

SECTION C

STATEMENT OF WORK

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C.1 OVERVIEW

C.1.1 Background

The General Services Administration (GSA) established the Office of Citizen Services and Communications (OCSC) in June 2002, to serve as the nation’s front door for accessing federal government information and services. OCSC’s mission is to provide citizens, businesses, and other government agencies easy access to information and services from the government through the medium of their choice - the web, telephone, e-mail, fax, or print. These services are to be provided through OCSC’s Federal Citizen Information Center (FCIC).

The FCIC manages four citizen oriented information services programs. These include:

National Contact Center (NCC) – A public information referral service that was established by law in 1978 to provide citizens with information on Federal Government programs and services. The NCC program responds to public inquiries seeking information on a wide range of government programs. The NCC normally responds to live inquiries between 8:00 am and 8:00 pm eastern time, weekdays, except Federal holidays. The NCC has provided twenty-four hours a day, seven days a week (24 x 7) coverage to provide inquiry response support for special applications.

In FY2003, the NCC responded to over 1.9 million telephone calls and 20,000 e-mail inquiries, took over 242,000 orders for consumer publications, and distributed over 700 printed documents. In addition to serving as a convenient access point for the public to obtain Federal Government information and services and order consumer publications, the NCC also serves customers of the FirstGov.gov website, and is currently providing inquiry response support to several agencies, including: Department of State, Office of Overseas Citizen Services; Department of Interior, Fish and Wildlife Service; and General Services Administration, Office of Public Affairs.

Prior to 2003, the center responded primarily to telephone inquiries. Written responses through electronic mail (e-mail) and postal mail were limited. Beginning April 2003, the NCC expanded its service to include regular use of e-mail and facsimile media to respond to public inquiries. The NCC currently responds to over 5,000 e-mail inquiries per month for various activities.

Consumer Publication Distribution Center at Pueblo, Colorado – A consumer information clearinghouse that distributed approximately 6 million consumer-oriented government publications in FY2003. The distribution center is based in Pueblo, Colorado, and is operated by the Government Printing Office (GPO) under an interagency agreement since 1973. The distribution center currently uses the NCC as its customer contact center for consumer publication-related matters, including receiving telephone orders for publications and responding

46 to e-mail inquiries. Publication orders are then forwarded to the distribution center for processing
47 and distribution. The FCIC intends to maintain the current relationship with GPO for processing
48 and distribution of consumer publications.

49
50 FirstGov.gov (www.FirstGov.gov) – A website that serves as the official Federal Government
51 portal for accessing government information on the Internet. It provides links to a vast number
52 of government resources on the Internet and a government-wide search engine that enables users
53 to locate government information quickly. In addition, users can submit questions via e-mail on
54 any government program and have their questions responded to by the NCC. The FirstGov.gov
55 web site is visited by approximately 6 to 7 million users per month and offers 15 to 17 million
56 page views per month. The web site currently receives approximately 4,500 e-mail inquiries a
57 month.

58
59 USA Services – One of the current Administration’s 24 eGov initiatives designed to improve the
60 delivery of Government information and services to the American public. One of the goals of the
61 USA Services Project is to leverage resources of the NCC and other Federal contact centers to
62 establish a seamless citizen information network that is easily accessible, and provides
63 consistent, timely, and professional responses to the American public via their preferred method
64 of communication. The initial objective is to reduce the burden of Federal agencies in responding
65 to misdirected inquiries by redirecting the inquiries to the NCC for response. To provide better
66 citizen service, the Government intends to leverage the capabilities offered under this contract to
67 provide complete managed inquiry response and management solutions to support other eGov
68 initiatives and Federal agency programs.

69
70 C.1.2 Scope of Work

71 This Statement of Work (SOW) provides a baseline of both general and specific requirements
72 that the Contractor will be expected to accomplish to meet the needs of the Government. The
73 Government plans to award multiple indefinite quantity, indefinite delivery (IDIQ) type contracts
74 to fulfill this requirement. As used in this statement of work, the term “contractor” refers to any
75 or all of the contract awardees.

76
77 The Government will establish one or more contractor-provided and managed multi-channel
78 contact centers to respond to inquiries for government information and services. The Contractor
79 shall provide a wide range of automated and manual customer support services to respond to
80 inquiries about Federal government programs, policies, information sources and agencies from the
81 general public, Congressional offices, business and professional communities, academia,
82 government offices, and electronic and print media. The Contractor shall furnish the necessary
83 facilities, personnel, equipment, supplies, and services, as required, to meet the requirements of
84 the Government. The Contractor shall perform all technical and management functions, as
85 described in this SOW, to plan, design, implement, operate, and manage the contact center
86 solutions. In addition, the Contractor shall provide any special project support needed to
87 analyze, plan, design, implement, operate and manage special customer support services that
88 may be needed to meet the diverse needs of the Government.

89
90 The geographic scope of this solicitation encompasses primarily contact centers that will be
91 located in the contiguous 48 states. Where appropriate, the Government may allow centers to be

92 located outside of the primary coverage area. The Contractor shall respond to inquiries and
93 fulfillment requests originated from within the United States and from foreign countries.

94
95 Initially, the Contractor will assume the inquiry response functions currently performed by the
96 existing NCC. The Government intends to leverage the capabilities of the new NCC to network
97 with other Federal Government contact centers to form a seamless citizen information network to
98 better serve the citizens. As the need arises for managed contact center services to support other
99 eGov initiatives and Federal agency programs, the Government intends to meet the needs of
100 these programs by providing complete managed contact center solutions through this contract.
101 Where and when appropriate, the Government will request, through the issuance of task orders,
102 the expansion of the NCC and/or establishment of additional center(s) by the Contractor to serve
103 the needs of these programs.

104
105 The term “multi-channel contact center,” as used in this solicitation, refers to a customer contact
106 center that performs all functions associated with receiving and responding to inquiries, and
107 providing information and services through the use of various communications media, including
108 telephones, telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile,
109 the Internet, and other media as appropriate.

110 111 C.1.3 Objectives

112 Through the services offered under this contract, the Government expects to realize the following
113 objectives:

- 114
115 1. Position the Government’s public information services on a par with or exceeding
116 private industry standards by providing customers with easily accessible, consistent,
117 timely, and professional responses to their inquiries via their preferred method of
118 communication.
- 119
120 2. Provide increased capability for the Government contact center community to network
121 together to establish a seamless citizen information network that fosters efficient use of
122 knowledge and resources in the delivery of government information and services.
- 123
124 3. Reduce other agencies’ burden of handling misdirected inquiries.
- 125
126 4. Provide increased capability to deliver fully managed multi-channel inquiry response
127 and management solutions to meet the needs of Federal agencies and programs.
- 128
129 5. Provide increased capability to measure and control the delivery of information services
130 to meet the evolving needs of citizens.
- 131
132 6. Gain and sustain access to commercial off-the-shelf technology that is scalable to meet
133 current and future requirements.
- 134
135 7. Control information dissemination costs.
- 136

137 8. Provide increased capability to measure agency and citizen satisfaction with the
138 delivery of information services
139

140 C.2 PROGRAM REQUIREMENTS

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142 C.2.1 General Requirements
143

144 C.2.1.1 Contact Center Location

145 Unless approved by the Government, all Contractor-provided, operated, and managed contact
146 centers shall be located within the contiguous 48 states. For location-specific applications where
147 it is not practical or economical to locate the center(s) within the contiguous 48 states, the
148 Government may allow the Contractor to deviate from such requirement. Any such deviation
149 must be approved by the Contracting Officer in advance of such placement.
150

151 C.2.1.2 Hours of Operation

152 Due to the diversity of agency requirements, the Contractor must have the capability to provide
153 attended (live) service on a 24 hours a day, 7 days a week (24 x 7) basis. Specific operating
154 hours, weekend and holiday coverage, and emergency notification requirements, if any, will be
155 determined on a case-by-case basis and be included in task orders issued by the Government.
156

157 An automated service (e.g., Interactive Voice Response (IVR) or equivalent) shall be used to
158 provide unattended service 24 hours a day, seven days a week. The Contractor shall provide
159 options that allow the Government to select the automated service from either the Contractor or
160 from any service providers under the General Services Administration Federal Government Long
161 Distance Carrier or other Government contracts (e.g. MCI, Sprint, AT&T), or both.
162

163 C.2.1.3 Work Types

164 Due to the diversity of agency requirements, the Contractor must have the capability to support a
165 wide range of customer support work types for all communications channels (e.g. telephone, e-
166 mail, facsimile, postal mail), including but not limited to the types of inquiries listed below.
167 Specific work types will be identified in task orders issued by the Government.
168

- 169 1. Referrals
- 170 2. General information inquiries
- 171 3. Inquiries on specific programs and services
- 172 4. Fulfillment requests
- 173 5. Order intakes
- 174 6. Congressional inquiries
- 175 7. Emergency inquiries
- 176 8. Contingency-related inquiries (e.g., inquiries resulting from the activation of an
177 agency's contingency plan)
- 178 9. Service calls
- 179 10. Scheduling of appointments
- 180 11. Complaint calls
- 181 12. Public comments

182 13. Customer surveys/feedback

183 14. Transcription services

184

185 C.2.1.4 Language Support

186 The Contractor must have the capability to support a wide range of languages in responding to
187 live inquiries under various workload conditions, including but not limited to the languages listed
188 below. Specific languages and volumes will be identified in task orders issued by the
189 Government. The Contractor may provide foreign language support via “foreign language line”
190 instead of on-site support if such is the most effective solution.

191

192 1. English

193 2. Spanish

194 3. Mandarin

195 4. Cantonese

196 5. French

197 6. German

198 7. Japanese

199 8. Korean

200 9. Vietnamese

201

202 C.2.1.5 Sample Workflow

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204 C.2.1.5.1 Call Processing Flow

205 The Contractor shall have the capability to accommodate call flow requirements of varying
206 complexity. The Contractor shall develop the optimum call flow based on requirements and
207 business rules as identified in individual task order requirements and industry best practices, as
208 applicable. The Government reserves the right to change the call flow requirements at any time
209 after task order issuance to accommodate changes in program requirements on an as-needed
210 basis. Any such action will be accomplished through the use of a Change Order with the
211 possibility of an equitable adjustment. A sample call flow process is provided below.

212

213 The caller dials a direct-dial or toll-free telephone number terminating at or routed to the
214 Contractor provided contact center for government information and assistance.

215

216 The call is delivered to an automated service (e.g., IVR or equivalent) furnished either by the
217 Contractor or the Government. The automated service provides a menu of services that access
218 answers to frequently asked questions and automated facsimile services. The automated service
219 may also provide an option for the caller to be automatically transferred to another government
220 contact center for assistance. If the caller is unable to satisfy his or her inquiry via the self-
221 service options offered by the automated service, or prefers to talk to a live Information
222 Specialist (IS), the caller can, during normal business hours, select the option to speak to a live
223 IS for assistance. If the call is received after normal business hours, the caller is informed of the
224 business hours and asked to call back during those hours on the next business day or leave a
225 message for a return call. If the call is of an emergency nature, the caller is provided with
226 directions to call a designated telephone number for assistance.

227
228 After the caller is routed to an IS, the IS responds to the caller's initial request and any other
229 additional requests the caller makes. The IS retrieves data from a knowledge base to respond to
230 customer requests and/or records the required information needed to complete any fulfillment
231 actions. The Contractor shall provide an inquiry tracking tool whereby the IS shall have the
232 capability to initiate actions or check the status of previous actions initiated on behalf of the
233 caller. When possible, all systems work shall be performed while the IS is engaged with the
234 caller during the phone call.

235
236 The IS either completes the call or routes the call to more experienced Contractor personnel for
237 further assistance. If information requested is beyond the scope of Contractor's agreed to level
238 of service as specified in the task order, the IS refers the caller to the appropriate Government
239 agency personnel for completion. Calls requiring transfer may be accomplished using blind or
240 attended transfer as specified by the agency, or may be referred to the appropriate agency via e-
241 mail or facsimile rather than via telephone transfer. In cases where the caller indicates an
242 emergency situation, however, the Contractor personnel shall stay on the line with the caller
243 (attended transfer) until a live person is reached. The caller has the option of making multiple
244 requests during any one phone call. At call termination, the IS will perform after-call wrap-up
245 procedures and logs necessary action items and call information.

246
247 The nature of the caller's request may require that information be sent to the caller. If the
248 requested information is available and can be sent by facsimile, the IS shall complete the
249 facsimile transmission. If printed information is requested, the IS will record the required
250 information needed to complete the fulfillment action. The fulfillment action may be completed
251 by the Contractor or by the Government.

252
253 Complex requests may require one or more follow-up calls by the IS. The IS shall have the
254 capability to dispatch information to a caller through mail, e-mail, and facsimile. The
255 Contractor-provided inquiry tracking tool shall monitor all requests that require follow-up and
256 automatically assign those requests to an IS for further action. Where follow-up telephone
257 contact is required, the system shall prompt the assigned IS to make such contact. The IS shall
258 both resolve the issue and initiate the customer callback, or escalate the issue internally for
259 resolution.

260
261 **C.2.1.5.2 E-Mail Workflow**

262 The Contractor shall have the capability to accommodate e-mail workflow requirements of
263 varying complexity. The Contractor shall develop the optimum workflow based on requirements
264 and business rules as identified in individual task order requirements and industry best practices,
265 as applicable. The Government reserves the right to change the work flow requirements at any
266 time after task order issuance to accommodate changes in program requirements on an as-needed
267 basis. Any such action will be accomplished through the use of a Change Order with the
268 possibility of an equitable adjustment.

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270 **C.2.1.5.2.1 E-Mail Workflow (Normal)**

271 A sample description of a normal e-mail workflow process is provided below.

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The inquirer visits a Government web site (e.g., FirstGov.gov's website @ www.firstgov.gov). If the inquirer cannot find what he or she is looking for, the web site provides alternatives for further assistance. One of the alternatives is a toll-free phone number to call for assistance. Another alternative is to access an automated tool or service from the website that provides answers to frequently asked questions (FAQs) (see Section C.3.1.10). If further assistance is needed, the inquirer can access an e-mail form on the website to send an inquiry on the desired subject. A variation of the web-based e-mail form alternative may be to allow the inquirer to send an e-mail message directly to a published Government e-mail address.

If the inquirer elects to use the e-mail form alternative, an e-mail form at the website will provide helpful hints and frequently asked topics to guide the inquirer through the process of submitting the request and help focus the nature of the inquiry. The request is then forwarded to the contractor-provided contact center for response.

Upon receipt of the inquiry at the center, the Contractor-provided e-mail distribution and management system will time-stamp, sort, categorize, and prioritize the inquiry based on agency specified business rules, and assign a tracking number that will be used throughout the process to track the status of the inquiry. The system will capture all relevant information about the inquiry and present it for use by the IS during the response process. As a first step in the response process, a government approved auto-response will be sent immediately to the e-mail address provided by the inquirer to acknowledge receipt, provide the tracking number for any future communication, and provide an estimated response time. Over time, as the Contractor develops preformatted responses to frequently asked subjects, the Contractor may include preformatted responses as part of the auto-response.

After the initial acknowledgment, the inquiry will be routed to an IS with the appropriate skills for responding to the inquiry. Depending on the nature of the inquiry, the IS will either respond directly or will refer the inquiry to the appropriate contractor or agency personnel for direct response. If the IS decides to refer the inquiry to an agency (or agencies) for response, the IS will send a notice to inform the inquirer of this decision and to provide relevant information on the responding office(s), the expected response time as determined by the agency (if applicable), and contact information. The status log for this inquiry will then be updated.

Upon completion of responding to an e-mail message forwarded by the Contractor, the responding agency will send a completion notice to the Contractor contact center for status update. The completion notice may be in the form of a batch listing containing all referred e-mails handled by that agency organized by tracking number and including a date and time, or a cc or bcc copy of each e-mail response, which then can be used by the Contractor to close out the case. With consensus of all parties, an alternative method of updating the status can be used. The Contractor shall work with the agency to develop a method that meets the needs of both parties. If the responding agency elects, as part of its business rules, not to send a completion notice to the Contractor, the inquiry will be considered closed as no further action will be required.

317 C.2.1.5.2.2 E-Mail Workflow (Misdirected)

318 The Contractor may receive e-mail inquiries from other agency(ies) who have determined that
319 they are not the appropriate agent for responding to these inquiries. One of the goals of the USA
320 Services initiative is to reroute these misdirected inquiries to the appropriate agencies for direct
321 response. These misdirected inquiries may be routed to the Contractor via a central forwarding
322 mail box established by each agency or from one or more individual mail boxes. Once received,
323 the inquiries are processed in a similar manner as described in Section C.2.1.6.2.1. The
324 Contractor shall work with the agencies to develop the appropriate protocols and procedures for
325 responding to and managing the disposition status of the misdirected inquiries.

326
327 C.2.1.5.2.1 E-Mail Response Options

328 E-mail response options may vary from one agency to another. Generally, when responding to
329 e-mail inquiries, the IS shall analyze the message content to determine the nature of each inquiry.
330 The IS shall evaluate the available response options to determine which is the most appropriate
331 for the inquiry and, if necessary, query the appropriate database(s) for relevant information to be
332 included in the response. For example:

333
334 No response - If the inquiry does not require a response (some examples are pranks, spams,
335 duplicate messages, and incomprehensible submissions), the IS records the type of message in
336 the status log and notes that no further action is required.

337
338 Comment or opinion - If the inquiry is a comment or opinion not requiring a customized
339 response, the IS forwards the inquiry to the appropriate agency and sends an acknowledgment to
340 the inquirer thanking them for their input and naming to which agency it has been transmitted.
341 The IS records the topic of the question using specific categories provided through the system for
342 use in reporting to agencies and updates the status log for this inquiry.

343
344 General inquiry easily answered - If the inquiry is general in nature and can be answered
345 immediately, the IS produces the response using preformatted responses. The IS records the
346 topic of the question using specific categories provided through the system for use in reporting to
347 agencies and updates the status log for this inquiry.

348
349 Inquiry to be forwarded to a single agency - If the inquiry requires a customized response and
350 must be forwarded to an agency, the IS forwards the inquiry to the appropriate agency. The IS
351 also sends a response to inform the inquirer of this action, what type of response time to expect,
352 and how to follow-up with the responding agency. The IS records the topic of the question using
353 specific categories provided through the system for use in reporting to agencies and updates the
354 status log for this inquiry.

355
356 Inquiry to be forwarded to multiple agencies - If the inquiry requires a customized response and
357 must be forwarded to more than one agency to receive a complete response, the IS prompts the
358 system to assign sub-level tracking numbers and forwards the inquiry to the appropriate
359 agencies, notifying them which other agencies are receiving the message. The IS also sends a
360 response to inform the inquirer of this action, what type of response time to expect, and how to
361 follow up with the responding agencies. The IS records the topic of the question(s) using

362 specific categories provided through the system for use in reporting to agencies and updates the
363 status log for this inquiry.

364
365 Inquiry to be referred to agency without e-mail - If the inquiry requires a customized response
366 and must be forwarded to an agency, but there is no established contact at that agency, the IS
367 provides the inquirer with an alternative means of communicating with the agency, such as the
368 agency website URL, call center number, or mailing address. The IS records the need for
369 follow-up action to establish an appropriate contact at that agency and updates the status log for
370 this inquiry.

