INVITATION FOR BID

IFB C4DNCS19
Data Networks and Communications Services

CATEGORY 28 – CUSTOM CONTACT CENTER SERVICES

<Enter Bidder Name Here>

Statement of Work

TECHNICAL & BUSINESS REQUIREMENTS

10/27/2020

BAFO

Issued by:

STATE OF CALIFORNIA

California Department of Technology Statewide Procurement

PO Box 1810

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Disclaimer: The original PDF version and any subsequent addendums of the IFB released by the Procurement Official of this Bid remain the official version. In the event of any inconsistency between the Bidder's versions, articles, attachments, specifications or provisions which constitute the Contract, the official State version of the IFB in its entirety shall take precedence.

ADDENDUM LOG

Addendum #	Date	Addendum Description
8	6/12/20	28.1.2 Added Language
BAFO	TBD	Section 28.4 Added Language Section 28.4.3 Modified Language

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TECHNICAL & BUSINESS REQUIREMENTS

CATEGORY 28 – Custom Contact Center Services

28.1 OVERVIEW

This Category 28 IFB C4DNCS19 (IFB) provides the State's solicitation for solutions for Custom Contact Center services. This IFB also describes the technical and business requirements necessary to support the CALNET program requirements. The Contractor shall obtain from the Customer a Scope of Work that describes the specific activities, deliverables, and milestones to be completed by the Contractor as part of the Customized Contact Center solution implementation, transition, maintenance and operations. It is the Contractor's responsibility to work with the Customer to develop the Scope of Work, by performing an assessment of the environment to identify all required components and tasks needed for implementation of the contact center solution.

This IFB will be awarded to Bidders that meet the award criteria as described in IFB C4DNCS19 Part 1, Bid Evaluation. The CALNET Data Networks and Communications (DNCS) Contract(s) that result from the award of this IFB will be managed by the CALNET Contractor Management Organization (CALNET CMO). The Scope of Work, implementation and deliverable acceptance shall be defined and managed directly by the Customer.

28.1.1 Bidder Response Requirements

Throughout this IFB, Bidders are required to acknowledge acceptance of the requirements described herein by responding to one of the following:

1. Example A (for responses that require confirmation that the Bidder understands and accepts the requirement):

"Bidder understands this requirement and shall meet or exceed it? Choose an item.**"**

Or,

2. Example B (for responses contained in Technical Feature and/or Service Tables):

Line Item	Feature Name	Feature Description	Bidder's Product Description, Restrictions and Limitations	Bidder's Product Identifier	Bidder Meets or Exceeds? Yes or No.
1					**Choose an item.**

28.1.2 Contractor Reference – Single Engagement Limitations

Contractors shall provide qualifying references in Part 1 Exhibits, Exhibit 4.1 Corporate Experience Summary and References. Contractors with references less than $1.5 million for a single engagement (as defined in Part 1 Exhibits, Exhibit 4.1) will be limited to engagements (single order) under $1.5 million.

Each Contractor's single engagement limitations will be published in the CALNET Customer User Instructions and where deemed appropriate by the CALNET Contract Management Office (CMO).

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.2 BUSINESS REQUIREMENTS

28.2.1 CALNET Program Requirements

28.2.1.1 Contractor Responsibilities

The Contractor shall:

1. Comply with the Requirements defined in this IFB.
2. Accept full responsibility for all Contract Requirements. This responsibility includes the conduct of the Contractor, their Subcontractors and Affiliates, in complying with the terms and conditions of the Contract.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

3. The Contractor shall only invoice for services performed in accordance with the feature ID's of this Contract. Costs for travel and expenses shall be the sole responsibility of the Contractor and shall not be billed to the Customer.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

4. The Contractor shall be responsible for the coordination and processing of all acquisitions for Services provided by Subcontractors and Affiliates.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

5. The Contractor shall be responsible for resolving any problems with Category 27 services that have been modified as part of a customized consulting services scope of work obtained from the Customer.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

