The Organization did not have any conditional grants in 2024.

Grant Revenue: Grants are recorded as revenue when the related approved expenditures are made. Unearned grant revenue represents advances of grant funds received prior to the incurrence of related costs by the Organization. At June 30, 2024, the Organization had conditional grants totaling $385,760 for which amounts were received in advance and included in refundable advances on the statement of financial position. At June 30, 2023, the Organization has conditional grants totaling $2,685,144 for which no amounts had been received in advance and they have not yet been recognized in the accompanying financial statements.

Contract Fees: Contracts are evaluated for performance obligations to determine the nature of the goods or services provided by the Organization. Revenue for performance obligations satisfied over time are recognized over the period based on time elapsed or on a cost-to-cost method based on the language in the agreement. For the year ended, June 30, 2024 and 2023, the Organization recognized contract fee revenue of $1,512,274 and $823,975 from services that transfer to the other entities over time.

Functional Expenses. The costs of providing various programs and other activities have been summarized on a functional basis in the statement of activities and in the statement of functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services based on the estimated time spent.

Advertising. Advertising costs of the Organization are expensed as incurred. Advertising expense was $535,266 and $572,570 for the years ended June 30, 2024 and 2023, respectively.

Contributed Nonfinancial Assets. Contributed nonfinancial assets are recorded as contributions at their estimated fair values at the date of donation. Donated services are recognized as contributions if the services (a) create or enhance non-financial assets or (b) require specialized skills, are performed by people with those skills, and would have otherwise been purchased by the Organization.

It is the Organization's policy to sell all contributed assets immediately upon receipt at auction or for salvage unless the asset is restricted for use in a specific program by the donor.

NOTE A - SUMMARY OF ACCOUNTING POLICIES - CONTINUED

Income Taxes. The Organization is exempt from Federal income taxes under Section 501(c)(3) of the Internal Revenue Code. As such, income earned in the performance of its exempt purpose is not subject to income tax. Any income earned through unrelated business activities is subject to income tax at normal corporate rates. For the years ended June 30, 2024 and 2023, the Organization had no tax liability on unrelated business activity. The Organization believes that they have appropriate support for any tax positions taken, and as such, do not have any uncertain tax positions that are material to the financial statements.

The Organization's Federal Returns of Organizations Exempt from Income Tax (Form 990) for June 30, 2024, 2023, and 2022 are subject to examination by the IRS, generally for three years after they were filed.

Use of Estimates. The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

NOTE B - INVESTMENTS

Investments consist of the following:

	2024		2023	
	Cost	Market	Cost	Market
Cash equivalents	$ 421,404	$ 426,124	$ 1,161,823	$ 1,164,944
Fixed income	2,712,099	2,645,240	7,113,537	6,762,068
Equity funds	3,325,595	4,221,349	2,917,475	3,750,660
Complementary strategies	121,085	152,787	173,512	201,458
Real estate funds	86,127	83,991	155,400	133,041
	$ 6,666,310	$ 7,529,491	$ 11,521,747	$ 12,012,171
Unrealized gain		$ 863,181		$ 490,424
Beneficial interest in net assets held by Omaha Community Foundation	$ 1,997,540	$ 1,993,172	$ 1,997,540	$ 1,887,014
Unrealized loss		$ (4,368)		$ (110,526)

Investment performance, net consists of the following:

	2024	2023
Dividends and interest	$ 394,095	$ 363,772
Realized gains (losses)	452,286	(116,000)
Unrealized gains	446,620	559,986
Investment expenses	(67,037)	(67,988)
	$ 1,225,964	$ 739,770

NOTE B – INVESTMENTS – CONTINUED

On December 17, 1998, the Organization entered into an agreement establishing a fund at the Omaha Community Foundation. Although ownership and management responsibility of this fund remains with the Omaha Community Foundation, the income will continue to provide perpetual gifts to the United Way of the Midlands' campaign through distributions to the United Way of the Midlands from the Omaha Community Foundation. These assets are recognized on the financial statements as "Beneficial interest in net assets held by the Omaha Community Foundation." As of June 30, 2023, the fair value of these assets is reflected in the statement of financial position.

NOTE C - FAIR VALUE MEASUREMENTS

Following is a description of the valuation methodologies used for assets and liabilities measured at fair value. There have been no changes in methodologies used during the years ended June 30, 2024 and 2023.

