



CALHOUN COMMUNITY COLLEGE  
REQUEST FOR PROPOSAL

CONTACT CENTER SERVICES

Issue RFP:	February 12, 2016
Mandatory Pre-Bidder's Conference:	February 26, 2016
Due Date for RFP Questions:	March 7, 2016
Proposals Due:	March 21, 2016
Vendor Presentations/Demonstrations:	March 31, 2016
Selection of Vendor:	April 7, 2016

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Calhoun Community College

Request for Proposal  
Contact Center Services

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**Calendar of Events**  
Calhoun Community College

**Request for Proposal**  
Contact Center Services

February 12, 2016	Issue RFP
February 26, 2016	Mandatory Pre-Bid Conference (In Person)
March 7, 2016	Questions on RFP due
March 21, 2016	Proposals due by 3 PM (Central Time) in office of: Mr. Bryan Helms 350N MSA Building Calhoun Community College 6250 US Hwy. 31 North Tanner, AL 35671
March 23, 2016	Reference(s) review begins
March 31, 2016	Vendor Presentations/Demonstrations by selected firms
April 7, 2016	Selection of Vendor (if decision is made to award contract)
May 16, 2016	Contract commencement

**Evaluation Criteria**  
Calhoun Community College

**Request for Proposal**  
Contact Center Services

Proposals will be evaluated in accordance with the following criteria:

1. Points can be assigned as follows:

1. Excellent	30
2. Good	20
3. Fair	10
4. Poor	5
5. Unacceptable	0

2. Each Category weighted by importance and compared to similar size institutions where applicable:

	<u>Weight Factor</u>
1. Qualification	30
• Higher Education Experience	
• Demonstrated Knowledge of CALHOUN	
2. Ease of implementations/customizations	10
3. Reporting Features	15
4. Proposed charge for system	15
5. References (3 similar size institutions w/multiple campus locations)	10
6. Implementation Plan	5
7. Staff Training (both Calhoun and Vendor)	15

- EXAMPLE: 1. Qualification  
Good Rating 20 x 30(weighting) =600 points
2. Staff Training  
Poor Rating 5 x 15 (weighting) =75 points

### **Evaluation Criteria Worksheet**

	Weighting Factor	Points Assigned	Total
1. Qualification	30		
2. Ease of implementations/customizations	10		
3. Reporting Features	15		
4. Proposed charge for system	15		
5. References (3 similar size campuses) w/ multiple campus locations	10		
6. Implementation Plan	5		
7. Staff Training	15		

**Request for Proposal**  
**Introduction & Bidder Instructions**  
Calhoun Community College  
Contact Center Services

1. Purpose

The purpose of this RFP is to establish a contract for a Contact Center Services partnership with Calhoun Community College. The contact center requirements are contained in the Scope of Services and Specifications of the RFP.

2. Commitment of the Community College

Calhoun Community College (CALHOUN) reserves the right to withdraw this RFP at any time and for any reason. Receipt of proposal materials by the College or submission of a proposal to the Community College confers no rights upon the proposer nor obligates the College in any manner.

A contract, based on this RFP, may or may not be awarded. Any contract resulting in an award from the RFP is invalid until properly approved and executed by the Chancellor or approved designee, Calhoun Community College. Any agreements shall be construed and interpreted according to the laws of the State of Alabama.

3. Issuing Office

This RFP is being issued by and sealed proposals are to be submitted to:

Mr. Bryan Helms ([bryan.helms@calhoun.edu](mailto:bryan.helms@calhoun.edu))  
350N MSA Building  
Calhoun Community College  
6250 US Hwy. 31 North  
Tanner, AL 35671

4. Form of Contract

The successful bidder shall submit a proposed agreement, the scope and terms of the contract shall consist of the RFP, any amendments thereto, and the contractor's proposal in response to the RFP. In the event that an issue is addressed in one document that is not addressed in the other documents, no conflict in language shall be deemed to have occurred. However, the College reserves the right to clarify any contractual relationship in writing with the concurrence of the Contractor, and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the Contractor's proposal. In all other matters not affected by the written clarification, if any, the RFP shall govern.

No modifications or changes in any provision in the contract shall be made, or construed to have been made, unless such modification is mutually agreed to, in writing, by the Contractor

and the College and incorporated as a written amendment to the contract. Memoranda of understanding and correspondence shall not be construed as amendments to the contract.