371
372 Additional information required - If the IS determines that additional information from the
373 inquirer is necessary to answer the question or to determine who can answer the question, the IS
374 may use a preformatted or customized response to request specifically the additional information
375 necessary to reply to the e-mail or to suggest that the inquirer call a toll-free number at a
376 specified contact center to discuss the question. The IS records the topic of the question using
377 specific categories provided through the system for use in reporting to agencies and updates the
378 status log for this e-mail.

379
380 Referral to law enforcement for action - If the IS determines that the message is of a suspicious
381 nature or contains a specific threat against life or property as defined by the agency, the
382 Contractor shall escalate the matter to the appropriate authority. The Contractor will use set
383 escalation procedures to ensure that the message is passed on to the appropriate law enforcement
384 authorities within a pre-defined time interval.

385
386 Undeliverable responses - The Contractor shall track all undeliverable e-mail responses
387 addressed to inquirers and perform analyses, as required, to determine the causes of non-
388 delivery. If the IS determines that non-delivery was caused by an erroneous e-mail address, the
389 Contractor shall make a reasonable attempt to identify and correct the error and to attempt
390 redelivery of the message. The Contractor shall record any non-delivery in the case management
391 database.

392
393 C.2.1.5.3 Facsimile Inquiry Workflow

394 The Contractor shall have the capability to accommodate facsimile inquiry workflow
395 requirements of varying complexity. The Contractor shall develop the optimum work flow based
396 on requirements and business rules as identified task order requirements and industry best
397 practices, as applicable. The Government reserves the right to change the work flow
398 requirements at any time after task order issuance to accommodate changes in program
399 requirements on an as-needed basis. Any such action will be accomplished through the use of a
400 Change Order with the possibility of an equitable adjustment. A sample workflow process for
401 facsimile inquiries is provided below.

402
403 The inquirer sends an inquiry via facsimile to a direct-dial or toll-free telephone number for
404 government information and assistance. The Contractor provided system receives the facsimile
405 inquiry, converts and stores the facsimile inquiry in a commonly used format and distributes the
406 inquiry to a qualified IS for response. The Contractor shall be responsible for tracking the status
407 of facsimile inquiries in a manner similar to e-mail inquiries. Facsimile inquiries referred to

408 other federal agencies for direct response shall be transmitted as e-mail attachments. The
409 Contractor shall note in the e-mail that the original inquiry was received as a fax document.
410 Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other
411 communications media, whichever is the most efficient and satisfies the inquirer. The
412 Contractor shall retain a copy of all responses for record keeping.

413

414 C.2.1.5.4 Postal Mail Inquiry Workflow

415 The Contractor shall have the capability to accommodate postal mail inquiry workflow
416 requirements of varying complexity. The Contractor shall develop the optimum workflow based
417 on requirements and business rules as identified in individual task order requirements and
418 industry best practices, as applicable. The Government reserves the right to change the work
419 flow requirements at any time after task order issuance to accommodate changes in program
420 requirements on an as-needed basis. Any such action will be accomplished through the use of a
421 Change Order with the possibility of an equitable adjustment. A sample workflow process for
422 postal mail inquiries is provided below.

423

424 The inquirer sends an inquiry via postal mail to a specified postal address maintained by the
425 Contractor or the Government. If the address is maintained by the Government, the mail will be
426 forwarded to the Contractor using one or more of the following methods:

427

428 1. forward by postal mail and/or courier service by the Government to an address
429 maintained by the Contractor;

430

431 2. picked up by the Contractor from the Government location; or

432

433 3. forward converted documents to the Contractor by electronic means (e.g. e-mail,
434 facsimile).

435

436 The Contractor receives the postal mail, assigns time and date of receipt to each inquiry, and
437 converts each inquiry, including associated envelope/packaging, to a commonly used electronic
438 format to facilitate routing and response and records management. The inquiry is then routed to
439 a qualified IS for response. The Contractor shall be responsible for tracking the status of postal
440 mail inquiries in a manner similar to facsimile and e-mail inquiries. Postal mail inquiries
441 referred to other federal agencies for direct response shall be transmitted as e-mail attachments.
442 The Contractor shall note in the e-mail that the original inquiry was received via postal mail.
443 Responses to postal mail inquiries may be via telephone, facsimile, e-mail, postal mail, or other
444 communications media, whichever is the most efficient and satisfies the inquirer. The
445 Contractor shall retain a copy of all responses for record keeping.

446

447 C.2.1.6 Response Protocols

448 The Contractor shall respond to information requests generally through the use of one or a
449 combination of the following methods:

450

451 Automated Response – The Contractor shall use automated tools (e.g., IVR, Fax-on-Demand) to
452 provide unattended service to provide information on frequently asked questions.

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Telephone response - When responding to inquiries, the Contractor shall analyze the inquiry, assess the appropriate response modes, gather available information from all pertinent sources, analyze and confirm the accuracy of the information, and provide the requested information and/or assistance in the most efficient manner to satisfy the inquirer's needs. For inquiries involving more complex subjects that may require further research off line, the Contractor shall conduct the research in accordance with agency-provided guidelines and provide the appropriate information within the timeframe specified by the Government. Whenever possible, immediate responses shall be given.

TDD/TTY response – The Contractor shall ensure that TDD/TTY users are offered similar levels of service received by telephone users serviced by this contract.

Facsimile response - In certain cases, the Contractor may be requested to provide to the inquirer a hard copy of a document that supports the oral response given over the telephone and/or conveys the information requested. When requested and where possible, the Contractor shall send a copy of the document to the caller via facsimile within the timeframe specified by the Government. The Contractor shall employ automated means of sending the requested documents. The Contractor shall use instructions provided by the Government for handling facsimile responses.

Electronic response – The Contractor shall respond to requests received through electronic media (e.g., e-mail, Internet websites, facsimile) within the timeframe specified by the Government. These responses may require the Contractor to provide copies of any information source documents as attachments to the electronic response. If the source documents are not available in electronic format, the Contractor may be required to convert the documents to a suitable format to facilitate electronic transmission and records management. The Contractor shall retain a copy of the electronic inquiry and response for record keeping for a period specified by the Government.

Written (postal mail) response – The Contractor shall respond to written requests accurately and completely within the timeframe specified by the Government. These responses may require the Contractor to provide copies of any information source documents as attachments to the written response. The Contractor may be required to convert the documents to a suitable format to facilitate routing, response and records management. Response to written inquiries may be provided by telephone, e-mail, facsimile, postal mail, or other communications media, whichever is more efficient and satisfies the inquirer. The Contractor shall retain a copy of the written inquiry and response for record-keeping for a period specified by the Government. For written inquiries where the Contractor is unable to decipher the content of the request, Contractor shall, if possible, contact the customer by telephone or mail and attempt to resolve the inquiry in the most expeditious fashion.

Form letter response – The Contractor may develop and prepare form letters for dissemination in response to telephone, electronic, and written inquiries. The Government shall approve all such form letters before they are used to fulfill information requests.

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499 Interim response - In cases where the Contractor cannot provide an immediate response because
500 further research is necessary, the Contractor shall provide the requestor with an interim response
501 within the timeframe specified by the Government. The interim response shall indicate when the
502 inquirer shall receive a complete response.

503
504 Coordinated response - Any inquiry, especially one involving legal, policy interpretation, and/or
505 a highly technical response, that cannot be answered readily from approved materials in the
506 knowledge database shall be referred to the appropriate authority for direct response. Telephone
507 inquiries of such nature shall be forwarded immediately after identification. Electronic,
508 facsimile and written inquiries identified as requiring special support from appropriate authority
509 shall be forwarded in the timeframe specified by the Government, but no later than 2 business
510 days after receipt.

511
512 Referral – Some inquiries may be misdirected and/or not within the scope of the specific
513 program mission. The Contractor shall differentiate these inquiries and re-direct and refer
514 inquiries that are misdirected and/or not within the scope of the programs, to individuals or
515 organizations that may be able to provide answers to questions or otherwise offer assistance.
516 When appropriate the Government will provide the Contractor with a referral list of such
517 individuals and organizations on a program-by-program basis. The Contractor shall maintain
518 and update this list throughout the contract performance period to ensure it is current and
519 complete.

520
521 **C.2.2 Projected Work Volume Data**

522 As an initial task, the contractor shall provide a complete multi-channel citizen inquiry response
523 and management solution to meet the needs of the FCIC NCC, as specified in Section J.2.

524
525 Where and when appropriate, the Contractor may expand the existing center(s) and/or establish
526 additional center(s) to serve the needs of other agencies and/or government programs in response
527 to individual task orders issued by the Government.

528
529 **C.3 SERVICES TO BE PROVIDED**

530
531 The Contractor shall provide all of the services identified in this SOW. Specific service
532 requirements will be identified on a case-by-case basis and be included in individual Task Orders
533 to be issued by the Government. The Contractor shall ensure that services delivered employ
534 technology that is effective and scalable to meet the evolving needs of the Government and
535 adhere to business processes that conform to industry best practices.

536
537 The Government reserves the right to add additional services required to meet the evolving needs
538 of the citizens and agency programs at any time during the life of the contract. Any additions
539 will be subject to written mutual agreement between the Government and Contractor.

540
541 For the initial task of supporting the NCC, the contractor shall provide all of the services
542 identified in Section J.3 of this solicitation.

543

544 C.3.1 Automated Services

545 The Contractor shall provide automated services to enable the Government to deliver unattended
546 service 24 hours a day, 7 days a week. The Contractor is responsible for the provision,
547 maintenance, design, implementation, operation, and management of these services.
548

549 C.3.1.1 Automated Voice Response Services

550 Automated voice response services are intended to provide unattended service to telephone
551 callers 24 hours a day, 7 days a week. These services include the traditional interactive voice
552 response (IVR) service, which uses the telephone touch-tone pad or simple voice commands to
553 access pre-recorded information. They also include advanced services that make use of speech
554 recognition and text-to-speech technologies to enhance efficiency and customer service. At a
555 minimum, the automated voice response services shall support the following languages:
556

- 557 1. Cantonese
- 558 2. English
- 559 3. French
- 560 4. German
- 561 5. Japanese
- 562 6. Korean
- 563 7. Mandarin
- 564 8. Spanish
- 565 9. Vietnamese

566
567 Specific language support requirements will be identified in task orders issued by the
568 Government.
569

570 The Contractor shall provide qualified personnel to develop and regularly maintain call flow and
571 messages for automated voice response services in keeping with the current informational needs
572 of the callers. The Contractor shall ensure timely update of all messages in accordance with the
573 turn-around timeframes established by the Government. Unless directed by the Government in
574 individual task orders, Contractor shall post changes within 24 hours of receipt for all non-
575 emergency information and within 2 hours of receipt for emergency notices. Support for
576 emergency postings and updates are required on a 24 hour a day, 7 day a week basis. Updates of
577 the script and/or the “call flow” may be made on demand and on an “as required” basis.
578

579 The Government may elect to furnish its own network-based automated voice response services
580 obtained from the Federal Government Long Distance Carrier or other contracts as part of the
581 toll-free telephone service if the use of such service is determined to be in the best interest of the
582 Government. The Government reserves the right to furnish these services at the outset of a
583 project or implement these services to augment or replace the contractor-provided services at
584 anytime during the effective contract period. In the event the Government elects to furnish its
585 own automated voice response service, the Contractor shall provide qualified personnel to
586 develop and maintain call flow and scripts for the Government furnished services as specified in
587 Section C.3.5.4.3.
588

589 C.3.1.1.1 Interactive Voice Response (IVR) Service

590 The IVR service shall accommodate callers with touch-tone and rotary telephones/dial pulse
591 telephones who seek information via the unattended mode. All IVR messages shall be recorded
592 using broadcast standard recording techniques, and any changes to the script will be made using
593 the same voice pattern, at the same pitch, speed and tone of delivery, and at the same volume as
594 the initial recordings. The IVR service shall provide options to allow the caller to return to the
595 main menu and select live operator assistance during the normal business hours. The IVR
596 solution shall provide access to information via Fax-Back/Fax-on-demand services, and other
597 automated services, when such services are ordered and implemented as part of the IVR solution.
598

599 C.3.1.1.2 Voice/Speech Recognition Service

600 The Contractor shall provide voice recognition service to augment and/or replace the traditional
601 IVR service. The service shall provide access to information via other automated services and/or
602 live assistance as appropriate. The service shall provide an intuitive, convenient, customer
603 friendly, and naturally sounding speech interface that serves callers quickly, efficiently,
604 accurately, and consistently. The service shall automatically adapt to callers' language, speech
605 patterns, accents, and noise environment to ensure accurate and responsive service. The service
606 shall incorporate self-learning technology to enable recognition and response accuracy to
607 continually improve as the service adapts to caller usage of the service. The service shall support
608 VoiceXML and other industry standards for voice-driven applications.
609

610 C.3.1.1.3 Text-to-Speech Service

611 The Contractor shall provide text-to-speech service to augment and/or replace the traditional IVR
612 service. The service shall convert textual information into speech that closely resembles natural
613 voice over any telephone. The service shall provide an intuitive, convenient, customer friendly,
614 and naturally sounding speech interface that serves callers quickly, efficiently, accurately, and
615 consistently. The service shall be able to distinguish between words with identical spellings but
616 different pronunciations and understand word context as they appear in a sentence. The service
617 shall provide word, phoneme, and bookmarks support. The service shall provide the capability
618 for authorized personnel to update dictionaries remotely to improve accuracy. The caller shall
619 not experience any noticeable latency during the processing of long text strings. The service
620 shall support speech synthesis mark-up language (SSML) and other industry standards for text-
621 to-speech applications.
622

623 C.3.1.2 Facsimile Services

624 The Contractor shall respond to requests for information via automated facsimile services,
625 including Automatic Fax-Back and Fax-On-Demand services. Automatic Fax-Back allows a
626 caller to select a document from a list via a self-service menu and direct the document to be sent
627 to a specified fax number. Fax-On-Demand allows an Information Specialist to automatically
628 fax a document requested by the caller to a specified fax number. Specific documents to be
629 provided via facsimile services will be identified in individual task orders.

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C.3.1.2.1 Automatic Fax-Back Service

The Contractor shall respond to requests for information via automated Fax-Back immediately upon such requests. The Contractor shall integrate the automated Fax-Back service with its IVR and/or other automated voice response services to enable the caller to select the requested information and enter a fax number for receiving the information without the assistance of an Information Specialist. The selection menu for the automated Fax-Back service shall allow the caller to return to the main menu and/or to allow the caller to access the Information Specialist for assistance.

C.3.1.2.2 Fax-On-Demand Service

When it is more efficient and cost effective to respond to inquiries (telephone, letter, e-mail, etc.) by facsimile, the Contractor shall deliver the requested information via Fax-on-Demand service immediately upon such requests. The Fax-On-Demand service shall allow the Information Specialist and/or the caller to select the requested information and either request the information be sent immediately via facsimile to the calling number during the same telephone session, or have the information sent to a different fax number entered by the IS or caller. The Fax-on-Demand service shall be integrated with the IVR and/or other automated service to enable the caller to access other services.

C.3.1.3 Voice Mail Service

The Contractor shall provide voice mail service to enable callers to leave suggestions, comments, callback information, and messages on specific subjects. The voice mail service shall be accessible from the IVR and/or other automated services and provide sufficient capacity to handle anticipated call volume and call duration as defined on individual Task Orders. The Contractor shall retrieve and act on the recorded information in accordance with task order requirements. When required, the Contractor shall provide a tape copy of voice mail messages recorded. The Contractor shall maintain a copy of the voice mail messages for 90 days from the record date.

C.3.1.4 Automated Callback (Telephone)

The Contractor shall provide an automated callback service to allow a telephone caller the option of leaving callback information for the Contractor to call back at a later time instead of waiting on queue for an available Information Specialist. The service shall prompt the caller to provide the callback information and provide an estimated callback time to the caller. The service shall automatically call the caller at the estimated callback time and connect the caller to an available Information Specialist for assistance. If the callback encounters a busy or no answer condition, the service shall repeat the callback for up to 2 additional attempts within an appropriate time interval as specified in individual task orders before aborting. If the callback encounters a voice mail or answering service, the service shall leave a brief message indicating the purpose and time of the callback and instructions for calling back, if any, as provided by the Government.

672 C.3.1.5 Web Callback

673 The Contractor shall provide a fully managed hosted web callback service to allow a visitor on a
674 Government website to access the service and leave callback information for the Contractor to
675 call back at a later time. The service shall prompt the caller to provide the callback information,
676 including the subject of the inquiry, and provide an estimated callback time to the caller. The
677 service shall automatically call the caller at the estimated callback time and connect the caller to
678 an available Information Specialist for assistance. If the callback encounters a busy or no answer
679 condition, the service shall repeat the call back for up to 2 additional attempts within an
680 appropriate time interval as specified in individual task orders before aborting. If the callback
681 encounters a voice mail or answering service, the service shall leave a brief message indicating
682 the purpose and time of the callback and instructions for calling back, if any, as provided by the
683 Government.

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685

686 C.3.1.6 On-Line Ordering

687 The Contractor shall provide a fully managed hosted service to allow a visitor on a Government
688 and/or Contractor-provided website to access an on-line ordering service to order free and/or
689 paid Government publications. The service shall capture the required information and either
690 provide the recorded information to the Government in electronic format, or use the captured
691 information to complete the fulfillment via services described in Section C.3.2.7.

692

693 C.3.1.7 E-Mail Web Form

694 The Contractor shall provide a fully managed hosted service to allow visitors on a Government
695 website to access a contractor-developed and maintained web form for submitting e-mail
696 inquiries to a designated e-mail address. The web form shall allow users to associate the topics
697 of their inquiries with a list of frequently requested topics identified by the Government. The
698 service shall capture all relevant information regarding the inquiry for transmission to the
699 designated e-mail system.

700

701 C.3.1.8 Automated Telephone Appointment Service

702 The Contractor shall be able to provide a centralized automated telephone appointment service
703 that callers can access via a single telephone number to make appointments nationwide 24
704 hours/day. At a minimum, the appointment scripts shall be provided in English and Spanish.
705 The Contractor shall support other languages as identified in individual task orders. The
706 Government prefers the service to be supported via voice recognition technology if such is
707 technologically and economically feasible. The offeror shall provide separate pricing options for
708 standard system and voice recognition-based system for the Government to consider.

709

710 The service shall include options for callers to access an IS for assistance in scheduling the
711 appointments during normal operating hours and to return the callers to the self-service menu.
712 The ISs shall have direct and efficient access to the appointment service to enable them to
713 schedule appointments while they are assisting the callers. The service shall employ design that
714 is scalable to serve multiple agencies and provide remote access via the Internet to all properly

715 equipped sites to enable them to manage appointments, organize and mine caller data, and set
716 service schedules and constraints. At a minimum, the service shall provide the following:

- 717
- 718 1. Automated self-service appointment scheduling by telephone to allow callers to
719 request, set, change, or cancel their appointments on their own based on time schedules
720 allotted by agencies.
721
 - 722 2. Automatically determine the most convenient agency location for scheduling the
723 appointment based on schedule availability and caller location information (e.g., caller
724 phone number, zip code). The service shall have the option to allow the caller to select
725 a different agency location.
726
 - 727 3. Integrated scheduler that shows daily, weekly, and monthly schedule by agency.
728
 - 729 4. Centralized and immediate script updating.
730
 - 731 5. Automated distribution of daily schedules and appointment changes to customer
732 agencies via e-mail at prescribed time with immediate notification and redistribution of
733 updated schedules after each new, rescheduled, and cancelled appointments that
734 occurred after the time of the daily distribution.
735
 - 736 6. Ability to handle multiple concurrent users with immediate updates on schedule
737 changes.
738
 - 739 7. Centralized reporting capability to include, at a minimum, number and duration of all
740 appointment calls, number of appointments made available by agency, number of
741 appointments requested by date and agency, number of appointments kept, and number
742 of changed and cancelled appointments by agency.
743

744 The Contractor shall provide all hardware and software and be responsible for the development,
745 operation, maintenance and management of the telephone appointment service. The Contractor
746 shall provide all software and instructions necessary for managing the appointment service for all
747 customer agencies. Appointment schedule design and format, and language support will be
748 identified on individual task orders.

