PimaCommunityCollege
Contracts&Purchasing

Proposal No. P20/10025L Call Center Services

Answers to Vendor Questions – Questions are in black, answers are in red

1.   Question: Please reconfirm the due date for this procurement by providing it in response to answers to questions.

Answer: The due date is March 13, 2020.

2.   Question: Why has this bid been released at this time?

Answer: Pima's contract with the current call center will expire on June 30, 2020.

3.   Question: When is the anticipated award date?

Answer: The anticipated award date is May 1, 2020.

4.   Question: Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?

Answer: Yes, bidders are welcome to submit an alternate fee structure.

5.   Question: Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.

Answer: Blackboard has performed under the scope of services outlined in the current contract.

6.   Question: Has the current contract gone full term?

Answer: The current contract will end on June 30. 2020.

7.   Question: Have all options to extend the current contract been exercised?

Answer: Yes. The current contract will not be extended.

8.   Question: Who is the incumbent, and how long has the incumbent been providing the requested services?

Answer: Blackboard is the current incumbent and has been providing service since July 1, 2015.

9.   Question: To what extent will the location of the bidder's proposed location or

headquarters have a bearing on any award?

Answer: The bidder and call center must be located in the United States to comply with the Department of Education, Title IV compliance. The bidder will be required to provide 24/7 call center support with capability to warm transfer to a higher tier at the college during normal business hours (MST).

10.   Question: How are fees currently being billed by any incumbent(s), by category, and at what rates?

Answer: Phone calls are $7.10/ per incident, emails are $5.00/ per incident. All categories have the same rate.

11.   Question: What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?

Answer: The estimated dollar amount paid last year was $375,000.00.

12.   Question: What is the minimum required total call capacity?

Answer: The estimated minimum required total call capacity is 40,000 calls per year.

13.   Question: What is the minimum simultaneous inbound call capacity?

Answer: The estimated minimum simultaneous inbound call capacity is 10-15, but may need to be scaled up or down, based on high volume/peak months at the college.

14.   Question: What is the maximum hold time?

Answer: The goal is to have a maximum hold time of 120 seconds.

15.   Question: What percentage of inbound calls must be answered by a live operator?

Answer: 100% of inbound calls must be answered by a live operator.

16.   Question: Is there a minimum or maximum number of operators and supervisors?

Answer: Estimated 5-10 operators and 1 supervisor, at minimum.

17.   Question: What are the required language options?

Answer: English. Spanish is preferred, but not required.

18.   Question: What is the required degree of dedication for the call center?

Answer: Required Associate's degree, at minimum.

19.   Question: What is the required degree of dedication for the operators?

Answer: It is expected that the operators are fully trained prior to taking inbound calls. This includes accessing the knowledge base, the Pima Community College website, and basic knowledge of higher education principles. The operator is expected to exhaust all resources, troubleshoot issues with the caller and confirm with the caller that their inquiry was addressed and resolved properly, and to their satisfaction.

20.   Question: Are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator, or must a live operator be the initial contact?

Answer: Yes, callers are allowed to connect with a message verification system. This could include a FERPA verification process and/or a deflection message for callers.

21.   Question: What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?

Answer: All phone calls will be recorded and must be maintained for the duration of the contract. Pima Community College must have access to recorded calls.

22.   Question: What are the recording and storage requirements for non-phone communications?

Answer: All communications will be stored and must be maintained for the duration of the contract. Pima Community College must have access to calls to download in real time.

23.   Question: What information is to be included in call logs?

Answer: Student's or caller's name, contact information, nature of call, resolution, etc. should be included in all call logs. Date, time, duration of call should also be recorded.

24.   Question: What is the current number of seats for operators and supervisors at your existing call center?

Answer: These numbers vary depending on the time of year and high volume/peak months. For example, in March, when volume is low, there may be 3-5 operators taking calls. In January and August, Pima's peak months of the year, there may be 10-15 operators taking calls. There is always at least 1 supervisor monitoring the call center operators.

25.   Question: What is the current average handle time for phone calls and other types of communications?

Answer: Current average handle time for phone calls is approximately 7 minutes.

26.   Question: What is the current average after-call work time for operators?

Answer: Current average after-call work time is 1-2 minutes.

27.   Question: Over the past year, what is the percentage of calls received in English versus non-English?

Answer: Pima does not have this information, but would estimate 3-5% of calls are non-English.

