

Pre-Proposal Conference for RFP

Enterprise Contact Center Services

RFP 6100035614

Issuing Officer: Barbara Booher
Office of Administration,
Bureau of IT Procurement Services

December 7, 2015 @ 10:00 AM

Agenda

- Housekeeping
- Introductions
- Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)
- Project Background
- Proposal Requirements
- Questions Submitted
- Additional Questions

Housekeeping

- In the event of a fire drill:
 - Exit the room to the rear, continue down the hall and exit through the stairwell. On the ground floor, exit the building and assemble near the flag poles.
- Restrooms:
 - Located outside of the room to your left.
- Sign attendance register
- Provide business card
- Sign-in sheet will be posted to e-Marketplace

Introductions

Commonwealth Representatives:

- Office for Information Technology
 - Barbara Booher, Issuing Officer
- Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)
 - Curtis Burwell, Contract Compliance Officer
- Office of Administration
 - Kevin Paul, Project Manager

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

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Curtis Burwell

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Program designed to encourage participation of Small Diverse Businesses (SDB) in state contracting

- A Small Diverse Business is a DGS-verified minority-owned business, woman-owned business, veteran-owned business or service-disabled veteran-owned business.
- A small business is a business in the United States which is independently owned, not dominant in its field of operation, employs no more than 100 full-time or full-time equivalent employees, and earns less than 7 million in gross annual revenues for building design, \$20 million in gross annual revenues for sales and services and \$25 million in gross annual revenues for those businesses in the information technology sales or service business.

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

To receive credit for being a Small Diverse Business or for subcontracting with a Small Diverse Business (including purchasing supplies and/or services through a purchase agreement), a Offeror must include proof of Small Diverse Business qualification in the Small Diverse Business participation submittal of the proposal, as indicated in section II of the RFP.

- Photocopy of its DGS issued certificate entitled “Notice of Small Business Self-Certification and Small Diverse Business Verification” indicating its diverse status
- Small Diverse Business(es) must be named including address and phone
- Letter of intent that specifies the type of goods or services the small diverse business will provide along with percentage of commitment
- All Offerors must include a numerical percentage which represents the total percentage of the work (as a percentage of the total cost in the Cost Submittal) to be preformed by the Offeror and not by subcontractors and suppliers
- All Offerors must include a numerical percentage which represents the total percentage of the work (as a percentage of the total cost in the Cost Submittal) to be performed by the Small Diverse business as subcontractors

**NOTICE OF SMALL BUSINESS SELF-CERTIFICATION
AND SMALL DIVERSE BUSINESS VERIFICATION**



The Department is pleased to announce that

AGENCY GUEST ACCOUNT

has successfully completed the Pennsylvania Department of General Services' process for self-certification as a small business under the Commonwealth's Small Business Procurement Initiative as established by Executive Order No. 2011-09, and is verified as a Small Diverse Business with the following designation(s):

BUSINESS TYPE(s): Construction Contractor, Construction Supplier, Design, Procurement Services, Procurement Goods, Information Technology

CERTIFICATION NUMBER: 336949-2012-07-SB-MWBE

ISSUE DATE: 07/15/2012

EXPIRATION DATE: 07/16/2015

RECERTIFIED DATE: 7/16/2014

A handwritten signature in blue ink, appearing to read "Sheri Phillips". The signature is written in a cursive style and is positioned above a horizontal line.

Sheri Phillips, Secretary
Department of General Services
Commonwealth of Pennsylvania

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

SMALL DIVERSE BUSINESS LETTER OF INTENT

[DATE]

[SDB Contact Name]
Title
SDB Company Name
Address
City, State, Zip]

Dear [SDB Contact Name]:

This letter serves as confirmation of the intent of [Offeror] to utilize [Small Diverse Business (SDB)] on RFP [RFP number and Title] issued by the [Commonwealth agency name].

If [Offeror] is the successful vendor, [SDB] shall provide [identify the specific work, goods or services the SDB will perform, and the specific timeframe during the term of the contract and any option/renewal periods when the work, goods or services will be performed or provided].

These services represent [identify fixed numerical percentage commitment] of the total cost in the [Offeror's] cost submittal for the initial term of the contract. Dependent on final negotiated contract pricing and actual contract usage or volume, it is expected that [SDB] will receive an estimated [identify associated estimated dollar value that the fixed percentage commitment represents] during the initial contract term.

[SDB] represents that it meets the small diverse business requirements set forth in the RFP and all required documentation has been provided to [Offeror] for its SDB submission.

We look forward to the opportunity to serve the [Commonwealth agency name] on this project. If you have any questions concerning our small diverse business commitment, please feel free to contact me at the number below.

Sincerely,

Acknowledged,

Offeror Name
Title
Company
Phone number

SDB Name
Title
Company
Phone number

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Contact Information

Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO)

Mr. Curtis Burwell

Contract Compliance Officer

Telephone: (717) 787-4834

E-Mail: cburwell@pa.gov

Project Background

Enterprise Contact Center Services

Kevin Paul

Project Manager

Office of Administration

Project Background

Objectives

- Procure an industry leading cloud based, multi-tenant, multi-channel, interactive contact center platform and comprehensive solution that will scale and adapt to the diverse needs of the state government staff and the public it will serve.
- Empower customers and contact center staff through comprehensive feature sets, that enables the Commonwealth to respond faster and more effectively and increase customer service.
- Scalable platform to meet the Commonwealth's business and fluctuating needs of its citizens with the ability to handle the increased call volumes due to emergencies or other major events.

