

**REQUEST FOR PROPOSALS  
CUSTOMER SERVICE CENTER  
OS/CSC-22-001-S**

**QUESTIONS AND RESPONSES #11**

Question 527: Section 2.3.4.G - As the State provides the IVR/ACD platforms, will the State also provide the monitoring solution as part of the IVR/ACD capabilities? If not, please explain in detail how the Contractor-provided solution will integrate with the DHS provided systems and how the State expects the Contractor to provide these capabilities.

**Response: The Contractor will provide the IVRS, CRM and ACD. Offerors will need to propose how this requirement will be met. Integrations will need to involve API's.**

Question 528: Section 2.3.5.A - It is critical in modern contact centers that Workforce Management (WFM) solutions are integrated with the IVR/ACD platform for real time assessment of supply and demand. As the State is providing the IVR/ACD platform, please confirm that the State will provide the integrated WFM solution. If the State does not provide the WFM solution, please explain in detail how the State expects the Contractor-provided WFM solution will integrate with DHS telephony systems.

**Response: The Contractor will provide the IVRS, CRM and ACD. Offerors will need to propose how this requirement will be met. The Contractor can propose either an integrated or a stand-alone WFM. As such WFM technology solution is not a mandatory requirement.**

Question 529: Section 2.6.8 - Please confirm the service level SLAs apply only to systems and technology fully within the control of the Contractor and not DHS provided systems, such as IVRS, ACD, CRM, or MDThink.

**Response: The Contractor will provide the IVRS, CRM and ACD. Offerors will need to propose how SLA's will be met.**

Question 530: Section 2.6.8 Service Level Measurements Table - What specific duties will the contractor perform in regard to CRM, IVR and ACD in regards to the service levels provided?

**Response: The Contractor will provide the IVRS, CRM and ACD. Offerors will need to propose how the SLA's will be met.**

Question 531: Section 2.3.1 A General Requirements What system or technology will the IVR use and what integrations will exist between the IVR, CRM, and ACD?

**Response: The Contractor will provide the IVRS, CRM and ACD. Offerors will need to propose how this requirement will be met.**

Question 532: Appendix 5 - Please confirm the State is responsible for configuration, maintenance, end user support, business continuity and disaster recovery, data backup and storage, as well as all license costs for the State provided IVRS.

**Response: The Contractor will provide the IVRS, CRM and ACD. Per Amendment 5, this question is no longer relevant.**

Question 533: Section 2.3.18.2.D Clarification Request: Please confirm the Contractor is only responsible for the system(s) within the Contractor control, not for systems provided by the State.

Follow-up Request: If these activities are the responsibility of the State, we ask the State to delete or revise this Contractor requirement accordingly.

**Response: Per Amendment 5, this question no longer applies.**

Question 534: Section 2.3.3 (Revised) Can DHS please list all the systems that the CRM will need to interface with and the type of interface (web services, manual, other)?

**Response: The CRM needs to integrate with the Child Support Management System (CSMS), the Eligibility and Enrollment (E&E) system, and the Child, Juvenile and Adult Management System (CJAMS). Integrations will need to be via API.**

Question 535: Appendix 5 - DHS IT Systems - Is Appendix 5 - DHS IT Systems (Revised) the list of systems the CRM must integrate with?

**Response: No. It is not.**

Question 536: Section 2.6.9.8 - Does the State include real-time dashboard functionality as part of the State provided systems? If not, does the State expect the Contractor to provide a real-time dashboard solution? If the Contractor is expected to provide the solution, please explain in detail how the Contractor-provided solution will integrate with DHS systems.

**Response: This question in part was written before Amendment 5. But The State does expect real-time dashboard functionality. Integrations will be via API's.**

Question 537: What training materials will be provided?

**Response: For the DHS provided training, materials will be provided at Transition-In.**

Question 538: Section 2.3.1 I - Will the contractor need to provide the language line or will it be provided by the state? If this is contractor provided will it be a billable line item?

**Response: The Contractor will need to provide the language line. It is not a line item on the price sheet. Offerors will need to price it in to the Total Proposal Price.**

Question 539: Section 2.3.1.I Clarification Request: As the State provides the CSC systems, please confirm the State provides the language line interpreter service.

Follow-up Request: Please confirm State and Contractor responsibilities in the provision and cost responsibility of interpreter services to ensure appropriate, equitable cost analysis.

**Response: This question was written before Amendment 5. Contractor is responsible for the language line.**

Question 540: Section 2.3.4.C Clarification Request: Please confirm the State is responsible for ensuring the ACD prompts callers to provide Call-back information and provides an estimated call-back time. The Contractor is only responsible for making sure the functionality works, testing, and reporting issues.