Investments: Cash equivalents, fixed income, equity funds, complementary strategies and real estate funds are valued at the observable net asset value (NAV) of shares held by the Organization at year end.

Beneficial interest in net assets held by Omaha Community Foundation: Valued based on the fair value of the Organization's ownership interest in underlying pools at The Organization.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Organization believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

NOTE C - FAIR VALUE MEASUREMENTS – CONTINUED

The following tables set forth the balances of assets and liabilities measured at fair value on a recurring basis as of June 30, 2024 and 2023.

June 30, 2024	Fair Value	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
Cash and equivalents	$ 426,124	$ 426,124	$ -	$ -
Fixed income	2,645,240	2,645,240	-	-
Equity funds	4,221,349	4,221,349	-	-
Complementary strategies	152,787	152,787	-	-
Real estate funds	83,991	83,991	-	-
Beneficial interest in net assets held by Omaha Community Foundation	1,993,172	-	-	1,993,172
	$ 9,522,663	$ 7,529,491	$ -	$ 1,993,172

June 30, 2023	Fair Value	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
Cash and equivalents	$ 1,164,944	$ 1,164,944	$ -	$ -
Fixed income	6,762,068	6,762,068	-	-
Equity funds	3,750,660	3,750,660	-	-
Complementary strategies	201,458	201,458	-	-
Real estate funds	133,041	133,041	-	-
Beneficial interest in net assets held by Omaha Community Foundation	1,887,014	-	-	1,887,014
	$ 13,899,185	$ 12,012,171	$ -	$ 1,887,014

The following table sets forth a summary of changes in the fair value of the Organization's level 3 assets for the year ended June 30, 2024 and 2023.

	2024	2023
Beginning balances	$ 1,887,014	$ 1,822,362
Realized and unrealized gains	153,520	116,397
Purchases	51,547	30,553
Distributions	(98,909)	(82,298)
Ending balance	$ 1,993,172	$ 1,887,014

NOTE D - ENDOWMENT

Endowment net asset composition by type of fund as of June 30, 2024 is as follows:

	Without Donor Restrictions	With Donor Restrictions	Total
Donor-restricted endowment funds	$ -	$ 3,987,652	$ 3,987,652
Quasi-endowment	$ 4,299,133	$ -	$ 4,299,133

Changes in endowment net assets for the year ended June 30, 2024 are as follows:

	Without Donor Restrictions	With Donor Restrictions	Total
Balance June 30, 2023	$ 3,803,883	$ 3,688,294	$ 7,492,177
Contributions	(5,000)	3,000	(2,000)
Investment performance, net	609,291	296,358	905,649
Amounts released from restriction	(109,041)	-	(109,041)
Balance June 30, 2024	$ 4,299,133	$ 3,987,652	$ 8,286,785

Endowment net asset composition by type of fund as of June 30, 2023 is as follows:

	Without Donor Restrictions	With Donor Restrictions	Total
Donor-restricted endowment funds	$ -	$ 3,688,294	$ 3,688,294
Quasi-endowment	$ 3,803,883	$ -	$ 3,803,883

Changes in endowment net asset for the year ended June 30, 2023 are as follows:

	Without Donor Restrictions	With Donor Restrictions	Total
Balance June 30, 2022	$ 3,244,415	$ 3,779,046	$ 7,023,461
Contributions	167,702	-	167,702
Investment performance, net	391,766	159,668	551,434
Amounts appropriated for expenditure	-	(250,420)	(250,420)
Balance June 30, 2023	$ 3,803,883	$ 3,688,294	$ 7,492,177

NOTE E – LEASEHOLD IMPROVEMENTS AND EQUIPMENT

Leasehold improvements and equipment consists of:

	2024	2023
Buildings and improvements	$ 975,114	$ 1,514,566
Furniture and equipment	473,771	509,579
Vehicles	57,186	50,914
Work in progress	41,987	-
Computer equipment and software	1,331,636	1,217,986
	2,879,694	3,293,045
Accumulated depreciation	(977,276)	(1,851,630)
	$ 1,902,418	$ 1,441,415

Depreciation expense for the years ended June 30, 2024 and 2023 was $357,088 and $293,566, respectively.

NOTE F – LEASES

On May 26, 2015, the Organization entered into a lease for its administrative office for ten years and three months; commencing on September 1, 2015, and ending on November 30, 2025. The lease contained two options to renew for 60 months each ending on November 30, 2035. The lease renewals were previously expected to be exercised, but on February 29, 2024 the lease was terminated and the Organization paid the landlord an allowance of $99,381.

