REQUEST FOR PROPOSAL # 2024-027
Student Financial Services Call-Center
RESPONSE ADDENDUM #2
January 22, 2024

CLARIFICATION

Timeline Date Change:

Reference Section	Event Name	Event Due Date
Section 1.2.2	Deadline for Proposal Submission	February 5, 2024,

QUESTIONS

Q1: Could you provide estimates for the following:
- **Anticipated call volume for both inbound and outbound calls.**
- **Average call duration for each call.**

A1: See available call statistics at the end of this document.

Q2: Why has this bid been released at this time?

A2: Because we need a contractor for early July as our current contract will be expiring.

Q3: Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?

A3: Bidders cannot provide an alternative fee structure. Bidders are recommended to use the fee structures provided and add any additional cost explanations in the space provided.

Q4: Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.

A4: N/A we do not currently have (and have never had) a vendor for this purchasing activity.

Q5: If this is a term contract subject to renewal, what is the term and the maximum number of option periods? There are two different contract periods listed within the documents.

A5: **Two years (2) with option of three (3) additional one year**

Q6: **Has the current contract gone full term?**

A6: **Current contract will end June 2024**

Q7: **Have all options to extend the current contract been exercised?**

A7: **N/A we do not have a current contract with any vendor.**

Q8: **Who is the incumbent, and how long has the incumbent been providing the requested services?**

A8: **N/A we do not currently have an incumbent who has been providing the requested services.**

Q9: **To what extent will the location of the bidder's proposed location or headquarters have a bearing on any award?**

A9: **Location or headquarters will have considerable bearing on award. The location of the vendor will be evaluated to ensure that designated staff can easily access vendor staff (taking into account time differences between the University and the vendor).**

Q10: **How are fees currently being billed by any incumbent(s), by category, and at what rates?**

A10: **N/A there is no incumbent.**

Q11: **What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?**

A11: **N/A there is no incumbent.**

Q12: **Is previous experience with any specific customer information systems, phone systems, or software required?**

A12: **Yes, experience with Peoplesoft/Oracle student information systems is required.**

Q13: **What is the minimum required total call capacity?**

A13: **30,000 calls/year**

Q14: **What is the minimum simultaneous inbound call capacity?**

A14: **50 calls; historically, our queue might jump up to 15 waiting with 15 on active calls.**

Q15: **What is the maximum wait time?**

A15: **Maximum wait time – 5 minutes**

Q16: **What is the maximum hold time?**

A16: Maximum hold time – 10 minutes

Q17: What percentage of inbound calls must be answered by a live operator?

A17: 100%

Q18: What percentage of calls must be resolved without a transfer, second call, or a return call?

A18: 80%

Q19: What is the maximum percentage of calls that can be terminated by the caller without resolution?

A19: 5% (currently 0%)

Q20: Is there a minimum or maximum number of operators and supervisors?

A20: Currently ranges from 3 operators with 1 supervisor up to 15+ operators with 2 supervisors depending on time in the semester.

Q21: What are the required language options?

A21: English, Spanish, French

Q22: What is the required degree of dedication for the call center? (Can call centers work on other contracts at the same time as this one)?

A22: Call centers able to work on other contracts at the same time as this one.

Q23: What is the required degree of dedication for the operators? (Can operators work on other contracts at the same time as this one)?

A23: Operators able to work on other contracts at the same time as this one (would want to ensure that it is a reasonable number of contracts being handled simultaneously, though).

Q24: Are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator, or must a live operator be the initial contact?

A24: Yes, callers allowed to connect with a message verification system or pre-recorded message before connecting to a live operator.

Q25: What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?

A25: Calls should be recorded for review and training purposes; recordings must be maintained for 1 year.

Q26: What was your average monthly call volume over the past year?

A26: See available call statistics at the end of this document.

Q27: What is the current number of seats for operators and supervisors at your existing call center?

A27: We currently have 6 Graduate Assistants and 16 full-time staff who are available to take calls at any given time.

Q28: What is the current average wait time for phone calls?

A28: See available call statistics at the end of this document.

Q29: What is the current average handle time for phone calls and other types of communications?

A29: See available call statistics at the end of this document.

Q30: What is the current average after-call work time for operators?

A30: See available call statistics at the end of this document.

Q31: Over the past year, what is the percentage of calls received in English versus non-English?

A31: We do not have this data.

Q32: Over the past year, what percentage of calls received were in Spanish?

A32: We do not have this data.

Q33: What time of day, days of the week, or times of the year do calls typically peak?