The contract shall be construed according to the laws of the State of Alabama. Any legal proceedings against the College regarding this RFP, or any resultant contract, shall be brought in the State of Alabama.

5. Deviations from the Form of Contract

The stated requirements appearing elsewhere in the RFP shall become a part of the terms and conditions of any resulting contract. Any deviations, must be specifically defined by the Contractor in the proposal.

6. Execution of Contract

The Contractor to whom the bid is awarded shall, within ten (10) days after prescribed documents are presented for signature, execute and deliver to CALHOUN the contract in substantial form, and include those items added or deleted during negotiations. The Contractor shall also provide satisfactory evidence of all required insurance coverage, bonds, and proof satisfactory to CALHOUN, of the authority of the person executing the contract on behalf of the Contractor.

The above documents must be furnished, executed, and delivered before the contract will be executed by CALHOUN. The contract will not be binding upon CALHOUN until it has been executed by CALHOUN and a copy of such fully executed contract is deliverable to the Contractor.

The contract shall be for a term of one year with successive one year renewal options not to exceed a total of five (5) years.

7. Contract Requirements

VENDOR DISCLOSURE FORMS:

State of Alabama Act 2001-955 requires that the Vendor Disclosure statement be completed and filed with all proposals, bids, contracts or grant proposals to the State of Alabama in excess of \$5,000.00. A vendor disclosure statement is not required for contracts for gas, water, and electric services, where no competition exists, or where rates are fixed by law or ordinance. In circumstances where a contract is awarded by competitive bid, the disclosure statement shall be required only from the person receiving the contract and shall be submitted within ten (10) days of the award. A new vendor disclosure statement is required for each purchase in excess of \$5,000.00 regardless of prior purchases. A current vendor disclosure statement must be on file before invoices can be processed for payment.

## 8. Examination of RFP Document

The bidder is encouraged to carefully examine all related RFP documents to become fully informed of the requirements and preferred features of the system to be provided. The bidder is responsible for collecting all necessary data required for developing its proposal for the described services.

Interested bidder(s) may contact Ms. Jannett Spencer, Acting Director of Student Financial Services at Calhoun Community College for any required clarifications.

A pre-bid conference will be held on February 26, 2016, at Calhoun Community College, Decatur, Alabama. Attendance at the pre-proposal conference is mandatory. The bidder must attend in person. Each bidder is limited to two (2) representatives per firm. The time and location on campus will be provided at a later date. Attendance via phone will not be allowed.

Bidder must submit three hardcopy original documents that contain the proposal. The original documents will become the property of CALHOUN.

Sealed proposals will be received until 3 PM. Central Time on March 21, 2016 at which time bids will be publicly opened. Proposals received after the date and time specified will not be accepted.

Sealed Proposals should be either mailed or delivered to:

Calhoun Community College  
Mr. Bryan Helms, VP of Financial/Administrative Services  
350N MSA Building  
Calhoun Community College  
Tanner, AL 35671

The outside cover should be clearly marked as:

Proposal for Contact Center Services  
**RFP # 2016-239-02**  
Name of Company  
March 21, 2016

## 9. Proposal Addenda and Rule for Withdrawal

Prior to the deadline date specified for receipt of proposals, a proposal may be withdrawn by submitting a written request for its withdrawal to the address listed above.

Unless requested by the College, it will not accept any addenda, revisions, or alterations to proposals after the proposal due date.

Any submitted proposal shall remain valid for six (6) months after the proposal due date.



#### 10. Addenda – Changes While Proposing

Every request for such interpretation or correction shall be addressed in writing to:

Calhoun Community College  
Ms. Patricia Hughes, Director of Office Management and Purchasing  
MSA Building  
Calhoun Community College  
6250 US Hwy. 31 North  
Tanner, AL 35671  
Attention: Contact Center Services RFP

Any such requests for interpretation or correction must be received at least ten (10) days prior to the last day for submitting proposals in order to be given consideration. All such interpretations and supplemental instructions will be transmitted by mail, email or fax to all bidders no later than five (5) working days prior to the last day for submitting proposals.

#### 11. Rejection of Non-Responsive Proposals

Proposals shall be considered non-responsive if they contain omissions, alterations of unacceptable conditions or limitations, or other irregularities of any kind. CALHOUN may reject proposals considered non-responsive.