On August 26, 2021, the Organization entered into a 60-month lease for office equipment. Under the terms of the lease, monthly rent payments are $390.

On August 22, 2022, the Organization entered into a 60-month lease for office equipment. Under the terms of the lease, monthly rent payments are $1,014.

On September 20, 2023, the Organization entered into a lease agreement for its administrative office commencing on October 1, 2023, and ending on December 31, 2030. Under the terms of the lease, monthly payments of $54,818 started on February 1, 2024 and escalate every year. As monthly payments are under fair market value, the Organization has recorded a receivable for contributed nonfinancial assets for the remainder of the lease. At June 30, 2024, contributed nonfinancial assets receivable is $2,154,244.

Operating lease right-of-use assets and lease obligations were as follows:

	2024	2023
Right-of-use assets	$ 3,814,263	$ 3,209,168
Lease obligations		
Current	510,099	257,200
Noncurrent	3,538,008	3,535,982
	$ 4,048,107	$ 3,793,182

Operating lease expenses for the years ended June 30, 2024 and 2023 was $733,578 and $328,014, respectively.

NOTE F – LEASES - CONTINUED

Average operating lease terms and discount rate at were as follows:

Weighted average remaining lease term (years):	6.46	12.28
Weighted average discount rate:	4.59%	3.04%

The following summarizes cash paid for operating lease obligations and other non-cash information:

	2024	2023
Cash paid for amounts included in measurement of operating lease obligations - operating cash flows	$ 623,592	$ 359,361
Right-of-use assets obtained in exchange for operating lease obligations	$ 4,131,243	$ 58,587

The aggregate future lease payments below summarize the remaining future undiscounted cash flows for operating leases as of June 30, 2024, and a reconciliation to operating lease obligations reported on the statement of financial position:

Year ending June 30,	
2024	$ 682,889
2026	699,540
2027	712,706
2028	722,326
2029	735,190
Thereafter	1,135,006
Total minimum lease payments	4,687,657
Less: present value discount	(639,550)
Operating lease obligations	$ 4,048,107

NOTE G - LIQUIDITY AND AVAILABILITY

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of financial position date, comprise the following:

	2024	2023
Financial assets at year end:		
Cash and cash equivalents	$ 1,266,064	$ 1,888,108
Contributions receivables	5,173,654	5,263,481
Grants receivable	666,796	133,556
Other receivables	490,404	135,995
Investments	7,529,491	12,012,171
Beneficial interest in net assets held by the Omaha Community Foundation	1,993,172	1,887,014
Total financial assets	17,119,581	21,320,325
Donor imposed restrictions		
Perpetual in nature	(3,430,544)	(3,427,544)
Purpose restricted	(1,808,438)	(506,238)
Time-restricted for future periods	(12,500)	(50,000)
Net financial assets after donor imposed restrictions	11,868,099	17,336,543
Internal designations		
Board designated reserves	(5,274,137)	(6,608,101)
Board designated reserves for Goodfellows	(228,241)	(254,504)
Board designated for Goodfellows	(387,592)	(391,372)
Quasi endowment	(4,299,133)	(3,803,883)
Financial assets available to meet general expenditures within one year	$ 1,678,996	$ 6,278,683

The Organization receives contributions designated by donors and considers contributions designated for programs which are ongoing, major and central to its operations to be available to meet cash needs for general expenditures. For the year ended June 30, 2024, designated contributions of $1,508,566 were included in the financial assets available to meet cash needs for general expenditures within one year.

The Organization's endowment funds consist of donor-restricted endowments and funds designated by the Board as endowments. Income from donor-restricted endowments is restricted for specific purposes, with the exception of the amounts available for general use. Donor-restricted endowment funds are not available for general expenditure.

The quasi-endowment of $4,299,133 is subject to an annual spending rate of 4.5% as described in Note A. Although the Organization does not intend to spend from this quasi endowment, unless approved by the Board for specific program purposes, these amounts could be available if necessary.

The board designated reserves of $5,502,378 is made up of three months of operating expenses and payout to community partner agencies, proceeds from the sale of a prior building and funds designated by the Board to supplement programs not funded by the annual campaign. These amounts are available for spending, subject to Board approval. These board designated reserves along with $1,678,996 of funds available for general expenditures in the next fiscal year from above combine to $7,181,374 of funds available to meet expenditures in the next year.

