SOLICITATION, OFFER AND AWARD

1. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) ▶ RATING

2. CONTRACT NUMBER	3. SOLICITATION NUMBER	4. TYPE OF SOLICITATION	5. DATE ISSUED	6. REQUISITION/PURCHASE NUMBER
TIB-04-02	RFP-TTB-04-02	☐ SEALED BID (IFB) ☐ NEGOTIATED (RFP)	12/12/03	

7. ISSUED BY CODE
Federal Retirement Thrift Investment Board
Suite 200, 1250 H Street, NW
Washington, DC 20005

8. ADDRESS OFFER TO *(If other than Item 7)*

NOTE: In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder".

SOLICITATION

9. Sealed offers in original and See Sec. L copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if handcarried, in the depository located in See Block 7 until 4 PM *(Hour)* local time 12/15/03 *(Date)*

CAUTION - LATE Submissions, Modifications, and Withdrawals: See Section L, Provision No. 52.214-7 or 52.215-1. All offers are subject to all terms and conditions contained in this solicitation.

10. FOR INFORMATION CALL:	A. NAME	B. TELEPHONE *(NO COLLECT CALLS)* AREA CODE 202	NUMBER	EXT.	C. E-MAIL ADDRESS

11. TABLE OF CONTENTS

(X)	SEC.	DESCRIPTION	PAGE(S)	(X)	SEC.	DESCRIPTION	PAGE(S)
		PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES	
X	A	SOLICITATION/CONTRACT FORM	1	X	I	CONTRACT CLAUSES	2
X	B	SUPPLIES OR SERVICES AND PRICES/COSTS	2			PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACH.	
X	C	DESCRIPTION/SPECS./WORK STATEMENT	4	X	J	LIST OF ATTACHMENTS	5
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	E	INSPECTION AND ACCEPTANCE	NA	X	K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS	4
X	F	DELIVERIES OR PERFORMANCE	1	X	L	INSTRS., CONDS., AND NOTICES TO OFFERORS	6
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X	H	SPECIAL CONTRACT REQUIREMENTS	3				

OFFER *(Must be fully completed by offeror)*

NOTE: Item 12 does not apply if the solicitation includes the provisions at 52.214-16, Minimum Bid Acceptance Period.

12. In compliance with the above, the undersigned agrees, if this offer is accepted within 120 calendar days *(60 calendar days unless a different period is inserted by the offeror)* from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified in the schedule.

13. DISCOUNT FOR PROMPT PAYMENT *(See Section I, Clause No. 52.232-8)*	10 CALENDAR DAYS (%)	20 CALENDAR DAYS (%)	30 CALENDAR DAYS (%)	CALENDAR DAYS (%)

14. ACKNOWLEDGMENT OF AMENDMENTS *(The offeror acknowledges receipt of amendments to the SOLICITATION for offerors and related documents numbered and dated):*	AMENDMENT NO.	DATE	AMENDMENT NO.	DATE
	Modification 01	12/2/03		

15A. NAME AND ADDRESS OF OFFEROR
CODE FACILITY
Spherix Incorporated
12051 Indian Creek Court
Beltsville, MD 20705

16. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN OFFER *(Type or print)*
Thomas W. Gantt
President and Chief Executive Officer

15B. TELEPHONE NUMBER AREA CODE	NUMBER	EXT.	15C. CHECK IF REMITTANCE ADDRESS IS DIFFERENT FROM ABOVE - ENTER SUCH ADDRESS IN SCHEDULE.	17. SIGNATURE	18. OFFER DATE
301	419-3900		☐		12/15/03

AWARD *(To be completed by Government)*

19. ACCEPTED AS TO ITEMS NUMBERED	20. AMOUNT	21. ACCOUNTING AND APPROPRIATION

22. AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION:
☐ 10 U.S.C. 2304(c) ( ) ☐ 41 U.S.C. 253(c) ( )

23. SUBMIT INVOICES TO ADDRESS SHOWN IN *(4 copies unless otherwise specified)* ▶ ITEM

24. ADMINISTERED BY *(If other than Item 7)* CODE

25. PAYMENT WILL BE MADE BY CODE

26. NAME OF CONTRACTING OFFICER *(Type or print)*

27. UNITED STATES OF AMERICA
Thomas L. Gray
(Signature of Contracting Officer)

28. AWARD DATE 3/4/04

IMPORTANT - Award will be made on this Form, or on Standard Form 26, or by other authorized official written notice.

SECTION B
SUPPLIES OR SERVICES AND PRICES/COSTS

B.1. SCOPE The Federal Retirement Thrift Investment Board (Agency) is soliciting proposals from qualified firms possessing the background and expertise necessary to provide external call center support services. The Agency is looking for a supplier that will provide adequate phone coverage (10 hours a day, 5 days a week) while maintaining a superior service level, strong customer service, and accurate and timely reporting.

B.2. BUSINESS PROPOSAL INSTRUCTIONS

a. The Business Proposal will set forth the Offeror's price to perform the required services identified in the Solicitation. Offerors should evaluate all information provided in this Solicitation, particularly in Section C, and submit pricing based on their proposed technical approach.

b. Since each pricing proposal will be evaluated to determine price realism, reasonableness, affordability, probable cost to the Agency, and understanding of the magnitude of effort, as well as being the basis for any price negotiation, it should be accurate, complete and well documented. PRICING INFORMATION IS NOT TO BE INCLUDED IN THE TECHNICAL PROPOSAL.

B.3. CONTRACT PRICING

a. Proposed pricing must be consistent with the requirements of this section as well as Sections L and M. Once a proposal is accepted and subsequent contract awarded, additions or changes to the manner of reimbursement will not be considered. Business Proposals must include and identify all burden (labor and material overhead, General and Administrative expenses, ancillary charges and fees).

b. Offeror's price proposal must include a complete cost breakdown with supporting documentation for all cost elements.

c. Pricing for progress reports, deliverables, and any other requirement of the contract must be included in the proposed total pricing, but must also be broken out separately.

d. Offeror shall propose an hourly rate of pay for the call center personnel. Proposals shall identify the base rate of pay and applicable burdens. Hours of effort by professional staff

must be proposed by category of expertise. The total number of hours required, if any, will be based on Agency need.

e. Travel and per diem costs for trips to both Washington, D.C. and the call center site needed to meet the requirements of this Solicitation must be identified separately. Provide costs for two-day trips to each site.

f. Identify any other charges relevant to this effort.