6. The Contractor shall assign a Contractor Program Manager (CPM) that will be available to the State throughout the Contract Term.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.2.1.2 General Business Requirements

The Contractor shall:

1. Notify the CALNET CMO in writing within 24 hours of the Contractor's receipt of the first complete Service Request for CALNET DNCS Services.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

2. Provide technical and business resources to Customers for information on pricing, features, and feature interactions/restrictions. The Contractor's staff shall be available by telephone to participate in meetings to answer questions about contracted Services.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

3. Projects can be performed on a Fixed Price Per Deliverable (FP/D). Fixed Price; FP/D: A defined service, or set of services, performed by the Contractor in response to a defined task, or set of tasks, at a specific fixed price, and delivered per a specific schedule. Note: When using FP/D the Scope of Work must describe in detail the particular project and the work that the selected qualified Contractor will be required to perform.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.2.2 Data Management and Standardization

The purpose of this section is to standardize data throughout the CALNET DNCS Contract and define the rules for referencing and reporting on the data. The Contractor shall be required to utilize the State prescribed data standards as defined in this section. In defining the data criteria, the State seeks to establish a level of accuracy, consistency, reliability and completeness in CALNET DNCS data. The Contractor shall comply with the State Data Management and Standardization Requirements.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.2.2.1 Customer Naming Conventions

The Contractors shall use the most current version of the State maintained list of CALNET Customer Names and Customer Codes provided in the Data Guidelines, (SOW Appendix C). The Customer Names and Customer Codes shall be used on all Service Provisioning documentation, tools, reports, or as directed by the CALNET Program.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

The CALNET Program will notify the Contractor when updates are made to the Customer Names and Customer Codes, the Contractor shall implement the changes within 30 calendar days of the CALNET Program notification.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.2.2.2 CALNET Data Guidelines

The Contractor shall utilize the prescribed data standards, formats and guidelines presented and defined in the CALNET Data Guidelines, (SOW Appendix C) when providing reports.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

The CALNET CMO reserves the right to make modifications or additions to the CALNET Data Guidelines to accommodate the State's reporting needs. Modifications to the CALNET Data Guidelines will be provided no more than twice during the term of the Contract.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.3 BILLING AND INVOICING

28.3.1 Billing and Invoicing Requirements

The Contractor's invoices shall reference the Contract number and provide a breakdown and explanation of all charges as specified throughout this section. Payments to the Contractor will only be issued for receipt of valid and approved invoices.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

The Contractor shall provide a unique Product Identifier for each Service and Feature Name to appear on Customer invoices.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

The Contractor shall integrate Affiliate's and Subcontractor's billing data into the Contractor's consolidated Billing and Invoicing application, creating one inclusive invoice to the Customer.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

28.3.2 State Associated Administrative Fee

The Contractor shall, on behalf of the CALNET Contract, bill and collect the State Associated Administrative Fee (SAAF) from Customers on a monthly basis throughout the life of the Contract excluding taxes and freight. The total SAAF collected for each month shall be remitted to the California Department of Technology no later than the 30th Business day of the following month. Prices shall reflect State Contract pricing, including any and all applicable discounts, and shall include no other add-on fees.

1. The Contractor shall apply the SAAF Fee rate to all of the Contractor's Services as a surcharge that shall appear on Customers invoice in the itemized taxes, fees and surcharges section.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

2. The Administrative Fee shall be identified as SAAF.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

3. The Contractor shall calculate SAAF from the Contractor's Catalog A pricing. Service taxes, fees, surcharges, and surcredits shall not be imposed in the SAAF.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

4. The SAAF rate may change during the period of performance of this Contract.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

5. The CALNET CMO will provide the Contractor with notice of any changes to the SAAF rate at least 30 days prior to the effective date of the new rate.

Bidder understands the Requirement and shall meet or exceed it? Choose an item.

6. The Contractor shall remit an Electronic Fund Transfer (EFT) as payment to the California Department of Technology based on the SAAF billed to Customers.