749
750 **C.3.1.9 Web-Based Appointment Service**

751 The Government may request that the Contractor augment the telephone appointment service
752 with a web-based appointment service that provides similar functionalities. The web-based
753 service must be synchronized with the telephone-based appointment service to ensure that the
754 same information is recorded and presented on both systems. The Contractor shall provide a
755 solution and include in Section B Pricing options for providing such a service.
756

757 **C.3.1.10 Hosted FAQ Service**

758 Government agencies operate a large number of websites that are accessed by the general public
759 for information. Increased public usage of these web sites has generated a substantial increase in

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760 e-mail inquiries that agencies must respond to. To reduce the workload associated with
761 responding to e-mail inquiries and to provide better customer service, the Government requires a
762 technology-based solution that will enable agencies to leverage previous good answers to
763 frequently asked questions (FAQs) and provide the answers to their customers 24 x 7 via self-
764 service using the Internet.

765
766 The Contractor shall provide a secure, highly available, and scalable hosted solution to enable
767 visitors to subscribing Government websites to access answers to FAQs on a 24 x 7 basis. The
768 service must provide the following:

- 769
- 770 1. Availability/Reliability/Scalability/Interoperability
 - 771 • Is available 24 x 7
 - 772 • Is scalable
 - 773 • Is open to web services between multiple Federal agencies, programs, and systems
 - 774 2. Security Safeguards
 - 775 • Provides adequate protection to ensure confidentiality and integrity of the information
 - 776 transmitted
 - 777 • Provides adequate security and access control to prevent unauthorized access to
 - 778 information and systems
 - 779 • Meets OMB Circular A-130, Security Certification and Accreditation requirements
 - 780 3. End-User Interfaces
 - 781 • Is compliant with Section 508 of the Rehabilitation Act Amendments of 1998 (see
 - 782 Section H.16)
 - 783 • Is user friendly and intuitive
 - 784 • Is easily configurable to match a website's look and feel
 - 785 • Has the capability for a user to submit an inquiry to either the Contractor or the
 - 786 subscribing agency for response.
 - 787 • Capability to review previously asked questions and status of questions and relevant
 - 788 responses.
 - 789 • Provides multiple navigation methods and help for navigation to assist users in finding
 - 790 answers easily.
 - 791 • Allows both browse and search of FAQs answers from a single or multiple knowledge
 - 792 bases by subject and response categories with results automatically ranked by relevancy,
 - 793 usefulness, or other appropriate methods selected by the Government.
 - 794 • Supports multiple languages.
 - 795 • Has the capability to collect user feedback on the effectiveness and usefulness of the
 - 796 service
 - 797 • Has the capability of accessing or integrating with the knowledge base
 - 798 • Allows user to set and save preferences such as search settings, e-mail contact for replies,
 - 799 etc.
 - 800 • Includes a tab method to allow user to ask an additional question while on an FAQ
 - 801 answer screen
 - 802 • Can be set to require user to look at existing FAQs before submitting a new question
 - 803
 - 804

- 805 • Allows user to subscribe to specific FAQs and to be automatically notified of updates
806
- 807 4. Interfaces for Information Specialists, Knowledge Manager, and Administrators
- 808 • Is compliant with Section 508 of the Rehabilitation Act Amendments of 1998 (see
809 Section H.16).
- 810 • Is user friendly and intuitive
- 811 • Is easily configurable.
- 812 • Has the capability to compile, report, and track user feedback and customer satisfaction
- 813 • Can route user inquiries to government and/or contractor regardless of their physical
814 location for response.
- 815 • Has the capability to track the status and review of questions
- 816 • Capability to search and browse FAQ answers from multiple knowledge bases by subject
817 and response categories with results automatically ranked by relevancy, usefulness, or
818 other appropriate methods selected by the Government.
- 819 • Supports multiple languages.
- 820 • Includes spell checker for verifying content of replies and new FAQ answers
- 821 • Has the capability of accessing or integrating with the knowledge base
- 822 • Has the capability to group two or more FAQ databases
- 823 • Accommodates multiple browsers, including at a minimum: MS Internet Explorer, 5.0
824 and higher; Netscape 4.7 and higher
- 825 • Includes help files that explain system functions
- 826
- 827 5. Administration and Notification
- 828 • Provides both remote and onsite access to authorized personnel to all administrative
829 functions, as appropriate
- 830 • Allows information in the FAQ knowledge base to be posted and/or modified in real time
- 831 • Allows government and/or contractor personnel to review and/or respond to user
832 inquiries in real time
- 833 • Can notify knowledge managers by e-mail about expiring or outdated content, based on
834 previously specified review dates
- 835 • Can notify end users of question or topical category updates
- 836
- 837 6. Content Management
- 838
- 839 Knowledge Base(s)
- 840 • Stores each FAQ and its corresponding answer as a separate record with a unique ID
841 number
- 842 • Has a provision for each FAQ to be tagged with meta-data, which might include subject
843 keywords, ownership, last updated date, expiration date, and other information
- 844 • Allows content managers to automate content management tasks, which might include
845 reviewing, archiving, and purging
- 846 • Can leverage data in existing pages or files and work with existing applications through
847 data-mining to avoid the necessity of reentering existing data
- 848 • Allows flexibility and scalability in constructing categories and subcategories of FAQ
849 topics

850 • Does not require knowledge of HTML, database programming, or other specialized skills
851 in order to add to or update knowledge base

852 • Includes a customizable review and authorization process for new or updated FAQs
853

854 Presentation (publishing to web, forwarding, printing, etc.)

855 • Is capable of presenting FAQs and their corresponding answers in a format that can be
856 indexed by search engines (internal or external) without affecting performance metrics

857 • Can search, select, and sort FAQ answers from within separate knowledge bases

858 • Enables knowledge managers to choose which knowledge bases will be included in each
859 topic query

860 • Allows knowledge managers to choose from multiple customizable FAQ ranking
861 methods, including manual ranking to increase or decrease a particular FAQ's
862 prominence relative to others

863 • Uses "Self-learning" technology to analyze, organize, and present information in ways
864 that enhance the user's satisfaction

865 • Has the capability to analyze a query or series of queries and recommend related
866 knowledge base items

867 • Allows the content of the knowledge base to be published to multiple web sites, each
868 with a customizable "look and feel" for different audiences, or for multiple audiences on
869 a single site

870 • Can provide relevant attachments for download from public web sites with FAQs or
871 responses

872 • Can display last update for each FAQ, if required

873 • Permits users to print individual FAQ and/or entire list of FAQs by subject category

874 • Can "remember" what the users have already seen over a single session, so they aren't
875 sent back to an answer they have already rejected

876 • Is able to interpret ambiguous queries by being "context sensitive" to which page or
877 section the user is viewing when the question is asked

878

879 Query Management

880 • Provides time/date stamping and user-friendly tracking numbers for all information
881 requests

882 • Allows multiple sub-tracking numbers to be assigned to a single request if required for
883 internal or external purposes

884 • Enables end users to update their requests

885 • Allows end users to save tracking numbers, track requests and maintain a history of
886 requests and responses

887 • Uses "intelligent issue recognition" to analyze misspellings, or to detect multiple
888 unrelated questions contained in a single query

889 • Can suggest answers to unstructured (ordinary e-mail) and structured (web form) e-
890 mailed questions

891 • Allows knowledge managers to build in "conditional routing" (if then) rules to allow
892 frequently misdirected questions to be forwarded to other offices or agencies

893

894 Response Management

- 895 • Includes an automated query acknowledgement mechanism with a choice of
- 896 customizable response messages
- 897 • Provides automated, customizable standard text response elements (opening headers,
- 898 closing statements, “boilerplate” language) for constructing replies or new FAQ answers
- 899 • Allows FAQ answers to be forwarded to government and/or contractor personnel whether
- 900 inside or outside the system
- 901 • Has a provision for sending internal notes, instructions and attachments before a response
- 902 is sent
- 903
- 904 7. Management and Reports
- 905 • Reports can be accessed via the web and/or e-mail
- 906 • Reports can be created on a scheduled or on-demand basis
- 907 • Authorization to view reports can be limited through an access control system
- 908 • A wide range of metrics can be recorded and displayed, including, but not limited to:
- 909 support staff and administrator performance and productivity; knowledge base usage;
- 910 query completion time; user satisfaction
- 911 • Offers preformatted reports, as well as reports that can be customized for a variety of
- 912 management purposes, i.e. sorting by state, sorting by Information Specialist, content
- 913 area, etc.
- 914 • Has the flexibility to allow selected individual FAQs to be counted in separate statistics
- 915 reports, if required
- 916 • Is able to consolidate queries that are essentially the same (e.g. ADA, American with
- 917 Disability Act, Disability law) for measuring purposes
- 918
- 919 8. Implementation, Training and Customer Support
- 920 • Service must be implementable within 45 calendar days from the date of service request
- 921 of the hosted FAQ service.
- 922 • Must provide administrator training and knowledge worker support staff training
- 923 • Must provide 24 x 7 customer service support to administrative users
- 924 • Must provide system implementation support services
- 925 • Must include a test suite to allow verification of compliance with Section 508 of the
- 926 Rehabilitation Act Amendments of 1998 and browser and operating system compatibility
- 927
- 928 9. Data Sharing
- 929 • Capability of sharing FAQ answers with other automated and customer support services
- 930 • Output is in Extensible Markup Language (XML) code to maximize data sharing with
- 931 other systems
- 932 • Can interface with existing and possible future systems (including wireless, voice
- 933 activated, etc.)
- 934
- 935

936 The Government intends to regularly harvest some or all of the information contained in the
937 Contractor’s FAQ knowledge bases through the Firstgov.gov search service or other agency
938 search services. The Contractor shall allow these Government search services to access and
939 retrieve relevant content of the FAQ knowledge bases and/or provide the capability to publish

940 the data to a designated Government or contractor system using standards and access/replication
941 schedules that are mutually acceptable to the Contractor and Government.

942

943 C.3.1.10.1 FAQ Guidelines

944 The hosted FAQ service may be ordered with other Attended Services described in Section C.3.2
945 of this SOW or as a stand-alone service. If the Contractor is tasked to develop and administer
946 the FAQ service, the Contractor shall conform to the following FAQ implementation guidelines:

947

948 1. All answers to FAQ prepared by the Contractor shall be self contained and written in
949 easy to read and understand language.

950 2. All acronyms/abbreviations used and associated descriptions must be included within
951 each answer

952 3. URLs in all FAQ answers shall be written out in answer text (not embedded)

953 4. Limit screen to 1 per answer (break content into usable chunks)

954 5. Link to other answers rather than refer to a number or position on the page

955 6. Last update date included with each answer

956 7. Include an identification number for each FAQ

957

958 C.3.2 Attended Services

959 The Contractor shall provide accurate, timely, complete, and courteous responses to all customer
960 inquiries. The Contractor shall provide qualified staff to support the work types identified in
961 Section C.2.1.4 of the SOW.

962

963 C.3.2.1 Responding to Telephone Inquiries

964 The Contractor shall provide qualified staff and required equipment and services to respond to
965 telephone and TDD/TTY inquiries in accordance with performance parameters and instructions
966 provided by the Government in individual task orders. The tasks to be performed include, but
967 are not limited to, the following:

968

969 Accurately responding to inquiries in a professional and courteous manner. These inquiries may
970 be in the form of telephone and TDD/TTY calls. When necessary, transferring or referring the
971 inquiries to the appropriate agency for response.

972

973 Conducting research of Government-approved sources of information to prepare responses to
974 inbound inquiries and developing appropriate responses accordingly.

975

976 Capturing and tracking information related to inbound inquiries including date and time of
977 receipt, nature of inquiry, customer identity when appropriate, information requested,
978 disposition, response date, and any fulfillment actions for tracking, quality control, analysis,
979 and/or follow-up action in the Contractor-provided case management tool.

980

981 When necessary, forwarding recorded information via telephone, facsimile, or e-mail or other
982 electronic transmission to the appropriate authority for further processing.

983

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984 Sending the requested information to a customer through the postal services, E-mail or facsimile,
985 whichever is the most efficient delivery method and satisfies the customer.

986
987 **C.3.2.2 Outbound Calling Services**

988 The Contractor shall provide qualified staff and required equipment and services to perform
989 outbound calling to selected customers in accordance with performance parameters and
990 instructions provided by the Government in individual task orders. The tasks to be performed
991 include, but are not limited to, the following:

992
993 Performing outbound callbacks in response to requests for callback service from callers.

994
995 Performing outbound callbacks to selected customers in order to follow-up with questions and/or
996 issues that cannot be resolved during the initial contact, to verify problem resolution, or to
997 measure customer satisfaction as approved by the Government.

998
999 Launching outbound calls to Government agencies for purposes of relaying customer
1000 information, obtaining information to customer questions and/or issues that cannot be resolved
1001 during the initial contact, or verifying problem resolution.

1002
1003 Performing outbound calls in support of customer surveys, program and/or product promotions,
1004 product recalls, sales and marketing, and special events.

1005
1006 Performing outbound calls in response to inquiries from callers using TDD/TTY devices.

1007
1008 **C.3.2.3 Responding to Postal Mail Inquiries**

1009 The Contractor shall provide qualified staff, and required equipment, services, and supplies to
1010 respond to written inquiries received via postal mail in accordance with business rules,
1011 guidelines, and performance parameters specified by the Government in individual task orders.
1012 The tasks to be performed include, but are not limited to:

1013
1014 Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
1015 more efficient and satisfies the inquirer.

1016
1017 When requested by the Government, converting the inquiry documents to electronic format to
1018 facilitate routing, and response and records management.

1019
1020 Conducting research of Government-approved sources of information to prepare responses to
1021 written inquiries and developing appropriate responses accordingly.

1022
1023 Recording and tracking data/information related to the inquiries including date and time of
1024 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
1025 actions for tracking, quality control, analysis, and/or follow-up action in the Contractor-provided
1026 case management tool.

1027
1028 When necessary, forwarding the inquiries to the appropriate authority for further processing.

1029
1030 Sending the requested information to a customer through the postal services, E-mail or facsimile
1031 whichever is more efficient and satisfies the inquirer.

1032
1033 Reviewing to ensure that outgoing responses are accurate and complete in accordance with
1034 business rules and guidelines established by the Government.

1035
1036 The Contractor shall respond to postal mail inquiries within the designated time frame specified
1037 by the Government. The Contractor shall collect and deliver written correspondence in
1038 accordance with format, process, and procedures established by the Government. Unless
1039 directed by the Government, the written response may not identify the Contractor by name
1040 unless that is the subject of the inquiry. If the information needed for the response is not
1041 available within a designated time frame, the Contractor shall call the inquirer or send an interim
1042 response stating when a final response may be expected. A form letter is acceptable. The
1043 Contractor may elect to use a government-approved pseudonym rather than the name of an
1044 employee as the signer of the letter.

1045
1046 C.3.2.4 Responding to E-Mail Inquiries

1047 The Contractor shall provide qualified staff and required equipment and services to respond to
1048 written inquiries received via e-mail. Responses shall be prepared in accordance with business
1049 rules, guidelines, and performance parameters specified by the Government in individual task
1050 orders. The tasks to be performed include, but are not limited to:

1051
1052 Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
1053 more efficient and satisfies the inquirer.

1054
1055 Conducting research of Government-approved sources of information to prepare responses to
1056 written inquiries and developing appropriate responses accordingly.

1057
1058 Recording and tracking data/information related to the inquiries including date and time of
1059 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
1060 actions for tracking, quality control, analysis, and/or follow-up action in the Contractor-provided
1061 case management tool.

1062
1063 When necessary, forwarding the inquiries to the appropriate authority for further processing.

1064
1065 Sending the requested information to a customer through the postal services, E-mail or facsimile
1066 whichever is more efficient and satisfies the inquirer.

1067
1068 Reviewing to ensure that outgoing responses are accurate and complete in accordance with
1069 business rules and guidelines established by the Government. If the initial response is found to be
1070 erroneous by the Contractor and/or the Government and further action is needed to inform the
1071 inquirer, the Contractor shall send a corrected response immediately to the inquirer.

1072
1073 The Contractor shall respond to e-mail inquiries within the designated time frame specified by
1074 the Government. The Contractor shall prepare the response in accordance with business rules it

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1075 has developed in conjunction with the Government and/or with other guidelines provided by the
1076 Government. A preformatted response or telephone response, if such is the most efficient and
1077 satisfies the inquirer, is acceptable.

1078
1079 The Contractor shall provide the required support to identify, record, and track the nature and
1080 volume of e-mail inquiries, and to measure the quality and timeliness of the response process
1081 from time of receipt to completed response. The Contractor shall accomplish this goal by
1082 tracking all incoming and outgoing e-mail messages and monitor the processing activities to
1083 determine volume, nature and disposition of the inquiries. The Contractor shall benchmark the
1084 response process in its entirety to determine processing time of various types of e-mail inquiries
1085 and the skill sets required for responding to different types of inquiries and include the
1086 benchmark results in the requisite management reports. The Contractor shall monitor the
1087 performance of its personnel to ensure productivity and quality standards, as specified in
1088 individual task orders, are met.

1089
1090 The Contractor shall provide ongoing support to refine business rules and prepare preformatted
1091 responses for use in responding to public inquiries in the most efficient and effective manner.
1092 The Contractor shall retain a history of agency contacts, including agency name and address,
1093 contact name, address, phone number, fax number, e-mail address, agency web site URL(s), and
1094 dates of previous contacts and nature of communications.

1095
1096 The Contractor shall utilize auto-filtering, auto-response, and auto-suggestions where appropriate
1097 to identify and populate appropriate e-mail responses to customers. The Contractor shall ensure
1098 that all outgoing e-mail responses are accurate and complete.

1099
1100 If a direct response to the e-mail inquiry cannot be provided, the Contractor shall forward the e-
1101 mail message to the appropriate Federal agency(ies) for direct response based on guidelines
1102 provided by the Government. The Contractor shall maintain a system to track the status of all
1103 inquiries directed to other agencies for response, including updates on final disposition of
1104 inquiries.

1105
1106 **C.3.2.5 Responding to Facsimile Inquiries**

1107 The Contractor shall provide qualified staff and required equipment and services to respond to
1108 written inquiries received via facsimile. Responses shall be prepared in accordance with
1109 business rules, guidelines, and performance parameters specified by the Government in
1110 individual task orders. The tasks to be performed include, but are not limited to:

1111
1112 Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
1113 more efficient and satisfies the inquirer.