Follow-up Request: If this assumption is correct, please revise the RFP to reflect the State and Contractor responsibilities.

**Response: This question was written before Amendment 5.**

Question 541: Section 2.3.18.B Request: As DHS has indicated the IVRS, ACD, and CRM are State systems, we request appropriate revision to clarify the requirements that the Contractor shall support superseded releases and back releases.

**Response: This question was written before Amendment 5.**

Question 542: Section 2.3.18.2.D Clarification Request: As DHS has indicated the IVRS, ACD, and CRM are State provided systems, can DHS please revise 2.3.18.2.D accordingly to reflect the Contractor's responsibilities within State provided systems?

**Response: This question was written before Amendment 5.**

Question 543: Section 3.7.5.B.1 Clarification Request: Please confirm that the Contractor is only responsible for the production, test, or training environments of systems within the Contractor's control, and that this requirement does not apply to DHS-provided systems such as the IVRS, ACD, and CRM.

**Response: This question was written before Amendment 5.**

Question 544: Section 3.10.2 Could DHS kindly clarify whether the omission of years of experience substitution for certain positions in RFP section 3.10.2 (pages 52 through 56) was intentional or accidental? Additionally, the RFP mentions that substitutions are allowed at the discretion of the Contract Monitor. Could you please provide clarification on whether years of experience substitutions, particularly for education qualifications, are permissible as part of the initial proposal submission for consideration?

**Response: Unless specified, the years of experience or substitution is not a minimum requirement. The years of experience and education of proposed staff will be considered during the evaluation process.**

Question 545: Section 3.6.6 Subcontractor Insurance - Please provide clarification on the definition of "Comparable levels of coverage" in regards to Subcontractor Insurance; is the intent to mean the Subcontractors Insurance costs of insurance (COI) should be based on the comparable Award Value of the Subcontractor, and not the overall Proposal/Award value?

**Response: The insurance shall be the equivalent.**

Question 546: Will DHS please provide the average daily or periodic volume of emails, faxes, and postal mail that are currently being received and processed?

**Response: Please see Appendix 8.**

Question 547: Section 2.3.9 - Do training materials related to the CSC operational processes and procedures already exist for on-boarding an agent? If so, will those materials and other relevant to the program (please list) be provided to the contractor?

**Response: The Contractor can ask for any of DHS' materials at Transition-In. The Administrative Desk Guide will be provided at Transition-In.**

Question 548: General Could the Department kindly provide clarification regarding the specific components that comprise the existing Customer Service Center (CSC) system? Our interpretation from the RFP is that the CSC system encompasses various technologies geared towards call center operations, including the Interactive Voice Response System (IVRS), Automated Call Distributor (ACD), Interpreter Service, and the Customer Relationship Management (CRM) System. We seek confirmation of this understanding to ensure alignment with the current and expected CSC system configuration.

**Response: Contractor will be responsible for the technology solution and any other of the Contractor's systems needed to provide call center services.**

Question 549: Will DHS please provide further details regarding the makes, versions, and configurations (e.g., on-premise or in the cloud) of the systems outlined in the RFP, including the Interactive Voice Response System (IVRS), Automated Call Distributor (ACD), Interpreter Service, and the Customer Relationship Management (CRM) System?

**Response: DHS prefers not to comment on the current solution.**

Question 550: Attachment B, Financial Proposal Form You are requesting a fully loaded fixed unit price per session and a fully loaded fixed price per month. Please provide the estimated number of sessions you anticipate each month in order for bidders to provide consistent pricing.

**Response: The Price Sheet has been amended to include only one price. DHS does not have the estimated number of sessions at this time.**

Question 551: Section 2.3.11.F - Please define the system(s) for which the Contractor is responsible for system changes.

**Response: Contractor will be responsible for system changes to the technology solution and any other of the Contractor's systems needed to provide call center services, not DHS systems.**

Question 552: Does the State have a language line that Contractor can leverage or should it be part of the Contractor's solution?

**Response: The language line should be part of the Contractor's solution.**

Question 553: Will DHS provide required IT support to build & deploy automation solutions by vendor?

**Response: This question was before Amendment 5 and may not apply.**

Question 554: Section 2.3.5.C.3 - Please define "Global Alerts."