Additional SAAF instructions will be provided by the CALNET CMO within 30 calendar days of Contract Award, which include the SAAF rate and what Services or charges it may apply to.

28.4 CUSTOMIZED CONTACT CENTER CONSULTING SERVICES

Customized consulting services shall only be sold and implemented in conjunction with the services or features listed in Category 27: Standard Contact Center Services.

These Services are for Custom Contact Center development that exceed the basic elements necessary to configure an instance of working Services in Category 27 as defined by General Provisions - eVAQ, Section 81 - Service Costs.

Bidder understands this requirement and shall meet or exceed it? Choose an item.

28.4.1 Planning and Migration

The Contractor shall provide consulting services for customizations that involve planning services at an hourly rate. These services may include:

1. Assessing the current environment and existing contact center technology in order to develop a vision and roadmap to meet business needs;
2. Developing and defining business requirements and high-level designs to support traditional (voice, fax, IVR, web) and emerging (chat, social media, mobile applications, etc.) contact center channels;
3. Developing appropriate metrics strategy, including key performance indicators (KPIs);
4. Developing executable operations and technology plans for business continuity/disaster recovery planning;
5. Assistance with Customer with number porting, site surveys, site audits, inventory, and records management.

Bidder understands this requirement and shall meet or exceed it? Choose an item.

28.4.2 Execution and Implementation

The Contractor shall provide consulting services for customizations that involve implementation services at an hourly rate. These services may include:

1. Designing new contact centers, multisite contact centers and redesigning existing contact centers;
2. Providing project management and/or subject matter expertise to implement contact center solution, make changes to existing ones, and transitions to new service models;
3. Designing routing strategies or addressing other specific technology needs to optimize business operations and technology use;
4. Establishing testing, monitoring and trouble reporting and resolution protocols to achieve or maintain stability and reliability;
5. Establishing processes that meet business objectives while optimizing the use of people and technology;
6. Designing or redesigning the contact center to optimize existing operations or address business and technology changes;
7. Cutover services including historical workforce management (WFM) data conversion/importing, live production cutover from legacy systems to new contact center services.

Bidder understands this requirement and shall meet or exceed it? Choose an item.

28.4.3 Specialized Training

The Contractor shall provide consulting services for specialized training at an hourly rate. These services may include:

1. Developing and delivering training in contact center technology for contact center agents, supervisors and system administrators that exceeds the training requirements for services provided with Category 27 Standard Contact Center Services;
2. Developing and delivering training in quality management and workforce management to supervisors and system administrators that exceeds the training requirements for services provided with Category 27 Standard Contact Center Services.

Bidder understands this requirement and shall meet or exceed it? Choose an item.

28.4.4 Operational and Process Improvement

The Contractor shall provide consulting services for process improvements and optimization at an hourly rate. These services may include:

1. Process optimization using best practice standards to increase performance in coaching, quality, workforce management, reporting, self-service, customer experience and business continuity;
2. Assessing current performance and identifying targets for improvements;
3. Conducting benchmark reviews to assess operation or key processes compared to best practices.

Bidder understands this requirement and shall meet or exceed it? Choose an item.

Table 28.4.a Customized Contact Center Consulting Services

Line Item	Feature Name	Feature Description	Bidder's Product Description, Restrictions and Limitations	Bidder's Product Identifier	Bidder Meets or Exceeds? Yes or No.
1	Planning and Migration	Consulting services as described in 28.4.1, per hour			Choose an item.
2	Execution and Implementation	Consulting services as described in 28.4.2, per hour			Choose an item.
3	Specialized Training	Consulting services as described in 28.4.3, per hour			Choose an item.
4	Operational and Process Improvement	Consulting services as described in 28.4.4, per hour			Choose an item.

The Contractor may offer additional Unsolicited Hourly Consulting Services in Table 28.4.b

Table 28.4.b Unsolicited Hourly Consulting Services

Line Item	Feature Name	Bidder's Product Identifier	Bidder's Product Description, Restrictions and Limitations
1			
2			
3			