#### 12. Oral Commitments

Potential bidders should clearly understand that any verbal representations made or assumed to be made during any oral discussions held between representatives of potential bidders and any Calhoun Community College personnel are not binding on Calhoun Community College, unless confirmed in writing by Ms. Patricia Hughes.

Any oral clarifications of substance shall be reduced in writing by the proposer when requested by CALHOUN.

#### 13. Offer of Gratuities

By submission of a proposal, the proposer certifies that no official or employee of the College has or will benefit financially or materially from this contract. The contract may be terminated by the College if it is determined that gratuities of any kind were either offered to, or received by, any official or employee of the Community College from the potential bidder, his agent, or employees.

#### 14. Vendor Presentation/Demonstration

Bidders who submit a proposal in response to this RFP will be required to make a presentation/demonstration of their proposal based on selection by Calhoun Community College. Only those vendors selected by Calhoun Community College will be required to

present. These presentations and demonstrations must show the College the “live” system functioning on a computer based system. It cannot consist of a demonstration not actually running on a computer system. For example, a simple PowerPoint presentation will not be sufficient. The demonstration must actually exercise the system in real-time via connection to a vendor supplied hosted software solution. The presentation/demonstration may use vendor data of their own choosing.

15. Restrictions on Communicating with Community College Staff

From the issue date of the RFP, until a Contractor is selected and selection is announced, bidders are not allowed to communicate with any College staff except:

1. Mr. Bryan Helms
2. Ms. Patricia Hughes
3. Ms. Jannett Spencer
4. College Representatives during oral presentations and demonstrations
5. Via written questions as provided in Paragraph 10.

The College shall reserve the right to reject a proposal for violation of this provision.

16. RFP Addenda

Addenda to this RFP may be necessary prior to the closing date and will be furnished by email to all prospective bidders. Failure to acknowledge receipt of addenda in accordance with instructions contained in the addendum may result in the proposal not being considered. No changes 24 hours before opening date.

17. Compliance with the Law

Contractor shall comply with all applicable laws, ordinances, rules and regulations relating to the Services provided under this Agreement.

18. Insolvency

In addition to all other rights herein, either party hereto may terminate this Agreement without prior notice should the other party become insolvent, voluntarily file for bankruptcy or receivership, or make any assignment for the benefit of creditors, or should the other party have commenced against it any proceeding, suit or action in bankruptcy or receivership provided such proceeding, suit or action is not dismissed within thirty (30) days.

CALHOUN’s financial status depends directly upon appropriations from the State of Alabama. Therefore, this agreement, and its continuation, is hereby expressly made contingent upon CALHOUN actually receiving from the State of Alabama an appropriation in sufficient amount so as to allow CALHOUN to meet its financial obligations. Such determination shall be made solely by CALHOUN and such determination shall be final and binding upon both parties. If at any time CALHOUN shall determine that its appropriation is not adequate to

allow it to meet its obligations, then in such event CALHOUN shall be allowed to terminate this Agreement, upon 90 days written notice to Contractor, with all other termination and final settlement provisions remaining applicable hereto.

#### 19. Trade Secrets and Proprietary Information

During the term of this Agreement, Contractor and College may have access to certain proprietary materials of each other. In the case of Contractor, proprietary information shall include management guidelines and procedures, faculty data, student data, staff data, operating manuals, and similar compilations regularly used in Contractor's business operations ("Trade Secrets"). Neither College nor Contractor shall disclose any of the other party's Trade Secrets or other proprietary information, directly or indirectly, during or after the term of this Agreement. The parties shall not photocopy or otherwise duplicate any such material without the prior written consent of the originator. All Trade Secrets and other proprietary information shall remain the exclusive property of its originator and shall be returned thereto immediately upon termination of this Agreement.

As a reminder, all student data must be protected under the provisions of FERPA (Family Educational Rights and Privacy Act). The successful vendor must demonstrate the security mechanisms in place to protect against data loss or security breaches. Also, evidence of FERPA training and certification of all vendor employees servicing the CALHOUN account must be provided prior to contract initiation.

#### 20. Assignment

This Agreement, or any portion thereof, may not be assigned by either party without the written consent of the other.

