**State of Georgia**



**State Entity: [Insert Name]**

Issued pursuant to the Georgia Technology Authority (GTA)

Convenience Contract Number 98000-HCC-0000001097, Hosted Contact Center

Request for Quote (RFQ)

**State Entity RFQ Number: [Insert]**

Title: Hosted Contact Center Solution

Bidder Instructions for HCC Contractors: All spaces below are to be filled in and this sheet must be incorporated within as the first page of the response to this Request For Quote (RFQ).

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Facsimile: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By my signature below, I certify that I am authorized to sign this RFQ response for the company named above. I further certify that this RFQ response is made without prior understanding, agreement, or connection with any other company or person submitting a separate response for the same RFQ, and is in all respects fair and without collusion or fraud. I further certify that the provisions of OCGA §§45-10-20 et seq. have not been violated and will not be violated in any respect. This offer shall remain open for acceptance for 120 days from the Amended Response Due/Closing Date. On behalf of the company named above, I further certify that such firm has and will abide by all conditions set forth in this RFQ.

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Name and Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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# HCC RFQ Introduction

## Purpose and Background of Procurement

The Georgia Technology Authority (GTA) Hosted Contact Center (HCC) Contracts (Number 98000-HCC-0000001097) are multiple-award Master Services Agreements (MSA) with prequalified HCC Contractors for hosted contact center services under fixed-priced, multi-year terms. State Entities defined in the GTA HCC MSAs are permitted to procure services using the GTA Hosted Contact Center Contracts as competitively bid convenience contracts.

Additionally, the original version of this RFQ document (subject to GTA revisions) may be utilized and revised at the option of State Entities for HCC RFQ solicitations to one or more of the awarded HCC Contractors awarded by GTA. For additional HCC contract information, visit the GTA Procurement webpage at http://gta.georgia.gov/hosted-contact-center-services, or direct email inquiries to procurement@gta.ga.gov.

As such, the *State Entity Name* is issuing this Request For Quote (RFQ) to establish a Hosted Contact Center (HCC) Services Agreement with one GTA HCC Contractor who will provide outsourced **Hosted Contact Center Services for the** *State Entity Name* **(**hereinafter, “State Entity”) as further described in this RFQ.

## State of Georgia Entity Guidelines

All Statements of Work submitted pursuant to this RFQ solicitation shall be made in accordance with the provisions of the GTA Hosted Contact Center Contract. These instructions and the specifications are contained within this RFQ. The general conditions and specifications of the RFQ, the successful HCC Contractor’s Statement of Work response, and all RFQ amendments (if any) will become part of the *state entity name* Services Agreement with the HCC Contractor.

The HCC Contractor’s Statement of Work response shall be evaluated in accordance with the criteria set forth in this RFQ. Opportunities for discussions may be provided by the *state entity name* to responsible HCC Contractors who submit Statements of Work determined in the Evaluation Team’s sole discretion to be reasonably susceptible to being selected for receipt of the purchase order. The purpose of the discussions is to clarify and assure full understanding of and responsiveness to the solicitation requirements. In conducting any such discussions, there shall be no disclosure of any information derived from Statements of Work submitted by competing HCC Contractors. The HCC Contractor is expected to respond with due diligence by providing the requested information in the designated manner. Such revisions may be permitted after submissions and prior to purchase order issuance for the purpose of obtaining best and final offers. HCC Contractors failing to respond to this RFQ exactly as prescribed may be disqualified.

A HCC Service Agreement and subsequent Purchase Order shall be issued to the responsive and responsible GTA HCC Contractor whose Statement of Work is determined to be the most advantageous for the State, taking into account all of the factors set forth in this RFQ. No other factors or criteria shall be used in the evaluation. Before acceptance of a Statement of Work, *state entity name* reserves the right to reject any or all Statements of Work at any time without penalty. The release of this RFQ does not compel *state entity name* to purchase.