28.   Question: Over the past year, what percentage of calls received were in Spanish?

Answer: Pima does not have this information, but would estimate 3-5% of calls are Spanish.

29.   Question: Is the support sought by the RFP currently being provided by the College or a third party, or some combination of both?

• If a third party is providing support, what is their role and scope of their work?

• What is the name of this vendor?

Answer: The support is currently being provided by both the college and a third party. The third party call center is currently being serviced by Blackboard. Blackboard responds to inbound calls and emails in the areas of student accounts/bursar, financial aid, and admissions, records and registration.
The college support serves all call inquires, which includes the same scope of work as Blackboard. In addition, they serve calls from the general public about directory information, college events and any other requests for information.

31.   Question: Page 5 of 44, Section 2. Scope of Work, General Outline, #2. Minimum Service Standards:
• 2nd Bullet – How do you calculate customer satisfaction today to determine quartile ranking?

Answer: Customer satisfaction is measured by performance of service provided to the end user/customer. This is used to identify end user's opinions of service performance. This service is measured monthly on a scale of 1-5. Customer service levels shall be at 3.5 or higher. (80% or higher).

32.   Question: Pages 6 of 44, Section 2. Scope of Work, General Outline – Missing #3 There appears to be no number 3 in the General Outline in the Scope of Work. Should we use the numbering as presented or should we renumber Historical Call Volume as number 3 and revise the subsequent numbered subsections accordingly?

Answer: Please use the numbering as presented.

33. Question:Page 6 of 44, Section 2. Scope of Work, General Outline, #4. Historical Call Volume:

• What is the call volume for admissions, registrar, advising, counseling, student records, student life, referral services, and general information? (In your 2014 RFP, this call volume was reported as a combined 120,000 calls annually.)

• What is the combined annual call volume for Student Support Services?

• Is your current vendor answering all calls for the departments encompassing Student Support Services?

  o   If not, what is your current arrangement for vendor support?

• What is the call volume by day/week for the last 12 months for each area for which you are requesting support?

Answer: The annual call volume is approximately 55,000 calls per year, with approximately 95% of those calls being student support services. The call center does not generally receive informational or directory questions. Yes, the current call center services inbound calls for the departments: student accounts/bursar, financial aid, and admissions, records and registration.
Below is a table of the calls broken down by month. Pima does not have call volume by day/week.

Call Volume for July 2018-June 2019

Admissions, Records, Registration	20,059
Financial Aid	21,042
Student Accounts/Bursar	8,744

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Month	Projected Monthly Total Incidents (Live + Self-Service)
January	4,911
February	2,639
March	2,913
April	4,445
May	5,261
June	4,693
July	7,086
August	9,217
September	4,238
October	3,362
November	2,597
December	3,639
Total	55,000

34.   Question: Page 6 of 44, Section 2. Scope of Work, General Outline, #5. Technical Requirements:
• Which, if any, of the current systems listed are used for 'view only' access?

Answer: Ellucian Banner is used as 'view only'

• How many of the systems listed are being utilized by the current call center vendor for support?

Answer: Ellucian Banner

• Are potential vendors expected to login to Desire 2 Learn, or just be knowledgeable about it and instruct students how to access it for specific needs?

Answer: The college has separate support for Desire 2 Learn (D2L). The call center is expected to explain how to access D2L. If the caller requires D2L user support, or is experiencing D2L issues, there will be a knowledge base that will refer the student to D2L support. This may also include a warm transfer to D2L 24 hour support and/or escalation via a ticketing system.

• To access the systems listed, either by 'view only' or logging-in, will any of these systems require the vendor to obtain a separate license agreement?

Answer: No, there should not be a need for a separate license agreement.

o   If so, will the College be providing this on behalf of the vendor?
o   If not, what are the costs of each type of license agreement necessary for support?

Answer: There are no costs for license agreement.

35. Question: Pages 7 and 8 of 44, Section 2. Scope of Work, General Outline, #6. Functional Area Topics to be Addressed, B. Describe the following service elements of the offering firm:

• B.9. Can you clarify what call backs are you referring to in this requirement?

Answer: This is referring to callbacks within a certain period of time. For example, if a customer calls, the calls back again within 1 hour, or same day, etc. If the customer calls back within an hour, or within the same day, it is an indication that their question was not answered correctly the first time.