#### 21. Catastrophe

Neither Contractor nor CALHOUN shall be liable for failure to perform its respective obligations hereunder when such failure is caused by fire, explosion, water, act of God, civil disorder or disturbance, strikes, vandalism, war, sabotage, weather and energy related closings, governmental rules or regulations, failure of third parties to perform their obligations with respect to the Services, or like causes beyond the reasonable control of such party, or for real or personal property or damaged due to such causes.

It is required by the College that the successful bidder speak to their disaster recovery/backup methodology in order for the vendor supplied contact center to remain operational in a disaster situation. The College requires that the vendor demonstrate routine exercise of their disaster recovery plan and provide reports to the Community College of those exercises. Failure to provide adequate disaster recovery/backup mechanisms in order to mitigate vendor downtime could result in the termination of the contract by CALHOUN should the deficiency not be corrected. Remediation of the disaster recovery/backup facilities would be required in a mutually agreed to time frame by the bidder and Community College.

## 22. Severability

If any term or provision of this Agreement or the application hereof to any person or circumstance shall, to any extent or for any reason be invalid or unenforceable, the remainder of this Agreement and the application of such term or provision to any person or circumstance other than those as to which it is held invalid or unenforceable shall not be affected thereby, and each remaining term and provision of this Agreement shall be valid and enforceable to the fullest extent permitted by law.

## 23. Amendments to Agreement

All provisions of this Agreement shall remain in effect throughout the term hereof unless the parties agree, in a written document signed by both parties, to amend, add or delete any provision. This Agreement contains all agreements of the parties with respect to matters covered herein, superseding any prior agreements and may not be changed other than by an agreement in writing signed by the parties hereto.

## 24. Entire Agreement

This Agreement and its attachments and other documents specifically incorporated by reference herein contains the entire understanding and agreement of the parties concerning the matters contained herein, and supersedes and replaces any prior or contemporaneous oral or written contracts or communications concerning the matters contained herein.

## 25. Additional Terms

Any contract awarded under this request or proposal shall include the following additional terms and conditions:

**The following provisions shall take precedence over any and all contrary or conflicting provisions of the agreement between the parties and shall govern the rights and obligations of the parties:**

This agreement shall be governed by and construed in accordance with the laws of the State of Alabama without giving effect to any choice- or conflict- of- laws, provisions, or rules (whether of the State of Alabama or any other jurisdiction) that would cause the application of the laws of any jurisdiction other than those of the State of Alabama.

It is further agreed that the terms and commitments contained herein shall not constitute a debt of the State of Alabama in violation of Section 213 of the Constitution of Alabama of 1901, as amended by Amendment Number 26. If any provision of this agreement shall contravene any statute or constitutional provision, either now in effect or which may be enacted during the term of this agreement, then the conflicting provision of this agreement shall be deemed null and void. \_\_\_\_\_ understands, acknowledges, and agrees that its sole and exclusive remedy for any claim which may arise from or relate to this agreement is to file a claim with the Board of Adjustment of the State of Alabama.

By signing this contract, the contracting parties affirm, for the duration of this agreement, that they will not violate federal immigration law or knowingly employ, hire, for employment, or continue to employ an unauthorized alien within the State of Alabama. Furthermore, a contracting party found to be in violation of this provision shall be deemed in breach of this agreement and shall be responsible for all damages resulting there from.

This agreement constitutes the sole and entire agreement of the parties to this agreement with respect to the subject matter contained herein, and supersedes all prior and contemporaneous understandings, negotiations, and agreements, both oral and written, with respect to such subject matter.

In accordance with the recommendations of the Governor and the Attorney General of the State of Alabama, the parties shall consider settling all disputes arising from or related to this agreement by using appropriate forms of non-binding alternative dispute resolution.

In the event of proration of the fund from which payment under which this agreement is to be made, the agreement will be subject to termination.

This agreement may be executed in counterparts, each of which shall be deemed and original, but all of which together shall be deemed to be one and the same agreement.

**Proposal Format**  
Calhoun Community College  
Contact Center Services

Proposals shall be submitted in the format contained in the Request for Proposal. This material must be in sequence and related to the Request for Proposal. The College will make no reimbursement for the cost of developing or presenting proposals in response to this Request. Only information specifically related to this type of project will be evaluated. Proposals must present the following information.