NOTICE: In case of a conflict between the terms, conditions and instructions contained herein and the provisions of the HCC MSA, the former shall govern.

## Agency Overview

This document represents a statement of need requesting services for the agency. The information listed here represents an overview of the business requirements.

*Use this section to provide a high level overview of the Agency and it’s purpose.*

## Background

*Use this section to provide background on the specifically contact center services and what/why the agency is generally making the request.*

[The ABC agency manages constituent inquiries and processes licensing applications for the State of Georgia.]

## RFQ Schedule of Events

| **Event** | **Date** |
| --- | --- |
| Release Date of RFQ | *XX/XX/XX* |
| Deadline for submission of Questions / Clarifications | *XX/XX/XX* |
| Anticipated date for responses to the submitted Questions / Clarifications | *XX/XX/XX* |
| Response to this RFQ Due | *Xx/xx/xx* @ X:00 pm |
| Anticipated Date of Award*Allow time as needed for evaluations*  | *XX/XX/XX* |
| Anticipated Offeror start work date | *XX/XX/XX* |
| Anticipated completion date for work | *Month and year* |

## Issuing Official (State Entity Contact)

**[insert first and last name]**

[insert state entity name and title]

[insert email address] (email address)

## Definition of Terms

Please review the following terms:

* State Entity – the governmental entity identified as the business owner in “Purpose of Procurement” section of this RFQ.
* Bidder or Offeror – a GTA HCC Contractor participating and submitting a quote in response to this RFQ.

Any special terms or words which are not identified in this RFQ Document may be identified separately in one or more attachments to the RFQ. Please download, save and carefully review all documents in accordance with the instructions provided in Section 2 “Instructions to HCC Contractor” of this RFQ.

## HCC Services Agreement Term

The initial term of the HCC Services Agreement resulting from this RFQ is expected to begin \_\_\_\_\_, 20\_\_and shall continue until end of the 20\_\_ fiscal year (July 1 - June 30), and which coincides with the existing HCC Master Services Agreement between GTA and the HCC Contractor. The State’s fiscal year is from July 1st through June 30th. The State Entity, HCC Services Agreement may be renewed at the sole discretion of the *state entity name* on a year-to-year basis for up to \_\_\_\_ (\_) additional terms of one (1) year each. Renewal(s) will be accomplished through the issuance of a contract amendment. In the event that the contract(s), if any, resulting from the award of this RFQ shall terminate or be likely to terminate prior to the making of an award for a new contract for the identified products and/or services, the State Entity may, with the written consent of the awarded supplier(s), extend the contract(s) for such period of time as may be necessary to permit the *state entity name* continued supply of the identified products and/or services. The HCC Service Agreement may be amended in writing from time to time by mutual consent of the parties. Unless this RFQ states otherwise, the resulting award of the HCC Services Agreement does not guarantee volume or a commitment of funds.

## HCC Services Agreement (For State Entities)

The Services Agreement under the GTA HCC Contract which the State Entity intends to use with the successful bidder is at­tached to this RFQ and identified as **Appendix \_\_, HCC Services Agreement (For State Entities)**. State Entity reserves the right to add provisions consistent with the successful bidder's offer and to negotiate with the successful bidder other additions to, dele­tions from, and/or changes in the language in the contract, pro­vided that no such addition, deletion or change in contract lan­guage would, in the sole dis­cretion of the State Entity affect the eva­luation criteria set forth herein, or give the successful bidder a competitive advantage.

## Restrictions on Communicating with Staff

From the issue date of this RFQ until the final award is announced (or the RFQ is officially cancelled), HCC Contractor are not allowed to communicate for any reason with any State staff except through the Issuing Official named herein, or during the Bidders/Offerors’ conference (if any), or as defined in this RFQ or as provided by existing work agreement(s). Prohibited communication includes all contact or interaction, including but not limited to telephonic communications, emails, faxes, letters, or personal meetings, such as lunch, entertainment, or otherwise. The State Entity reserves the right to reject the response of any HCC Contractor violating this provision.