A33:

- **Times of the year:** Beginning of Fall and spring semesters (week before and week of first day of classes for each term), July
- **Days of Week: Mondays and Fridays**
- **Time of day: 11am – 1pm**

Q34: Request for Proposal Document: Page 6, Section 1.1.3 Purpose: Please provide the average monthly volume and hourly call volume handled by the current staff.

A34: See available call statistics at the end of this document.

Q35: Submission Form Package: Page 32, Evaluation Question(s) – Technical Interface Data Exchange: Will the chosen vendor be required to integrate with the TouchNet payment card processor platform after contract award?

A35: Yes, the vendor will need full access to TouchNet to provide comprehensive customer service; the vendor will not need to process payments.

Q36: What is the current call volume? Are you able to provide an estimate/forecast?

A36: See available call statistics at the end of this document.

Q37: What are the call drivers/call types that are currently handled by the department?

A37: Questions about the following:
- **Financial aid offer letters/understanding overall costs**
- **Resources for finding other aid**
- **Payment info (methods & options, e.g. online, in-person, payment plans, etc)**
- **Billing line items**
- **Clarification on financial aid eligibility (types of aid, requirements for receiving various aid types**
- **Miscellaneous "campus operator" requests transferred to other departments**

Q38: How many agents do you currently have who manage the call volume?
- **Do you have a preference for where the agents are located?**
- **Do you require multilingual agents?**

A38: We currently have 6 Graduate Assistants and 16 full-time staff who are available to take calls at any given time. No preference for where agents are located within the continental US.

Q39: What is the current staffing plan? i.e. shift times, peak times, hours of operation

A39:

- **8:30am-4:30pm Monday through Friday throughout the calendar year, except federal holidays. Historically, shifts are 8:30-12:30 and 12:30-4:30.**
- **Interest in expanded hours (evenings and/or weekends) during peak seasons, e.g. two weeks around the start of both fall and spring semesters (August and January) and possibly in the spring semester as well, as prospective families reach out**
- **Times of the year: Beginning of Fall and spring semesters (week before and week of first day of classes for each term), July**
- **Days of Week: Mondays and Fridays**
- **Time of day: 11am – 1pm**

Q40: What is the projected go-live date?

A40: May/June 2024

Q41: Please can you confirm the current incumbent or if this is a new requirement.

A41: This is a new requirement, no incumbent.

Q42: Can you please provide the University of Maine's annual budget and/or contract value for this program?

A42: The University annual budget for this project can not be disclosed at this time.

Q43: Please clarify any geographic staffing requirements for this program or if staff may be anywhere within the continental United States, offshore, etc.

A43: No preference for where agents are located within the continental US.

Q44: Please confirm that the University of Maine will accept either a hybrid in-center/ work from home staffing model or fully remote work from home.

A44: University of Maine will accept this type of staffing model after receiving thorough understanding from vendor of the policies and procedures in place to ensure regulatory compliance and effective student service can be achieved in this type of model.

Q45: Please provide anticipated labor categories and staffing ratios, as well as job descriptions.

A45: 1 supervisor: 10 operators at a maximum; preferably 1 supervisor: 6 operators.

Q46: Please provide anticipated requirements and any contract language relative to any Service Level Agreements (SLAs) such as Average Handle Time, Average Speed to Answer, etc.

A46: All the requirements needed for this product are outlined in the RFP. Please see "Appendix H, Solutions Requirements Matrix and 4.0 Master Agreement."

Q47: Please provide anticipated baseline staffing levels or estimates, if available.

A47: Unknown

Q48: Will the University of Maine please provide the anticipated IVR/ACD technology that will be utilized to support this program.

A48: We are not using this kind of technology.

Q49: Will the University of Maine please provide the anticipated CRM technology that will be utilized to support this program.

A49: Oracle PeopleSoft

Q50: Will the University of Maine please provide the anticipated Knowledgebase technology that will be utilized to support this program

A50: TeamDynamics

Q51: Will the University of Maine have a requirement for Customer Satisfaction Services (CSAT) and if so, please elaborate on channels/ frequency CSAT metrics.

A51: We do not have a customer survey that we use.

Q52: Please provide the University of Maine's Quality Assurance scripting and quality review standards.

A52: No Quality Assurance set up now.

Q53: Will the University of Maine please provide the anticipated WFM technology that will be utilized to support this program or confirm if the respondent must provide one.

A53: The University does not have that at the moment if it is part of the respondents' technologies that would be a plus.