**Section A:**     Company Profile: A brief narrative describing the company's history, corporate resources, management team, company philosophy, approach to providing services, qualifications, higher education experience, total number of years in business, relevant experience and benefit CALHOUN will receive through contracting with the firm.

The College requires a listing of all higher education institutions served that are similar in demographics and multi-campus education delivery. In addition at least three account references from this list should be included that contains liaison names, telephone numbers, physical addresses, email addresses, and a description of services provided, and dates of the services.

**Section B:**     System Features: A complete description of the contact center services and all of the features of the center should be included. The services available and described can extend beyond the requested services in this proposal.

**Section C:**     Secure Contact Center Hosting Facility Profile: Physical location of contact center site, number of years in business, number of clientele housed in this location, emergency preparedness/disaster recovery methodology and plan, detailed schematic of infrastructure and fail-over sites.

**Section D:**     Scalability: Methodology employed by the facility/vendor used to address peak times or cyclical trends related to high-volume, high-access call volume. Also, costs associated with any other components necessary for addressing increased demand on systems.

**Section E:**     Implementation Plan: Describe the process used to implement the contracted services, including any customization or transition period that will be required. Provide a listing of events and timeframes for accomplishing the implementation. All contact center services must be operational on the first day of the contract initiation period.

**Section F:**     Reporting Features: Describe how the contact center services will be reported and accessed. Training related to the use of the reporting features is a required component of the proposal.

- Section G:** CALHOUN Staff Training/Development: Describe the training and development program that the vendor will implement at CALHOUN for CALHOUN staff. Include a detailed instruction plan and the number of hours of training required, as well as a description of any services that would be provided specifically for CALHOUN.
- Section H:** Vendor Staff Training/Development: Provide a specific description of the training and development that the vendor will provide for their employees. Describe the detailed instruction plan, the number of hours of instruction, method of presentation, and exactly how vendor personnel will be schooled on the support needs of CALHOUN.
- Section I:** Research and Development Capabilities: The vendor must have the research and development capabilities needed to remain aware of changing industry technologies for contact center technologies. A brief description of the vendor's research and development capabilities must be included in the RFP response.
- Section J:** Exceptions to RFP: The vendor must address any and all exceptions to the RFP. These should be referenced by subsection.
- Section K:** Additional Explanations and Interpretations: Any explanation desired regarding the meaning or interpretation of the RFP, attachments, specifications, etc. must be requested in writing with sufficient time allowed for reply to reach bidders before the submission of their offer. Oral explanation or instruction given before the award of the contract will not be binding.
- Any information given to prospective bidders concerning the RFP will be furnished to all prospective bidders as an amendment or addendum to the RFP.
- Section L:** Acknowledgement of Amendment or Addendum to RFP: Receipt by a bidder of an amendment or addendum to the RFP must be acknowledged by inserting a copy in the bidders' proposal.
- Section M:** Further Information: All proposals received in response to this RFP will be evaluated and ranked in accordance with the evaluation criteria stated in Section 2. Bidders are cautioned that the College will not accept after the closing date for receipt of proposal, data that is essential for a complete and thorough evaluation of the proposal. The College expects to award a contract based on the initial offer, therefore all proposals should be submitted on the most favorable and complete price, and terms, including scope of services based on our stated criteria, that bidder can submit to the College.
- Section N:** Proprietary Information: After the award of the contract, all proposals will be opened for public inspection. Trade secrets, test data and similar proprietary information will remain confidential, provided such material is clearly marked. However, net cost information will not be considered confidential.

**Section O:** ADA Section 508 Compliant: Each vendor must certify that its proposal and the services offered are in full compliance with the Americans with Disabilities Act Section 508. Specific data related to the vendor's compliance methodology would be beneficial.



# **Scope of Services**

## **GENERAL INFORMATION**

### **Objective**

Calhoun Community College (CALHOUN) is soliciting proposals for contact center services that must include a scalable business model and focuses on timely responsiveness, outreach, and world class customer service. CALHOUN seeks to ensure that the contact center services provided results in increased caller satisfaction due to the use of a robust quality assurance model. CALHOUN's objectives include, but are not limited to, answering incoming calls, web chats, emails, constituent initiated ticket system requests, and provide robust and comprehensive reports related to all calls at appropriate intervals. Also, outbound services including prospective student contact should be provided. The contact center should be prepared to manage two types of contacts: problem/solution resolution and recruitment/enrollment management services.

