



**MEMORANDUM**

**To:** New York State Procurement Council  
**From:** OGS Preferred Sources Team (as Staff to the New York State Procurement Council)  
**Date:** September 14, 2016  
**Subject:** New York State Preferred Source Program for People who are Blind (NYSPSP) request to remove restrictions on Call Center Service Offerings.

**NYSPSP requests the NYS Procurement Council (“Procurement Council”) approve the removal of the 2003 and 2004 restrictions imposed on Call Center Services.**

**OVERVIEW**

On May 29, 2003, the Procurement Council granted Preferred Source Status to the Industries for the Blind of New York State<sup>1</sup> (IBNYS) for Call Center Services. This approval, however, limited the number of Call Center Stations to 40, at the Association for the Visually Impaired-Goodwill Industries (ABVI) facility in Rochester, NY. This approval included the provision that expansion beyond 40 stations or to sites other than Rochester would require subsequent approval from the Procurement Council.

On November 29, 2004, the Procurement Council approved the IBNYS application to add a Call Center at the Northeastern Association for the Blind at Albany (NABA) facility in Albany, NY. This approval limited the number of Call Center Stations in Albany to eight. During this meeting the Procurement Council also refused to lift the restriction of 40 seats at the Rochester location.

It is unclear why the Procurement Council limited the number of seats and locations for Call Center Services in 2003 and 2004. No such restriction has been identified for any other approved Preferred Source Service offerings and OGS has found no details supporting such restrictions.

The OGS Preferred Source Team reviews Preferred Source applications for price approval when the Agency’s contract for Preferred Source services are in excess of \$50,000. OGS did not receive any Call Center applications for price approval for sites other than Rochester until December 2010, which was six years after the NABA application was approved. It appears that the OGS Preferred Source staff assigned to review the Preferred Source price applications were not made aware of the restrictions previously imposed on this service as the List of Approved Preferred Source Services did not identify any such restriction and therefore approved that application and later approved applications for services in Utica and New York City.

It was not until June 23, 2016 that current OGS staff discovered the restriction and immediately brought it to the attention of NYSPSP who in turn, submitted their request for removal of the restrictions.

NYSPSP has advised that Call Center Services are a great fit for persons who are blind or visually impaired. Working within a Call Center promotes the development and utilization of real-world communication, as well as, other skills that enable these employees the opportunity to obtain meaningful, long-term employment.

Currently NYSPSP has five active contracts with 1.5 Full Time Equivalent Employees (“FTEs”) working in Buffalo, 1 FTE in New York City, 5.25 FTEs in Rochester and 9 FTEs in Albany for a total of 16.75 FTE workers who are

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<sup>1</sup> IBNYS is the predecessor facilitating entity for the approved qualified charitable non-profit-making agencies for the blind approved by the Commissioner of the Office of Children and Family Services. .

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blind or visually impaired. This is well below the original 40 seat limitation initially placed on this service by the Procurement Council. As well, In July 2016, the Procurement Council approved the definitions for Call Center Services, Inbound and Outbound, which creates a clear framework for this service offering.

**PROCUREMENT COUNCIL APPROVED DEFINITIONS**

Call Center Services – Inbound is the receiving of calls on behalf of a customer and providing responsive information and direction as requested by the customer. This may be in the form of a hotline, switchboard, receptionist, customer service call center or help desk support representatives. Supporting tasks may include inbound text messages or other means of electronic communication, data collection, data entry, reporting, or transferring & escalating calls. This service may also include outbound calling directly related to an inbound call. This service does not include Information Technology (IT) support.

Call Center Services – Outbound is the initiation of calls on behalf of a customer to complete a survey or other assigned phone inquiries as requested by the customer. Services may be in the form of verbal surveys which include data collection, follow-up or satisfaction measurement. Services may also include debt collections, customer service, and patient monitoring. Supporting tasks may include initiating or receiving accompanying e-mailed surveys, text messaging or other means of electronic communication, purchasing of telemarketing lists, data collection, data entry, reporting, or demographic and statistical analysis. Patient monitoring refers to the process of using outbound telephone calls to follow-up with patients after procedures or treatments. Patient monitoring does not include telemedicine or services where patients relay data by a medical device (e.g.: heart monitoring through a voice/data line),

**EMPIRE STATE DEVELOPMENT REVIEW:**

The ESD final recommendation was not available at the time this draft memo was prepared.

**RECOMMENDATION**

OGS, acting as Staff to the Procurement Council, has reviewed this request to remove the limitations on the number of Call Center seats and the location of Call Center Services. Staff finds no basis to continue the current restrictions on this service offering and recommends the Procurement Council approve the removal of these limitations previously imposed on Call Center Services.