Q54: Please clarify if work will need to be done at client facilities or other existing physical location.

A54: Work not anticipated to be done at client facilities or other existing physical location of UMaine.

Q55: If vendor is required to provide staff working in the University of Maine's facilities, please clarify if the university will also provide all equipment including desktops/laptops, headsets, etc. or if vendor should provide these.

A55: N/A see A54.

Q56: Does the University of Maine require a vendor to provide a FedRAMP or (StateRamp) CCaaS and/or CRM?

A56: No

Q57: Please provide any architectural diagrams of all technologies needing to support this scope of work including any integrations.

A57: All the technologies required are outlined in Appendix H Solutions requirements and questions related to it will be addressed during technical reviews.

Q58: Please provide current or anticipated IVR call flow diagrams.

A58: We do not use IVR technology.

Q59: Please provide current or historical SLA's. What are the anticipated SLAs for the opportunity?

A59: N/A because we do not have a current contract.

Q60: Please provide historical and anticipated report standards

A60: N/A because we do not have a current contract.

Q61: Please provide historical redundancies and failovers if any.

A61: N/A

Q62: Please provide historical call volume by campus by month with a breakdown of call type (disposition) if possible.

A62: See available call statistics at the end of this document.

Q63: Please provide average call handle time by month.

A63: See available call statistics at the end of this document.

Q64: Please provide call arrival pattern data or call arrival heat map.

A64: See available call statistics at the end of this document.

Q65: Please provide historical queue performance: abandonment rate & average speed to answer.

A65: See available call statistics at the end of this document.

Q66: Will the respondent's solution be required to integrate with any existing University technologies? If so, please list what technologies and if API connections are available.

A66: Please see the Submission Package- Appendix H1- Solution Requirements Matrix

Q67: Is there a payment processing component to the solution?

A67: Not required, would like to explore options if they exist.

Q68: What is the most common reason for calls?

A68: Questions about the following:
- Financial aid offer letters/understanding overall costs
- Resources for finding other aid
- Payment info (methods & options, e.g. online, in-person, payment plans, etc)
- Billing line items
- Clarification on financial aid eligibility (types of aid, requirements for receiving various aid types
- Miscellaneous "campus operator" requests transferred to other departments.

Q69: Will agents be required to provide counsel on financial aid matters?

A69: Yes, financial aid questions will be a common reason for calls.

Q70: Is it necessary to fill out the HECVAT if you are providing third party products?

A70: This needs to be filled out by any respondent.

Q71: Does the University currently use a CRM? If so, what is the current service?

A71: Other departments use Salesforce; our office exclusively uses PeopleSoft

Q72: Will the respondent need to answer questions about payment or tuition status?

A72: Yes, billing-related questions will be a common reason for calls.

Q73: How many hours pr week does the average grad student answering phones work per week?

A73: Each graduate student works 20 hours per week answering phones per week.

Q74: What are your busy seasons?

A74:
- **Times of the year: Beginning of Fall and spring semesters (week before and week of first day of classes for each term), July**
- **Days of Week: Mondays and Fridays**
- **Time of day: 11am – 1pm**

Q75: Do you require staff to have any specific credentials or clearances?

A75: The University will provide the FERPA training, and any other documentation needed to be compliant with confidentiality requirements.

Q76: Will there be a fulfillment component to the solution?

A76: No.

Q77: What is your annual spend with the incumbent vendor?

A77: N/A there is no incumbent the service is done in-house.

Q78: How, technically, will the vendor receive the calls? Will the vendor assume ownership of the main phone number? Will each school or location transfer calls to the vendor? Will a connection be made between "one stop shop" and the vendor's phone systems? If using transfer, how many incoming phone lines does each location have?

A78: The University will transfer calls to the vendor. Between 10 and 15 incoming phone lines

Q79: Are there any rules or preferences that would prohibit the vendor from hiring students to work in the call center?

A79: The respondent will need to provide more information on the students that their intended to hire.

Q80: Can you please provide clarification to preferred billing? Per call, per minute, or monthly fee.

A80: Per call or monthly fee

Q81: Will we have access to their SIS?

A81: The vendor will have access to SIS

Q82: What departments will be included in the service? Do you have the monthly volumes for each department included?

A82: Student Financial Services includes Financial Aid and Billing. Call volumes represent combined volume for Financial Aid and Billing.

Q83: How are calls currently coming in, the "one stop shop" or each school?

A83: Calls are coming to a queue and then distributed through staff.

Q84: Can you provide call volume and incoming email statistics?