1114
1115 Conducting research of Government-approved sources of information to prepare responses to
1116 facsimile inquiries and develop appropriate responses accordingly.

1117
1118 Recording and tracking data/information related to the inquiries including date and time of
1119 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment

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1120 actions for tracking, quality control, analysis, and/or follow-up action in the Contractor-provided
1121 case management tool.

1122
1123 When necessary, forwarding the inquiries to the appropriate authority for further processing.

1124
1125 Sending the requested information to a customer through the postal services, E-mail or facsimile
1126 whichever is more efficient and satisfies the inquirer.

1127
1128 Reviewing to ensure that outgoing responses are accurate and complete in accordance with
1129 business rules and guidelines established by the Government.

1130
1131 The Contractor shall respond to facsimile inquiries within the designated time frame specified by
1132 the Government in individual task orders. Unless directed by the Government, all facsimile
1133 inquiries shall be received and stored electronically to facilitate distribution and processing. The
1134 Contractor shall convert and store incoming facsimile inquiries to a commonly used electronic
1135 format to facilitate distribution and processing. Unless directed by the Government, facsimile
1136 inquiries referred to other federal agencies for direct response shall be transmitted as e-mail
1137 attachments. When referring the inquiry, the Contractor shall note in the e-mail that the original
1138 inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone,
1139 facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies
1140 the inquirer. The Contractor shall retain a copy of all responses for record keeping. A
1141 preformatted or telephone response, if such is the most efficient and satisfies the inquirer, is
1142 acceptable.

1143
1144 The Contractor shall provide the required support to identify, record, and track the nature and
1145 volume of facsimile inquiries, and to measure the quality and timeliness of the response process
1146 from time of receipt to completed response. The Contractor shall accomplish this goal by
1147 tracking all incoming and outgoing facsimile messages and monitor the processing activities to
1148 determine volume, nature and disposition of the inquiries. The Contractor shall benchmark the
1149 response process in its entirety to determine processing time of various types of facsimile
1150 inquiries and the skill sets required for responding to different types of inquiries and include the
1151 benchmark results in the requisite management reports.

1152
1153 C.3.2.6 Interactive Web-Based Services

1154 The Contractor shall provide qualified staff, equipment and services to support interactive
1155 Internet-based services, such as web chat, instant messaging, and co-browsing. The tasks to be
1156 performed include, but are not limited to those identified for Attended Services described in
1157 Section C.3.2.1 through C.3.2.5 of this SOW.

1158
1159 C.3.3 Other Support Services

1160
1161 C.3.3.1 Fulfillment Services

1162 The Government currently provides, and intends to continue to provide, high volume fulfillment
1163 services to other Government agencies through an existing arrangement with the Government
1164 Printing Office's Pueblo operations. However, there will be instances when an agency may

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1165 require fulfillment services that can be performed more efficiently by the Contractor. When
1166 requested by the Government, the Contractor shall provide a complete fulfillment solution for
1167 purposes of providing customers with printed information. This information may be downloaded
1168 from sources including the Internet and/or other appropriate database applications (e.g., agency
1169 web site, Contractor-provided knowledge database). The tasks to be performed include, but are
1170 not limited to the following:

- 1171
- 1172 1. Retrieving the document from appropriate sources and, if necessary, printing the
1173 document for distribution.
 - 1174
 - 1175 2. Developing and/or implementing application(s) to track the print fulfillment status of
1176 all required records and files as specified.
 - 1177
 - 1178 3. Ensuring that tracking information is recorded and made available upon request as part
1179 of the Contractor-provided case management tool.
 - 1180
 - 1181 4. Ensuring the system can accept multiple requests from a customer made during any one
1182 phone call or written inquiry.
 - 1183
 - 1184 5. Providing relevant documents to customers through the postal services, E-mail or
1185 facsimile, whichever is the most efficient and satisfies the inquirer.
 - 1186

1187 The Contractor shall be responsible for supplying all printing equipment and supplies, mailing
1188 supplies, including envelopes and postage, and performing all fulfillment functions, such as
1189 addressing, insertion, and posting. The Government will provide the materials to be mailed or
1190 provide the sources where the materials can be obtained. Unless directed by the Government, all
1191 materials are to be sent via the least expensive class of U.S. Mail it can qualify for. Postage
1192 incurred by the Contractor for fulfillments will be reimbursed by the Government as Other Direct
1193 Charges (ODC).

1194

1195 C.3.3.2 Transcription Service

1196 The Contractor shall provide qualified staff and equipment to transcribe messages recorded on
1197 voice mail and other recorded services. The Contractor shall perform transcription service on an
1198 as needed basis as specified in individual task orders (e.g., daily, weekly, monthly)

1199

1200 C.3.3.3 Language Translation Services

1201 The Contractor shall provide language translation services on an as-needed basis to allow non-
1202 English speaking customers the ability to communicate their needs to the Government. This
1203 capability shall include, but not be limited to:

- 1204
- 1205 1. Supporting over-the-phone, e-mail, and fax language translation capabilities.
 - 1206
 - 1207 2. Supporting for multiple languages, including English and Spanish. (Note: Agency
1208 language requirements may be extensive and will vary widely from agency to agency.

1209 The specific languages to be supported by the Contractor will be identified in task
1210 orders issued by the Government.)

1211
1212 3. Providing a data collection tool to evaluate the need and usage of language translation
1213 services.

1214
1215 C.3.4 Directory Listing Services

1216 The Contractor shall arrange for the listing of public contact numbers (both voice and TTY) and
1217 website URLs to appear in selected telephone directories, as specified in task orders issued by
1218 the Government. The Contractor shall ensure that contact numbers and web site URL appear in
1219 the “U.S. Government” sections of the Blue or White Pages. The contact numbers and web site
1220 URL shall be in bold type where that is available.

1221
1222 Offerors are hereby advised that GSA currently manages a Government-wide Blue Pages project
1223 to provide a more centralized and citizen friendly approach of listing government agency
1224 telephone numbers in certain Blue and Yellow Pages directories. For those directories that are
1225 not covered under the Blue Pages project, the Contractor shall provide for the listing of the
1226 telephone number, the associated web site URL, and the location address of each agency that
1227 serves the area covered by the applicable Blue and Yellow Pages directories. The Contractor
1228 shall coordinate with designated Government representatives to avoid duplication of listing. The
1229 costs of these listing shall be borne by the Contractor. The Contractor shall report these costs to
1230 the Government for reimbursement as Other Direct Costs (ODC).

1231
1232 C.3.5 Technical and Management Services

1233 The Contractor shall provide all required technical and management services as part of the
1234 citizen inquiry response and management solution, including program management, technology
1235 management, information management, human resources management, performance
1236 management, quality assurance, security, contingency/disaster recovery, and management
1237 reports. The Contractor shall provide a tiered pricing structure for providing technical and
1238 management services commensurate with the complexity of the requirements identified in task
1239 orders issued by the Government. The tiered structure shall include a core support component
1240 and an incremental support component.

1241
1242 C.3.5.1 Core Project Management Support

1243 The core support component shall include a project management staff (e.g., Contractor's Project
1244 Manager, site manager(s), technical personnel, human resource personnel, administrative
1245 personnel, content specialists) and support services required to meet task requirements. The
1246 level of support required will be dependent on complexity of task requirements.

1247
1248 Level 1 - encompasses tasks that involve work that is low complexity in scope. These tasks
1249 generally require the recruitment and training of fewer than 10 new employees and the
1250 development and maintenance of simple scripts for automated voice response service and
1251 knowledge and/or customer databases. Training requirement of new employees is generally
1252 limited to 40 hours or less. Knowledge base and content development and maintenance, inquiry
1253 tracking and contact management, and reporting requirements are generally low.

1254

1255 Level 2 – encompasses tasks that involve work that is moderate complexity in scope. These
1256 tasks general require the recruitment and training of 25 or fewer new employees and the
1257 development and maintenance of moderately complex scripts for automated voice response
1258 service and knowledge and/or customer databases. Training requirement of new employees is
1259 generally between 40 to 80 hours. Knowledge base and content development and maintenance,
1260 inquiry tracking and contact management, and reporting requirements are moderate.

1261

1262 Level 3 – encompasses tasks that involve work that is high complexity in scope. These tasks
1263 general require the recruitment and training of 50 or fewer new employees and the development
1264 and maintenance of highly complex scripts for automated voice response service and knowledge
1265 and/or customer databases. Training requirement of new employees is generally between 80 to
1266 120 hours. Knowledge base and content development and maintenance, inquiry tracking and
1267 contact management, and reporting requirements are high.

1268

1269 Level 4 – encompasses tasks that involve work that is very high complexity in scope. These
1270 tasks generally require the recruitment and training of 100 or fewer new employees and the
1271 development and maintenance of extremely complex scripts for automated voice response
1272 service and knowledge and/or customer databases. Training requirement of new employees is
1273 generally between 120 to 160 hours. Knowledge base and content development and maintenance,
1274 inquiry tracking and contact management, and reporting requirements are very high.

1275

1276 C.3.5.1.1 Incremental Support

1277 The Contractor shall provide support to accommodate specialized and unique requirements, or
1278 new requirements added subsequent to project implementation, that require additional resources
1279 beyond those provided for under Core Project Management Support. The Contractor shall
1280 provide incremental support in the following areas:

1281

- 1282 1. Program Management
- 1283 2. Technology Management
- 1284 3. Information Management
- 1285 4. Relationship Management

1286

1287 C.3.5.2 Program Management

1288 The Contractor shall provide program management, oversight, and quality control of contact
1289 center services, systems, and components, including, but not limited to the following tasks:

1290

1291 Project management - Ensure the successful implementation, operation, and management of the
1292 inquiry response and management solution as prescribed in this Statement of Work and task
1293 orders issued by the Government.

1294

1295 Oversight - Serve as the single point of contact to: assist in engineering, planning, and
1296 administrative functions as needed to meet task order requirements; coordinate activities among

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1297 government offices, business partners, contractors, and other relevant organizations; resolve
1298 questions or issues related to hardware, software, communications, applications, and programs,
1299 including dispute resolution with service providers; escalate unresolvable technical issues to the
1300 appropriate government official for final resolution; and develop resolution mechanisms to
1301 resolve technical issues and problems among contractors to minimize conflict and delay of
1302 services.

1303
1304 Quality control - Generate Government-approved management reports; develop and execute
1305 program deliverables; perform capacity planning, staff scheduling and workload projections
1306 based on performance and encounter metrics/measurements; attend scheduled and ad hoc
1307 meetings/discussions on an as needed basis; analyze information received through performance
1308 of customer services and support tasks to determine system, procedural, or other program related
1309 problems; communicate results of the analysis to the Government; prepare briefings, decision
1310 papers, and other documents as specified by the Government.

1311
1312 Training – Provide training to government project personnel on the use of project management
1313 and support tools as required to meet task order requirements.

1314
1315 C.3.5.3 Technology Management

1316 The Contractor shall provide all required technology management services to effectively plan,
1317 implement, operate and manage the contact center solution, including infrastructure and network
1318 management support.

1319
1320 C.3.5.3.1 Infrastructure Management

1321 The Contractor shall plan, implement, operate, maintain, and manage the contact center
1322 infrastructure, including, but not limited to:

1323
1324 Site - Requirements definition and validation, selection, design, layout, accessibility,
1325 accommodation, operation, management, maintenance, security, and disaster recovery.

1326
1327 Hardware, software, and telecommunications equipment and services - Requirements definition
1328 and validation, integration planning, design, configuration, selection, acquisition, installation,
1329 programming, initialization, testing, performance verification and acceptance, monitoring,
1330 analysis, administration, management, maintenance, security, and disaster recovery.

1331
1332 C.3.5.3.2 Network Management

1333 The Contractor shall provide network engineering and management services, including, but not
1334 limited to the following:

- 1335
1336 1. Provide systems design, integration, implementation, management, and quality
1337 assurance support for all networks, including the Internet.
1338
1339 2. Recommend, process, coordinate, and monitor telecommunications orders, serving as a
1340 liaison with telecommunications vendors.

1341

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- 1342 3. Analyze traffic and usage data to determine network performance levels. Recommend
1343 improvements in network design in accordance with customer service standards and
1344 cost efficiencies.
1345
- 1346 4. Perform real-time monitoring of call delivery.
1347
- 1348 5. Provide optimized call routing design based on availability of network-based or
1349 systems-based call routing capabilities.
1350
- 1351 6. Provide optimized automated announcement system design based on availability of
1352 network-based and systems-based automated announcement capabilities.
1353
- 1354 7. Monitor network performance and identify network problems and outages; compile and
1355 maintain a log of problems, outages, service interruptions, and unauthorized access;
1356 notify designated Government personnel promptly of any problems, service disruptions,
1357 and unauthorized access.
1358
- 1359 8. Activate and oversee emergency/disaster recovery activities in accordance with
1360 Contingency/Disaster Recovery Plan.
1361

1362 C.3.5.4 Information and Relationship Management

1363 The Contractor shall provide information and relationship management services inclusive of
1364 knowledge management, inquiry tracking, customer/public relations management, web site
1365 coordination, and shall maintain filing systems that facilitate project oversight.
1366

1367 C.3.5.4.1 Knowledge Management

1368 The Contractor shall develop, implement, administer and manage the required knowledge
1369 management system to effectively meet task order requirements. The Contractor shall update,
1370 revise, and otherwise maintain currency and accuracy of the knowledge base as new information
1371 becomes available. The Contractor shall incorporate best practices in system design to minimize
1372 the burden of maintaining the required knowledge base and maximize its effectiveness. The
1373 Contractor shall develop systematic approaches to finding, understanding, and using relevant
1374 knowledge to achieve task objectives, including, but not limited to, reviewing newspapers, the
1375 Internet, publications, and other information resources. The knowledge management system
1376 shall be accessible to all Contractor personnel. The Contractor shall also provide access to the
1377 system via the Internet to designated Government employees at remote locations. The number of
1378 individuals to be provided access will be specified in individual task orders. Access to the
1379 knowledge databases shall be limited based on the individual user's program support needs and
1380 level of authority, and shall be restricted only to authorized personnel.
1381

1382 The Government will brief the Contractor on the relevant programs and services and current
1383 business processes, and provide the initial content data to be recorded in the knowledge
1384 management system. Subsequent to the initial effort, the Contractor shall provide services,
1385 including, but not limited to:
1386

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1. Collect, organize, select, record, verify, update, and present relevant information in the knowledge management system on an ongoing basis.
 2. Update and manage the content of the knowledge management system on an on-going basis.
 3. Develop a procedure to ensure agency concurrence on all updates and information dissemination from the knowledge management system to any other media.
 4. Conduct research of agency-approved sources of information and develop appropriate responses to customer inquiries.
 5. Organize information into suitable means for easy access by all contact center employees, Government employees, and/or customers.
 6. Analyze usage data of the knowledge management system to determine trends and patterns.
 7. Collect, organize, and prepare information and answers to frequently asked questions for dissemination using automated systems, such as interactive voice response, automatic fax-back, information search and retrieval systems, and web-based systems.
 8. Ensure that, where applicable, additions, changes, or deletions of materials from the knowledge database are carried over to corresponding IS training and support materials.

1412 C.3.5.4.2 Inquiry Tracking

1413 The Contractor shall develop, implement, administer and manage the required inquiry tracking
1414 system to effectively track the status and disposition of all inquiries as required in individual task
1415 orders. The Contractor shall incorporate best practices in system design to minimize, to the
1416 extent possible, keystrokes or data entry required for recording inquiry tracking and management
1417 data (i.e., use of preformatted data entry forms with pull-down and/or multiple choice selection
1418 items). This system shall be accessible to Contractor ISs and authorized Government employees
1419 via Internet access from remote locations. Access to the inquiry tracking and management
1420 system shall be limited based on the individual agency program support needs and level of
1421 authority, and shall be restricted only to authorized personnel. The Contractor shall obtain
1422 Government approval to ensure usefulness and efficiency in the design of any screens related to
1423 inquiry tracking and management.

1424
1425 The Contractor-provided inquiry tracking and management system shall provide functionality
1426 including, but not limited to the ability to:

- 1427
1428
1429
1430
1431
1432
1. Capture, record, and document all customer inquiries and responses made to those inquiries whether via telephone, facsimile, E-mail, written correspondence, or any other communication channels supported. This includes date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow-up action.

1433 The system shall also identify whether the inquiries are resolved by the Contractor
1434 or forwarded to Government personnel for resolution.

1435

1436 2. Retain a history of customer inquiries, interactions, and responses.

1437

1438 3. Support reporting requirements that include data and management information
1439 analysis. Incorporate multiple sorting and reporting alternatives including, but not
1440 limited to: by case number, by caller name, by applicant name, by date, by
1441 disposition code, by inquiry type, by program, by method of inquiry receipt, by
1442 method of inquiry response, by frequently asked question (FAQ).

1443

1444 4. Provide the Government with the capability and support required to ensure
1445 uninterrupted access to the application outside of scheduled system maintenance
1446 periods.

1447

1448 C.3.5.4.3 Automated Voice Response Development and Maintenance

1449 The Contractor shall be responsible for call flow design and development and maintenance of the
1450 information content and audio messages used for all automated voice response services, such as
1451 IVR, voice recognition, and text-to-speech services. The Contractor shall provide analysis and
1452 ongoing support for script design and optimization, call flow analyses, service request processing
1453 and coordination, if required, and script management. The Contractor shall develop and
1454 regularly maintain messages for the automated voice response services in keeping with the
1455 current informational needs of the callers. The Contractor shall work closely with the
1456 Government to develop the automated responses. The Government shall approve all automated
1457 responses before they are implemented. The Contractor shall ensure timely updates of all
1458 automated messaging in accordance with the turnaround timeframes established by the
1459 Government. In general, Contractor shall post changes within 24-hours of receipt for all non-
1460 emergency information and within 2-hours of receipt for emergency notices. Support for
1461 emergency postings and updates, as determined by the requesting agency, is required on a 24
1462 hour a day, 7 day a week basis.

1463

1464 C.3.5.4.4 Customer Coordination Support

1465 The Contractor shall provide required customer coordination support to meet task order
1466 requirements, including, but not limited to the following tasks:

1467

1468 1. Coordinate with Government agency representatives, business partners, contractors,
1469 and other relevant individuals or organizations to discuss implementation,
1470 operational, and programmatic issues.

1471

1472 2. Provide planning and coordination support to implement and manage the Directory
1473 Listing Service.

1474

1475 C.3.5.4.5 Website Content Coordination

1476 The Contractor shall share relevant inquiry data and trends with agency web support team to
1477 ensure that information provided at the agency websites and the contact center is accurate, up-to-
1478 date, and meets the needs of agency customers.

1479

1480 C.3.5.4.6 Filing System

1481 The Contractor shall establish and maintain a filing system that shall allow Government
1482 oversight of, at a minimum, written and electronic correspondence, employee (but not
1483 individual) performance, work stoppages, agency liaison, hardware and software maintenance,
1484 database maintenance, call data, and contract reports.

1485

1486 C.3.5.5 Human Resources Management

1487 The Contractor shall perform all functions associated with the recruitment, training, and retention
1488 of qualified personnel needed to meet task requirements. The Contractor shall schedule and
1489 manage the contact center workforce to ensure adequate staffing is available to meet workload
1490 requirements.