B.4 TYPE OF CONTRACT

The Agency is considering several types of contracts for this project, including cost-plus-fixed fee, cost-reimbursement, cost-plus-hourly fee, cost-plus-incentive fee. Comments are invited, based on the Offeror's experience, as to the contract type which would be most successful and appropriate in similar call center efforts.

[END OF SECTION]

SECTION C
STATEMENT OF WORK

C.1. INTRODUCTION The Federal Retirement Thrift Investment Board (Agency) administers a retirement savings and investment plan for Federal employees called the Thrift Savings Plan (TSP). The TSP was established by the Federal Employees' Retirement System Act of 1986 (FERSA), and is codified primarily at 5 U.S.C. sections 8351 and 8401-8479. The TSP offers Federal employees the same type of savings and tax benefits that many private sector corporations offer their employees under 401(k) plans. The TSP currently has over 3.1 million participants, with assets of over $118 billion.

a. The Agency has an interagency agreement with the Department of Agriculture's National Finance Center (NFC) in New Orleans, LA, to provide TSP record keeping services. These services, including a call center, are provided by the Thrift Savings Plan Division (TSPD) of the NFC.

b. The Agency recently implemented a new automated TSP record keeping system which moved the TSP from a monthly-valued plan to a daily-valued plan. The new system and daily valuation increased the number of calls and participant inquiries. As a result, additional call center support is required. This requirement, as well as the need to ensure coverage in the event of a disaster that would close the NFC call center, has provided an immediate opportunity to establish a complementary, parallel call center.

c. Therefore, the Agency requires a Contractor to establish a parallel call center in an area of the country that will not be susceptible to weather related disasters that may occur in the New Orleans area. This parallel call center will also provide coverage of all calls in the event of a disaster that affects the NFC call center operations. The parallel call center will initially handle 20% of the current call volumes and eventually handle 50% of all TSP phone traffic (40% by the end of the first year of the contract). A key element of the future operating plan is for each of these centers to provide disaster recovery relief for the other site.

d. The Agency will utilize the external call center to complement current services in a parallel operation. The Agency is seeking a call center that has experienced and professional agents. The service representatives' actions generated by the incoming calls include but are not limited to:

- Account Maintenance
- Loan Repayments

- Service Requests
- Loan Information

e. The five most common subcategories of call types include:

- Loan status (29%)
- Loan policy questions (14%)
- Loan repayment questions (11%)
- Status/account information (10%)
- Request for forms (10%)

C.2. DESCRIPTION OF WORK TO BE PERFORMED Offerors are requested to respond to all portions of the QUESTIONNAIRE FOR EXTERNAL CALL CENTER SERVICES, in Section J, thereby providing a comprehensive business solution to the Agency. If an Offeror believes that its capabilities are limited to specific portions of the solicitation's requirements, the Offeror should so state.

a. Offerors are expected to handle incoming calls only. Workload estimates for incoming calls for the first twelve months of this contract are included in the table below:

Month	Avg Total Program Traffic	% of Program Traffic to Contractor	Total Call Volume to Contractor	Average Handle Time (minutes)
January	210,322	20	42,064	4.5
February	178,945	20	35,789	4.5
March	195,776	30	58,733	4.5
April	221,452	30	66,436	4.5
May	238,711	40	95,484	4.5
June	226,197	40	90,479	4.5
July	249,986	40	99,994	4.5
August	211,165	40	84,466	4.5
September	194,012	40	77,605	4.5
October	231,914	40	92,766	4.5
November	249,318	40	99,727	4.5
December	214,546	40	85,819	4.5

Please note that the volumes going to the Contractor represent only a percentage of total traffic, as indicated by the second column. The Contractor must, however, be able to handle total program traffic in the event of a disaster at the New Orleans site. Further, the above volumes are based on past experience and may change due to the new daily-valued system and the issuance of statements from semi-annually to quarterly.

For the remaining four renewable option years of this contract, the Contractor should assume an annual growth rate of 10 percent and should anticipate handling 50 percent of the total program traffic.

b. The new parallel call center will be open from 11:00 am to 9:00 pm Eastern Time (ET), Monday through Friday. The estimated percent of volume received by day is:

Day of Week	Percent of Traffic
Monday	25
Tuesday	22
Wednesday	19
Thursday	17
Friday	17

c. The current operation is open from 7:00 am to 7:00 pm ET (the closing time will be changed to 8:00 pm ET when the new Contractor is selected). Current call volume percents by interval through- out the day are:

Time Interval	Avg Percent of Traffic
7:00 am	1.03
7:30	1.32
8:00	2.31
8:30	3.61
9:00	4.66
9:30	4.97
10:00	5.27
10:30	6.87
11:00	6.12
11:30	5.24
12:00 pm	5.36
12:30	5.30
1:00	5.01
1:30	5.04
2:00	5.10
2:30	5.51
3:00	4.95
3:30	5.31
4:00	4.71
4:30	4.42
5:00	3.25
5:30	2.38
6:00	1.49
6:30	0.78

d. The Contractor must supply personal computer workstations for each call center employee. These workstations must meet the following minimum requirements:

Processor:	Pentium 4, 2 GHz
Memory:	256 KB RAM
Hard Drive:	40GB
Graphics:	64 MB video card
Monitor:	17" CRT, color

e. The Contractor must have the capability to tape 100% of incoming calls and must safely and securely store all tapes on site for the life of the contract.

f. The Contractor must demonstrate the capability to provide training on-site. The Agency will provide "Train the Trainer" services regarding program and application training, after which the Contractor will be fully responsible for completing this training. The Contractor is expected to provide routine computer-related skills training for all associates assigned to the phones. This training must be submitted to and approved by the Agency. The program must be at least as robust as the current one-day program in use from Phone Pro. The outline of the Phone Pro program will be made available to the selected Contractor if requested.

[END OF SECTION]

SECTION F
DELIVERIES OF PERFORMANCE

F.1. DELIVERABLES The Contractor shall provide monthly progress reports that summarize significant accomplishments and statistics for each calendar month. Additional management reports (e.g., actual daily call volumes, call durations, service factors attained, hang-ups, and other statistics) that would also be provided by the Contractor should be addressed in the proposal in response to the questionnaire in Section J.