A84: See available call statistics at the end of this document.

Q85: Will there be an opportunity to use chat bots or are they interested in implementing them?

A85: We already have a chat bot.

Q86: Will we provide a different phone number for each location or school?

A86: University of Maine (Orono, ME) and University of Maine at Machias will be the participating campuses. They will use the same phone number.

Q87: Is there any volume forecast available? It is mentioned that there was a significant increase in volumes, but no volume data has been provided.

A87: See available call statistics at the end of this document.

Q88: Will this be predominantly voice call support service with very minimal in person check-ins? What is the percentage split between them?

A88: Clarify your question

Q89: Do we have to operate out of the university campus? If yes, will the university provide us with necessary space to operate out of?

A89: No.

Q90: Is there a well-defined process for the call center services? Is there like a scope document that can be shared with us?

A90: Please check in the RFP (Submission Package)- Appendix H1- Solution Requirements

Q91: Do we have a CRM or ticketing system in place already?

A91: Peoplesoft

Q92: Is there any need for certification of any kind for providing these services?

A92: The University will provide the FERPA training to the awardee. + Access regulations that the awardee will need to abide by.

Q93: Can we automate the interactions as much as possible? Can we provide self-service and self-support options as part of our solution?

A93: We would be willing to explore these types of solutions.

Q94: Do we need any specific language capabilities, given the University of Maine has students from various countries.

A94: We are looking mainly at English.

Q95: Is there any documentation that is available online for us to reference some of the sample issues and challenges that would have to be supported?

A95: No

Q96: Can we get some sample interactions or some sample support scenarios that were handled?

A96: Student calls to ask why they can't register for classes. Advisor (operator) reviews account holds and identifies the ones that prevent registration: pre-registration hold and immunization hold. Reviews student's balance and provides multiple options for resolving pre-registration hold: accepting pending loans if available, making out of pocket payments, and discusses options for additional loans. Advisor also shares where to find additional information, e.g. resources on the University's website. At the end of the call, advisor offers to transfer student to Registrar's Office to address immunization hold.

- Parent calls to ask about the status of their Parent PLUS Loan and ask whether the student's bill is fully covered by the loan. Advisor reviews student consent info and determines that the parent is not listed on the student's consent form, and therefore the advisor cannot share student-specific details; advisor explains accordingly and offers available options: discuss general information, call back with student to provide verbal consent, ask student to reach out directly, or have student submit consent form. Advisor also reviews the PLUS Loan application and determines that the caller IS the parent who borrowed the PLUS Loan; advisor reviews PLUS loan status and provides specific guidance without disclosing student-specific details. At the end of the call, advisor emails the consent form to the student with an explanation of what it's for.

Q97: Do the services have to be provided within the state of Maine or can we deliver the services from outside also? Can we consider offshore / nearshore options?

A97: No preference for where agents are located within the continental US.

Q98: What kind of reporting is being expected from the call center service operations?

A98: Please see data provided on the last page.

Q99: Do we have to perform outbound calling or reactive support to the student requesting services?

A99: Not at this time, intent is for incoming call services.

Q100: Do we have to perform any kind of integration with any of the existing platforms or tools? If yes, please provide details?

A100: Please see the solutions requirement list

Q101: What is the estimated inbound call volume? Day/week/month/annually

A101: See available call statistics at the end of this document.

Q102: Are there periods, if so, which times during the semester?

A102: Clarify question.

Q103: Will there be a need for any outbound campaigns?

A103: Not at this time, intent is for incoming call services.

Q104: What is the average length of a call?

A104: See available call statistics at the end of this document.

Q105: Will all campuses participate in each campaign? If yes, do volumes and handle times differ by campus?

A105: University of Maine (Orono, ME) and University of Maine at Machias will be the participating campuses. No differences.

Q106: What University systems will need access to? Is the University prepared to provide all necessary training to ensure joint success?

A106: Please see the solutions requirement list. University is ready to collaborate with the vendor

Q107: What are the University's escalation procedures/policy?

A107: No current escalation procedures. The University expects the vendor to provide potential solutions for escalation procedures.

Q108: What is the expected launch date for the program?

A108: May/June 2024

Q109: What are the hours of operation for the program?

A109: Monday-Friday, 10am-4:15pm (we have adjusted student service hours for the spring semester to help with FAFSA Simplification implementation – after spring semester we will be returning to an open time of 8:30am),

Q110: It is mentioned in the RFP that the University is utilizing graduate school students at present along with calls being dispersed to other full time employees withing University offices. How many total individuals does University of Maine have absorbing calls that would be migrated and consolidated within the contact center? Graduate school students + others?