1491

1492 C.3.5.5.1 Recruitment and Retention

1493 The Contractor shall develop and implement an effective program to ensure timely recruitment
1494 and long term retention of qualified personnel to support task order requirements. At a
1495 minimum, the program shall address corporate human resources support, recruitment sources,
1496 testing and qualification processes, retention techniques and incentives, and employee
1497 satisfaction.

1498

1499 C.3.5.5.2 Workforce Management

1500 The Contractor shall be responsible for analyzing historical work volume, employee availability
1501 and schedule preferences, and trends to accurately forecast and schedule staffing resources to
1502 meet fluctuating workload requirements for all communications channels. The Contract shall
1503 employ proven best practices management approaches to ensure optimum utilization of available
1504 staffing resources to meet service objectives.

1505

1506 C.3.5.5.3 Training

1507 The Contractor shall develop and implement a comprehensive training program that shall ensure
1508 that contact center staff provides superior levels of customer service across all customer access
1509 channels. Training courses shall provide participants the opportunity to develop skill levels in
1510 comprehensive customer contact and subject knowledge, and shall be provided through both
1511 classroom instruction and technical on-the-job training.

1512

1513 On a task order basis, the Government and the Contractor shall work together to jointly develop
1514 initial training. The Government will provide content-unique and organization-specific training
1515 as part of initial training. The Contractor shall provide customer service skills, equipment,
1516 database(s), and policy/procedure training. The duration of the training will vary depending on

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1517 the task requirements. The training shall be both classroom and hands-on, computer-based and
1518 should include, at a minimum, working with databases and applicable Government furnished
1519 systems. The training shall be conducted at the Contractor's facility, and the Contractor shall
1520 bear all related costs.

1521
1522 C.3.5.5.3.1 Training Curriculum

1523 Contractor shall construct training coursework and materials to address specific learning
1524 objectives of various groups. All training coursework and materials are to be approved by the
1525 Government prior to presentation to contractor personnel. The training curriculum shall include
1526 the following minimum components:

1527
1528 ISs - Training programs shall be developed from the premise that all new staff have little or no
1529 contact center experience. The courses shall provide participants the opportunity to develop skill
1530 levels in telephone etiquette, listening, problem-solving, verbal and written communication,
1531 managing stress, working in teams, and other course modules related to foundational customer
1532 contact and human interaction skills. The Contractor shall ensure that ISs are adequately trained
1533 in the handling of calls from: non-English speaking individuals; individuals who are hearing,
1534 speech, or visually impaired; individuals with low literacy ability; irate and/or abusive callers;
1535 callers in crisis situations; and any other caller diversity issues that may be identified. In
1536 addition, training shall be developed to educate ISs in the terminology, services, laws and
1537 regulations (e.g., Privacy Act), systems, and protocols specific to the task requirements.

1538
1539 Leadership - Courses shall provide participants with an overview of project goals and objectives,
1540 performance goals (e.g., quality, and productivity) and contact center management (e.g.,
1541 operations, and service level). Participants shall be provided the opportunity to develop skills in
1542 coaching, team-building, time management, problem solving, and other course modules related
1543 to human performance management. In addition, training shall be developed to educate the
1544 leadership team in the terminology, services, systems, and protocols specific to the task
1545 requirements.

1546
1547 Support Personnel - Courses shall provide participants with an overview of project goals and
1548 objectives. Participants shall be provided the opportunity to develop specific skills relating to
1549 their areas of expertise including, but not limited to, supervision, training, quality, service level
1550 management, and technical support. In addition, training shall be developed to educate support
1551 personnel in the terminology, services, and protocols specific to the task requirements.

1552
1553 Contractor shall also include enhanced training modules to inform staff of Government
1554 organizational structure and agency missions, applicable laws and regulations, new or modified
1555 programs and/or service offerings specific to the task requirements.

1556
1557 C.3.5.5.3.2 Training Facilities

1558 Contractor shall provide all training facilities, computer terminals (including desktop content,
1559 functionality, and connectivity), audio and visual equipment, and other materials/supplies
1560 necessary for training as well as appropriate workspace for students. The Contractor shall design

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1561 the training facilities to provide training in an effective and efficient manner. The Contractor
1562 shall provide the storage space for all course materials and references.

1563

1564 C.3.5.5.3.3 Instructor and Classroom Criteria

1565 The Contractor shall provide certified instructors to deliver all training provided under this
1566 contract. The training is to be provided at Contractor-provided facilities that are designed for
1567 optimum learning with effective student-to-instructor ratio and class size limits.

1568

1569 Government personnel will be available during start-up to provide content knowledge training
1570 for the start-up ISSs and/or conduct train-the-trainer style learning sessions with Contractor's
1571 training instructions for course modules. Additionally, the Government may make personnel
1572 available to provide initial and/or regularly scheduled (e.g., biannual) task-specific training
1573 sessions with Contractor's staff.

1574

1575 C.3.5.5.3.4 Course and Reference Materials

1576 The Contractor shall develop the course materials based on relevant information and materials
1577 provided by the Government, including but not limited to, program background, laws and
1578 regulations (e.g., Privacy Act), services, work types, policies and procedures, and related
1579 systems. Specific materials to be provided will be included in individual task orders. Contractor
1580 shall develop or revise training materials as necessary to accommodate such changes, keeping all
1581 training materials up-to-date for the duration of the contract. All training coursework and
1582 materials are to be approved by the Government prior to presentation to contractor personnel.

1583

1584 Contractor shall ensure that updates to training materials are carried over to applicable ancillary
1585 reference materials, job aides and supporting processes inclusive of contact center operations,
1586 quality assurance, and information systems (e.g., Contractor-provided knowledge database).

1587

1588 Prior to task implementation, Contractor must provide the Government with a copy of task-
1589 specific training materials for review and approval and with a copy of all other training materials
1590 to be delivered under a specific task order for review only.

1591

1592 C.3.5.5.3.5 Reporting and Record Keeping

1593 The Contractor shall maintain a comprehensive list of contact center employees who have
1594 received training and/or obtained certification, including the frequency of training, types of
1595 training, and results of training. The Contractor shall maintain copies of all training records and
1596 reports for the duration of the contract.

1597

1598 C.3.5.5.3.6 Training Metrics and Analysis

1599 The Contractor shall provide training metrics and analysis, including, but not limited to the
1600 following tasks:

1601

1602 Measure IS classroom training performance by a combination of written tests and job-simulated
1603 exercises at the level of baseline performance goals for new ISs and target performance goals for
1604 experienced ISs.

1605

1606 Analyze the results of IS training performance measures.

1607

1608 Measure training effectiveness and performance of the instructor(s) by third party analysis or
1609 student survey.

1610

1611 Revise the training program based on the results of IS and instructor performance metrics,
1612 focusing on those ISs for whom additional/modified training may be indicated.

1613

1614 C.3.5.6 Performance Management

1615 The Contractor shall deliver services in accordance with the performance standards specified in
1616 each task order. The Contractor shall develop the required plans, procedures, methodologies, and
1617 tools, and perform the planning, oversight, and management functions to ensure that all service
1618 delivery performance standards specified in the task order are met.

1619

1620 C.3.5.6.1 Service Level Management

1621 The Contractor shall develop, implement, and maintain a service level management plan that
1622 incorporates both strategic and tactical real-time service level considerations. At a minimum, the
1623 plan shall address processes, methodologies, and tools for workload forecasting and
1624 management, IS scheduling, service recovery (from system failures, disasters, etc.), problem
1625 identification and resolution, problem notification, and contingency planning and escalation.
1626 This section refers to the daily management of customer access and not catastrophic conditions
1627 that are addressed in Section C.3.5.11 of this SOW, entitled, Contingency/Disaster Recovery.

1628

1629 C.3.5.7 Quality Assurance/Quality Improvement

1630 The Contractor shall develop, implement, and manage a Quality Assurance/Quality Improvement
1631 Program to ensure that services delivered comply with the performance standards specified by
1632 the Government.

1633

1634 C.3.5.7.1 Service Monitoring and Calibration

1635 The Contractor shall provide on-site and remote service monitoring and performance analysis to
1636 support planning and operation of the contact center. Contractor shall develop a comprehensive
1637 service monitoring plan, including, but not limited to, the following components:

1638

1639 Monitoring processes - Contractor shall develop and implement a continuous performance-
1640 monitoring program to ensure that ISs are performing in accordance with the performance

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1641 standards defined by the Government as specified in individual task orders for all
1642 communications channels. Contractor shall devise methods for: capturing time, date, application
1643 name, and comments for the inquiries monitored; tracking and trending by IS, supervisor,
1644 manager, and application; reporting for training need, individual and operational performance
1645 issues, and hiring considerations; and communicating monitoring results to ISs and other
1646 operational areas within the contact center to ensure continual performance and process
1647 improvement.

1648
1649 Monitoring system - Contractor shall utilize an automated inquiry monitoring and recording
1650 system with remote access. The Government prefers the call monitoring system include both
1651 voice and data capabilities. Should data capabilities not be available, a description will be
1652 required to explain how the Contractor monitors and evaluates the accuracy of information both
1653 provided and recorded by the ISs. The Government reserves the right to remotely monitor
1654 Contractor's ISs at anytime without pre-arrangement and to contract with a third party to
1655 remotely monitor Contractor's ISs. The Government will provide input to the Contractor
1656 concerning remotely monitored inquiries.

1657
1658 Calibration - Contractor shall ensure all its quality professionals define and perceive customer
1659 interactions in the same way. Calibrated quality professionals shall monitor each full time IS
1660 assigned to specific programs a mutually agreed upon number of times and shall prorate
1661 monitoring sessions for part time employees so that they receive the same level of monitoring as
1662 do full-time employees. For each IS, quality professionals shall schedule monitoring sessions at
1663 various times of the day and various days of the week to ensure a fair representation of IS
1664 performance (e.g., monitoring back-to-back calls for a single IS would not be acceptable). The
1665 Contractor and the Government will mutually agree upon the criterion for calibration. Upon task
1666 order award, the Government and Contractor shall schedule and conduct calibration sessions to
1667 reach the acceptable criterion for calibration. The Government and Contractor will conduct
1668 calibration sessions on an ongoing basis at least once every two (2) weeks thereafter.

1669
1670 Continual process improvement - To improve operations, Contractor shall develop and
1671 implement action plans based on analysis of monitoring results. These plans shall be available to
1672 the Government for review upon request. In addition, evaluations conducted by quality
1673 professionals shall be available to the Government both in an individual and an approved
1674 consolidated report format. The Government requires that Contractor documents in detail the
1675 data, results, conclusions, recommendations, action plans, and improvement priorities identified
1676 as a result of quality monitoring.

1677
1678 Caller notification - Contractor shall ensure legal and regulatory compliance concerning
1679 notification and consent when monitoring calls for quality purposes.

1680
1681 Compliance - Contractor shall verify that call monitoring complies with all applicable Federal,
1682 State, and local laws and statues.

1683
1684 The Government will work closely with the Contractor to determine which customer calls shall
1685 be recorded for monitoring purposes.

1686

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1687 C.3.5.7.2 Effectiveness of Service Delivery

1688 The Contractor shall provide measurements and analysis of the effectiveness of service delivery
1689 including, but not limited to:

1690
1691 Accuracy of information provided - Perform regular assessments of the accuracy of information
1692 provided by ISs to the inquirers. Such assessments shall be conducted through regularly-
1693 scheduled call and other work-type monitoring. The Contractor shall report the results of the
1694 assessments to the Government in accordance with task order reporting requirements.

1695
1696 Accuracy of information recorded - Perform regular assessments of the accuracy of data and
1697 information collected and recorded by ISs. Such assessments shall be conducted through
1698 regular-scheduled call and other work-type monitoring. The Contractor shall report the results of
1699 the assessments to the Government in accordance with task order reporting requirements.

1700
1701 Customer satisfaction assessments - Design, develop, and implement customer satisfaction
1702 surveys in conjunction with Government personnel to measure the performance level of the
1703 Contractor-provided services. Obtain all appropriate approvals in compliance with Federal
1704 regulations and statutes prior to initiating any survey activities. The Contractor shall use the
1705 results of the customer satisfaction assessment to determine customer perceptions about the
1706 quality of the service delivery, IS system performance, and the overall process of service
1707 fulfillment. Contractor shall use these results to develop and implement action plans to
1708 continually improve customer satisfaction, and shall provide the results of both the survey and
1709 action plans to the Government for review upon request.

1710
1711 Employee satisfaction assessments - Develop and implement a continuous program both to
1712 monitor employee satisfaction and to determine employee perceptions about the quality of the
1713 support provided by Contractor and the operational environment. Provide the results of the
1714 assessments (including prioritized recommendations) to the Government for review upon request
1715 and cooperate with the Government to devise action plans to target any suggested improvements,
1716 including required actions, responsibilities, and timeframes.

1717
1718 C.3.5.7.3 Quality Improvement Program

1719 The Contractor shall develop, implement, and manage a Quality Improvement Plan that
1720 incorporates customer-focused initiatives into the contact center solution, including, but not
1721 limited to:

1722
1723 Compliment and complaint management - Contractor shall have an automated Compliment and
1724 Complaint Management process to capture customer service information regarding areas of
1725 service issues and customer need. Contractor shall compile and analyze such data, identifying
1726 market opportunities or opportunities for improvement where appropriate, and reporting such
1727 information to the Government on a monthly basis.

1728
1729 Employee suggestions - Contractor shall conduct regular surveys to collect ideas from ISs for
1730 improving customer satisfaction. This input shall be provided to the Government on a monthly
1731 basis. The Government will use this information in their efforts to improve customer

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1732 satisfaction. For those areas related to Contractor's performance, Contractor shall develop and
1733 implement action plans to continually improve customer satisfaction and shall make these plans
1734 available to the Government upon request.

1735
1736 External operational assessments - Contractor shall permit the Government, and/or a
1737 Government authorized third party, to conduct, at the Government's expense, operational
1738 assessments of Contractor's operations to determine the quality of service delivery, the quality of
1739 IS system performance, and the efficiencies of the operations. Operational assessment includes a
1740 validation and an audit of the contact center. It may include organizational and training
1741 assessments as well as other task-related activities performed by the Contractor. The purpose of
1742 these assessments is to gain information concerning the operation, identify opportunities to
1743 support improvements of contact center operations, and opportunities for the Government to
1744 support Contractor. The Contractor shall cooperate fully in any such review, provide the
1745 Government (or designated third party) with information, and explain Contractor's procedures
1746 and operations to the Government, if necessary. The Government will provide Contractor
1747 feedback on the results of any operational assessments. The Government and Contractor shall
1748 identify high-priority recommendations, and cooperate to develop and implement action plans
1749 that target high-priority improvements.

1750
1751 C.3.5.8 Management Reports

1752 The Contractor shall provide for the automatic generation of comprehensive, accurate, easy to
1753 understand, and timely reports. The Government intends to request and receive only those
1754 reports that provide insight to the Contractor's level of performance in meeting contractual
1755 requirements and satisfying customer needs. The Government may also request the Contractor to
1756 provide management and operational reports on an ad hoc basis for purposes of gaining insight
1757 to specific program and customer service needs. The Contractor shall provide management
1758 reports via a secure web site for remote access and download via the Internet. Access to these
1759 reports shall be controlled via User Identification Code and Unique Password. When requested
1760 by the Government, the Contractor shall provide these reports in electronic and/or hard copy
1761 format. Specific report formats, content, frequency, and delivery methods of all reports shall be
1762 coordinated with and approved by the Government on an individual task order basis. The
1763 preferred delivery method will be through the use of XML.

1764
1765 C.3.5.8.1 Weekly and Monthly Status Reports

1766 At a minimum, the Contractor shall provide weekly and monthly status reports. These reports
1767 shall be brief, factual, and shall include, but not be limited to:

1768
1769 Management summary - shall document major events or problems and progress in their
1770 resolution.

1771
1772 Continual improvement opportunities - shall document input received from Contractor's ISs
1773 concerning ideas for improving customer satisfaction.

1774
1775 Narrative - shall describe work performed during the reporting period and work expected to be
1776 performed in the next reporting period, including assessment of Project status against

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1777 schedule/plan, discussions of any problems, issues, change requests, recommendations for
1778 correction, and variances between Contractor billed versus proposed pricing where applicable.

1779
1780 C.3.5.8.2 Operational Reports

1781 The Contractor shall provide operation reports that provide a recap of key contact center
1782 activities in support of each task. Reports shall provide information by individual programs and
1783 in aggregate.

1784
1785 Such reports shall provide detail sufficient to reflect the level of effort provided. The reports
1786 shall be supported with measurements occurring by second, minute, hour, or day, as appropriate.
1787 Activity reports shall include hourly, daily, weekly, monthly, and annual trending of key data
1788 elements in both tabular and graphic formats.

1789
1790 Specific data elements appropriate to each work type including responses handled via automated
1791 services, inbound and outbound calls, incoming and outgoing facsimiles, incoming and outgoing
1792 E-mail messages, incoming and outgoing written correspondence, appointment and hosted FAQ
1793 services activities shall be included. At a minimum, the reports shall provide all relevant
1794 information on volume and disposition of inquiries by work type, call origin by area code and/or
1795 geographic area, performance statistics (e.g., call attempts, blockage, speed of answer,
1796 abandonment rate, holding and call wrap-up time, etc.), and IS occupancy rate. Specific data
1797 elements, formats, and data collection and reporting intervals shall be coordinated and approved
1798 by the Government.

1799
1800 The Government reserves the right, during and for a 3 month period immediately after the Start-
1801 Up Phase of each task, or in cases of non-performance, to request more detailed and more
1802 frequent reporting at no additional cost to the Government until such time as Contractor
1803 performance levels have stabilized and are in full compliance of contract requirements.

1804
1805 C.3.5.8.3 Problem Resolution Reports

1806 In support of each task, the Contractor shall collect and compile a list of customer requests for
1807 information, services, or fulfillment literature that the Contractor is unable to answer or provide
1808 given the tools and data at its disposal. Such reports shall include both detailed and consolidated
1809 data and reference the specific information or item requested. The reports shall provide an
1810 explanation of how these inquiries were handled/resolved.

1811
1812 C.3.5.8.4 Monitoring Reports

1813 In support of each task, the Contractor shall compile the results of call and work monitoring
1814 efforts including conclusions, recommendations, action plans, and improvement priorities. Such
1815 results should include both accuracy of information provided and accuracy of information
1816 recorded. These results shall be available in both individual and consolidated report formats.

1817
1818 C.3.5.8.5 Compliment and Complaint Management Reports

1819 In support of each task, the Contractor shall gather and report customer comments to the
1820 Government on a monthly basis. At a minimum, this report shall include a categorization and

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1821 tally of comments received according to predefined disposition codes, verbatim customer
1822 comments as captured by the automated survey equipment or IS, or the actual document from
1823 which they were received, and an analysis and trending of the type and quantity of comments
1824 recorded over the life of each task.

1825

1826 C.3.5.8.6 Ad Hoc Reports

1827 In support of each task, the Contractor shall provide up to twelve (12) ad hoc reports annually at
1828 no additional cost to the Government. Such requests will be initiated and approved by the
1829 Contracting Officer or his/her duly authorized representative. The Government reserves the
1830 right, during initial project implementation or in cases of non-performance, to request more
1831 detailed and more frequent reporting at no additional cost to the Government until the need for
1832 such reports subside or Contractor performance levels have stabilized and are in full compliance
1833 of contract requirements.