F.2. PERFORMANCE Period of performance. The term of this contract is one year, with four one-year renewable options, as follows: base year, date of award through September 30, 2004; option year 1, October 1, 2004 - September 30, 2005; option year 2, October 1, 2005 - September 30, 2006; option year 3, October 1, 2006 - September 30, 2007; and option year 4, October 1, 2007 - September 30, 2008. The options may be unilaterally exercised by the Contracting Officer by formal modification to the contract.

F.3. PLACE OF PERFORMANCE The site(s) (and all associates assigned to the telephones) selected to handle these calls must be within the United States, and cannot be co-located with the current facility in New Orleans, LA. The site(s) should be far enough away to function as a disaster recovery option if the New Orleans site is for any reason incapacitated.

[END OF SECTION]

SECTION G
CONTRACT ADMINISTRATION

G.1. CONTRACTUAL INFORMATION

Contractual interpretation and assistance may be obtained by contacting:

Federal Retirement Thrift Investment Board
1250 H Street, NW.
Washington, D.C. 20005

ATTN:
Phone:

G.2. CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE

The Contracting Officer hereby designates the below named individual as the Contracting Officer's Technical Representative (COTR).

Name:
Address: Federal Retirement Thrift Investment Board
1250 H Street, NW.
Washington, DC 20005
Phone:

The COTR is responsible for administering the performance of work under this contract. In no event, however, will any understanding, agreement, modification, change order, or other matter deviating from the terms of this contract be effective or binding upon the Agency unless formalized by proper contractual documents executed by the Contracting Officer prior to completion of the contract.

The COTR is responsible for: (1) monitoring the Contractor's technical progress, including the surveillance and assessment of performance and recommending to the Contracting Officer changes in requirements; (2) interpreting the scope of work; (3) performing technical evaluation as required; (4) performing technical inspections and acceptances required by this contract; and (5) assisting the Contractor in the resolution of technical problems encountered during the performance. The Contracting Officer is responsible for directing any changes in the terms, conditions, or amounts cited in the contract.

For guidance from the COTR to the Contractor to be valid, it must: (1) be consistent with the description of work set forth in the contract; (2) not constitute new assignments of work or

change to the expressed terms, conditions, or specifications incorporated into the contract; (3) not constitute a basis for an extension to the period of performance or contract delivery schedule; and (4) not constitute a basis for any increase in the contract cost.

The COTR may be changed by the Agency at anytime without prior notice to the Contractor. Written notice to the Contractor will be given by the Contracting Officer to effect any change in COTRs.

G.3. TECHNICAL DIRECTION

Work performed under this contract shall be subject to the technical direction of the COTR. Technical direction, as used herein, will be the overseeing of the Contractor and its staff to insure compliance with all the requirements of the contract. It will include elaboration of the Specifications (Section C) by filling in details or otherwise completing the general description of work set forth by the contract schedule.

If in the opinion of the Contractor, any instruction or direction issued by the COTR is not provided for in any of the provisions of the Contract, the Contractor shall not proceed but shall notify the Contracting Officer in writing within five (5) working days after the receipt of any such instruction or direction and shall request the Contracting Officer to modify the contract accordingly. Upon receiving such notification from the Contractor, the Contracting Officer shall issue an appropriate contract modification or advise the Contractor in writing that, in his/her opinion, the technical direction is within the scope of this clause and does not constitute a change under the Changes Clause of the contract. The Contractor shall thereupon proceed immediately with the direction given.

G.4. INCORPORATION OF CONTRACTORS PROPOSAL

It is understood and agreed that the Contractor shall, in meeting the requirements of this contract, perform the work in accordance with the proposal to the Agency dated _____, provided however, that to the extent that any provisions set forth herein are in conflict or inconsistent with any provisions of said proposal, the provisions of this contract shall be controlling and shall supersede the provisions of said proposal.

G.5. ORDER OF PRECEDENCE

The order of precedence for interpretation of the terms, conditions, and requirements of this contract shall be as follows:

a. Cover Sheet (Standard Form 26 or 33);

b. PART I - THE SCHEDULE of the contract (Sections B through H);

c. PART II - CONTRACT CLAUSES of the contract (Section I); and,

d. Contractor's proposal, as clarified and amended.

[END OF SECTION]

SECTION H
SPECIAL CONTRACT REQUIREMENTS

H.1. LANGUAGE English is the only language to be supported for this program.

H.2. HOURS OF OPERATION Under normal conditions, the Contractor will be expected to operate from 11:00 am Eastern Time to 9:00 pm Eastern Time from Monday through Friday. However, at any time when coverage for the New Orleans site is required, the Contractor will be expected to cover the phones from 7:00 am Eastern Time until 9:00 pm Eastern Time, Monday through Friday.

H.3. ADVERTISING

The Contractor must not publicize, advertise, or otherwise announce selection of the Contractor by the Agency without the prior written approval of the Agency.

H.4. RELEASE OF INFORMATION PERTINENT TO THE CONTRACT

The Contractor must not release information or reports relevant to the performance of work under this contract or the work products called for under this contract without the prior written approval of the Agency.

H.5. AGENCY PROPERTY

The Agency reserves the right to supply to the Contractor, as Agency-furnished property, any supplies, equipment and materials determined by the Contracting Officer to be necessary and in the best interest of the Agency in the performance of this contract, provided such property is furnished or the Contractor is notified of the Agency's intent to furnish such property, prior to the Contractor's assuming responsibility for said equipment. Title to all property furnished by the Agency hereunder will vest in the Agency.

H.6. RIGHTS IN DATA

Notwithstanding any other provision contained in this contract, the Agency retains rights to all materials developed under this contract.

H.7 KEY PERSONNEL

The Contractor must include in its proposal, by name and capacity, the key personnel to be assigned to perform and carry

out all phases of work under this contract. Key personnel include the following:

Name	Capacity
_____	_____
_____	_____
_____	_____

The individuals named above are considered by the Agency to be key personnel and essential for the successful completion of all work assigned under this contract. In the event any individual on the list of key personnel is to be removed or diverted from this contract, the Contractor must (1) notify the Contracting Officer; (2) supply written justification as to why the individual(s) is being removed or diverted; and, (3) provide the name(s) of the proposed substitute or replacement including the education, work experience, etc., of each new person; all at least 14 calendar days in advance of the action.

