

ADDENDUM
February 27, 2018

ADDENDUM NO. 1 TO ALL OFFERORS:

Reference – Request for Proposals: RFP 18-788 Call Center Services
Date Issued: February 12, 2018
For Delivery to: University of Mary Washington, Commonwealth of Virginia
***NEW* Proposal Due Date: Tuesday March 13, 2018 @ 2PM EST**

This addendum consists of six (6) pages.

*****Due Date Change - EXTENDED:**

The University will be closed on Friday March 9, 2018, so the due date is now changed to **Tuesday March 13, 2018 by 2pm EST.**

General Questions from Offerors:

- 1. Can companies from outside the USA, like from India or Canada, apply for this?**
Yes, companies from outside of the US may submit a proposal.
- 2. Would our firm need to come to UMW for meetings?**
The Contractor would not necessarily need to come to UMW's physical campus for meetings.
- 3. Can we perform the tasks of this RFP outside of the USA, like from India or Canada?**
Performing the tasks of this RFP outside of the US is not preferable concerning international call rates.
- 4. Can we submit proposals via email?**
No. Proposals must be submitted by mail or in person - UMW must have a physical copy of the proposal.
- 5. Does vendor have to reside in Virginia? If yes, do they need to be on university property?**
No, the vendor does not have to reside in Virginia.
- 6. Page 8 of the RFP refers to Required General Terms and Conditions of the Solicitation that are mandatory as part of the resulting contract. The link provided in the document appears to be broken. Can an updated link and/or the General Terms and Conditions be provided?**
<http://adminfinance.umw.edu/procurement/umw-policies-and-procedures-2/>. Here is the link where the University's General Terms and Conditions are located. If this link is unavailable for some reason due to any website issues, please go to adminfinance.umw.edu/procurement/ and then click on "Laws, Policies and Procedures" in the horizontal menu bar and scroll down to access the Terms under "Policies."
- 7. Given that there are only seven business days between the due date for questions and the last day vendors could ship a printed response to the University, would the University consider extending the deadline to give vendors adequate time to incorporate the University's answers into their bids?**
The University is extending the due date to March 13th at 2PM due to the fact that the University is closed on March 9, the previously stated due date. This should provide the vendor some extra time to prepare.

Statement of Needs Questions:

- 1. The RFP says the University would assist the vendor in selecting the individuals to be on team...that gets close to co-employment.**

Not sure if there is a question here - UMW would like to be able to help select the individuals from the contractor who would serve on the call team if possible to ensure a highly skilled team is selected. We will use the reference check to gauge the quality of call team (relative to overall satisfaction).

2. Support includes taking inbound calls and making outbound calls...correct?

The vendor selected will only assist with outbound calls (not inbound).

3. What is the average handle time (AHT) or average talk time?

It depends on the campaign. There is no average.

4. For outbound calls, what is the connect rate? For example, you give us 100 households to call...how many of those households do you reach the first time you call. How many attempts do you want vendor to make to connect to household?

This should be included in the vendor's proposal (proposal plan). See proposal section VII.B —See below:

The Offeror shall strive to meet the following goals:

- 1. Initiate calls to students and/or parents with a minimum of 80% of the names provided by the University. Initiated calls are calls that may not be successful in reaching a student/parent.*
- 2. Complete calls to students and/or parents with a minimum of 45% of the names provided by the University. Completed calls are calls that are initiated and reach a student/parent, resulting in a conversation.*
- 3. Leave voicemail messages for a minimum of 35% of the names provided by the University.*

5. I assume calls are only made when school is open...correct? Holiday observed?

No - calls will not just be made when the University is open. For example, calls will occur when the University is closed end-December – January. Calls will also be made on weekends. Calls do not occur on religious holidays.

6. Is the recruitment campaign year round or only during Fall and Spring?

Campaigns are year round (to include summer).

7. Is there previous data regarding the average handling time for the campaign phone calls, including wrap-up time?

No.

8. Is there an existing CRM and database available for application integration?

We have an existing CRM. External data is imported; no direct integration.

9. Is your contractor, Hobson still part of the Campaign process? If so, what data/services do they provide?

Hobson's is not part of the Campaign process. External data is imported; no direct integration.

10. Would you consider new start-up companies for this proposal?

We will consider all proposals.