1834

1835 C.3.5.9 Security

1836 The Office of Management and Budget (OMB) Circular A-130, *Management of Federal*
1837 *Information Resources*, requires federal agencies to plan for security, ensure that appropriate
1838 officials are assigned security responsibility, and authorize processing prior to operations and,
1839 periodically, thereafter. This authorization by senior agency officials, often referred to as
1840 Designated Approving Authorities (DAA), is sometimes referred to as accreditation. The
1841 technical and non-technical evaluation of an IT system that produces the necessary information
1842 required by the authorizing official to make a credible, risk-based decision on whether to place
1843 the system into operation, is known as certification. The individual responsible for making a
1844 technical judgment of the IT system's compliance with stated security requirements, identifying,
1845 assessing, and documenting the risks associated with operating the systems, coordinating the
1846 certification activities, and consolidating the certification and accreditation documents, is
1847 referred to as the certification agent or certifier. For additional information on the certification
1848 and accreditation process, the Contractor should consult the draft Special Publication 800-37,
1849 *Guidelines for the Security Certification and Accreditation of Federal Information Technology*
1850 *Systems*, published by the National Institute of Standards and Technology (NIST).

1851

1852 The Contractor shall develop, implement, and maintain a security plan that ensures the
1853 confidentiality, integrity, and availability of information and systems for the duration of this
1854 contract. The security plan shall contain, at a minimum, the information outlined in Special
1855 NIST Publication 800-18, *Guide for Developing Security Plans for Information Technology*
1856 *Systems* dated December 1998. Additional information may be required at the discretion of
1857 agency DAAs in accordance with agency policies or directives as specified in task orders.

1858

1859 The Contractor shall prepare all certification and accreditation (C&A) documents for submission
1860 to an agency-designated Information System Security Manager (ISSM). The ISSM will
1861 coordinate the submission of the C&A documents to the DAA for approval. The documents
1862 shall include the following:

1863

1864 Security Plan – provides an overview of the security requirements for the information and IT
1865 systems and describes the existing or planned controls (management, operational, and technical)

1866 for meeting those requirements. The Plan also describes the systems and delineates
1867 responsibilities and expected behavior of individuals who access the systems.

1868
1869 Security Test and Evaluation Reports – determines the systems’ compliance with security
1870 requirements documented in the Security Plan and verifies that the security controls identified in
1871 the Plan are correctly implemented and effective. The Security Test and Evaluation Reports
1872 shall be prepared by a third party vendor selected and paid for by the Contractor. All work
1873 performed by the third party vendor shall be submitted, reviewed, and approved directly by the
1874 Government. The Government reserves the right to have the Security Tests and Evaluation
1875 Reports done by its own contractor. The contractor shall cooperate fully with the third party
1876 vendor or the Government’s contractor in the preparation of such reports.

1877
1878 Risk Assessment Report – determines the degree of risk associated with the confidentiality,
1879 integrity, and availability of the IT systems and the information they process, store, and transmit.

1880
1881 Certifier’s Statement – documents that the security controls are correctly implemented and
1882 effective in their applications. The statement provides an overview of the security status of the
1883 system, and brings together, all of the information necessary for the DAA to make an informed,
1884 risk-based decision.

1885
1886 The Contractor shall coordinate the submission of certification and accreditation documents with
1887 the DAA and correct any deficiencies identified in the certification and accreditation process
1888 until full accreditation from the DAA is obtained. The Contractor shall implement procedures
1889 for communicating to the Contracting Officer and/or designated key personnel security-related
1890 issues that impact Contractor performance under this contract. Such procedures shall include an
1891 escalation process defining various stages of issue severity and the notification level appropriate
1892 to each.

1893
1894 C.3.5.9.1 Personnel Security

1895 The Contractor shall perform appropriate personnel screening in accordance with their
1896 administrative hiring policies. Such policies may or may not include collecting and reviewing
1897 any or all of the following information for each prospective candidate to determine if the
1898 applicant is a potential candidate for employment:

- 1899
1900 1. credit and/or criminal history inquiry
1901 2. employment verification
1902 3. drug screening

1903
1904 All information collected and actions taken shall be done in accordance with applicable Federal,
1905 state and local laws and statutes.

1906
1907 C.3.5.9.2 Information and Telecommunications System Security

1908 The Government requires that all contractor-provided information and telecommunications
1909 systems be made secure from unauthorized access and use. Access to the required filing system,

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1910 including but not limited to written correspondence, shall be limited to only those personnel who
1911 are authorized to support a given task. The Contractor shall maintain a listing of those
1912 employees with authorized access. When designing system security, Contractor shall address
1913 factors including, but not limited to:

1914
1915 Information systems - Ensure that all information handled by computer systems is protected
1916 against unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and
1917 inadvertent or deliberate compromise.

1918
1919 Telecommunications systems - Provision of telecommunications security is sufficient to protect
1920 all incoming and outgoing calls and electronic inquiries/responses, and all data collected from
1921 these activities, from unauthorized access or loss.

1922
1923 Software applications and databases - Access to software applications and databases is limited to
1924 only those personnel who are authorized to support a given task. Such restriction is
1925 accomplished through the use of customized menus, user log-on identification codes, operator-
1926 defined password protection, and or automatic timeout values. The Contractor shall use
1927 expiration dating as a method of password security maintenance.

1928
1929 Internet and E-mail usage policy – Guidelines regarding to appropriate Internet access and usage
1930 is implemented and enforced. Policies addressing access to and disclosure of electronic mail
1931 messages sent or received by employees using Contractor’s corporate E-mail system shall also
1932 be implemented and enforced. Such guidelines will inform employees that their privacy does not
1933 extend to their use of Contractor-provided equipment or supplies.

1934
1935 System testing - System testing is performed on a regular basis to monitor adherence to, and
1936 compliance with, stated security measures.

1937
1938 Audits - Contractor shall be subject to periodic system audits in the same manner and fashion as
1939 conducted by the Government. Such audits shall relate to both Contractor-provided systems and
1940 Contractor’s use of government-provided data under this contract. Examples of such audits
1941 include IG and security audits, generation of active employee listings to verify user identification
1942 maintenance practices, retrieval of user activity reports and archived security information, and
1943 demonstration of Contractor's ability to monitor, collect, store, and control access to usage data.

1944
1945 C.3.5.9.3 Facility Security

1946 Contractor is responsible for providing a physically secure facility for people, equipment, and
1947 documentation. All security requirements apply to the Contractor facility, alternative facility, or
1948 any subcontractor facilities. When designing physical security measures, Contractor shall
1949 address factors including, but not limited to:

1950
1951 Controlled access - All personnel who enter the facility shall be issued a badge or identification
1952 card. Employees have a permanent badge and approved visitors receive a temporary badge. In
1953 general, facility access is limited to: Contractor personnel performing work under contract;
1954 authorized Government personnel; maintenance personnel or suppliers performing upkeep or
1955 repair of facilities or equipment; customer personnel visiting the site on official business; and

1956 personnel as approved jointly by Contractor and the Government. Contractor must obtain
1957 Government approval prior to granting either current or potential customers access to areas
1958 where Government work is performed. Terminated employees shall have their badges removed
1959 and their accounts deactivated and/or deleted from any system access immediately upon
1960 termination. Proof of such removal shall be documented by Contractor and made available to the
1961 Government upon request.

1962

1963 Data and telecommunications center - The primary data and telecommunications center is
1964 secured through the use of key-code access with entrance granted only to those requiring access
1965 to this area on a regular basis to perform their normal job functions or who are escorted as in the
1966 case of visitors or technicians.

1967

1968 Confidential information - Subsequent to the award of each task order, the Government will
1969 provide Contractor with a listing of items it deems proprietary and confidential in nature.
1970 Examples of such data include, but are not limited to, customer names, addresses, and social
1971 security numbers. Contractor shall implement appropriate security measures to ensure such data
1972 is safeguarded in a manner consistent with those employed by the Government. Examples of
1973 data security include locked file storage, confidentiality stamping, restricted system access, data
1974 encryption, restricted print options, and disposal by shredding.

1975

1976 Proper notification - Contractor shall report all attempts made, whether successful or not, to
1977 breach the physical security of the facilities or primary data centers where the work is performed,
1978 or any related telecommunications and information systems that support each task. The
1979 Contractor shall adhere to applicable agency IT Incidence Handling Procedures for reporting
1980 these intrusions, including escalation to Department of Homeland Security FedCIRC if
1981 necessary. Such reports shall be made to the Government as soon as possible and in no event
1982 more than twenty-four (24) hours after discovery of the incident. In rare instances, the
1983 Contractor may receive calls that threaten the well being of the Government and/or other
1984 personnel or property. The Contractor shall ensure that procedures are in place to report the calls
1985 immediately to the appropriate law enforcement agency(ies).

1986

1987 C.3.5.10 Contingency/Disaster Recovery

1988 The Contractor shall develop and implement contingency/disaster recovery plans and procedures
1989 addressing operations in the event of a shutdown or lapse in service for any reason. This is to
1990 minimize service disruption to Government customers. The plan shall identify risks as well as
1991 steps necessary to prevent it from happening in the first place. The plan shall include an
1992 alternate set of steps to minimize the impact should prevention fails. The plan must define the
1993 precise steps to take to recover as quickly as possible, including recovery procedures for physical
1994 facility, data systems, contact center systems and applications, communications networks,
1995 electrical service, customer access points, partners and procedures, and staff. The Contractor
1996 shall develop and implement procedures to test the plan on a regular basis. The plan shall be
1997 developed in accordance with Contingency/Disaster Recovery requirements specified in
1998 individual task orders and applicable agency IT Security Policy and NIST Special Publication
1999 800-34, Contingency Planning Guide for Information Technology Systems.

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C.3.5.10.1 Program Operations Recovery

In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of both the contact center infrastructure and the communications network servicing the Government requirements shall include sufficient redundancy to allow normal business operations to continue with minimal disruption and inconvenience to customers for all access channels.

C.3.5.10.2 Voice Recovery

When designing disaster recovery plans for the communications network, Contractor shall address factors including, but not limited to:

Network routing - If an individual facility should become inaccessible, a sufficient communications network shall be in place to allow for forwarding of customer calls to one or more alternate facilities. If the outage is brief, the network shall resume normal call routing as soon as the primary facility is operational again.

Operational impact - Documented policies shall exist for assuming workload from an incapacitated facility for immediate, short-term, and long-term relief.

Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of preparing the staff and assessing the plan's viability.

C.3.5.10.3 Data Recovery

When designing disaster recovery plans for data recovery, Contractor shall address factors including, but not limited to:

Backup routines - The ease and frequency of which backup routines are conducted and the ability to backup data on remote servers/processors.

Effectiveness - The degree to which data can be compressed for backup purposes and the ability to perform unattended backups on high-density/high-capacity storage devices.

Operational impact - The time that is required to complete backups and the need to remove users from the system to conduct backup routines.

Data integrity - The methods of maintaining data integrity so that completed transactions are not lost due to outages, system failures, etc. In long-running transactions, such as when a IS needs to navigate several screens of data entry, there should be interim checkpoints that save the transaction so that it may be re-entered from the last checkpoint if the transaction wasn't completed prior to the failure.

Data recovery - The methods of restoring data from backup in the event of a failure (e.g., commercial power failure, system or hardware failures).

2045 Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of
2046 preparing the staff and assessing the plan's viability.

2047
2048 C.3.5.10.4 Notification Process

2049 Contractor shall implement procedures for communicating to the Government primary point of
2050 contact and/or designated key personnel disaster-related issues that inhibit contact center
2051 operations. Such procedure shall include an escalation process defining various stages of issue
2052 severity and the notification level appropriate to each.

2053
2054 C.3.5.11 Value Engineering and Design

2055 The Contractor shall implement an ongoing program to provide service upgrades and
2056 improvements as a result of value engineering, including, but not limited to:

- 2057
- 2058 1. Performing cost benefits analyses and evaluating the impact and appropriateness of
2059 deploying new and emerging technologies and/or commercial off-the-shelf (COTS)
2060 products and services for consideration by the Government.
 - 2061 2. Reviewing Government-provided materials and identifying opportunities to enhance its
2062 clarity and ease of understanding by the caller.
 - 2063 3. Evaluating and optimizing and/or upgrading system hardware and software to enhance
2064 customer service and/or reduce cost.
 - 2065 4. Conducting ongoing reviews of various applications and providing improvement
2066 suggestions (e.g., revise scripting for automated services to improve call flow).
 - 2067 5. Developing and implementing action plans, in coordination with the designated
2068 Government personnel, to continuously improve service offerings, products, and the
2069 overall process of service fulfillment.
 - 2070 6. Assisting in implementation of quality procedures, action plans, and processes.
 - 2071 7. Developing and implementing an on-going customer service improvement program to
2072 address issues related to service delivery, such as, etiquette, customer satisfaction,
2073 employee satisfaction, information accuracy, and responsiveness.
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2081 C.3.6 Special Project Support

2082 The Contractor shall provide technical and management support needed to analyze, plan, design,
2083 implement, operate, and manage special services that may be needed to meet the diverse needs of
2084 the Government. These special services (e.g. web hosting, prototyping of new capabilities,
2085 special applications and systems interconnectivity) will be priced on a task order-by-task order
2086 basis. The Contractor shall provide all necessary personnel, facilities, equipment and services
2087 needed to support special services as identified in task orders issued by the Government.

2088
2089

2090 **C.4 STAFF TO BE PROVIDED**

2091
2092 The Contractor is expected to support the diverse needs of a wide range of government
2093 programs. The Contractor shall provide qualified personnel in sufficient quantities to perform the
2094 functions identified in this SOW and individual task orders. All matters pertaining to the
2095 employment, supervision, compensation, promotion, and discharge of the Contractor's
2096 employees shall be the responsibility of the Contractor, which is in all respects the employer of
2097 such employees. All proposed substitutes for key personnel shall meet or exceed the
2098 qualifications of the person to be replaced. The Government shall be notified in writing of any
2099 proposed substitution of key personnel at least thirty days in advance of the proposed
2100 substitution.

2101
2102 The Contractor shall perform background checks on all prospective employees in accordance
2103 with applicable agency Personnel Security Handbook prior to providing them for service under
2104 the contract. At a minimum, this check shall ensure that no prospective employee has a criminal
2105 misdemeanor or a felony record and has a satisfactory history of credit. Additional background
2106 checks or security clearances may be required as specified in individual task orders.

2107
2108 C.4.1 Key Personnel

2109 The Contractor must have the capability to provide qualified personnel to meet the specific
2110 requirements of each task order. At a minimum, the Contractor shall provide the following key
2111 personnel:

2112
2113 Program Manager - responsible for managing and implementing the overall contract requirement
2114 and oversee implementation of more complex tasks; organizes, directs, coordinates planning, and
2115 implements all contract and/or task order support activities; interacts with high level program
2116 officials regarding issues and status of the contract and/or task orders; coordinates financial and
2117 staffing resources; monitors and analyzes contract and performance data and reports results to
2118 senior Government officials; coordinates recruitment and training activities to keep staff current
2119 on agency programs and performance objectives; manages the activities of subcontractors; and
2120 reviews contract, operations and management reports. The Government reserves the right to
2121 approve the selection of the Contractor-assigned Program Manager prior to his/her placement in
2122 supporting the task if such assignment is warranted.

2123
2124 Project Manager - responsible for managing and implementing individual task requirement;
2125 organizes, directs, coordinates planning, and implements all project support activities; interacts
2126 with program officials regarding issues and status of the project; coordinates financial and
2127 staffing resources; monitors and analyzes performance data and reports results to the
2128 Government; coordinates training activities to keep staff current on agency programs and
2129 customer service objectives; manages the activities of subcontractors; and prepares operations
2130 and management reports. For each task, the Government reserves the right to approve the
2131 selection of the Contractor-assigned Project Manager prior to his/her placement in supporting the
2132 task.

2133
2134 Site Manager - responsible for overall daily operations and management of the contact center,
2135 including staffing, facility, training, service delivery, problem escalation and resolution, and

2136 performance monitoring; provides technical assistance to the planning, design, installation,
2137 modification, and operation of telecommunications and information systems capabilities; ensures
2138 all functions and processes are implemented and operated properly.

2139
2140 To meet specific task requirements, the Government may require the assignment of one or more
2141 key personnel in support of a task. The Government may also identify additional key personnel
2142 requirements in individual task orders.

2143
2144 C.4.2 Support Staff

2145 The Contractor shall provide sufficient qualified support staff to perform functions including, but
2146 not limited to:

2147
2148 Human resources management - ensure the placement of qualified candidates into open positions
2149 by participating in employment-related activities such as recruiting, screening, testing,
2150 evaluating, behavioral interviewing, and hiring for a wide variety of positions; prepares
2151 employment-related reports; conduct new employee orientation sessions; experienced in
2152 employee relations, legal compliance, and compensation matters.

2153
2154 Supervision - supervise and coordinate the daily workflow to ensure productivity and quality
2155 standards are met and customer service efforts are consistently achieved; assist the manager in
2156 the administration of the unit; provide leadership, guidance, training, and work direction to
2157 assigned personnel to ensure goals and objectives are met; foster a work environment that
2158 respects individuals, promotes teamwork, and encourages innovation and creativity.

2159
2160 Quality assurance - assess the quality of service provided by ISs through monitoring incoming
2161 calls and other work types while focusing on the quality of customer service, accuracy of
2162 information provided, and adherence to departmental policies and procedures; analyze
2163 operational performance against company and customer expectations and identifies areas of
2164 competency and areas of needed improvement; establish and maintain systems for capturing,
2165 analyzing and reporting quality measures; interface with other operational and cross-functional
2166 areas to ensure consistency in reporting practices and to help determine quality needs; provide
2167 recommendations on continual process improvement.

2168
2169 Training - design, develop, evaluate, and deliver training programs for all levels of staff; evaluate
2170 the applicability and quality of training programs offered by outside vendors; complete needs
2171 assessments to identify future training needs and provide guidance to staff on matters related to
2172 continuing education; design course manuals, support materials and tools; perform
2173 administrative duties related to employee training such as scheduling classes,
2174 ordering/maintaining supplies, maintaining training records and a library/database of training
2175 materials and subject matter experts; conduct surveys of training and equipment needs; conduct
2176 follow-up studies to determine overall training effectiveness; prepare formal reports and
2177 correspondence.

2178
2179 Service level management - manage overall forecasting and staffing processes to ensure
2180 efficient, cost-effective overall IS utilization; creates, execute and oversee effective plan
2181 (annual, weekly, daily); work closely with Project and Site Managers to assist in determining

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2182 future staffing requirements, optimize site scheduling, balance workload across the network,
2183 maximize performance and meet overall objectives; review on an on-going basis, existing
2184 technologies and software recommending changes as needed to ensure maximum utilization of
2185 resources; manage actual performance feedback against targets, identify shortfalls, take
2186 corrective action and make adjustments accordingly; conduct need assessment to ensure
2187 continual improvement of overall forecasting and staffing performance.

2188
2189 Knowledge/content management - research and resolve open issues by thorough and efficient
2190 investigation; create, index, and maintain knowledge database records and answers to FAQs;
2191 ensure the accuracy and clarity of information recorded; purge outdated records from the system
2192 in accordance with records management guidelines provided by the agency; communicate record
2193 additions or changes to all staff on a timely basis.