NOTE G - LIQUIDITY AND AVAILABILITY - CONTINUED

The Organization manages its liquidity and reserves following three guiding principles: operating within a prudent range of financial soundness and stability, maintaining adequate liquid assets to fund near-term operating needs and maintaining sufficient reserves to provide reasonable assurance that long-term obligations will be discharged.

NOTE H - NET ASSETS

Net Assets Without Donor Restrictions

Board Designated Reserve

United Way of the Midlands holds investments which have been designated by the Board of Directors as a reserve restricted for expenditures which are not funded by annual campaign contributions. Examples of such expenditures include capital purchases, funding for unbudgeted emergency services, and other miscellaneous unforeseen and/or non-routine expenditures. All expenditures charged to the Board Designated Reserve must be approved by the Board of Directors.

Board Designated for Goodfellows

United Way of the Midlands holds contributions for the benefit of Goodfellows to be used to continue to help individuals and families stay in their homes, put food on the table and keep the lights and heat on during difficult times. The agreement between the Organization and Goodfellows notes that funds received related to this agreement or donations to Goodfellows will not be commingled with other money raised or invested by the Organization.

Quasi-Endowment

Quasi-endowment net assets consist of funds designated by the Board of Directors to function as an endowment.

Net Assets With Donor Restrictions

Purpose and Time Restricted Net Assets

Purpose and time restricted net assets are assets primarily from the Fall United Way of the Midlands Campaign, which donors restricted for the following year. Purpose and time restricted net assets consist of the following:

	2024	2023
Endowment earnings restricted for specific purposes	$ 557,108	$ 12,330
Funding to offset future direct program expenses	3,418,074	293,488
Contributions for grant disbursements	-	250,420
	$ 3,975,182	$ 556,238

NOTE H - NET ASSETS – CONTINUED

Net Assets With Donor Restrictions -Continued

Perpetual in Nature

Perpetual in nature net assets consist of investments endowed for which donor restriction stipulates that the original gift be maintained in perpetuity. Income derived from the donated assets are restricted to be used as an annual pledge to the campaign.

Net Assets Released from Restriction

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors.

	2024	2023
Expiration of time restrictions	$ 298,567	$ 534,636
Satisfaction of purpose restrictions		
Developmental and intellectual disabilities	-	250,420
Basic needs	29,813	27,376
211 Contact Center	26,461	-
JAG NE Program	163,549	-
JAG NE Program Expansion	57,633	25,967
Shine Bright	267	-
Mental Health Initiative	151,486	219,536
Nebraska Iowa Tornado Relief Fund	589,000	-
	$ 1,316,776	$ 1,057,935

NOTE I - RETIREMENT PLAN

The Organization sponsors a 401(k) defined contribution retirement plan for all regular, full-time employees who completed one year of eligible service. The Organization will match all employee contributions up to 3% and may make discretionary contributions as well. Total expense incurred was $521,974 and $403,700 for the years ended June 30, 2024 and 2023, respectively.

NOTE J – CONTRIBUTED NONFINANCIAL ASSETS

Several companies sponsored Community Ambassadors who provided approximately 2,017 and 2,429 hours of service to the Organization during the years ended June 30, 2024 and 2023, respectively. During the year ended June 30, 2024, all of the hours were sponsored totaling $48,152, made up of $21,000 of contributions restricted to offsetting campaign expenses and $27,152 of contributed nonfinancial assets restricted to offsetting campaign expenses. During the year ended June 30, 2023, all of the hours were sponsored totaling $46,923, made up of $19,750 of contributions restricted to offsetting campaign expenses and $27,173 of contributed nonfinancial assets restricted to offsetting campaign expenses.

NOTE J – CONTRIBUTED NONFINANCIAL ASSETS - CONTINUED

For the year ended June 30, 2024, contributed nonfinancial assets recognized as revenue within the statements of activities consist of the following:

	Without Donor Restrictions	With Donor Restrictions	Total
Advertising	$ 102,266	$ 204,575	$ 306,841
Personnel	-	21,000	21,000
Supplies	32,006	41,091	73,097
Professional services	78,387	18,735	97,122
Leases/facilities	174,364	2,248,027	2,422,391
Office equipment	633,800	-	633,800
	$ 1,020,823	$ 2,533,428	$ 3,554,251

For the year ended June 30, 2023, contributed nonfinancial assets recognized as revenue within the statements of activities consist of the following:

	Without Donor Restrictions	With Donor Restrictions	Total
Advertising	$ 219,459	$ 264,511	$ 483,970
Personnel	-	27,173	27,173
Supplies	1,651	18,936	20,587
Professional services	32,007	4,220	36,227
	$ 253,117	$ 314,840	$ 567,957

The nonfinancial assets listed above were recognized as revenues within contributed nonfinancial assets. As of June 30, 2024, there were $2,154,244 of time restrictions relating to leases/facilities, thus, reflected in the statement of activities as net assets with donor restrictions. The remaining restrictions noted above for the years ended June 30, 2024 and 2023, were met, thus, amounts were reflected in the statement of activities as net assets without donor restrictions.