## Submitting Questions

All questions concerning this RFQ must be submitted in writing via email to the Issuing Official identified in the “Issuing Official” section of this RFQ. No questions other than written will be accepted. No response other than written will be binding upon the State. All HCC Contractor must submit questions by the deadline identified in the Schedule of Events for submitting questions. HCC Contractors are cautioned that the State Entity may or may not elect to entertain late questions or questions submitted by any other method than as directed by this section.

All questions about this RFQ should be submitted in the following format:

|  |
| --- |
| Company Name |
| 1. | Citation of relevant section of the RFQC | Question 1 |
| 2. | Citation of relevant section of the RFQC | Question 2 |

# HCC Project Scope of Work

## Business Objective

*Use this section to provide the specific agency and/or contact center business objectives to strive for. A high level example is listed below.*

[To improve ASA and reduce call volume by 20% and improve self-service options, reduce total monthly expenses by 5%. The agency is seeking alternative flows to help reduce toll charges for the services.]

*Use this section to provide a summary of the project scope. An example is listed below.*

[The agency would like to engage a HCC Contractor to provide a solution that will replace the existing contact center services. In addition, the agency would like to validate their existing contact center call flows to confirm if any additional improvements can be made before, during or after the transition to benefit the business objectives.]

## Other Business Requirements in scope

#### CRM - Constituent Relationship Management

Use this section to describe the specifically how the customer expects to leverage CRM, whether it is an existing system requiring integration or to replace and migrate off of an existing system.

#### Existing Contact Center Infrastructure

*Use this section to describe the object of any existing contact center infrastructure that will be reused or retired as part of the project.*

#### Current Capacity/Environment

*Use the table below to provide a summary of the existing or future contact center environment and target metrics. An example is listed below*

The current contact center capacity metrics are provided in the tables below for reference.

**Contact Center Capacity**

|  |  |  |
| --- | --- | --- |
| Description | Quantity/Metric | Notes |
| Calls Per Month | Number of Monthly Calls |  |
| AHT - Average Handle Time | Average Handle Time in Minutes |  |
| ABA - Average Abandonment | Average Abandonment Percentages |  |
| ASA – Average Speed of Answer | Average Speed of Answer in minutes |  |
| FCR – First Call Resolution | First Call Resolution Time in minutes |  |
| SLA – Service Level Agreement | SLA performance percentage |  |
| Current Agent Seats | Number of Agent Seats |  |
| Routable Email/Chat | Number of Email/Chat Seats |  |
| Routable Voice Mailbox | Number of Voice Mailboxes |  |
| Call Flow/Taxonomy | High Level Description of the Call Flow. An example is shown below.Front End IVR with Data Dip to a Mainframe application, then a menu tree of 4 choices, 1. Self Service
2. Contact Center Agents – Business Area – Info Only
3. Contact Center Agent – Business Area / Premised Based Branch office
	1. Option a
	2. Option b
	3. Option c
4. Contact Center Agent –Business Area/ Remote Agents
	1. Option a
	2. Option b
	3. Option c
 | Call Flow Documentation is attached as **Appendix A** |

*Use this section to provide a summary of the more specific categories below. An example is listed below*

The ABC agency has one toll free and several local telephone numbers that are associated with the solution.

**Telco Services (EXAMPLE NUMBERS)**

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Quantity/Metric | Minutes per month | Notes |
| 800 Toll Free Numbers | 1 | 3,000,000 |  |
| Published Numbers | 4 | n/a |  |
| Unpublished Numbers | 2 | n/a |  |
| Fax Numbers | 4 | n/a |  |

**Main Branch Office (EXAMPLE NUMBERS)**

|  |  |  |
| --- | --- | --- |
| Description | Quantity/Metric | Notes |
| Office Agents | NUMBER HERE | VoIP Telephony Systems in place from current provider that needs to be transitioned, Fully Managed Broadband Connectivity |