The successful bidder will act as a help desk for answering student questions about Financial Aid. The successful bidder should possess proficiency and expertise in the support of members of the military and their dependents. Also, familiarity with staff and faculty, detailed knowledge of all web sites and familiarity with the physical layout of the various sites and campuses, schedules, marketing and promotional programs is required.

### **Background**

Calhoun Community College serves 10,500+ students at its three campuses in Alabama (Tanner, Huntsville and Downtown Decatur) and on-line. Accredited by the Commission on Colleges of the Southern Association of Colleges and Schools, of the 10,500 students enrolled at CALHOUN, many are online learners enrolled in nine-week terms and are serviced by the Community College's on-line division. CALHOUN is focused on providing world class service to students and all constituents, therefore, the contact center services are a critical support unit to the Community College.

The key performance indicators for the successful bidder will include but is not limited to:

- Average Speed of Answer – Less than 90 seconds
- Abandonment Rate – Less than 5% of all contacts
- Price per Minute – .86 per minute or less
- Customer Satisfaction Rate – 95% or higher

## **CALHOUN CONTACT CENTER SERVICE REQUIREMENTS**

### **Management Services**

1. The successful bidder must provide competent managerial staff that is experienced in planning and project management. Full disclosure regarding the proposed managerial staff and their work background and experience must be included.
2. The successful bidder must provide a dedicated manager for the CALHOUN Contact Center who will work closely with CALHOUN's contract management team. The bidder may include other managerial and staff members for the initial contract set-up and/or for the ongoing operations of the contact center as it deems necessary to succeed in the contract
3. The bidder's management staff must be willing and able to attend meetings at CALHOUN's various locations for initial planning, quarterly contact reviews and whenever deemed necessary by the CALHOUN contract management team. At least one time annually a site visit by the offsite contact center management team is required.
4. The successful bidder must provide normal and emergency contact information for each of their key personnel. It is highly desirable for the bidder's key personnel to attend emergency meetings in person, via video conferencing or web meetings. Contact center services must be available 24/7 including web chats.
5. The final date for questions regarding the RFP is March 7, 2016.
6. It is anticipated that the initial contract will be for 1 year and renewable annually for the next four succeeding years should the College choose to do so.
7. The contract will commence on May 16, 2016.

### **Contact Center Capability**

The contact center representatives must be able to answer questions in the following areas of Financial Aid:

- Holds (What kind of hold do I have? and How do I get it removed?)
- College service hours

- Navigation through Web Services that are impacted by Financial Aid
- Assisting students with using Financial Aid TV
- Be familiar with Financial Aid policies (both Federal and State of Alabama) that apply to military personnel, veterans and dependents.
- Respond to calls requesting financial aid services such as how to apply for financial aid, loans, scholarships, grants, and work study.
- Answer questions regarding account status, missing documentation, selection for verification, admissions status, and award amounts.
- The center will respond to questions regarding the conditions for receiving aid, requirements necessary for disbursement, cost of attendance, federal loans, private loans, current balances, fund disbursement information, and refund information.
- Provide information regarding SAP (Satisfactory Academic Progress).
- Provide in-depth information on student loan processes from counseling through disbursements/repayments.
- In depth knowledge of all the Banner Financial Aid Screens.

Examples of questions students ask with regards to our Financial Aid processes:

- What is the status of my aid?
- Has my refund been sent to me?
- How do I apply for Financial Aid?
- What other requirements do I need to satisfy for Financial Aid?
- Has my tuition and fees been paid?
- What is the reason my Financial Aid has not been applied to my account?
- Why did my classes get dropped?
- Why do I have to do an appeal (SAP)?
- Why do I have a HOLD on my account and how do I get it removed?
- How do I perform Terms/Conditions and Authorization to Pay?
- Will Financial Aid pay for my certificate program?
- Will Financial Aid pay for 'mini-mesters'?
- How do I get my books for classes?
- Why do I have a balance since I have been awarded a Pell Grant?
- What is selected for verification?
- Why was I selected for verification?
- Above list of questions is representative and not all inclusive.

### **Contact Center Service Expectations**

1. Contact center representatives (CCRs) must be trained to promptly answer all student service requests received by telephone, email, and web-based chats. The CCRs must be trained in the use of the knowledge base self-help portal that can be provided for assistance.