2194
2195 Inquiry tracking – capture and track all relevant information and disposition of all inquiries;
2196 ensure inquiries are completed on a timely basis.

2197
2198 Technical support - ensure all areas of systems architecture, security, design, development,
2199 analysis, installation, programming, testing, maintenance, administration, and ongoing support
2200 for contact center hardware, software, network, telecommunications, and Internet equipment and
2201 services.

2202
2203 This is not a complete list of all responsibilities, duties, efforts, or skills associated with these
2204 positions, but is intended to serve as an overview of the functions that the Contractor is expected
2205 to perform.

2206
2207 C.4.3 Information Specialists (IS)

2208 The Contractor shall provide sufficient contact center IS staff to perform the functions specified
2209 in individual task orders. The Contractor shall ensure that ISs possess the appropriate
2210 qualifications and skills required to perform the task. Unless specifically authorized in the task
2211 orders, all ISs shall be situated in contractor-provided facilities with restricted access.

2212
2213 C.4.3.1 Qualifications

2214 Each member of the Contractor-provided IS staff shall meet the following minimum
2215 requirements:

2216
2217 1. High school diploma or General Educational Development (GED) Certificate

2218
2219 2. English language proficiency

2220
2221 C.4.3.2 Competencies

2222 The Contractor-provided IS staff shall demonstrate the requisite skills and knowledge to perform
2223 the following functions, at a minimum:

2224
2225 1. Oral and written communication skills sufficient to facilitate clear and accurate
2226 information exchanges with customers.

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2. Ability to control the pace and flow of the inquiry/request and manage call time effectively.
 3. Ability to handle inquiries and requests in a courteous and professional manner, including calls received in crisis situations, and/or from abusive callers.
 4. Ability to listen to and empathize with customers and acknowledge their concerns.
 5. Ability to follow protocol and to apply sensitivity and discretion in handling confidential information.
 6. Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquire/request effectively.
 7. Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner.
 8. Ability to use the web to search and retrieve information.
 9. Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other physically impaired callers and route them to the appropriate IS or queue for response.
 10. Ability to take direction within a team setting and complete team-related work promptly.
 11. For IS assigned specifically to support TTY callers, ability to effectively respond to inquiries using appropriate equipment.

2257 C.4.3.3 Skills Categories

2258 The Contractor shall provide qualified personnel in sufficient quantities to perform the functions
2259 identified in task orders issued by the Government. The Contractor is expected to support the
2260 diverse needs of government programs. The skills categories identified below are those that the
2261 Government anticipates may be required to satisfy the diverse needs of agency programs. The
2262 specific skills category(ies) required will depend on the complexity of work to be performed, as
2263 identified in individual task orders. The Government reserves the right to add other skills
2264 categories to meet agency requirements at any time during the effective period of this contract.
2265

2266 Level 1 - Handles telephone inquiries that are routine and transactional in nature. Captures or
2267 disseminates basic information, utilizing a prepared script. Little or no deviation from script is
2268 permitted in responding to inquiries. Proficient in using automated tools, search and information
2269 retrieval systems, and knowledge and contact management systems. Requires High School
2270 diploma, or GED.
2271

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2272 Level 2 – Handles inquiries received via multiple communication channels (e.g., phone, e-mail).
2273 Nature of inquiries involves subjects that are moderate in complexity. Responses are generally
2274 scripted but may require probing of callers for specific information. Proficient in using
2275 automated tools, search and information retrieval systems, and knowledge and contact
2276 management systems. Requires High School diploma, or GED and some college, or equivalent
2277 combination of education and prior customer service experience. Requires general knowledge of
2278 Government programs.

2279
2280 Level 3 - Handles inquiries via multiple communication channels. Nature of inquiries involves
2281 subjects that are high in complexity. Responses are not scripted and require frequent probing of
2282 callers for specific information. Proficient in using automated tools, search and information
2283 retrieval systems, and knowledge and contact management systems. Requires Associate degree
2284 and prior experience in one or more specialized areas. Requires specialized knowledge of
2285 Government programs and/or subject matters.

2286
2287 Level 4 - Handles inquiries via multiple communication channels. Nature of inquiries involves
2288 subjects that are very high in complexity and requires subject matter experience. Responses are
2289 not scripted and require extensive probing of callers for specific information. Proficient in using
2290 automated tools, search and information retrieval systems, knowledge and contact management
2291 systems, and other specialized systems. Requires Bachelors degree or equivalent work
2292 experience and subject matter experience.

2293
2294 Level 5 - Handles inquiries via multiple communication channels. Nature of inquiries involves
2295 subjects that are highly specialized and requires subject matter expertise. Responses are not
2296 scripted and require extensive probing of callers for specific information. Proficient in using
2297 automated tools, search and information retrieval systems, and knowledge and contact
2298 management systems, and other specialized systems. Requires advanced degree or equivalent
2299 work experience and subject matter expertise.

2300
2301 **C.4.3.4 Multi-language Support**

2302 The Contractor shall provide qualified personnel in sufficient quantities to meet the language
2303 requirements specified in individual task orders. At a minimum, the Contractor must have the
2304 capability to supply ISs who are proficient the following languages:

- 2305
2306 1. English
2307 2. Spanish
2308 3. Mandarin
2309 4. Cantonese
2310 5. French
2311 6. German
2312 7. Japanese
2313 8. Korean

2314 9. Vietnamese

2315
2316 The specific language requirement and associated work volumes will be specified in individual
2317 task orders issued by the Government. The Contractor shall incorporate all appropriate
2318 considerations for multi-language requirement into the support for each task including, but not
2319 limited to, areas such as training, quality monitoring, supervision, and automated services.

2320
2321

2322 **C.5 FACILITIES TO BE PROVIDED**

2323

2324 C.5.1 General

2325 The Contractor shall provide adequate facilities to support the contact center operations,
2326 including, but not limited to the following:

2327

- 2328 1. Work areas,
2329 2. Employee lounge areas,
2330 3. Storage areas,
2331 4. Training and conference facilities with supporting audio and visual equipment,
2332 5. Telecommunications and computer facilities,
2333 6. IS work stations, including modular and/or other furniture and chairs,
2334 7. File cabinets and file storage systems,
2335 8. Lighting and office appliances, and
2336 9. Other required office furnishings.

2337

2338 The Contractor is responsible for the ongoing maintenance, upkeep, and management of the
2339 contact center facilities. For security purposes, the Contractor shall generally be prohibited from
2340 identifying the facility(ies) as supporting Government business on either the exterior building
2341 walls or signage. Specific approval to do so can only be granted by the Contracting Officer.

2342

2343 C.5.2 Facility Infrastructure

2344 The Contractor shall be responsible for the acquisition, installation, and maintenance of all cable,
2345 wiring and support infrastructure required to operate the facility, including, but not limited to:
2346 cable distribution systems; conduits; terminals and connectors; raised flooring; and other
2347 equipment needed to interconnect and support the contact center systems and operations.

2348

2349 C.5.3 Site Selection and Facility Design Requirements

2350 When selecting and/or designing contact center site, the Contractor shall factor in the following:

2351

- 2352 1. The site selected shall provide a geographic location chosen to minimize the effect of
2353 catastrophic weather conditions on customer contact center operations. For multi-site

- 2354 solutions, the sites shall be spaced located in different geographic locations to minimize
2355 the possibility of adverse weather conditions affecting the operations
2356
- 2357 2. The site shall be located at a safe location deemed appropriate for contact center
2358 operations.
2359
- 2360 3. The site shall be easy to access in terms of relative proximity to local air transportation
2361 and major air carrier services.
2362
- 2363 4. The site shall be located within the contiguous 48 states unless specifically approved by
2364 the Government.
2365
- 2366 5. The site shall be designed and built to comply with all applicable state, local, and
2367 Federal government standards and regulations, such as the Occupational Safety and
2368 Health Act (OHSA) of 1970, as revised, and the Americans with Disabilities Act of
2369 1990. The site shall remain in compliance with such standards and regulations
2370 throughout the term of the contract.
2371
- 2372 6. The site shall be situated in a location where the local labor market can support the
2373 contact center size and the skill sets of the labor pool required to support the task
2374 requirements, including foreign language, subject matter expertise, and other special
2375 requirements that the programs may present. Considerations should include the degree
2376 of competition for the labor pool from other contact centers and related industries and
2377 its impact on recruiting and retaining contact center personnel.
2378
- 2379 7. The site shall be designed to provide an office environment that is conducive to
2380 providing customer support, supporting private conversations, and facilitating
2381 communication among staff.
2382
- 2383 8. The site shall be designed to provide space, furnishing, acoustic, lighting, and
2384 temperature environment that meets or exceeds contact center industry standards.
2385
- 2386 9. The site shall be designed to accommodate modern telecommunications and computer
2387 systems and contact center furnishing.
2388
- 2389 10. The site shall be designed to meet other environmental control standards that are in
2390 compliance with Federal, state, local, and industry standards.
2391
- 2392 11. The site shall be supported by an appropriately sized backup generator and a non-
2393 interruptible power supply.
2394
- 2395 12. The site shall be designed to provide redundant, high bandwidth, high availability
2396 connections to the telephone network and the Internet.
2397
2398
2399

2400 C.5.4 Project Housing

2401 The Contractor-provided workspace assigned to support specific tasks shall meet the following
2402 criteria:

- 2403
- 2404 1. Contiguous workspace shall be provided for the entire complement of IS staff
2405 supporting a specific task within a given site.
 - 2406
 - 2407 2. Security of information is a key concern of the Government. The Contractor shall
2408 provide a secure facility with restrictive access to only those Contractor employees and
2409 authorized Government representatives who support specific tasks.
 - 2410
 - 2411 3. IS seats need not be dedicated outside of the normal hours of operation; however, if
2412 future growth demands increased seating capacity, then the same seats shall be made
2413 available across multiple shifts if needed.
 - 2414
 - 2415 4. Unless specifically authorized by the Government on an individual task order basis,
2416 hoteling of IS seats, whereby no specified grouping of seats is assigned to the task on a
2417 permanent basis, is not permitted.
 - 2418
 - 2419 5. Contractor shall designate at no additional cost to the Government a non-exclusive
2420 space for an authorized Government representative, to work when onsite. The space
2421 shall include enclosed office space and workstation, computer and Internet access,
2422 telephone and modem lines, administrative support and services, and security.
2423 Transitory Government personnel shall be provided workspace if available.
 - 2424

2425 C.5.4.1 Exclusive-Use Space

2426 To meet specific program requirements, the Contractor may be requested to provide space for the
2427 exclusive use of one or more authorized Government representatives. Specific space
2428 requirements, if required, will be included in individual task orders.

2429

2430 C.5.5 Facility and Systems Access

2431 The Contractor-provided facilities and systems shall be designed to provide physical and
2432 information access security with security monitoring and access restriction at all times. Access
2433 to the contractor-provided facilities shall be provided to authorized Government personnel at
2434 anytime during the normal operation of the contact center. Access to contractor provided
2435 systems, including remote access by Contractor employees and authorized Government
2436 employees, shall be restricted to authorized personnel at all time.

2437

2438 Designated Government employees, and/or their authorized representatives may visit any contact
2439 center facility used to support its programs without prior notice for the purpose of conducting on-
2440 site reviews, information gathering, or program observation.

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C.6 TECHNOLOGY INFRASTRUCTURE TO BE PROVIDED

The Contractor shall provide and maintain all contact center system hardware, software, and accessories to meet task order requirements. At a minimum, the system shall meet the requirements specified in Sections H.11, H.16, and C.6.1 through C.6.11 below.

C.6.1 Inquiry Processing Technology and Services

Contractor shall provide the required inquiry processing technology and services to handle the workload presented by the Government. These include, but are not limited to:

Workstations – Contact center staff shall be provided desktop workstations, including computers, telephones and headsets, and other equipment and accessories required to sustain contact center operations. Unless specified by the Government, all workstations shall be equipped with e-mail and Internet access.

Inquiry Routing and Distribution – The system shall provide routing/distribution of incoming inquiries based on sequence of arrival/origination, inquiry type, IS availability and skills, contact center availability, or other predefined routing instructions, as specified by the Government. The system shall provide at a minimum:

1. The capability to monitor and visually display the work state and availability status of all ISs on a real-time basis.
2. The capability to display call-handling statistics real-time.
3. The capability to provide electronic and hard copy reports on all trunks, IS, and workgroup performance statistics.
4. The capability to provide incoming calls by Dialed Number Identification Service (DNIS) reporting.
5. The capability to originate and least-cost route outgoing and follow-up calls.

Automated Fax-Back/Fax on Demand – The system shall have the capability to allow customers to generate a request for a document to be automatically sent to their fax machine. This function can also be activated internally by a IS to send documents to a customer's fax machine.

Automatic Numbering Identification (ANI) - Certain caller information, such as the caller's telephone number, may be used to identify the caller and access caller information to facilitate customer service and/or to support the compilation of caller demographic information. Numeric area code information shall be translated to reflect its corresponding geographic location (e.g., area code 202 would be reflected as Washington, DC) for reporting purposes. The contact center system shall be ANI-enabled and possess any additional software required to support such functionality.

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2486 Accounting and Management - The system shall provide accounting and management
2487 capabilities for all inquiry types.

2488
2489 Call Queuing - The system shall queue incoming calls and provide callers with an estimated wait
2490 time in queue and other recorded messages. The system shall provide the caller with an option to
2491 stay in queue or leave a message for callback based upon response to prompts. During or upon
2492 completion of the callback message, callers shall have the option of returning to the queue
2493 without losing his or her place in the queue.

2494
2495 Call Transfer – The system shall be capable of transferring calls to a different workgroup within
2496 the contact center and/or to a workgroup located in a different contact center via blind or
2497 attended transfer, as specified by the Government. The call transfer function may be activated
2498 automatically by the caller or manually through the IS. The Contractor shall provide the most
2499 efficient and cost effective way of transferring the calls unless otherwise directed by the
2500 Government. The system shall be capable of tracking the quantity and duration of calls
2501 transferred from one program to another program within the Contractor’s system.

2502
2503 Computer Telephony Integration (CTI) – The system shall be capable of displaying caller-
2504 relevant information at the IS workstations (e.g., via screen pop technology). The displayed
2505 information may be triggered by DNIS, and/or ANI information, and/or through information
2506 entered by the caller or IS, and/or through data gathered by the IVR service.

2507
2508 Dialed Number Identification Service (DNIS) - The system shall be DNIS-enabled, in order to
2509 distinguish incoming calls by the called number and route them to the appropriate response
2510 system and/or IS. The system shall be capable of providing the appropriate program
2511 identification (e.g., via whisper announcement) at the IS workstation.

2512
2513 Automated Voice Response – The system shall be equipped with innovative and effective
2514 automated voice response solutions that enables the callers to obtain answers to frequently asked
2515 questions quickly and in a customer friendly manner. The solutions include the use of IVR,
2516 voice recognition and text-to-speech technologies. The system shall have the ability to quantify
2517 (aggregate by menu and message) the selections of callers by business and non-business hours
2518 and days for reporting purposes. The system shall accommodate callers with touch-tone and
2519 rotary telephones/dial pulse telephones who seek information via self service and/or assistance.

2520
2521 TDD/TTY Calls – The system shall be equipped with Telephone Device for the Deaf (TDD) or
2522 TTY (ASCII) terminals for responding to inquiries from individuals who are hearing and
2523 visually impaired.

2524
2525 System Capacity – The Government requires that Contractor provides sufficient capacity on the
2526 system to support projected call volumes, workload estimates, and call routing in accordance
2527 with service level goals (e.g., blockage). The Contractor shall provide sufficient expansion
2528 capability to accommodate call pattern variations.

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2529 C.6.2 E-Mail Routing and Management

2530 The contractor-provided e-mail routing and management system shall be integrated with the
2531 inquiry processing system described in Section C.6.1 to ensure efficient staff utilization. At a
2532 minimum, the system shall provide the following:

2533 Time/Date Stamping of Receipt - automatically stamps the time and date of receipt of e-mail
2534 messages.

2535
2536 Automated Inquiry Tracking Number Assignment - automatically assigns a tracking number to
2537 each incoming e-mail message; provides a capability to automatically assign sub-tracking
2538 number(s), when prompted, for tracking e-mail messages forwarded to multiple agencies.

2539
2540 Auto-Message Processing - monitors incoming mailboxes for incoming mail; automatically
2541 scans, filters, analyzes, sorts, categorizes, prioritizes, routes, queues, and responds to e-mail
2542 messages based on predefined rules; includes spam control, auto-acknowledgement, content-
2543 driven auto-response, and external notification capabilities. The auto-acknowledgement and
2544 auto-respond features must be able to retrieve the e-mail address of the inquirer from a web e-
2545 mail form, an auto-forwarding e-mailbox, and/or free form e-mail and use it for responding to
2546 the inquiry.

2547
2548 Automated Response Aids - provides storage and retrieval of customized and preformatted
2549 messages, automated response suggestions, spell-check, and auto-text insertion of commonly
2550 used words, phrases, and responses to enhance response efficiency.

2551
2552 Attachments/Web Links - provides the ability to receive e-mail attachments and send
2553 attachments and/or embedded web links with the outgoing e-mail message.

2554
2555 Monitoring - allows customer support supervisors, managers, and up to 5 designated
2556 Government representatives from remote locations, to closely monitor message queues, agent
2557 activity, and performance levels; provides automatic escalation of messages that are past
2558 performance level thresholds.

2559
2560 Mail Tracking - allows off-site respondents to receive and respond to messages via their existing
2561 e-mail client, while maintaining full message tracking.

2562
2563 Inquiry Tracking - records and tracks all relevant information and disposition of all e-mail
2564 inquiries; provides problem-tracking functionality and is capable of recording and generating
2565 records of problems reported, tracking the problem through to resolution, and maintaining
2566 historical data on problems by the inquirer and by problem category and frequency. Case
2567 tracking database information shall be available to ISs for inquiry and real-time update as
2568 appropriate.

2569
2570 Management Reports - provides a full array of scheduled and ad hoc management reports in a
2571 commonly used electronic format that track e-mail volume statistics, category and agency
2572 breakouts, historical data, trends, case tracking, productivity and performance measurements.
2573 The reports shall include both summary and detailed data. The Contractor shall assure that the
2574 information on the reports can be grouped and sorted by the fields in the inquiry tracking

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2575 database. Reports shall be accessible via a secure web site. The preferred delivery method will
2576 be through the use of XML.

2577
2578 Interoperability - The systems shall be able to exchange e-mail with Government e-mail systems.

2579
2580 Security - provides all required measures to ensure that the security of the e-mail and associated
2581 systems are not compromised (e.g. content checking, anti-virus, e-mail exploit detection and
2582 defense, and threats analysis).

2583
2584 Storage - provides sufficient capacity to store all incoming and outgoing e-mail messages, case
2585 tracking data, and other relevant information - at a minimum - for the current fiscal year and the
2586 previous fiscal year.

2587
2588 Mass Mailing - provides the ability to transmit information via e-mail to lists of recipients stored
2589 within the system in accordance to pre-established schedule and/or as directed in the task orders.

2590
2591 C.6.3 FAQ System

2592 The Contractor shall provide a reliable, scalable, and secure FAQ solution that provides the
2593 capabilities specified in Section C.3.1.10 of this solicitation.