**Response: Alerts in CSMS, formerly Global Alert in CSES, are important indicators entered by a child support case worker in a case to inform anyone viewing that case that one of the following conditions exist:**

- Third party permission to discuss case;**
- Administration has been threatened;**
- Family violence protection; and**
- Notable case information.**

**Notable case information may include, but is not limited to, a missing social security number for a noncustodial parent.**

Question 555: Attachment B-1 Pricing Form Can DHS clarify if they would like 3,200 users to have the full technology access?

**Response: DHS is requesting pricing for 3200 DHS users. The DHS users will have varied levels of access and permission based on their roles (i.e. manager, supervisor, caseworker). All users will need edit access. All users will need to be able to input information into the system. The Department anticipates approximately 30 users to have configuration and administrative rights.**

Question 1: Q&A Response # 5 For licensing and pricing purposes will the state please identify the breakdown of the 3200 users by title and the access needed for each group (e.g., Read, Write, etc.)

**Response: The DHS users will have varied levels of access and permission based on their roles (i.e. manager, supervisor, caseworker). All users will need edit access. All users will need to be able to input information into the system. The Department anticipates approximately 30 users to have configuration and administrative rights.**

Question 556: 3.3.2; Attachment B Financial Proposal 2<sup>nd</sup> Revised Financial Proposal shows a unit-based pricing for Years 1-5 of the contract. However, RFP Section 3.3.2 Invoice Submission Schedule does not address unit-based pricing. Can client please clarify invoice process for unit-based pricing?

**Response: For this Contract, the awarded vendor will need to submit monthly invoices which account for the number of calls managed by agents, documents fulfilled and the number of users of the technology solution.**

Question 557: This email is regarding BPM039019 Amendment 11 and Q&A series 10, posted on 9/20/23. The modified requirement in Amendment 11 is a material change that will impact the level of effort and solution required for the CRM. As such, we would like to request a three-week extension of the due date, to 10/27/23.

In addition, some of the recent responses to questions will result in new interpretation of several RFP requirements for all offerors. Thus, we are preparing additional questions but we wanted to send this note first: please confirm that you would be able to accept additional questions from offerors, given the material impact of the recent information.

The change in integration requirements between the CRM and State systems, from electronic transmission of daily files to real-time data transmission, is the primary driver for both our extension request and desire for further Q&A opportunity. While we understand the need to conclude this procurement process, we believe it will ultimately benefit DHS to provide vendors with sufficient time and information to respond accurately and thoroughly.

A quick response to all offerors on the opportunity for questions and plans for extension would be much appreciated, so that we may plan accordingly.

**Response: Offerors are permitted to ask additional substantive questions. However, it is at the discretion of the Procurement Officer if they will be answered based on the availability of time to research and communicate an answer before the Proposal Due Date. The Proposal Due Date remains the same.**

Question 558: Section 2.3.15-G - Please confirm that the fully loaded unit price per hour required in Attachment B for Task Order Services is not to include COTS product software license costs. Please confirm our assumption that the State will purchase the licenses needed for the required software.

**Response: The Department is asking for labor prices for the specific category listed if a task order were to be issued. The State will not purchase licenses.**

Question 559: 4. Call Center RFP per Amendment 5 5.3.2.P.1 - 3. If all third party service, hardware, and software are handled as subcontracts between the Offeror and the third party vendor, will the Department please confirm if RFP Sections 5.3.2.P.1 - 3. are considered non-applicable? For example, if the Offeror provides a cloud-based CRM solution, but all contractual agreements are between the Offeror and the CRM platform provider (meaning the State is not signing any contractual agreements directly with the CRM platform provider), are these sections considered not applicable?

If RFP Sections 5.3.2.P.1 - 3. are considered applicable, letters of authorization will not be available until the agreement to provide the cloud-based service is signed. The Offeror does not authorize that service until after contract award. Will the Department please confirm how the Offeror should handle this?

**Response: The Offeror must determine if any agreements and terms and conditions require the State's consent or authorization.**

Question 560: Section 2.3.3 - If the CRM will need to create a document repository, please identify the estimated volume of each type of document that will need to be stored in the CRM.

**Response: PDF and Word documents need to be stored in the CRM against work orders. The average document size will not exceed 5 MB per work order. Not every work order will have documents. Roughly 30 to 40% of the work orders will require document upload.**



Question 561: Section 2.3.3 - Please provide more details regarding the Contractor's Help Desk responsibilities for DHS' 3,200 users. For example, will the Contractor's Help Desk staff establish new accounts and terminate access at the end of an employee's tenure for all DHS users? Do all 3,200 DHS users need Help Desk support? What are the main types of help desk issues the Contractor will need to support?