**Premise Based Branch Office**

|  |  |  |
| --- | --- | --- |
| Description | Quantity/Metric | Notes |
| Branch Office PBX | Number of Branch Office Equipment | Leverage a newly purchased PBX functions |
| Branch Office Agents | Number of Agents supported by equipment |  |

**Remote/Home Based Agents**

|  |  |  |
| --- | --- | --- |
| Description | Quantity/Metric | Notes |
| Remote Agents | Number of Agents | Agents home access does not support VoIP quality service |
| Remote Agents | Number of Agents | Agents have full broadband internet capability |

## HCC Contact Center Technology Points of Integration

Use this section to provide details on the specific points of integration required for the contact center servers

|  |  |  |
| --- | --- | --- |
| Description | Integration Point | Additional Notes |
| Customer Application |  |  |
| Other Application  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Roles and Responsibilities

*Use this section to describe the key roles and responsibilities for STATE ENTITY, Customer and Provider*.

## Assumptions and Dependencies

*This section should describe the key assumptions and dependencies for the project.*

## Primary Contacts

*Use this section to provide key agency contacts for the project. A table is provided below.*

|  |  |  |
| --- | --- | --- |
| Name | Title | Contact Info |
|  |  |  |
|  |  |  |
|  |  |  |

## Deliverables and Key Milestones

*Use this section to provide a summary of the key deliverables for the project. An example is listed below*

The HCC Service Provider will respond with their proposed solution to include:

* Deliverable One and Milestone Date
* Deliverable Two and Milestone Date
* Deliverable Three and Milestone Date

## Engagement Planning

*Use this section to provide a summary of the project scope. An example is listed below*

The agency and the selected HCC Contractor will plan the milestones and deliverables associated with the engagement.

# Statement of Work

## SOW Content

HCC Contractor’s SOW response to this RFQ will include the following:

### Approach Content:

* + - 1. Describe in HCC Contractor’s own words their understanding of the *project name* implementation project’s objectives and *State Entity name* expectations of the work activities.
			2. Describe HCC Contractor’s approach to Hosted Contact Center (HCC) Services for the *project name* Project and how they will meet/address each of the requirements in the Statement of Work Section and the Deliverable Section.
* The response should repeat each responsibility in the Statement of Work (SOW) Section. Following each entry, provide a description of the proposed approach to meeting the SOW requirement.
* The response should fully describe the HCC Contractor’s deliverables as requested in the Deliverables Section. Following each entry, provide a description of the proposed approach to creating the deliverable.
	+ - 1. Submit a high-level work plan in Microsoft Project format with milestones, staff-day estimates and timelines for the completion of each milestone and each deliverable. Include the estimated completion date of the project.
			2. Describe the staff commitment: indicate number of staff-days the HCC Contractor will spend on the project by project phase and by deliverable. *State Entity name* reserves the right to choose only the staff *State Entity name* feels is best suited for the project. This should include any *State Entity name* time required as well.

### Price Content

**The HCC Contractor must submit SOW pricing information as follows.**

1. Submit a fixed priced bid for all services and products in this response. Fees for per diem, travel, and ancillary expenses must be included in the fixed price (total cost of project).

2. *State Entity name* reserves the right to modify requirements should a HCC Contractor’s Statement of Work identify a change that is in the best interest of *State Entity name*. Any suggested changes to the proposed deliverables should be in writing.

 3. There may be no best and final offer (BAFO) procedure. Therefore, the Statement of Work should be submitted on the most favorable terms that the HCC Contractor can provide.

 4. All responses, documents, and material pertaining to this RFQ will be considered public information and will be available for inspection after award. The HCC Contractor is hereby warned that no part of its Statement of Work or any other material submitted might be marked as confidential, proprietary, or as trade secrets.

## Rejection of Statements of Work

*State Entity name* reserves the right to reject any and all Statements of Work.