• B.11. Does the school use its own Ticketing System today to enter and track resolutions?

Answer: The college does not use its own ticketing system for call center resolutions.

   o If so, would you like the vendor to use the College's system?
   o
Answer: N/A

   o If not, what is the system currently in use?

Answer: The current vendor provides a ticketing system that Pima employees login to and resolve escalated tickets.

• B.22. Are 'warm' transfers supported by the current vendor?

Answer: Yes
   o How are 'warm' transfers handled today?

Answer: A warm transfer to Pima Community College from the vendor would occur if:
   1) the student needs detailed academic advising or financial aid advising
   2) the student is irate or wants to submit a formal complaint
   3) the student needs a transaction performed (i.e. registration or hold released)
The current call center does not perform transactions. If the student needs a transaction performed, the call center will warm transfer to an academic or financial aid advisor via voice to voice contact. The vendor is required to provide the student's name, student ID number and describe the nature of the call, prior to connecting the student with the college.

   o Is there adequate staff at the College to accept transfers?

Answer: Yes, the college has a team of virtual advisors who are available to answer warm transfers Monday-Thursday between the hours of 8am-5pm MST and Friday 10am-5pm MST

   o How are warm transfers calculated into First Call Resolution statistics?

Answer: Warm transfers should not be considered a resolution statistic.

• B.23. Who is your current chatbot vendor?

Answer: Pima Community College has a contract with Ocelot for financial aid chatbot. No other department currently uses chatbot.

      o   Are you considering replacing the current vendor if this technology is provided by your new call center vendor, or vendor partner?

Answer: Yes, all vendors will be evaluated.

      o   What is the current number of chatbot interactions?

Answer: Current chatbot numbers from February - March, 2020 are 337 conversations, with 1,109 interactions. The current chatbot supports financial aid only.

      o   What is the resolution rate on chatbot interactions?

Answer: Estimated resolution rate for chatbot is 93%.

      o   How are chatbot escalations handled today?

Answer: Chatbot escalations are sent back to the college and the financial aid team resolves the detailed inquiries that require additional research.

36.   Question: Page 8 of 44, Section 2. Scope of Work, General Outline, #6. Functional Area

Topics to be Addressed, C. Describe how metrics and reporting will be handled. Question #7:

• Is it permissible to acknowledge and affirm that we will provide the types of reports that are being requested?
      o   If not, what information or documentation would you like to have included in the response?

Answer: Yes. Any other metrics and reporting not listed would be appreciated.

37.   Question: Page 10 of 44, Section 3. Proposal Preparation and Submittal, D. Response to Scope of Work:

• Can the proposal be submitted double-sided or must it be submitted single sided?

Answer: Single sided

38.   Question: Page 13 of 44, Section 3. Proposal Preparation and Submittal, #9. Appendix:

• For items b. and c., what is the time period for which you are requesting information?

Answer: 5 years

39.	Question: Page 19 of 44, Cost Proposal

• You ask for 3 separate cost per call and then a total, what goes in the total section?
• Are you expecting calls/emails to be charged at separate prices based on volume?
• Can we just list one price per call for all volume for each area?
• Can you provide the number of calls transferred for the last 12 months and the departments transferred to?
• You ask for pricing for additional services, yet mention pricing for these additional services will be negotiated, are you just looking for approximations?

Answer:
Calls Escalated to Pima for July 2018-June 2019

Admissions, Records, Registration		5,492

Financial Aid				1,166

Student Accounts/Bursar			32

Answer: The total section will be the sum of calls/emails for the specified area.
The College is expecting calls/emails to be charged at separate prices based on volume.
You may list the same price for each line item on the price page.

You may list any additional services that may be beneficial to the College.

40.	Question: Section 7. Sample Agreement, Attachment D, Insurance Requirements, #2C. Insurance Coverage Requirements:

• C. Commercial General Liability Insurance, Blanket Contractual Liability – Written and Oral $50,000
			o	What risk is this requirement seeking to cover? Per insurance advisor, this is not a typical request or type of insurance coverage.

Answer: The insurance requirements have been vetted and approved by the College's Contract department.

41.	 Question: How are these services being managed currently? In-house or outsourced?

	Answer: Outsourced

42.   Question: If outsourced, who is the incumbent vendor?

Answer: Blackboard

43.   Question: What challenges are you facing with the current set-up, if any?

Answer: Pima is unable to answer this question.