The Contractor must not, under any circumstances, remove or divert key personnel unless prior written authorization has been granted by the Contracting Officer. The person replacing the key person must have the same or higher qualifications and experience as the person replaced.

H.8. EARLY TERMINATION

During the period of the contract, the Agency may terminate this contract upon sixty (60) days written notice to the Contractor.

H.9. CONFIDENTIALITY

All information from data files on participant accounts provided to the Contractor is confidential and is subject to the Privacy Act. The Contractor and Contractor personnel shall maintain this information in strict confidence and shall not disclose this information, or any information obtained as a result of performance of this contract, to any person or entity, other than employees or bonafide Contractors of the Federal Retirement Thrift Investment Board (Agency), without the prior written approval of the Agency. This provision, or a provision with an identical effect, shall be placed in any subcontracts.

All information concerning the National Finance Center (NFC) operating system provided to the Contractor is proprietary and is subject to the Privacy Act and the Computer Security Act. The Contractor and Contractor personnel shall not disclose this

information to any person or entity or otherwise make any improper use of this information during or after the performance of this contract. The Contractor and Contractor personnel shall maintain this information in strict confidence and shall make no entry into data files, except as is necessary in the performance of this contract. The Contractor and Contractor personnel and their successors are prohibited forever from using this information for personal or business gain, personally or for another, directly or indirectly, without the prior written approval of the Agency. This provision, or a provision with an identical effect, shall be placed in any subcontracts.

H.10. SECURITY All staff assigned to work on this project must undergo a basic security check including a criminal and financial background check. All staff must be U.S. citizens or resident aliens with green cards. Further, all work completed on this project is subject to the Privacy Act. The Contractor must have the capability to shred any and all documents containing a social security number or other Privacy Act information.

[END OF SECTION]

SECTION I
CONTRACT CLAUSES

The following clauses are hereby incorporated by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make the full text available.

(CAUTION): The Offeror is cautioned not to delete or add any other clause or clauses to the following contract clause list. Such an action may cause the offer to be unacceptable. ("FAR Citation" in the following list refers to the Federal Acquisition Regulations [48 CFR Chapter 1.])

TITLE	FAR CITATION
Definitions (DEC 2001)	52.202-01
Gratuities (APR 1984)	52.203-03
Covenant Against Contingent Fees (APR 1984)	52.203-05
Restriction on Subcontractor Sales to the Government (JUL 1995)	52.203-06
Anti-Kickback Procedures (OCT 1995)	52.203-07
Limitation of Payments to Influence Certain Federal Transactions (JAN 1990)	52.203.12
Instructions to Offerors - Competetive Acquisitions (MAY 2001)	52.215-01
Audit - Negotiation (JUN 1999)	52.215-02
Requirements for Costs or Pricing Data or Information Other than Costs or Pricing Data - Modifications	52.215.21
Notice to the Government of Labor Disputes (FEB 1997)	52.222-01
Convict Labor (AUG 1996)	52.222-03
Contract work Hours and Safety Standards -- Overtime Compensation -- General (JUN 1996)	52.222-04
Walsh-Healey Public Contracts Act (DEC 1996)	52.222-20
Equal Opportunity (APR 2002)	52.222-26
Equal Opportunity for Special Disabled and Vietnam Era Veterans (APR 2002)	52.222-35
Affirmative Action for Handicapped Workers (JUN 1998)	52.222-36
Service Contract Act of 1965, as Amended (MAY 1989)	52.222-41
Drug-Free Workplace (MAR 1989)	52.223-06
Privacy Act (APR 1984)	52.224-02
Federal, State and Local Taxes (JAN 1991)	52.229-03
Cost Accounting Standards (APR 1998)	52.230-02
Administration Cost Accounting Standards (APR 1984)	52.230-06
Disclosure and Consistency of Cost Accounting Practices (APR 1998)	52.230-03
Payments (APR 1984)	52.232-01
Discounts for Prompt Payment (FEB 2002)	52.232-08

Limitation on Withholding of Payments (APR 1984) 52.232-09
Extras (APR 1984) 52.232-11
Progress Payments (FEB 2002) 52.232-16
Interest (JUN 1996) 52.232-17
Assignment of Claims (JAN 1986) 52.232.23
Protection of Government Buildings, Equipment
and Vegetation (APR 1984) 52.237-02
Changes - Cost-Reimbursement (AUG 1987) 52.243-02
Changes - Time-and-Materials or Labor
Hours (SEPT 2000 ..... 52.243-03
Subcontracts (AUG 1998) 52.244-02
Competition in Subcontracting (DEC 1996) 52.244-05
Property Records (APR 1984) 52.245-01
Government Property (Cost-Reimbursement, Time-and-
Materials, or Lab0000or-Hours Contracts) (JAN 1986) .. 52.245-02
Termination (Cost-Reimbursement)
(APR 1984) 52.249-02
SERVICE OF PROTEST (JAN 1985)

I.1. Protest, as defined in Section 33.101 of the Federal Acquisition Regulation, shall be served on the Contracting Officer by obtaining written and dated acknowledgement of receipt from Contracting Officer, Federal Retirement Thrift Investment Board, Suite 200, 1250 H Street, N.W., Washington, DC 20005 Telephone:

SECTION J
LIST OF ATTACHMENTS

QUESTIONNAIRE FOR EXTERNAL CALL CENTER SERVICES

1. Confirm that you are prepared to work within all the parameters outlined in this RFP. If any present a problem, please explain.

2. Due to the unique culture provided by the Agency to its participants, confirm that you will provide a dedicated customer services unit for the Agency account (i.e., a unit servicing only the Agency account). If no, please explain why or give the minimum number of representatives required to provide a dedicated customer services unit.

3. Indicate the address(es) of the site(s) you plan to use for this project. If you plan to use more than one site, indicate the percentage of total phone traffic to be handled by site. Confirm that all operators will be located at this sites(s).

4. Provide resumes of the key staff you expect to use for this project. Also, certify your understanding that if replacements to this team are made, the resumes of the incoming staff must be reviewed and approved in advance by the Agency's Contracting Officer.