Project Background

End Result

- Common platform to support all Contact Center Services (Interactive Voice Routing (IVR), Call Recording, Workforce Management, Predictive Dialer, Reporting, etc.)
- Service Level Agreements (SLA's) to support agency needs.
- High availability
- Scalability
- Self managed or vendor managed options
- Competitive pricing to support dynamic call center size

Background Information

- Immediate need to support Department of Human Services
- Minimize transition impact to agencies
- Align with ITIL processes
- Telecom end point agnostic
- Sensitive to capital investment of anchor tenants on Contact Center Solution.

Proposal Structure

- Proposal is divided into the following three parts that must be submitted in separate individual sealed envelopes:
 - Technical Submittal = **50%** of total points
 - Cost Submittal = **30%** of total points
 - Small Diverse Business (SDB) Submittal = **20%** of total points
- Bonus Points:
 - Domestic Workforce Utilization = maximum available **3%**
[Appendix J]

Proposal Structure

- To minimize delays in proposal evaluation and to avoid rejection of your proposal, read the RFP carefully and submit a complete proposal.
- Follow as completely as possible the proposal format given in Part II of the RFP; this will aid the evaluation process.
- The evaluation will be based on what is submitted.
- Provide as much detail as possible in response to all requirements in the RFP.

Proposal Requirements

- Each Offeror must provide the following: [Section I-12 Proposals, pg. 3]
 - Seventeen (17) paper copies of the Technical Submittal
 - Two (2) paper copies of the Cost Submittal
 - Two (2) paper copies of the Small Diverse Business (SDB) Submittal
 - Two (2) complete and exact copies of the entire proposal (Technical, Cost and SDB Submittals, along with all requested documents) on CD-ROM or Flash drive in Microsoft Office or compatible format.

Proposal Requirements Continued

- Mandatory Responsiveness Requirements (Section III-1)
 - Timely received from an Offeror
 - Properly Signed by the Offeror

Proposal Requirements Continued

- Additional Proposal Requirements
 - Signed by an official representative to bind the company to a contract. Appendix C, Proposal Cover Sheet must be submitted in order for the proposal to be considered responsive.
 - The proposal must consist of three (3) separately sealed submittals:
 - Technical Submittal
 - Cost Submittal
 - Small Diverse Business Submittal
 - Submit proposals as outlined and referenced in Part II Proposal Requirements.
 - The total score for the technical submittal must be greater than or equal to 70% of the available technical points to advance.
 - **Do not** include any cost information in your technical submittal. If your proposal includes cost information, it shall be deemed non-responsive.

Proposal Requirements Continued

- **Do not** include any assumptions in your cost submittal.
[Appendix I, Cost Matrix]
- Submit proposal, including the cost proposal, on the basis of the terms and conditions set out in Appendix A.
- If the proposal is contingent on negotiations of terms and conditions, your proposal may be deemed non-responsive.

Proposal Requirements Continued

- **ADDRESS PACKAGES PROPERLY**
 - Reference Calendar of Events, pg. iv.
 - **Note:** All proposals must be received by the Commonwealth Mail Processing Center. If the proposals are delivered directly to 506 Finance Building, your proposal may be deemed non-responsive.
 - Include RFP Number – 6100035614
 - Number Multiple Packages (i.e. 1 of 3, 2 of 3, etc.)
 - Must be Sealed
 - Allow time for delivery

Calendar of Events

<p>Answers to Potential Offeror questions posted to the DGS website (http://www.emarketplace.state.pa.us) no later than this date.</p>	<p>Issuing Office</p>	<p>Thursday, December 10, 2015 at 3:00 PM</p>
<p>Please monitor the DGS website for all communications regarding the RFP.</p>	<p>Potential Offerors</p>	<p>Ongoing</p>
<p>Sealed proposal must be received by the Issuing Office at: Barbara Booher, Bureau of IT Procurement c/o Commonwealth Mail Processing Center 2 Technology Park (rear) Attn: IT Procurement 506 Finance Harrisburg PA 17110</p> <p>Note: Hand-delivered proposals must be delivered to the address set forth in the Calendar of Events and must be time and date stamped by the facility receiving the proposals. Proposals may only be hand-delivered between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays.</p>	<p>Offerors</p>	<p>Friday, January 8, 2016 at 1:00 PM</p>

Calendar of Events Continued

Tentative schedule for oral presentations as set forth in **Section I-19**. The Issuing Office will notify Offerors selected to conduct oral presentations.

Offerors

TENTATIVE:
Week of
February 8, 2016

Proposal Delivery Address

Sealed proposal must be received on or before **Friday, January 8, 2016**, by **1:00 PM** to the Issuing Office at the following address:

**Barbara Booher, Bureau of IT Procurement
c/o Commonwealth Mail Processing Center
2 Technology Park (rear)
Attn: IT Procurement 506 Finance
Harrisburg, PA 17110**

Note: Hand-delivered proposals must be delivered to **Commonwealth Mail Processing Center, 2 Technology Park (rear)**, and must be time and date stamped by the facility receiving the proposals. Proposals may only be hand-delivered between 6:15 a.m. and 2:15 p.m., Monday through Friday, excluding Commonwealth holidays. The Issuing Office will not accept proposals that are hand delivered to 506 Finance Building.

Questions & Answers (Q&A)

- **Questions**

- All additional questions must be written on the Q&A sheets provided.
- All Q&A will be posted to the DGS PA e-Marketplace website:

<http://www.emarketplace.state.pa.us>

- **The Q&A final document will become official when posted to the DGS PA e-Marketplace website.**

Thank you for attending today's
pre-proposal conference.