11. Will the University provide the appropriate call-script for the campaign and will agents utilize a decision tree created by the university? This is included in pricing as "administrative fees."

The University will provide the appropriate call-script for the campaign which will include a decision tree created by the University for agents to follow. *Note: the vendor may and is encouraged to include script development in their program proposal.*

12. Does the university have reporting templates that vendors will need to complete? Or will vendors be proposing their own reporting tools and templates?

No, the University does not have reporting templates the vendor will need to complete. Reporting should be included in the program plan and in the proposal.

13. **Student TeleAmbassadors made 3,000 calls. How many hours of work was this? Over what duration of time?**
The specific call hours weren't tracked. Calls were made from October 1 to May 1.
14. **How many names and numbers of students will the university provide to the vendor? Over what duration of time?**
The amount of names/numbers the University will provide to the vendor as well as the duration of time will vary by campaign.
15. **What is the Universities current average daily call volume?**
This data isn't currently collected.
16. **Can the University clarify exactly what it means by names given in the pricing sheet? And how does this relate to the "names given" by the university?**
"Names given" refers to the sheet of all available names of students that UMW would like for the contractor to contact.
17. **During the past year, what are the locations where work was performed?**
Fredericksburg campus (Fredericksburg, VA).
18. **Does the University have its own cell center facility?**
No.
19. **How many vendors are providing these services currently?**
None.
20. **What was the spend on Call Center/Tele-Recruiting Services during the past year?**
Under \$5,000.
21. **What is the period of time over which the calls will be made? Over what number of months? What time of year?**
Calling campaigns happen year round (January - December) and will occur throughout the length of the resulting contract.
22. **Are there inbound calling requirements?**
No inbound calling requirements - only outbound calls will be made.
23. **What will determine the extent of the campaign (i.e., the number of records to be called)?**
Calls are targeting to an "audience type" and there are no set number of records to be called.
24. **What is the call to action (i.e., what action are the callers asking the students/parents to take)?**
This will vary by campaign.
25. **Is it the desire of the University that the selected vendor will access UMW's CRM system Hobson to manage communication with prospective students?**
No - this is not included in the scope of services requested.
26. **Is it anticipated that the initial calling list will be 3,000 records?**
Not necessarily - it could be more or less than that amount depending on the campaign.
27. **How many records is the complete list of students who expressed interest in the University of Mary Washington?**

This varies by entry term. UMW receives approximately 7,000 applications a year from traditional first-year students. Students who “express interest” is typically triple that amount.

28. Are there restrictions on where the call center is located?

No.

29. The RFP notes that outbound calls are only made during the hours 5-8pm EST Monday through Friday, and 5-8pm EST Sunday. Are these hours tied to specific research indicating the best time to call, or is there another reason for these hours?

No, these hours are not tied to specific research indicating the best time to call. These are just our preferred times.

30. What is the current average hold time?

This data isn't currently collected.

31. What is the current abandonment rate and peak call volume?

This data isn't currently collected.

32. What are the peak call times?

This data isn't currently collected.

33. What are the historic volumes of outbound calls needed to be made by month?

This data is unknown.

34. How many FTEs are currently handling calls internally and through the vendor (externally)?

This data is unknown.

35. What is the current escalation rate for the past year for peak, non-peak, and overall?

This data isn't currently collected.

36. What is the desired escalation rate peak, non-peak, and overall?

This data isn't currently collected.

37. Will training material on specific admission requirements and processes for the University of Mary Washington be provided as training material to awarded vendor?

Yes.

38. Is the experienced project manager required to be dedicated exclusively to this project?

No.

39. The RFP states that the vendor must “provide an experienced Project Manager to work closely with UMW staff members in the Office of Enrollment Management.” Is the project manager required to be on-site in the Office of Enrollment Management, or may they be based in our call center?

The project manager is not required to be on-site and may be based in the vendor's call center.

40. Are the customized call-scripts provided by UMW or do these have to be developed by the winning vendor?

Call scripts will be provided by UMW, however we encourage the vendor to make any suggestions they see necessary or provide samples of call scripts that have demonstrated positive results in the past.

41. How many times a year are telesearch services used by UMW?

No set number; this will vary year-to-year.