44.   Question: What is the estimated budget for this project?

Answer: Pima is unable to answer this question.

45.   Question: What is the current Average Handle Time of these issues?

Answer: See answer to question 25.

46.   Question: What is the tentative award date for this RFP?

Answer: Tentative award date is May 1, 2020.

47.   Question: What is the tentative start date for this project?

Answer: Expected go live is July 1, 2020, however, the college would prefer a soft launch mid June to address any issues or concerns prior to going live.

48.   Question: *Under Section 2, Scope of Work, 2. Minimum Services Standards: Response time for email to be less than 5 minutes*. Is this correct?

Answer: This is correct.

49.   Question: Is the College looking for a Contact Center location that is within the boundaries of the U.S.?

Answer: The College is seeking proposals from qualified firms in accordance with the Scope of Work. The call center must be located in the United States to comply with the Department of Education, Title IV compliance.

50.   Question: Could PCC provide a break out of the call and email volumes for the year by month and week? (page 6, section 4 Historical Call Volume)

Answer: See question 33.

51.   Question: What is the average call handle time? (page 6, section 4 Historical Call Volume)

a.   Financial Aid

b.   Student Service Center

Answer: See answer to question 25.

52.   Question: Does your abandon rate change with peak/non peak periods? (Page 5, Section 2, 2. Minimum Service Standards)

Answer: Abandon rate can vary at certain times of the year. This is also based on agent availability. The current call center hires up two times a year to support the high call volume in the months of August and January.

53.   Question: What is PCC's preferred strategy for off-peak calls and chats? (Page 5, Section 2, 2. Minimum Service Standards)

Answer: Pima Community College prefers a 24/7 support line. The college does not require chat.

54.   Question: What languages does PCC require and what % of calls are in those languages? (Page 7, Section B, Question 12)

Answer: English is required. Spanish is preferred, but not required. Approximately 3-5% of calls are Spanish speakers.

55.   Question: Can you please confirm that "Student Accounts" includes both the Student Service Centers, Admissions, and Records call and email volumes? (Page 6, Section 4 Historical Call Volume)

Answer: In section 4, page 6, the 45,000 calls includes financial aid; student accounts/bursar; cashier services and payments. Examples of these calls are
   1) a student that is asking about their financial aid status
   2) a student needing assistance with financial aid verification paperwork
   3) a student who needs someone to walk them through setting up a payment plan
   4) a student with a past due balance who is inquiring about the balance and/or how to pay the balance
   5) a student checking on the status of their refund
Any calls related to admissions, records, registration, advising are not included in this number, however, the 45,000 amount is a high projection, it will most likely be lower than that.

56.   Question: Is there a relationship between 15,000 annual emails and the statement on page 3 that reads "The Financial Aid Department receives approximately 35,000 financial aid applications a year. Approximately 50% are selected for verification? (Page 3, Section 1, 3. Description of Student Support Services)

Answer: The 15,000 emails per year encompasses all queues (financial aid, student accounts/bursar and admissions, records and registration. There are approximately 5,000 financial aid related emails per year.

57.   Question: Is the Technical Requirements section specifying that we have Windows 7, Windows XP etc. PCs available so we can replicate the student experience for individuals using those platforms? (Page 6, Section 5 Technical Requirements)

Answer: No. However, Ellucian Banner 9 integration is required.

58.   Question: Is there is an existing knowledge base or does one need to be created? (Page 7, Section B, Question 7)

Answer: There is an existing knowledge base.

59.   Question: Is there an incumbent and if so who is it?

Answer: See question 8

60.   Question: Would you be receptive to different tiered student support specialists? Tier 1 and a tier 2 to handle higher-level calls in order to hit the 95% resolution rate? (Page 5, Section 2 Minimum Service Standards)

Answer: Yes, Pima Community College is open to different tiering systems. Definitions and business process for each level of tiering is required.

61.   Question: Does the 95% resolution rate include all issues or is this 95% of resolvable incidents, excluding ones that require escalation per Pima's process? (Section 2: Scope of Work, 2. Minimum Service Standards, page 6)

Answer: 95% resolution refers to resolvable incidents. It is expected that the call center will resolve any inquiry where a knowledge base article was created. The call center is not expected to resolve any inquiries where a transaction must be performed.