2. The contact center (and any emergency backup center) must have sufficient telecommunications infrastructure to have dedicated access (T-1 or better) to the internet, a toll-free phone number for all United States students.
3. The successful bidder must be able to provide a smooth and seamless transition for transfer calls to Calhoun.
4. The contact center must have a robust call handling and/or tracking system and be able to license it to CALHOUN, if needed, to share data and call statistics. CALHOUN requires that the contact center adopts and use the ticketing system approved by CALHOUN. Additionally, any customer relationship management software adopted by CALHOUN must be used by the contact center. The contact center must be willing and able to submit tickets on behalf of the students/constituents.
5. The contact center must be willing to change their workflow to mirror the College adopted ticketing system even if changes or alterations are made to the ticketing system.
6. The successful bidder will be able to provide, on-demand and routinely scheduled reports as requested by CALHOUN. On-demand reports should be furnished to Calhoun within 24 hours after Calhoun files a written request through email. Scheduled reports should be received 48 hours after the ending date of the reporting period.
7. An Interactive Voice Response (IVR) system or Enhanced Call Routing (ECR) system may be proposed if either can improve customer service to CALHOUN callers. For instance, callers could be presented with a prerecorded message with different options to be connected based on the area of support. Also, should the student/constituent not wish to hold, an option for a callback should be provided. Once the caller has chosen to speak to a CCR, the call should then be answered in accordance with the Service Level Agreement (SLA) referenced later in this document.
8. CALHOUN requires the capability to offer pertinent prerecorded announcements for students/constituents to hear while awaiting a call to be answered.
9. The successful bidder will be solely responsible to warrant and ensure that all technology and procedures used by the contact center comply with the regulations of the FCC and State Telemarketing laws. CALHOUN will not accept responsibility for contractor's failure to not follow these requirements.
10. The successful bidder will provide comprehensive reports of all call activity regardless of the disposition of the call response. All activity will be reported as frequently as daily and in a form that will allow for the analysis of call by subject and point of origination.
11. Reminder call to students prior to the start of the term/semester that have Financial Aid issues.
12. Welcome call to enrolled students after the beginning of the term.

## **Contact Center Representatives (CCRs)**

1. The successful bidder must provide professional CCRs that are pleasant, courteous, patient and helpful. CALHOUN would prefer CCRs with a minimum of three years' experience in a contact center environment. The CCRs must possess excellent oral and written communication skills to effectively screen callers and provide basic information prior to escalating the call, email, or web chat to a CALHOUN internal contact center or to a CALHOUN staff member. All students/constituents must be treated with courtesy and respect. While all CALHOUN students are required to speak English, CCRs may have to effectively assist some callers with strong accents or who have other difficulty communicating over the phone. All CCRs will expend every effort to meet or exceed the expectations of the caller before escalating the inquiry to CALHOUN.
2. The successful bidder must complete background checks on all Contact Center Representatives hired and working on the CALHOUN account. The background check should be used to screen potential CCR's from working on the CALHOUN account where sensitive and personally identifiable information is stored. Documentation certifying successful screening of the candidates must be provided to CALHOUN whenever a CCR is placed on the CALHOUN account. The cost of the screening will be borne by the successful bidder.
3. The successful bidder will provide a dedicated internal trainer or team of trainers to train CCRs to handle calls, emails, web chats, and to submit work request tickets. These trainer(s) need to immediately update the CCRs on changes within CALHOUN, issues or concerns, or other actionable items that could impact the quality of the service being provided. CALHOUN's contract management team will assist, as needed, in training CCRs initially and throughout the contract term specifically regarding new enhancements and features of CALHOUN. However, it is the responsibility of the contact center to thoroughly train all newly hired CCRs. CALHOUN reserves the right to review, critique and ask for changes to training materials developed by the bidder.
4. CALHOUN requires that all CCRs be trained in providing service to irate or upset callers and understand how to diffuse a volatile situation. If the CCR is unable to satisfy the caller, the CCR must follow established escalation procedures.
5. The successful bidder acknowledges and understands that it is required to protect certain confidential information from disclosure under applicable law, including but not limited to, the Family Educational Rights and Privacy Act (FERPA), the Gramm Leach Bliley Act (GLBA), and other governing laws in order to protect personally identifiable information. All members of the bidder's organization that service the CALHOUN account must be trained, certified and documented in regards to these requirements. CCRs and all members of the bidder's staff must consider their interactions with students as confidential. CCRs and the bidder's organization must not provide any student email addresses, phone numbers or otherwise personally identifiable information to third parties.