5. The Agency anticipates that the coverage hours for this project will be from 11:00 am Eastern Time to 9:00 pm Eastern Time, Monday through Friday. The Contractor must be prepared, however, to provide coverage from 7:00 am Eastern time to 9:00 pm Eastern Time, Monday through Friday, in the event of reduced call handling capabilities at the New Orleans site. Please confirm that you can maintain this level of phone coverage. Please note that the Agency is closed on the following holidays:

   - New Year's Day
   - Martin Luther King's Birthday
   - President's Day
   - Memorial Day
   - Independence Day (July 4)
   - Labor Day
   - Columbus Day
   - Veteran's Day (November 11)
   - Thanksgiving Day
   - Christmas Day

Further, the NFC in New Orleans will be closed on Mardi Gras, and the Contractor will be expected to assume responsibilities for all calls on that day.

6. Describe how you handle communication with your customers. Will there be dedicated account management? Will the Agency have access to operational contacts? Will we have access to our contact person during all hours that the operation is open? Will there be a different contact person assigned according to a particular work shift? Please identify the individuals by name, title, and phone number.

7. Describe the structure and staffing of your customer service office, and complete the following table:

   A. Number of customer service representatives.
   B. Average length of experience with your firm.
   C. Average turnover.
   D. Expected supervisor and management structure for this requirement.
   E. Number of representatives per supervisor.

8. Please describe your hiring criteria and hiring process. Include information on the timeframe required to hire representatives for a program like the Agency's, the typical "drop out rate" at the two month mark, and the maximum number of representatives you will be able to hire and train at one time for this program.

9. Describe your call quality assurance processes, including how you validate and report results, and how you use the information to improve performance.

10. Briefly describe your new hire and ongoing training programs. What processes do you have in place to maximize a new representative's performance as quickly as possible? Also, provide information on any training or leadership programs you will utilize for your frontline supervisory/management team.

11. Describe your performance evaluation and coaching programs for customer service representatives.

12. Confirm that 100% percent of calls will be taped and that the Agency will have full electronic access to taped and live calls from the Agency's offices. Also provide the storage capabilities for these tapes; they must be retained for the length of the contract.

13. Describe your processes for managing service levels, efficiency, and cost.

14. Given the workload estimates provided in response to this RFP, how many Full Time Equivalent (FTE) representatives will you have on staff by month for the first year of this contract? How many FTEs will you plan for and staff for in the event of a disaster in New Orleans? How long will it take you to go from your planned staff size to the number of trained representatives needed in the event of a prolonged disaster? How many working hours per week do you use to calculate an FTE?

15. Describe how you will verify that call tracking procedures will be followed for all calls.

16. Describe your procedures for handling customer complaints.

17. How flexible are you in accommodating changes to the services you are providing? For example, if the Agency decides to add new products or delete existing ones what kind of turnaround time is involved in explaining the change to the service representatives and incorporating it into the training?

18. Describe the implementation process and timelines for call center establishment for a project similar in size and complexity to this one.

19. Please confirm that you will be able to comply with the following customer service levels, and provide the calculation you use to derive the following metrics:
    - 80% or more of calls answered within 20 seconds
    - Blocked call percent (includes all internal and external busies) of 2% or less

    Further metrics such as quality rates, customer satisfaction rates, first call resolution, and others may be added to the requirements later in the project.

20. Complete the following table with customer services statistics for a similar client in the same office that is proposed to provide service the Agency:

CUSTOMER SERVICES STATISTICS			
	2002		2003
Measure	**Standard**	**Actual Result**	**Standard**
Average speed to answer			
% of calls answered within 20 seconds			
Call abandonment rate			
Percent of calls that receive a busy signal (internal or external)			

21. Provide references for three (3) clients recently added and two recently lost. References should preferably be companies with call centers of 100 to 500 agents in the financial service sector. Include company name and contact phone number and email address.

Data Management and Reporting

22. Systems/Data Quality

    a. What policies, procedures, and controls are in place to ensure high quality and security in your systems and data management?

    b. Describe your audit trails, your reconciliation procedures, data protection, security, etc. How do you maintain data integrity and quality overall?

23. Does your system utilize encryption technology? If so, please describe what level.

24. How do you respond to technical problems and downtime? Describe your technical support. How do you notify clients of downtime and what processes do you use to remedy the problem.

25. What are your back-up procedures?

26. Please describe your disaster recovery processes for both telephone and computer systems. How would you handle a long-term disaster at your site? How would you handle a long-term disaster at the parallel site in New Orleans? Verify that you will have all of the required architecture (lines, ACD

ports, PCs, etc.) necessary to function as the single call handling site in the event of a disaster in New Orleans.

27. Please describe your system capabilities for tracking and reporting on metrics.

28. Describe the telephony equipment you will use for this contract.

29. Describe and provide samples of your standard reports. Are there additional costs associated with any of these reports? How frequently are these reports available?

30. Can you provide ad hoc reports? Are there any additional costs? Please explain.

31. Are any of the standard reports available electronically?

32. Will the Agency have access to an online ad-hoc query and report-generating tool? If so, please provide a description of the tool and its capabilities.

33. Describe any significant hardware or software upgrades to your systems planned to occur over the next two years. Describe how clients are advised of system upgrades and enhancements. Include timing, fees, and explanation of system impacts. The Agency requires ninety (90) days' notification in writing of system upgrades and enhancements. Please confirm that you can comply with this.

34. Are system upgrades and fixes included in your standard pricing?

END OF SECTION

SECTION K
REPRESENTATIONS, CERTIFICATIONS

K.1. SOLICITATION PROVISIONS INCORPORATED BY REFERENCE

TITLE	FAR CITATION
Certificate of Independent Price Determination (APR 1985)	52.203-02
Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions (APR 1991)	52.203-11
Prohibition of Segregated Facilities (FEB 1999)	52.222-21

K.2. DUNN & BRADSTREET CONTRACTOR ESTABLISHMENT NUMBER

The Offeror is requested to supply below, their DUN and Bradstreet Contractor Establishment Number.

DUNS No.: 04-398-4988

K.3. SUBCONTRACTING REPRESENTATION

The Offeror represents that there ( ) will, (X) will not, be opportunities for subcontracting under any resulting contract.