62.   Question: Concerning the text, robo call campaigns – what is the estimated or average number of contacts and frequency of delivery? Is this based on current FTE? (Section 2: Scope of Work, 6. Functional Area Topics to be Addressed, page 8).

Answer: Estimated average number of calls can vary by campaign. For example, a robo and/or text campaign can include 5,000-15,000 contacts. Some campaigns are based on current FTE and some are to target stop outs. Some campaigns require voice to voice and follow up coaching with the student. Those campaigns average 1,500-2,000 students.
The frequency of call campaigns are generally 2-3 per year and take place prior to the fall and spring semesters aimed to drive enrollment.

63.   Question: Concerning the 5-minute response SLA for Email, would Pima accept a Live Chat SLA of 2-minutes in lieu of email response due to the higher level of interactive guidance and customer experience? (Section 2: Scope of Work, 2. Minimum Service Standards, page 5-6)

Answer: Pima would prefer for the call center to respond to the customer through the same modality as the inquiry was received.

64.   Question: Is Pima open to multiple modalities and tools for support not described in the RFP? (Section 2: Scope of Work, 6. Functional Area Topics to be Addressed, page 8).

Answer: Pima is open to other modalities, but does reserve the right to exclude some modalities. For example, the college may not need a chat function.

65. Question: Please expand upon what is meant by advising calls/contacts? What type of advising would be required?

Answer: The call center is not required to do in depth academic advising. The call center is required to give students general information. For example
   1) how to apply for admissions
   2) how to register for courses
   3) how to pay
   4) how to access D2L
   5) how to locate programs and degrees on the PCC website
      etc.

66. Question: What is the expected or anticipated email volume?

Answer: 15,000 emails per year

67. Question: When are PCC's Launch and decide dates?

Answer:The anticipated award date is May 1, 2020.
Expected go live is July 1, 2020, however, the college would prefer a soft launch mid-June to address any issues or concerns prior to go live.

68. Question: What is PCC's training time?

Answer: Pima will make themselves available for any training needs. The college does not have a standard training schedule.

69. Question: How many full-time employees does PCC currently have?

Answer: Approximately 1,300 including adjunct faculty and staff.

70. Question: What is PCC's average handle time?

Answer: See answer to question 25.

71. Question: More information on PCC's volume per interval. (How many calls during peak season compared to a standard month)

Answer: See Question 33.

72. Question: Do you have a preference between a US or Philippines location?

Answer: See the answer to question 9.

73. Question: What other languages does PCC need help with? Percentage of calls in other languages?

Answer: English. Spanish is preferred, but not required. Approximately 3-5% of calls are Spanish speakers.

74. Question: Does PCC only want RFP mailed in?

Answer: You may mail in your proposal or drop off at the address indicated on page 1.

75. Question: What is the award timeline for this Proposal?

Answer: See Question 3.

76. Question: What is the expected "Go Live" date for call center services?

Answer: Expected go live is July 1, 2020, however, the college would prefer a soft launch mid June to address any issues or concerns prior to going live.

77. Question: Page 5, Scope of Work says the contract will be on an "as needed, if needed" basis. Can you define this for the vendors? Does this mean the College is seeking peak only or options to turn off services during slower times?

Answer: No, the college needs call center services 24 hours, 7 days a week, 365 days a year. If the call center is not open 365 days a year, a list of holidays the call center is closed is required.

78. Question: Regarding page 6, Technical Requirements, which systems will the vendor need to access to provide services?

Answer: Ellucian Banner

79. Question: Please describe a situation where the vendor would transfer the call. Are these calls considered warm transfers or will the vendor simply be transferring to a College queue?

Answer: A warm transfer to Pima Community College from the vendor would occur if:
1) the student needs detailed academic advising or financial aid advising
2) the student is irate or wants to submit a formal complaint
3) the student needs a transaction performed (i.e. registration or hold released)

The current call center does not perform transactions. If the student needs a transaction performed, the call center will warm transfer to an academic or financial aid advisor via voice to voice contact. The vendor is required to provide the student's name, student ID number and describe the nature of the call, prior to connecting the student with the college.

80. Question: Regarding email, is the vendor sending email blast alerts, a one-time "Request for Information" email reply response to students, or conversational/back and forth email exchanges?

Answer: No, the current vendor is not sending email blasts or alerts as part of the current contract.