6. The successful bidder will have quality assurance measures in place to ensure CCRs continually provide excellent customer service. This will include recorded interactions between the CCR and the student/constituent. Quality assurance measures must include periodic surveys of customers to assess compliance with pre-determined measures. These periodic surveys should be described in the bid proposal.
7. CALHOUN requires that the successful bidder remove from the CALHOUN account any CCR or management team member at the Community College's request. The reasons for the request for removal will be discussed with the successful bidder. This discussion does not presume agreement between CALHOUN and the bidder that the removal action is warranted.
8. CALHOUN requires that the successful bidder be equipped to manage outbound calls, email contacts, SMS text messaging contact, RSS feeds, and Tweeter contact.
9. CALHOUN requires that the successful bidder be knowledgeable of all military tuition and veterans' benefits and policies.

## Service Level Agreements (SLAs)

The successful bidder will provide world class excellent customer service that meets or exceeds agreed upon SLAs (predetermined performance metrics). CALHOUN's minimum SLAs are shown below, but the bidder is encouraged to propose additional or more stringent metrics. Due to the continuing development of CALHOUN's online academic programs and services and growth in future technologies, the bidder agrees to renegotiate, amend or add to the initial Service Level Agreements when requested by Calhoun.

The following is a table of minimum service level expectations:

<b>Task</b>	<b>Service Level</b>
Live Support by Phone(ASA)	100% less than 90 seconds calculated on a monthly basis
Abandonment Ratio	Less than 5% calculated on a monthly basis
Web Chat	Acknowledged within 60 seconds calc. on a monthly basis
E-mail	Estimated Time of Response – 8 hours or less calc. on a monthly basis
CCRs keep computerized notes so that a client history is maintained.	Each customer that requests a service or describes a problem that goes beyond an immediate resolution.
Call Escalation	If student cannot be served immediately, calls will be escalated in one of two ways. Calls concerning Financial Aid will be escalated via a CALHOUN Financial Aid call log. All other calls will be escalated to a qualified Calhoun instructor/staff member. No service fees will be incurred once escalation has been completed.
Ticket Resolution	Bidder must complete ticket requests within 24 hours or escalate to CALHOUN
Reporting	Statistical Information and Ticket data; accessible online (daily/weekly/monthly).

The SLA's will be measured as noted in the chart above. If any one of the Service Level measurements are not met, then a 10% adjustment in the monthly payment will occur. If the contract is not renewed for a second year then the SLA reduction fee will be sent to the Community College in the form of a refund.

## **Emergency Planning/Disaster Recovery**

The contact center must have adequate back-up measures in place to quickly overcome system failures due to hardware problems, carrier problems, electrical outages, etc.

The contact center must have emergency contingency plans in place to allow another backup location(s) to provide services to CALHOUN customers in case of natural disasters, fires, or manmade disasters, etc.

CALHOUN personnel will inspect the contact center facilities at any time of its choosing. This will include reviewing the contact center's disaster recovery procedures and exercising the system to prove its functionality.

## **Preferred Services**

If the successful bidder has the ability to provide high quality services for outbound calls and emails, Calhoun may purchase these services from time to time. Examples of such outbound services would be surveys, outreach or follow-up contacts for student or alumni.

## **Additional Information**

The contact center proposal should provide the following additional information:

1. History of the company to include: higher education experience and number of years in business.
2. Physical location of contact centers. (All locations are expected to be in the United States.)
3. Average contact center representative tenure.
4. What CRM system is used? (Is the same CRM system used for all clients or is the system linked to the clients' software?)
5. Call recording methodology?
6. How will cyclical trends associated with CALHOUN's volume be managed?
7. Documentation of technology platforms.
8. CCR recruitment, training, and quality assurance processes.
9. The largest volume of annual calls received on behalf of a single client.
10. References.
11. A cost matrix which explains the basis of billing for each service provided. **At least** two alternate pricing structures should be provided by the bidder:
  - Annual flat rate pricing
  - Per incident fee based on call duration/tickets/emails required for resolution