2594
2595 C.6.4 Knowledge Management System

2596 The Contractor shall provide an integrated knowledge management system to store, organize,
2597 search and retrieve knowledge needed to respond to inquiries received via all communications
2598 channels, including those received through the hosted FAQ service. The service shall
2599 incorporate innovative self-learning or equivalent technology to analyze, organize, and present
2600 information to enhance the user's ability to effectively find information. At a minimum, the
2601 system shall have the following capabilities:

- 2602
- 2603 1. Real-time access to knowledge base via an easy-to-use secure web or equivalent
2604 interface for posting, updating, searching and retrieving information, including
2605 management reports by authorized personnel. Capability of sharing FAQ answers and
2606 information in the knowledge base with other systems and/or services through the use
2607 of XML.
 - 2608
 - 2609 2. Real-time and historical insight in the usage pattern and usefulness of the stored
2610 knowledge.
 - 2611
 - 2612 3. Real-time access to search and retrieve information via the Internet by the general
2613 public.

2614
2615 C.6.5 Contact Management System

2616 The Contractor shall provide a contact management system for capturing, tracking, assigning and
2617 managing all inquiries from initial contact through resolution, regardless of the access channel.
2618 The system shall include problem-tracking functionality and be capable of recording and
2619 generating records of problems reported via any channel, tracking the problem through to

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2620 resolution, and maintaining historical data on problems by caller, tracking identification number,
2621 and by problem category and frequency. The system shall have the capability to capture blended
2622 channel communications in a single customer record. The system shall be available to all ISs for
2623 inquiry and real-time update as appropriate. The Contractor shall provide summary and detailed
2624 system and management data via secure web access. The system shall be capable of
2625 automatically extracting the relevant information from electronic inquiries populating the
2626 corresponding database fields via the use of XML.

2627
2628 The Contractor-provided contact management system must have the capability to track a wide
2629 range of data and activities, including personal data and customer demographic, contact logging
2630 and interaction, nature of inquiry and disposition, and inquiry tracking information. Specific
2631 requirements to be supported will be identified in individual task orders.

2632
2633 **C.6.6 Workforce Management System**

2634 The Contractor shall provide a multi-channel workforce management system that will enable
2635 management personnel to analyze historical work volume, employee availability and schedule
2636 preferences, and trends to accurately forecast and schedule staffing resources to meet work
2637 volume requirements. The system shall be able to generate staff shift schedules based on traffic,
2638 staff availability, and service objectives. The system shall have the capability to optimize the
2639 schedule for skill-based routing.

2640
2641 **C.6.7 Customer Survey Automation**

2642 The Contractor shall provide the capability to survey callers in an automated fashion for
2643 purposes of customer satisfaction assessment. The system shall provide the means to capture
2644 and transcribe the comments for analyses. The system shall be capable of capturing, storing,
2645 aggregating, and reporting survey results. All surveys shall be conducted in accordance with
2646 rules prescribed by the Government as defined in individual task orders (e.g. no surveying of
2647 calls placed for emergency purposes, surveys not offered to the same caller more than x times in
2648 x months).

2649
2650 **C.6.8 Compliment and Complaint Management**

2651 The Contractor shall provide an automated capability to gather and report on customer
2652 complaints, compliments, and other service related comments/suggestions. The system shall
2653 provide the means to capture and transcribe the comments for analyses

2654
2655 **C.6.9 Service Monitoring and Quality Control**

2656 The Contractor shall provide the capability for performance monitoring. Supervisory and quality
2657 control personnel shall be able to monitor the performance of the ISs without plugging into the
2658 ISs' telephone sets. The monitoring system shall allow for silent monitoring both with and
2659 without tone indication to the IS during monitoring. Minimum system capabilities must include:

- 2660
2661 1. Monitoring sessions that can be scheduled and recorded for later review by supervisory
2662 and quality assurance personnel

2663

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2664 2. Monitoring system that can record the voice and data portions of the transaction

2665

2666 3. All calls recorded for quality monitoring purposes shall be retained for a 60-day period

2667

2668 4. Remote access for monitoring by authorized Government personnel.

2669

2670 C.6.9 Training

2671 The Contractor shall provide audio and visual equipment, computer workstations and servers,
2672 and other training aids to facilitate training of contractor staff.

2673

2674 C.6.10 Literature Fulfillment

2675 The contact center system shall be capable of generating transactions fulfilling information
2676 requests (e.g., postal mail, E-mailing or facsimile of forms or information booklets) and relevant
2677 communications with customers. The system used for this function shall incorporate an alert
2678 process that notifies the appropriate resource to open and process requests as they are received.
2679 The contact center shall use laser-quality printers to provide the capability to print letters,
2680 product information, or other relevant information in black and white and/or in color. Contractor
2681 shall also be capable of electronically tracking the request through fulfillment.

2682

2683 C.6.11 Voice Mail and Electronic Mail

2684 The contact center system shall be equipped with voicemail and electronic mail capabilities to
2685 support internal and external communications. The Contractor shall provide E-mail accounts
2686 and addresses and Internet access for receiving and responding to customer inquiries at the
2687 contact center.

2688

2689 C.6.12 Power Supply

2690 The Contractor shall provide emergency electrical power generation capability, as well as an
2691 uninterruptible power supply (UPS) to ensure continuity of contact center operations. The UPS
2692 shall be capable of protecting systems from voltage lags, over-voltage conditions, line frequency
2693 fluctuations, and power blackouts. It shall be capable of sustaining operations in the event of
2694 loss of normal sources of power until the backup generators can come online. The backup
2695 generator shall be capable of sustaining full contact center operation for a minimum of 24 hours.
2696 The transition from normal to emergency to backup power shall occur without loss of power to
2697 systems and without the disconnection of calls in process, loss of data, or customer calls queued
2698 for service.

2699

2700 C.6.13 Database Design

2701 All database design shall conform to industry standards and conventions and shall be capable of
2702 sharing data with other government/contractor systems through the use of XML. Any such
2703 databases shall be capable of sustaining a heavy query transaction load without impacting
2704 required system response requirements. These databases shall be designed and implemented to
2705 provide continuous read/write access during the Project required availability times. Maintenance
2706 cycles may restrict access as long as they are of short duration, scheduled outside of normal
2707 business hours and coordinated and approved by the Government.

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C.7 TELECOMMUNICATIONS SERVICE TO BE PROVIDED

C.7.1 Local Telecommunications Services and Internet Access

The Contractor shall provide the required local exchange carrier (LEC) and Internet access services to meet task requirements.

C.7.2 Intercity Telecommunications Services

The Government may provide its own intercity telecommunications services as Government Furnished Equipment or request the Contractor to provide the services as part of the overall solution.

Government furnished intercity telecommunications services may include domestic and international toll-free services and outbound intercity telecommunications and dedicated transmission services (between the contractor facility and government location(s)) furnished through the Federal Government’s long distance carrier and other contracts. Dedicated transmission services between contractor facilities shall be provided by the Contractor. Intercity telecommunications services provided by the Government may include the following features:

1. Domestic and international toll-free services with nation-wide single number coverage and call routing features (e.g. area code routing, time of day and day of week routing, percent allocation routing, area code routing, allocation routing, alternative routing)
2. Call termination features (e.g. network call transfer, dialed number identification service (DNIS))
3. Automatic number identification (ANI)
4. Automated voice response service (e.g. IVR, voice recognition)
5. Outbound long distance service
6. Management reports

When requested, the Contractor shall provide the necessary intercity telecommunications services to meet the needs of the Government. At a minimum, the Contractor shall provide services and features equivalent to those described in this section. The Contractor shall price telecommunications services separately in Section B to enable the Government to select the optimum solution. The Government may change service provider at any time during the effective period of a task order if such a change is in the best interest of the Government. The Contractor will be notified in writing if such a change is to occur.

C.7.3 Network Design

The Contractor shall be responsible for the overall network design, traffic engineering, and meeting the interface requirements of all telecommunications and Internet access services needed to sustain both the voice and data requirements of the contact center operations. This

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2749 requirement includes supporting data transmission between the Contractor and Government
2750 systems and appropriate security mechanisms to protect sensitive data.

2751
2752 **C.7.4 Network Termination Equipment**

2753 The Contractor shall provide any equipment necessary to terminate the telecommunications and
2754 Internet access services to the contact center, including any inside wiring and connectors
2755 between the network service demarcation point and the contact center system.

2756
2757 **C.7.5 Service Coordination**

2758 The Contractor shall be responsible for coordinating with the FTS 2001 contractor and/or other
2759 telecommunications service provider(s) for service provisioning, trouble resolution, and service
2760 restoration.

2761
2762 **C.7.6 Telephone Number Ownership**

2763 The Government may furnish its own toll-free telephone number(s) for use by the Contractor or
2764 request the Contractor to provide the toll-free telephone number as part of the solution. The
2765 Contractor shall expedite transfer of all toll-free telephone number(s) used to support tasks
2766 issued under this contract to the Government at the conclusion of each task.

2767
2768 **C.7.7 Internet Domain Ownership**

2769 The Government may furnish its own Internet domain(s) for use by the Contractor or request the
2770 Contractor to provide the Internet domain(s) as part of the solution. The Contractor shall
2771 expedite transfer of all Internet domain(s) used to support tasks issued under this contract to the
2772 Government at the conclusion of each task.

2773
2774
2775 **C.8 PERFORMANCE MANAGEMENT**

2776 The Government intends to establish performance standards that will be used to measure
2777 contractor performance and a methodology for calculating incentive awards for superior
2778 performance on a task order-by-task order basis. The performance standards, incentive award
2779 schedule, and methodology for calculating incentive award amount will be identified in
2780 individual task orders issued by the Government.

2781
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2784 **C.9 GOVERNMENT-FURNISHED PROPERTY AND SERVICES**

2785 The Government will furnish pertinent information to the Contractor for use in the performance
2786 of each task. Examples of information to be provided by the Government include, but are not
2787 limited to, the following:

- 2788
2789
2790 1. Privacy Act guidelines
2791 2. Escalation procedures and guidelines

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- 2792 3. Business rules and response formats and guidelines
- 2793 4. General government and program specific training materials
- 2794 5. Existing methods and procedures manuals
- 2795 6. Government agency contact listing
- 2796 7. Government travel guidelines
- 2797 8. Contact listing for Congressional and Diplomatic offices
- 2798 9. Existing script or call guides as presently used to support current agency programs
- 2799 10. Data, personnel and physical security guidelines
- 2800 11. Screen layout and file structure for data transmitted by agencies
- 2801 12. Access to Government databases where applicable
- 2802 13. Public distribution materials (e.g., publications, applications, forms, brochures) where
- 2803 applicable.
- 2804 14. Initial content for knowledge database
- 2805 15. Conflict of interest guidelines
- 2806 16. Relevant laws, regulations, policies and procedures
- 2807 17. Reference materials
- 2808 18. Database files
- 2809 19. Envelops and mailing supplies

2810
2811 For any materials to be distributed to the inquiring public, the Contractor shall be responsible for
2812 stocking adequate supply and submitting resupply requests on a timely basis to ensure
2813 continuous availability.

2814
2815
2816 **C.10 DOCUMENTATION TO BE PROVIDED**

2817
2818 The Contractor shall provide the documentation described below and in accordance with the
2819 schedule set forth in task orders issued by the Government. The Contractor shall review all plans
2820 on a continual basis throughout the life of the contract in order to maintain their accuracy and
2821 appropriateness to the current operating environment. Subsequent to their initial acceptance by
2822 the Government, any changes to these plans shall require Government review and approval prior
2823 to their implementation. The Government reserves the right to require additional documents to
2824 meet specific task requirements.

2825
2826 Conflict of Interest Compliance Plan – identifies plans and procedures to identify, evaluate, and
2827 mitigate all actual, apparent, and potential conflicts of interest that preclude or would appear to
2828 preclude the Contractor from rendering impartial assistance or advice.

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2829 Customer Satisfaction Plan - identifies plans and procedures to survey customers to determine
2830 the degree of customer satisfaction on the services rendered. The plan shall include details on
2831 the processes and methodologies that the offeror will use to identify problems and implement
2832 corrective actions.

2833

2834 Design, Engineering, Implementation and Management Plan – includes the following:

2835

2836 Site Selection - identifies processes, methodologies, and criteria used for site selection, including
2837 those that affect staffing, foreign language support, and emergency/disaster recovery.

2838

2839 Facilities - identifies and defines the contact center design, including work and office space and
2840 training facilities.

2841

2842 Technology – identifies and defines the system architecture and configurations for both primary
2843 operation and backup systems, including those supporting automated and manual inquiry
2844 processing, workforce management systems, knowledge/inquiry tracking databases, quality
2845 monitoring and training systems, management reports and other support tools used to support the
2846 contact center operations. Defines the use of XML within the system architecture to maximize
2847 data sharing with other government/contractor systems.

2848

2849 Networks - identifies and defines the telecommunications/Internet services and most cost
2850 effective network design for supporting the contact center operations.

2851

2852 Operations - identifies processes and procedures for managing automated and attended functions,
2853 automated voice response script design and maintenance, call routing design and management,
2854 workforce scheduling and management, and service delivery strategies.

2855

2856 Disaster Recovery/Contingency Plan – identifies every risk as well as the steps necessary to
2857 prevent it from happening in the first place. The plan shall include an alternate set of steps to
2858 minimize the impact should prevention fail. The plan must define backup and restoration
2859 processes and the precise steps to take to recover as quickly as possible, including recovery
2860 procedures for physical facility, voice, data, and desktop systems and applications,
2861 communications networks, electrical service, customer access points, partners and procedures
2862 and staff. The Plan shall define the roles and responsibilities of contractor personnel during
2863 contingent and disaster events, including plans for training the personnel to prepare them to
2864 respond to such events. The plan shall include implementation procedures to test and execute the
2865 plan on a regular basis to ensure preparedness for such events. The plan shall be developed in
2866 accordance with applicable agency IT Security Policy and NISI Special Publication 800-34,
2867 Contingency Planning Guide for Information Technology Systems.

2868

2869 Human Resources Management Plan – includes the following:

2870

2871 Staffing – identifies staffing resources for contact center operation and project
2872 management. The plan shall include a staffing chart that identifies the allocated resources
2873 (expertise and staff hours) needed to perform each of the required functions to support the
2874 project. The plan shall include relevant details on recruiting and retaining employees, workforce

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2875 scheduling and workload management, supervision and quality monitoring practices. The Plan
2876 shall also address roles and responsibilities of project and contact center staff by title and define
2877 supervisor and Quality Assurance (QA) monitor to IS ratios that will be used in support of the
2878 task.

2879
2880 Training – identifies plans, procedures, and methodologies for training contact center
2881 employees, including the types and schedule of training to be provided, and criteria for selecting
2882 instructors and training evaluation assessment methods.

2883
2884 Dismissal Procedures - identifies procedures that the Contractor shall follow in the event of
2885 a Federal Government closure or other emergency affecting the area in which the contact center
2886 is located.

2887
2888 Knowledge/Case Management Plan - identifies methodologies, processes and procedures for
2889 effective knowledge management, including those required for developing, operating, and
2890 maintaining the required knowledge and case management databases to support the contact
2891 center operations. Where appropriate, the plan shall include methodologies and procedures for
2892 effective management of distributed knowledge databases and sharing of knowledge/case
2893 management data with other government and/or contractor systems.

2894
2895 Operations Management Plan – identifies plans and procedures for managing staff, facilities,
2896 equipment and processes effectively; includes procedures that the Contractor shall follow in the
2897 event of a service outage, an unexpected surge in call volume, a Federal Government closure or
2898 other emergency affecting the area in which the contact centers is located.

2899
2900 Performance Management Plan – identifies plans and procedures to measure any customer
2901 service performance standards deemed appropriate.

2902
2903 Phase-In Plan – identifies plans and approaches for implementing the proposed solution,
2904 including required tasks, schedule and milestones, and deliverables. The plan shall include
2905 methodologies and procedures for minimizing disruption of service to current customers.

2906
2907 Program Management Plan – identifies and defines the Contractor’s organization, roles and
2908 responsibilities, and lines of authority, management procedures/policies/plans, plans and
2909 programs for managing team partners and subcontractors, escalation procedures for
2910 problem/dispute resolution, and reporting requirements for the tasks and services to be
2911 performed under this contract.

2912
2913 Project Plan – provides a comprehensive plan for implementing the project, which addresses all
2914 strategies, objectives, required actions, roles and responsibilities and target dates for
2915 implementation of tasks. Identifies critical paths and task dependencies.

2916
2917 Quality Assurance/Quality Improvement Program Plan – identifies plans, methodologies, and
2918 procedures for maintaining effective quality assurance and service improvement programs,
2919 including monitoring and assessing performance and service activities to ensure quality services
2920 are provided to customers. Included in the program shall be a Quality Improvement Plan to

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2921 identify and document performance assessment and improvement opportunities and procedures
2922 for implementing the service improvements. The Plan shall address all areas, including, staffing,
2923 training, operations, contract deliverables, performance management, process engineering,
2924 service delivery, service improvements, and customer satisfaction.

2925
2926 Security Plan – provides an overview of the security requirements for the information and IT
2927 systems and describes the existing or planned controls (management, operational, and technical)
2928 for meeting those requirements. The Plan also describes the systems and delineates
2929 responsibilities and expected behavior of individuals who access the systems. The plan shall be
2930 developed in accordance with applicable agency IT Security Policy and NIST Special
2931 Publication 800-18, Guide for Developing Security Plans for Information Technology Systems.

2932
2933 Service Level Management Plan – identifies processes and methodologies for effective service
2934 level management, including workload forecasting, IS scheduling, service recovery (from system
2935 failures, disasters, etc.), problem identification and resolution, problem notification, and
2936 contingency planning and escalation.

2937
2938 Status/Management Reports - provides contract status, contact center performance, and
2939 management reports, including, but not limited to:

2940
2941 Contract Status Reporting

2942 Work Performed during the reporting period

2943 Activities anticipated for the next reporting period

2944 Compliance/Non-Compliance (including Corrective Actions)

2945 Cost Incurred Vs. Cost Budgeted

2946

2947 Performance Reporting

2948 Call/Inquiry/Fax/E-mail/Appointment Activities

2949 Service Levels/Quality

2950 Inquiry/Request Types and Trends

2951 Exceptions

2952 Notification of Service Outages

2953 Trunk Usage

2954 Agent Group Activity

2955 Agent Activity

2956 Customer Profiles

2957 Traffic Analyses

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2958 Management Reporting

2959 Data and Information Security Issues

2960 Problems/Issues and Trends

2961 Training Evaluations

2962 Workload/Workforce/Scheduling Information

2963 Staffing Forecasts

2964 Notification of Changes

2965 Quality Assurance Reports

2966 Performance Assessment Reports

2967

2968 Test and Acceptance Plan – identifies plans and procedures that the contractor shall use to ensure
2969 that the full range of services to be provided are successfully tested prior to actual
2970 implementation.

2971

2972 Value Engineering/Process Improvement Plan – identifies plans and procedures to evaluate new
2973 and emerging technologies and/or reengineering business processes to improve program
2974 efficiency and customer service.

2975

2976 Additionally, the Contractor shall obtain and provide all permits, contracts, copyrights, licenses,
2977 etc., necessary for its performance of any tasks issued under this contract and shall provide
2978 copies of such information to the Government upon request.