Contributed items were utilized in the following programs:

Advertising: Items were used for special events related to fundraising initiatives for Operations, 211, and JAG NE & Goodfellows programming.

Personnel: Items were used for loaned executive for UWM Campaign.

Supplies: Items were used for volunteerism events and special events related to fundraising initiatives.

Professional Services: Items were used for the Organization's operations, 211 and JAG NE programming, and special events related to fundraising incentives.

Lease/Facilities: Space was used for the Organization's operations, 211 and JAG NE programming, and special events related to fundraising incentives.

Office Equipment: : Items were used for special events related to fundraising initiatives for Operations, 211, and JAG NE & Goodfellows programming.

NOTE K – PARTICIPATION PARTNER AGREEMENTS

The Organization has a contractual agreement with the Community Health Charities of Nebraska (CHC) whereby these two agencies would conduct a joint fund-raising campaign in the counties of Douglas, Sarpy, and Pottawattamie. Under the contract, CHC receives 4.75% of the "adjusted net campaign contributions" as defined by the terms of the agreement.

The Organization has agreed to be a national distributor for certain companies. Payroll deductions are forwarded to the Organization where these funds are distributed on a quarterly basis to all United Way organizations. No administrative fee is charged, however, the short-term income earned on the funds while they reside in the Organization's accounts is used to offset the cost of providing this service. As of June 30, 2024 and 2023, $395,030 and $374,140 was included in cash and cash equivalents and in undistributed funds payable for the current period campaign.

NOTE L – UNITED WAY WORLDWIDE COST DEDUCTION STANDARDS

The Organization has committed to comply with the United Way Worldwide cost deduction standards, which govern how expenses are recovered from contributions designated to specific agencies or other United Way organizations. The Organization has also committed to all of the other United Way Worldwide membership requirements and provides a written compliance certification to the Board of Directors and the United Way Worldwide on an annual basis.

NOTE M - CONCENTRATIONS OF CREDIT RISK

Financial instruments which potentially subject the Organization to concentrations of credit risk consist principally checking and money market accounts at a financial institution. Accounts at each institution are insured by the FDIC up to $250,000. At June 30, 2024 and 2023, the bank accounts exceeded federally insured limits by $185,045 and $2,993,785, respectively. The Organization has not experienced any losses on such accounts.

NOTE N – LINE OF CREDIT

The Organization has a $2,000,000 revolving line of credit, none of which was drawn down as of June 30, 2024. The interest rate is the prime rate, which was 8.50% at June 30, 2024. The line of credit expires on February 14, 2025, and is secured by an investment account of the Organization.

NOTE O – RELATED PARTY TRANSACTIONS

The Organizations Board of Directors includes executives from various businesses and institutions that the Organization uses for normal business activities. For the years ended June 30, 2024 and 2023, the Organization paid $741,482 and $604,349, respectively, for the health and dental insurance premiums of its employees. The Organization also paid $836,118 and $604,834, respectively, to an institution that issues the Organization its corporate credit cards.

The Organizations Board of Directors contributed $160,637 and $180,333 to the campaigns in 2024 and 2023, respectively.

NOTE P – DIRECT COMMUNITY SERVICES

Community Impact

This function is dedicated to encouraging community engagement, mobilization, and sharing a community vision. Activities include building community relationships, promotion of community involvement in priority issues, and advocating for the support of priority services. Additional activities include prioritization and research for initiative development, outcome measure development and assessment, and service implementation through fund distribution, economic development strategies, and agency designation management.

As a direct result of the strategic planning process, United Way's vision, going forward, calls for the organization to engage the passion, energy and resources of community partners and leaders, working together to help underserved vulnerable populations and improve people's lives to strengthen our entire metro area in the long-term.