K.4. TAXPAYER IDENTIFICATION (NOV 1988) (FAR 52.204-3)

a. Definitions.

"Common parent," as used in the solicitation provision, means an Offeror that is a member of an affiliated group of corporations that files its Federal income tax returns on a consolidated basis.

"Corporate status," as used in this solicitation provision, means a designation as to whether the Offeror is a corporate entity, an unincorporated entity (e.g., sole proprietorship or partnership), or a corporation providing medical and health care services.

"Taxpayer Identification Number (TIN)," as used in this solicitation provision, means the number required by the IRS to be used by the Offeror in reporting Income Tax and other returns.

b. The Offeror is required to submit the information required in paragraphs (c) through (e) of this solicitation provision in order to comply with

reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M and implementing regulations issued by the Internal Revenue Service (IRS). If the resulting contract is subject to reporting requirements described in 4.902(a), the failure or refusal by the Offeror to furnish the information may result in a 20 percent reduction of payments otherwise due under the contract.

c. Taxpayer Identification Number (TIN).

(X) TIN: _ _____.

( ) TIN has been applied for.

( ) TIN is not required because:

( ) Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the U.S. and does not have an office or place of business or a fiscal paying agent in the U.S.;

( ) Offeror is an agency or instrumentality of a state or local government;

( ) Other, state basis _____.

d. Corporate Status.

( ) Corporation providing medical and health care services, or engaged in the billing and collecting of payments for such services;

(X) Other corporate entity;

( ) Not a corporate entity;

( ) Sole proprietorship

( ) Partnership

( ) Hospital or extended care facility described in 26 CFR 501(c)(3) that is exempt from taxation under 26 CFR 501(a).

e. Common Parent.

(X) Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this clause.

( ) Name and TIN of common parent:

K.5. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (MAY 1989) (FAR 52.209-5)

a. The Offeror certifies, to the best of its knowledge and belief, that:

The Offeror and/or any of its Principals:

1. Are ( ) are not (X) presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

2. Have ( ) have not (X), within a 3-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statues relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and

3. Are ( ) are not (X) presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in subdivision (a)(1)(i)(B) of this provision.

The Offeror has ( ) has not (X), within a 3-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

b. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This certification concerns a matter within the jurisdiction of an agency of the United States and the making of a false, fictitious, or fraudulent certification may render the maker subject to prosecution under section 1001, title 18, United States Code.

1. The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

2. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.

3. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

4. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

[END OF SECTION]

SECTION L

INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS

L.1. INSTRUCTIONS FOR BUSINESS PROPOSAL

The Offeror shall submit as part of the proposal, a separate enclosure entitled "Business Proposal." The Business Proposal shall include all proposal data required by Sections B and K of this solicitation. Offerors shall submit an original and two copies of the Business Proposal in accordance with the requirements of L.7, and conforming to the following format:

a. Administrative Data

The Offeror shall:

1. Indicate the names and addresses of the cognizant Government Audit Agency and cognizant Inspection Agency, if applicable. (Ex. Securities Exchange Commission, Comptroller of the Currency, or State Agency);

2. State its place of business, including the street address, and the name and address of the owner and operator of facilities other than the Offeror's when it is reasonably expected that such facilities will be used in the performance of the contract. The Offeror shall also include the Data Universal Numbering System (DUNS) number applicable to that name and address; and,

3. Indicate if it has the necessary financial capacity, working capital and other resources necessary to perform the contract without assistance from any outside source (if not, indicate the amount required and the anticipated source.)

b. Offeror Certification

The Offeror shall complete and submit certifications included in section K of this RFP. The successful Offeror may be required to execute a CERTIFICATE OF CURRENT COST OR PRICING DATA as prescribed in FAR 15.804-4.

c. Cost and Pricing Data

Offerors must submit cost and pricing data as required by Section B. The proposed prices must include all costs for which the Offeror expects reimbursement.

L.2. INSTRUCTIONS FOR TECHNICAL PROPOSAL

To facilitate proposal evaluation, the Offeror shall submit as a part of the proposal, a separate enclosure (original and five (5) copies) entitled "Technical Proposal." The contents of this enclosure should be keyed to the Technical Proposal requirements as outlined below. As appropriate, the Technical Proposal shall be in the same topical sequence as this solicitation document. The Technical Proposal must address all requirements of the solicitation with the exception of those in Sections B and K.

By submitting this proposal, the Offeror is granting representatives of the Agency authorization to check references of the Offeror. The Offeror is also granting representatives of the Agency authorization to conduct reference checks of the performance of subcontractors and firms involved in joint venture arrangements. In addition, the Offeror is also granting representatives of the Agency authorization to conduct reference checks of the performance of the personnel and quality of project management offered in support of the contract.

Technical Proposal preparation

Provide a brief synopsis of the proposal. State broadly how the proposal meets the requirements and the intent of the specification. List all exceptions taken to the solicitation requirements and include appropriate rationale for each. Where alternate proposals are made, discuss the controlling principles behind each.

The Technical Proposal shall address, and include specific substantiation to support the Offeror's ability to meet the minimum technical qualifications, as set forth in Section M.

The Technical Proposal shall conform to the other instructions provided elsewhere in this solicitation. The specific areas the Agency will be evaluating, and the relative weight assigned to each area, are included in Section M.

L.3. BUSINESS PROPOSAL PREPARATION

The Business Proposal submitted in response to this solicitation must be under separate cover from the technical submission submitted for consideration. All of the cost aspects of the

offer must be addressed in the Business Proposal. No cost or price information shall be included in the Technical Proposal.

L.4. SOLICITATION INFORMATION

Solicitation interpretation and assistance may be obtained by contacting:

Federal Retirement Thrift Investment Board
1250 H Street, NW.
Washington, D.C. 20005

ATTN:
Phone:

L.5. SPECIAL INSTRUCTIONS

You are required to submit an original and two (2) copies of the Business Proposal and an original and five (5) copies of the Technical Proposal. The Business Proposals along with the original Technical Proposal should be bound separately from the five copies of the Technical Proposal. It is neither necessary nor appropriate to reproduce and submit the entire solicitation package as part of the proposal.

The place designated for receipt of offers is:

Federal Retirement Thrift Investment Board
1250 H Street, NW.
Suite 200
Washington, DC 20005

L.6. RECEIPT OF PROPOSALS

Proposals must be received by the Agency no later than 4:00 p.m., local time, on December 15, 2003. Late proposals will not be considered.