* 1. Any Statement of Work that fails to meet the mandatory requirement stated in this RFQ will be rejected.
	2. Any Statement of Work that does not contain all the required documentation found in this RFQ may be rejected.
	3. Any Statement of Work that contains a reference, in response to Section 6.0 mandatory 2, which cannot be validated by *State Entity name*.
	4. *State Entity name* reserves the right to waive minor irregularities in Statements of Work. Minor irregularities are defined as those that have no adverse effect on *State Entity name* interest and will not give the HCC Contractor an advantage or benefit not enjoyed by other HCC Contractors.

*State Entity name* is not liable for any costs incurred by HCC Contractors in the preparation, delivery, or presentation of submissions to this RFQ*.*

## Statement of Work Submission Instructions

A. Each Statement of Work shall be prepared simply and economically, avoiding the use of elaborate promotional material beyond those sufficient to provide a complete, accurate and reliable presentation.

 B. The Statement of Work must be divided into two sealed packages – a technical proposal and a price and plainly marked as:

 Name of Company

 SOW Technical Proposal or Price Proposal (as applicable)

 RFQ (Insert RFQ Number)

 (Insert Due Date and Time)

C. Please submit one original and *(number)* hard copies, plus *(number)* copies on CD of your technical proposal; and one original and *(number)* hard copies, plus *(number)* copies on CD of your price proposal.

 D. Please submit proposals to the address listed on the cover page of this RFQ and no later than the date and time specified in the RFQ Schedule of Events.

# Statement of Work Response Evaluation

## SOW Evaluation

Each SOW submitted to *State Entity name* will be reviewed for completeness and responsiveness to the RFQ.  *State Entity name* will use the following to evaluate each Bidder on the following areas:

*[State Entity to insert SOW evaluation criteria and approach]*

The *State Entity name* evaluation team will utilize *[insert lowest responsive bidder or best value scoring]* evaluation method to determine which HCC Contractor best meets the needs and requirements associated with this RFQ.  Scores will be determined based on the degree to which the HCC Contractor’s track record, experience and skill coincide with the demands of this effort which are unique to *State Entity name* and specifically the *project name* implementation, experience and knowledge of the topics discussed in the Technical proposal and the ability of the HCC Contractor to complete the deliverables required with the proposed team.

## Price Evaluation

*[State Entity to insert price evaluation criteria and approach]*

After all Statements of Work have been evaluated by *State Entity name*, *State Entity name will A. issue a Purchase Order, or B. finalize a HCC Services Agreement*  to the winning bidder, which will incorporate the Statement of Work and any additional clarifying documents.

# Pricing, Method and Schedule of Payments

## State Entity name will authorize Contractor payment only after:

1. HCC Contractor submission of all agreed upon deliverables for the period to the designated *State Entity name* Project Lead. The HCC Contractor should propose a payment schedule tied to measurable events, milestones, and/or deliverables, which will include a \_\_\_% hold back to be paid at project completion (as defined in the *project name* RFQ No. \_\_\_\_\_).
2. HCC Contractor submission of a signed invoice which clearly indicates the amount due and the services and deliverables being invoiced. Note: The total amount of all invoices is not to exceed the HCC Contractor’s total Statement of Work amount.
3. Review and signed acceptance of the agreed upon deliverables and invoice by the designated *State Entity name* Project Lead.

Remedies for substandard performance:

1. Payments will not be made if delivery, inspection, and acceptance criteria are not followed, the invoiced amounts are disputed, or work product is unacceptable.
2. The Contractor must bear the costs of re-work, or re-inspection.

# Finalized State Entity Agreement

*Use this section to provide a summary of the project scope. An example is listed below*

The State Entity and the selected HCC Contractor finalize the State Entity agreement, including documentation of project milestones, documentation of any one-time and the on-going charges, and documentation of any State Entity-level SLAs and Reports.

Appendix \_\_\_

**Call Flow Documentation**

Appendix \_\_

**State Entity Agreement included as Appendix E, Participating State Entity Agreement**