**Response: Contractor will need to provide Application / Platform support for DHS users since they would be active users of the vendor proposed technology solution.**

Question 562: Section 2.3.3 - Is the Contractor migrating any data from MD THINK or only the current CRM? If data will be migrated from both systems, please specify the type of data that will be migrated from each system.

**Response: Data will need to be migrated from the current CRM in a relational database system model.**

Question 563: Attachment M, Item 24 Please provide clarification on the retention period required for each of the following items, if they are outside the general 3-year "retention of records" period listed in the RFP:

- Security logs/events
- Call recordings
- Backups

Metrics

**Response: The Contractor shall comply with the requirements for record retention in Attachment M.**

Question 564: Section 2.3.3 (Revised) Is the Vendor expected to migrate customer or interaction data from an existing DHS system? If so, which system and approximately how many records?

**Response: Approximately 8 million case records from the current CRM and 12 million IVR log data.**

Question 565: Attachment B-1 Pricing Form Can DHS clarify how many DHS users need access to which technology platforms? Pricing can vary dependent upon the functions they will use.

**Response: DHS is requesting pricing for 3200 DHS CRM users. The DHS users will have varied levels of access and permission based on their roles (i.e. manager, supervisor, caseworker). All users will need edit access. All users will need to be able to input information into the system. The Department anticipates approximately 30 users to have configuration and administrative rights. There will be a limited number of about 40 to 50 DHS users who will need access to the Contractor's ACD and IVRS.**

Question 566: Section 2.2 - Will DHS provide a detailed requirements matrix for the IVRS/ACD and the CRM to ensure vendors provide accurate estimations?

**Response: Please refer to the RFP and any amendments.**

Question 567: 2.2, Figure 1 Appendix 5 Amendment 5 Modification 9 - There are multiple places in the RFP as well as the amendments issued for the RFP that list various DHS systems. To properly price the interface and staffing requirements would the state please provide a definitive list of the systems the contractor will need to interact which includes:

- DHS System Name
- DHS System Acronym (if applicable)
- Contractor Interaction (CRM Interface or CSR screen access)
- For each unique exchange between the CRM and the named DHS System:
  - o Interface Name
  - o Transport Protocol (e.g., SFTP, RESTful Web Service, etc.)
  - o Data format (e.g., csv file, XML, JSON, etc.)
  - o Direction (e.g., Inbound to CRM, Outbound from CRM)

Frequency (e.g., real-time, hourly, daily, etc.)

**Response: The CRM needs to integrate with the Child Support Management System (CSMS), the Eligibility and Enrollment (E&E) system, and the Child, Juvenile and Adult Management System (CJAMS). Integrations need to be via**

**API. Direction needs to be two-way. The Contractor can propose a suitable transport protocol based on their middleware architecture.**

Question 568: 11. Revise Section 2.3.3: The Contractor shall also provide that the CRM is an industry standard product that allows for transferability of the CRM data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor during the Transition-Out period. - So that vendors can better understand their commitment, what are the requirements for a system to be "host-able" by MDTHINK? Is there a particular database, CRM platform, cloud vendor, VMware or other hosting attributes that must be met? Will the State accept a mixture of the two options where portions of the solution are hosted by MDTHINK and others to another vendor?

**Response: DHS does not have a particular database or technology in mind with respect to MD THINK hostable criteria.**

Question 569: Attachment B Financial Proposal 2nd Revised;

Answers to Questions Series 6 The Financial Proposal defines the monthly cost for technology solution "includes CRM, IVRS, ACD, Automated Dialer System and any other technology components associated with the Call Center operations proposed" for 3,200 DHS staff. In answer to question #248, the state indicates 40-50 DHS staff will need access to contractor's IVRS and ACD. Will the state define a separate monthly cost for the 40-50 DHS staff requiring IVRS and ACD access only?

**Response: The State intends to use our Price Sheet as specified.**

Question 570: 5.3.2, P Technical Proposal - Required Forms and Certifications (Submit under TAB O)

3) For each service, hardware or software proposed as furnished by a third-party entity, Offeror must identify the third-party provider and provide a letter of authorization or such other documentation demonstrating the authorization for such services. In the case of an open source license, authorization for the open source shall demonstrate compliance with the open source license. - Will the state please clarify that Letters of Authorization are required only for the services, hardware, or software for which the Offeror would expect the State to agree and sign to the terms and conditions of these solutions?

**Response: The Letters of Authorization are required for all third-party software.**

Question 571: Section 2.6.7. System Problem Response Definitions and Times Will the state please clarify the difference between Service Priority Emergency and High?