To ensure that the proposal arrives at the proper place on time and to prevent opening by unauthorized individuals, your proposal must be identified on the wrapper as follows:

Proposal Submitted in Response to Solicitation
No. RFP-TIB-04-02
Package No. _____ of _____

Contents: _____ (In accordance with the other instructions, this blank should list either "Business Proposal and Original Technical Proposal" or "Copies of Technical Proposal.")

Date: _____
Location: 1250 H Street, NW
ATTN:

If a receipt is required when delivering a proposal, please prepare a receipt document in advance and present it to the person at the delivery location. The receipt document must state the following:

Proposal submitted in response to Solicitation No. RFP-TIB-04-02

Due Date: December 15, 2003; 4:00 pm, local time
Date and Time Received:
Signature

(Provide adequate space on the form to allow a time and date stamp.)

If the above format is not followed, no receipt of proposals will be given. Please do not ask for an exception, as none will be granted.

L.7. ALTERNATE PROPOSALS

Offerors may submit more than one proposal in response to this solicitation provided each proposal meets all requirements specified herein. If alternate proposals are submitted, each such proposal must be clearly labeled and identified as such on the cover page.

L.8. TYPE OF CONTRACT

Please refer to Section B.

L.9. WRITTEN QUESTIONS

Written questions are requested to be submitted no later than thirteen (13) days after the issuance date of this document.

L.10. MARKING OF INFORMATION TO RESTRICT DISCLOSURE AND USE OF DATA

A proposal may include data, such as a technical design or concept or financial and management plan, which the Offeror does not want disclosed to the public for any purpose or used by the Agency for any purpose other than evaluation of the proposal. If an Offeror wishes so to restrict its proposal, it shall mark the title page with the following legend:

> This data, furnished in connection with Request for Proposals No. RFP-TIB-04-02, shall not be disclosed outside

the Agency and shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate the proposal; provided that, if a contract is awarded to this Offeror as a result of or in connection with the submission of this data, the Agency shall have the right to duplicate, use, or disclose the data to the extent provided in the contract. This restriction does not limit the Agency's right to use the information contained in the data if it is obtained from another source without restriction. The data subject to this restriction is contained in sheets.

The Offeror shall mark each sheet of data, which it wishes to restrict with the following:

> Use or disclosure of proposal data is subject to the restriction of the Title Page of this Proposal.

Proposals or quotations of subcontractors which are included as part of a proposal submitted by a prime-Offeror may be marked in a manner consistent with the clause above.

Notwithstanding the above, records, or data bearing such a legend as in the paragraph above, may be otherwise subject to release under the terms of the Freedom of Information Act, 5 USC 552, as amended. It is noted, however, that absent a request for such records or data pursuant to the statutory provisions (the Freedom of Information Act, 5 USC 552, as amended), and the subsequent determination of releasability, the legend shall be honored in accordance with the above.

L.11. DISCOUNTS

Prompt payment discounts will not be considered in the evaluation of offers. However, any offered discount will form a part of the award, and will be taken if payment is made within the discount period indicated in the offer by the Offeror. As an alternative to offering a prompt payment discount in conjunction with the offer, Offerors awarded a contract may include prompt payment discounts on individual invoices.

L.12. TELEGRAPHIC PROPOSAL

Telegraphic proposals will not be considered, although proposals may be modified by telegraphic notice provided such notice is actually received prior to the closing date and time.

L.13. INSURANCE REQUIREMENTS

Execution of this proposal shall constitute a certification by the Offeror that it is complying with all state and Federal laws with respect to insurance requirements.

L.14. PAYMENT BY ELECTRONIC FUNDS TRANSFER

The resultant Contractor may be required to complete a Payment Information Form, which will allow for the electronic transfer of payment funds using the Federal Reserve Communication System.

L.15. MINIMUM ACCEPTANCE PERIOD

Offers allowing less than 120 calendar days in the "offer" portion of (SF) 33, Section A, for acceptance by the Agency will be rejected as unacceptable.

L.16. INCURRED COSTS

The Agency is not liable for any costs incurred by the Offerors in submitting proposals in response to this solicitation.

L.17. PRE-AWARD SURVEY/VISITATION/POST AWARD CONFERENCE

The Agency reserves the right to visit all qualified Offerors to inspect their facilities and operation prior to any determination of contract award under this solicitation. In lieu thereof, the Agency may opt to inspect the apparent Contractor's facility prior to award of contract. Subsequent to award, a post award conference may be conducted either at the Agency or at the Contractor's facility.

[END OF SECTION]

SECTION M
EVALUATION FACTORS

M.1. GENERAL

This section sets forth the criteria to be used for the evaluation and award of all offers. These criteria will be applied to each offer to determine the successful Offeror. The evaluation process is described below.

M.2. EVALUATION OF OFFERORS

The Agency will select an Offeror for award in accordance with FAR Part 15 and Agency Source Evaluation and Selection Procedures. The significant features of this procedure are:

a. The Agency will evaluate cost/pricing using the information provided in response to Section B;

b. The technical evaluation panel will evaluate technical responses; and

c. The Agency, in addition to the cost/price and technical evaluations, will consider any award decision in light of the responsibility factors set forth in FAR Part 9.

M.3. EVALUATION FACTORS

This section sets forth the criteria to be used for the evaluation of each timely offer to determine the successful Offeror. The evaluation of offers will consist of technical and cost evaluation. Only proposals deemed to be technically acceptable will receive further consideration. The Agency is committed to providing the highest level of customer service and satisfaction. Offerors should be aware of the fact that only the highest caliber of quality and service will be accepted. This commitment to customer satisfaction and service will serve as a significant evaluation factor as well as serving as the justification for continuing the contract.

M.4. EVALUATION FACTORS FOR AWARD

The Agency will make award to that responsible Offeror whose proposal conforms to the solicitation and is most advantageous to the Agency, cost or price and other factors considered. For this solicitation, technical quality is more important than cost. As proposals become more equal in their technical merit, the evaluation of cost becomes more important. An evaluation of each proposal will be made in the technical area, and if technically acceptable, in the cost area. The technical evaluation carries a

seventy-five percent (75%) weight towards the contract award, and the cost/price evaluation carries a twenty-five percent (25%) weight. The total score will be determined by combining the final technical score and the final cost/price score.