United Way will be accountable to the community for achieving and communicating results of its own work, that of its partners and grant recipients. It will serve the most vulnerable among us by supporting the local safety net and take the next critical step – committing to solutions on some of our area's biggest human challenges.

Other Program Services

Information and Referral

When a caller dials 2-1-1, they find easy access to health and human service programs in Nebraska and Iowa. Certified Resource Specialists develop and maintain a computerized comprehensive database of nearly 4,000 health and human service programs. Individuals who need help, often in crisis situations, are connected with the right community resources by Certified Information and Referral Specialists who use the vast database. As well, individuals and groups that want to volunteer to help others can also be linked with local nonprofit groups. The 2-1-1 community resource database is also available on our website, www.ne211.org. The information gathered from both agencies and callers helps to identify gaps in local human services, which can assist local policy makers with future planning efforts. Effective October 2019 with the help of funding from the State of Nebraska, the NE211 Helpline was manned 24x7x365.

Court Referral

Court Referral provides an alternative to incarceration for offenders, both youth and adults, who have been ordered by the judicial system to make retribution to the community through volunteer service. Trained specialists provide placement, monitoring and reporting services to ensure the successful completion of court ordered hours. These individuals are placed in not-for-profit organizations to provide much needed assistance in carrying out each host organization's mission. The individuals gain and enhance marketable social and job skills. The judicial system gains a cost-effective means for managing offenders. The entire community is impacted and receives benefits from this program.

NOTE P – DIRECT COMMUNITY SERVICES – CONTINUED

Comprehensive Volunteerism

The Organization links prospective volunteers with local nonprofit organizations that need the help. These can be one-time, monthly or more regular volunteer projects that meet the skills and schedule of the volunteering individual or group. Also, volunteer leadership and management skills are developed and implemented through referral, training, recognition and consultation for both program service volunteers and those who wish to serve on policy making boards at local nonprofits. A community volunteer opportunity database is available on the Organization's website.

Jobs for America's Graduates (JAG)

Effective July 2020, Organization agreed to provide services to the Nebraska Department of Labor (NDOL) regarding implementation and operation of the JAG Model in Nebraska. This program established JAG accredited programs at Nebraska schools (approved in advance by NDOL) with the purpose of helping junior high and high school students overcome obstacles and build skills so they are set up for success in the classroom and workplace. This program is funded in large part by an agreement with NDOL consisting of funds provided through the United States Department of Labor and Temporary Assistance for Needy Families (TANF) funds through the United States Department of Health and Human Services.

Goodfellows

In November 2020, Organization entered into an agreement with the Omaha World Herald to transfer responsibility of the Goodfellows program to the United Way. All assets, liabilities and back-office administration of this program were transferred to United Way. At that time, United Way accepted full responsibility of the fundraising and program duties of Goodfellows. The Goodfellows program was established in the 1890's to help those in our community who had fallen on hard times, including people between jobs, the elderly, the ill, those who have experienced abuse and those facing a personal crisis with nowhere else to turn. In partnering with Goodfellows the United Way will continue to help individuals and families stay in their homes, put food on the table and keep the lights and heat on during these difficult times.

Emergency Rental Assistance Program

In April 2021, the Organization was selected as a partner agency supporting Metro Area Continuum of Care for the Homeless (MACCH) in the distribution of the City of Omaha's $22 million grant from the U.S. Department of Treasury Emergency Rental Assistance funds. These funds are to assist Omaha citizens with rental and utility assistance due to the COVID-19 pandemic. Distributions of these funds began in July 2021 and ended in June 2023.

NOTE Q – NEW ACCOUNTING STANDARDS

In June 2016, the FASB issued ASU 2016-13, *Financial Instruments – Credit Losses (Topic 326)*. ASU 2016-13 significantly changed how entities will measure credit losses for most financial assets and certain other instruments that aren't measured at fair value through net income. The most significant change in this standard is a shift from the incurred loss model to the expected loss model. Under the standard, disclosures are required to provide users of the financial statements with useful information in analyzing an entity's exposure to credit risk and the measurement of credit losses. The FASB has subsequently issued additional, clarifying standards to address issues arising from implementation of the new current expected credit loss standard. ASU 2016-13 and all subsequently issued amendments, collectively "ASC 326," is effective for annual reporting periods beginning after December 15, 2022. Financial assets held by the Organization that are subject to the guidance in FASB ASC 326 were cash and cash equivalents.