**Response: Please refer to the definitions and the chart and users affected.**

Question 572: Section 2.3.3 The Contractor shall provide a vendor-hosted CRM for this Contract, which provides user access or licenses for approximately three thousand two hundred (3,200) users as designated by DHS. The Contractor shall ensure that the CRM integrates to the MD THINK-hosted DHS applications (CJAMS, CSMS, E&E, etc.). The Contractor shall also provide that the CRM is an industry standard product that allows for transferability of the CRM data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor during the Transition-Out period.- For instances where components of the proposed solution are being licensed and hosted by third parties, such as SaaS products, does the state agree they have responsibility to negotiate their own licenses for the component meets this requirement?

**Response: If it is a transferable SaaS product, the State will have the responsibility of licensing during transition-out.**

Question 573: Section 2.3.3 - The Contractor shall also provide that the CRM is an industry standard product that allows for transferability of the CRM data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor during the Transition-Out period - Given that the state is defining requirements that point to a SaaS solution, will the state remove or revise this requirement to allow vendors to propose a CRM solution that is the best option for DHS. Please confirm the ownership and licensing of the systems will be negotiated by the state or new vendor with the system supplier at the end of the contract term.

**Response: If it is a transferable SaaS product, the State will have the responsibility of licensing during transition-out.**

Question 574: Section 2.3.2 I - The Contractor shall also provide that the IVRS is an industry standard product that allows for transferability of the IVRS data and system to MDTHINK (or be host-able by MDTHINK) or to another vendor at the end of the Contract. - Given that the state is defining requirements that point to a vendor-hosted solution, will the state remove or revise this requirement to allow vendors to propose an IVRS solution that is the best option for DHS. We understand caller data and contract data will transfer. Proprietary data will not transfer.

**Response: The State will not remove the requirement.**

Question 575: Does MD DHS have an inhouse or vendor development team, and who is the vendor?

**Response: DHS prefers not to answer questions for the current solution.**

Question 576: Are there any existing APIs we can re-use for the 'report a change' transaction in the VA?

**Response: There are no existing API's that can be re-used.**

Question 577: Section 2.3.3 - What are the use cases for the 3200 CRM users? Will these users execute and complete the cases/WOs?

**Response: The DHS users will have varied levels of access and permission based on their roles (i.e. manager, supervisor, caseworker). All users will need edit access. All users will need to be able to input information into the system. The Department anticipates approximately 30 users to have configuration and administrative rights.**

Question 578: Section 2.3.3 - Can you please provide more details on the breakdown of the 3200 users by persona? Are we expecting all 3200 users to be direct users of CRM? Or would a specific set of users would access CRM data via MDThink application?

**Response: The DHS users will have varied levels of access and permission based on their roles (i.e. manager, supervisor, caseworker). All users will need edit access. All users will need to be able to input information into the system. The Department anticipates approximately 30 users to have configuration and administrative rights.**

Question 579: Section 2.3.3 Do you currently use any knowledge management solution? Is it an internal tool or available to customers and how do you manage knowledge articles?

**Response: For the new Contract, DHS will provide the knowledge base articles to the Contractor during Transition-In. The expectation is the Contractor's CRM includes knowledge management features.**

Question 580: Section 2.3.3 How many MDThink applications are required to be integrated with the CRM?

**Response: The CRM needs to integrate with the Child Support Management System (CSMS), the Eligibility and Enrollment (E&E) system, and the Child, Juvenile and Adult Management System (CJAMS). Integrations need to be via API.**

Question 581: Are there any ongoing evaluations of Commercial Off-The-Shelf (COTS) solution(s)?

**Response: DHS prefers not to answer questions for the current solution.**

Question 582: Section 2.3.1-A - Implement and manage a CSC to handle inbound and outbound calls for the Department, which incorporates the Department's IVRS and CRM. - If contractor is responsible for hosting the CRM and data conversion is required from the current CRM, what is the current storage requirements in gigabytes for data to be converted?

**Response: This question was submitted before Amendment 5.**

Question 583: Section 3.3.2.B - Volumes for Inbound and Outbound Calls, Email Support/Fax Verification, and Document Fulfillment will vary month to month and therefore, is not typically invoiced in equal monthly installments. Please clarify how bidders should invoice the State for Inbound; Outbound, E-mail support/Fax Verification and Document Fulfillment. Should monthly invoices be based on the total number of units incurred in the month times the proposed rates from the Financial Proposal Form?

**Response: Yes.**