42. **For those students or parents who have expressed interest in UMW, have they given consent to be contacted via cell phone?**
Yes.
43. **The pricing sheet asks for pricing based on 5,000 names. Is that monthly, per quarter, or per year?**
No set timeframe.
44. **Will the awarded vendor have access and training on a UMW system to record notes on result of call effort? Or will the vendor need to provide a CRM system and give UMW access and training on system usage?**
Data will be imported to UMW's CRM. Systems will not be shared; no cross-training will be required.
45. **To assist in providing a competitive price: is UMW permitting their selected vendor to use predictive dialer technology (with consent and run in full compliance to laws and regulations) to increase the efficiency of outbound calling efforts?**
This may be included in the proposal. We will entertain proposals with and without the use of this technology.

Questions Related to SWAM:

1. **My business is a small certified business. Would you consider canceling the solicitation and resoliciting with an award of up to 20 pts for swam/small subcontracting plan instead of the 10 points listed in the evaluation criteria right now?**
While we are aware and understand that our institution's goal for swam spend is 42% and we strive to provide our business to small businesses, there are just not enough small businesses in the market that provide these services (preliminary search turned up 15 total vendors registered under the commodity code issued for the solicitation) and just not enough potential spend for this contract for us to consider canceling at this time and reissuing with a higher point value for small businesses.
2. **Would all SWAM certifications need to be completed at the time of proposal?**
Yes - to be awarded the full available 10 points for being a small business, you will need to have a small business certification completed by the time that the proposal is received.
3. **Are non-SWaM vendors required to subcontract with a SWaM vendor? Is there a required subcontracting percentage of contract revenue?**
No, no vendor is required to subcontract out any of the services required.
4. **Is an offeror who is not certified by the DSBSD as a small business, however is a certified Women Owned Business and Women Owned Small Business required to submit a small business subcontracting plan? Will proposals who do not submit a subcontracting plan be disqualified?**
The small business subcontracting plan table should be filled out only for those vendors who are planning to subcontract out part or all of the work. However, if the offeror is a registered DSBSD small business, we ask that you provide your certification number. Offerors who submit proposals without a small subcontracting plan will not be disqualified.
5. **Does the University expect a 42% small business participation for this contract? Or is there another target participation goal the University has set?**
The 42% Swam spend goal is set by the Governor of Virginia and strived for by the University to achieve that percentage of TOTAL spend with small business on an annual basis. This does not mean that we expect a 42% small business participation for this contract but that on a whole as a University this is our annual spend goal.
6. **Is qualifying small business participation limited to direct participation in the contract, or are second-tier services (such as office supply vendors, facility maintenance, etc.) qualified as well?**

Second-tier services qualify as long as you document on the small business subcontracting plan the amount or percentage of the work to be supplied by those businesses.

7. Can the University clarify its vision for how an out-of-state vendor, providing call center services located out of state, would involve an in-state business enterprise that has obtained its DSBSD certification?

Subcontracting to a Certified-Small Business is not required for this project. However, if you are interested in subcontracting out the work, please include any plans of doing such and the vendor you plan to use on the small business subcontracting plan form. The eVA VBO B2B site is a great way to connect with small businesses for subcontracting. But again, being a small business or subcontracting any portion of the work to a small business is NOT required.

8. What if a proposing vendor wishes to perform the entire contract without the use of a subcontractor? Are these vendors immediately at a disadvantage against other, in-state vendors that may subcontract out a portion of the work? Will simply completing and including the form entitle a vendor to the full 10 points?

If the vendor is not a certified small business or does not plan to subcontract out any of the work to a small business, that vendor would simply not receive any portion of the 10 points available in the small subcontracting criteria. This point value was given to be large enough to award small businesses a small advantage to compete as the University's goal is to award 42% of its spend to small businesses, but not large enough to greatly sway the outcome of the evaluation so that more emphasis is placed on the vendor's ability to provide the solution that would best fit the agency's needs.

END OF ADDENDUM NO. 1

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RFP 18-788 Addendum No. 1 (and all addenda) should be acknowledged and included in the RFP submittal package.

NAME OF OFFERING FIRM: _____

NAME OF OFFEROR REPRESENTATIVE: _____

OFFEROR SIGNATURE: _____

DATE: _____