On July 1, 2023, the Organization adopted ASC 326. The impact of the adoption was not considered material to the financial statements and primarily resulted in enhanced disclosures only.

NOTE R – RECLASSIFICATIONS

Certain amounts in the year ended June 30, 2023 financial statements have been reclassified to conform with current year presentation. These reclassifications had no effect on the 2023 net decrease in net assets.

NOTE S - SUBSEQUENT EVENTS

Subsequent events have been evaluated through the audit report date, the date the financial statements were available to be issued.

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SUPPLEMENTAL INFORMATION

United Way of the Midlands

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Year ended June 30, 2024

Federal Grantor/Program or Cluster Title	Pass-Through Grantor	Assistance Listing Number	Grant Identifying Number	Federal Expenditures
U.S. Department of Labor				
Employment Service Cluster/ Employment Service/ Wagner-Peyser Funded Activities	Nebraska Department of Labor	17.207	023-0058-2023	$ 150,000
U.S. Department of Health and Human Services				
477 Cluster/ Temporary Assistance for Needy Families	Nebraska Department of Labor	93.558	023-0058-2023	2,900,000
U.S. Department of Education				
COVID - 19, Governor's Emergency Education Relief Fund	Nebraska Department of Labor	84.425C	023-0010-2022	214,420
U.S. Department of Treasury				
COVID-19, Coronavirus State and Local Fiscal Recovery Funds	City of Omaha, Nebraska	21.027	SLFRP0230	2,685,144
U.S. Department of Justice				
Crime Victim Assistance	Nebraska Crime Commission	16.575	261-2024-VA1055	119,838
				$ 6,069,402

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

Basis of Presentation. The accompanying schedule of federal awards includes federal grant activity of United Way of the Midlands and is presented on the accrual basis of accounting. Grant awards are considered expended when the expense transactions associated with the grant occur. The information in this schedule is presented in accordance with the requirements of the Uniform Guidance. Therefore, some amounts presented in this schedule may differ from amounts presented in or used in the preparation of the basic financial statements.

Subrecipients. The Organization had no subrecipients.

Indirect Costs. The Organization elected to use the ten percent de minimis indirect cost rate as allowed in the Uniform Guidance, 2 CFR 200.414.

SINGLE AUDIT SECTION

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INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

Board of Directors
United Way of the Midlands
Omaha, Nebraska

We have audited in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of United Way of the Midlands, which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements and have issued our report thereon dated October 8, 2024.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered United Way of the Midlands's internal control over financial reporting (internal control) as a basis for designing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of United Way of the Midlands's internal control. Accordingly, we do not express an opinion on the effectiveness of Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

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Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether United Way of the Midlands's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

HBE LLP

Lincoln, Nebraska
October 8, 2024

REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE IN ACCORDANCE WITH THE UNIFORM GUIDANCE

Board of Directors
United Way of the Midlands
Lincoln, Nebraska

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited United Way of the Midlands's compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on each of United Way of the Midlands's major federal programs for the year ended June 30, 2024. United Way of the Midlands's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, United Way of the Midlands complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2024.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of United Way of the Midlands and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of United Way of the Midlands's compliance with the compliance requirements referred to above.

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Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to United Way of the Midlands's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on United Way of the Midlands's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about United Way of the Midlands's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding United Way of the Midlands's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of United Way of the Midlands's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of United Way of the Midlands's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

HBE LLP

Lincoln, Nebraska
October 8, 2024

United Way of the Midlands

SCHEDULE OF FINDINGS AND QUESTIONED COSTS

Year ended June 30, 2024

Summary of Auditors' Results

a) An unmodified audit report was issued on the financial statements of United Way of the Midlands.

b) No deficiencies in internal control were disclosed by the audit of the financial statements.

c) The audit did not disclose any noncompliance which would be material to the financial statements.

d) No control deficiencies in internal control over its major federal award programs was disclosed by the audit.

e) An unmodified audit report was issued on compliance for United Way of the Midlands's major federal award programs.

f) The audit disclosed no findings which were required to be reported relative to the major federal award programs.

g) The programs tested as major were:

- COVID-19, Coronavirus State and Local Fiscal Recovery Funds, Assistance Listing No. 21.027

h) The dollar threshold used to distinguish between Type A and Type B programs was $750,000.

i) United Way of the Midlands qualified as a low-risk auditee as defined by the Uniform Guidance.

Findings – Financial Statements Audit

None

Findings and Questioned Costs – Major Federal Awards Program Audit

None