M.5. MINIMAL TECHNICAL FACTORS FOR AWARD

The technical proposal must demonstrate compliance with the minimum technical factors listed below in order to be considered for award. Proposals, which do not conform, to the technical requirements of this section will be rejected by the Technical Evaluation Panel (TEP) before technical evaluation.

Offerors must demonstrate and certify compliance with the following minimum criteria:

a. That any and all sites (including personnel) used to process the calls by the Contractor be within the continental United States.

b. That the call center(s) site(s) be sufficiently removed from New Orleans to be considered an acceptable disaster recovery alternative in the event that call processing is suspended for any period of time in New Orleans.

c. That the Contractor has prior experience in operating similar call center programs in the financial services industry.

d. That the Contractor provide a dedicated customer service unit with staff working solely on the contract with the Federal Retirement Thrift Investment Board.

M.6. Technical Evaluation - 100 points.

Upon determining Offeror compliance with the minimum technical criteria identified above, the TEP will evaluate proposals for technical merit using the evaluation criteria identified below. Evaluation criteria are listed in descending order of importance.

A. Operational Management Capability - 75 points

The successful Offeror must be able to demonstrate knowledge of best practices for operating call centers and must have experience in applying these practices in the operation of their call centers. This experience must include financial programs and must involve call centers of approximately the same size as the proposed center.

There are three areas where the Contractor must demonstrate expertise. These are people management, process management, and technology management.

1. People Management

Under this category, Offeror will be evaluated on their ability to select, train, and manage a team of individuals that meet or exceed expected levels of performance. Specific elements of people management include:

a. Hiring. We will review the proposal to determine plans for recruiting and selecting staff for the program. We will evaluate such items as turnover rates, average tenure, and amount of supervision to determine the emphasis placed on the selection and development of front line personnel. We will also review total hiring capabilities to ensure that staffing requirements can be met on a timely basis.

b. Training. We will evaluate the training program Contractors are currently using for front line associates, as well as their planned training program for this requirement. Our review will include not only new hire training, but also the commitment made to ongoing training for experienced customer service representatives. We will also evaluate training plans for front line supervisors.

c. Coaching and performance evaluation. These activities are crucial to effective call center management. We will review Contractors' plans for evaluating the performance of customer service representatives, coaching customer service representatives, and maximizing the performance contribution of each individual.

d. Management expertise. We will review resumes of key members of the management team to ensure they have the background and experience required to successfully direct the operation and meet program objectives.

2. Process Management

The best run call centers are process intensive. It is through these processes that they ensure consistent levels of service. We will review the following processes of the Contractors.

a. Workforce management. Workforce management processes include forecasting, staffing, scheduling, real time management, and service level management. We will evaluate these processes to determine how proactive the organization is and how strong its emphasis is on planning as opposed to reacting.

b. Quality assurance. No matter how good an organization is at people management, it is the quality assurance practices that determine how consistent the organization delivers services. We will assess the processes used by each Offeror to determine how effective it will be at creating a consistent responsive experience for all callers.

c. Complaint management. Complaints are a fact of life in call centers and the best ones recognize them as an opportunity to turn around customer perceptions and for improving processes. We will assess the Offerors' plans for handling complaints and improving processes based on those complaints.

d. Reporting. Call centers take different approaches to reporting results. Our review will include an assessment of Offerors' reporting plans to ensure that they will provide the key metrics that produce a complete picture of the call center's performance.

3. Technology Management

For this project, the Agency will provide most of the application technology. The Contractor, however, will be responsible for telephony equipment and will need to connect to various systems and maintain desktop tools. We will evaluate the Offerors on the following skills:

a. Flexibility. Over time, changes will need to be made to the technical architecture to accommodate changes in the business. We will review responses to ensure that the Offerors will be able to fulfill these change requests in a timely manner.

b. Ease of access. Performance data on operation of the call center will originate from Contractor systems. Reports will be required; however, our preference is to have electronic access to this information whenever possible. Contractors providing electronic access will receive a higher score.

c. Telephony capabilities and expertise. We will review information provided on ACD and call taping systems to ensure these systems can adequately process calls in the manner required by this project.

d. Disaster recovery and backup procedures. We will review disaster recovery procedures from two different perspectives. The first is the view of the Offerors' operations, and the systems and procedures they have in place to keep their operation up and running as consistently as possible. Our second view will be the ability for the

Offerors to act as the disaster recovery site if the New Orleans call center incurs a disaster. We will also review the backup procedures in place to ensure that data is not lost.

e. System security. We will review security control and audit procedures in place to ensure quality and system security.

B. Account Management Capability - 25 points

In a call center outsourcing arrangement, the Contractor names an account manager or account management team to act as the interface with the client. This represents a vital communication link, and we will review the following items to gauge the level of account management expertise offered by Offerors.

1. Communication protocols. We are interested in locating an Offeror that takes a proactive approach in providing relevant and accurate information. We will assess this through the Offerors' communication plans and the processes they have in place for responding to client requests.

2. Program implementation. The start-up of a program is critical to long-term success. We will assess Contractors' capabilities in not only the timeliness of their plans but in the amount of communication they expect to provide throughout the process.

M.7. Cost/Price Evaluation.

A maximum of 25 points will be assigned to price, to be determined as follows: The lowest-priced, technically acceptable proposal will be given a score of 25 points; higher priced proposals which are technically acceptable will be given fewer points in accordance with the following formula:

$$\frac{\text{Lowest Priced Proposal}}{\text{Higher Priced Individual Offer}} \times 25 = \text{Business Score}$$

M.8. PAST PERFORMANCE

The Agency shall consider Offeror's past performance on similar assignments, to assess the relative capabilities of competing Offerors.

M.9. AWARD

While the total score shall be an important factor in selection for award of a contract, the Agency will award any contract

resulting from this solicitation to that Offeror presenting the most advantageous offer to the Agency, all factors considered.

The Agency may reject any or all offers, accept other than the lowest offer, and waive informalities and minor irregularities in offers received.

The Agency may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Offeror's best terms from a price and technical standpoint.

[END OF SECTION]

///NOTHING FOLLOWS\\\