A110: We currently have 6 Graduate Assistants and 16 full-time staff who are available to take calls at any given time.

Q111: What important qualities does the University look for in new agents when hired to take calls?

A111: Strong communication skills,

Q112: What are the language requirements for this program, what percentage of calls are in English and then what is the breakdown for other language needs?

A112: Language requirement is English.

Q113: What is the Universities belief around what the new program implementation timeframe is?

A113: We are anticipating up to 6 weeks for a new program implementation.

Q114: Please share in detail what training materials exist, how comprehensive the training is or if it needs to be built out. We recently consolidated calls from various departments at another University and found that the training materials were very fragmented; our curriculum writing team needed to re-craft the training materials to consolidate and professionalize them.

A114: The University has a comprehensive and structured training materials.

Q115: What is the University of Maine's length of training – number of hours at present?

A115: Currently, for new employees, our student service/phone training is approximately 60-80 hours long – about 3 weeks.

Q116: Will the University of Maine provide a resource for training and train the trainer?

A116: Yes, UMaine is able to provide resources for training and assist in training the trainer.

Q117: Is the University open to, once NDA's are in place, allow the chosen vendor to side jack and listen to calls during training with current agents/resources, prior to call volume being migrated and consolidated?

A117: Yes, the University if open to this for training purposes.

Q118: Is it acceptable to conduct training and operate the program in a virtual environment?

A118: Yes, it is acceptable to conduct training and operate the program in a virtual environment.

Q119: What are the current channels being operated for the program (Phone, Chat, Email, Social, SMS, etc.), if phone only what are the desired channels over time?

A119: Phone, email; limited SMS and chat. Preference for support with phone, email, and SMS.

Q120: What are the top call types for this program?

A120: top call types are about billing. See A37

Q121: What type of calls will need to be transferred back to the Financial Aid team at the University? Will those be live transfers or a task that is created for their team to work?

A121: May involve both live transfers and a worklist; preference for a ticketing system rather than live transfers. Call types involve complex questions about aid and billing, e.g. potential appeals

Q122: What technology will the University of Maine provide and what technology is expected from the vendor?

A122: Vendor must provide computers, internet, phones, headsets, and any associated software/applications to handle phone calls

Q123: Please provide in detail your entire technology stack for calls and other channels.

A123: Please see solution requirements list.

Q124: Are there any KPI's currently being adhered to and, if so, what are they?

A124: No current KPI's.

Q125: Can you provide historical volume for inbound and outbound calls? Intra-day if possible?

A125: See available call statistics at the end of this document. See available call statistics at the end of this document.

Q126: Can you please provide historical AHT for all forms of contact covered under this program?

A126: See available call statistics at the end of this document.

Q127: Are there any peaks/seasonality to the volume? If so, please provide call volumes for peak months.

A127:
- **Times of the year: Beginning of Fall and spring semesters (week before and week of first day of classes for each term), July**
- **Days of Week: Mondays and Fridays**
- **Time of day: 11am – 1pm**
- **See available call statistics at the end of this document.**

Q128: Are there are any specific background check requirements for this program – we manage other similar programs and a standard background check has been sufficient, does University of Maine follow the same policy?

A128: Standard UMaine background check

Q129: What are the top goals for the chosen vendor to focus on?

A129: - Timely & courteous resolution of inbound calls

- Providing complete & accurate information to allow callers to make informed decisions

Q130: What does success look like, short and long term?

A130: - Short term: Successfully onboard & launch call center with high implementation fidelity/alignment with the existing approach to student service (i.e., prioritizing quality over quantity of calls taken, generating trust, etc.)

- Long term: overall reduction in SFS staff time spent on student service (e.g., on escalations and follow up); continue to meet or exceed expectations for providing high-quality service to students and families

Q131: What services are you currently not providing to your students that you would like to be able to provide through the call center? (i.e. SMS txt communication, proactive enrollment support, etc.)

A131: Open to SMS text messages; desire for ticketing system to improve follow-up communication when calls must be escalated to the UMaine team

Q132: What additional value add/wish list items are you looking to achieve through call center support? (i.e. admissions support and student success coaching, matriculation and financial aid support, etc)

A132: See A131

Q133: Are there any current levers in place to measure student satisfaction with phone support? If so, is there any data that could be shared regarding opportunities for improvement?

A133: No current levers to measure this.

Available Call Statistics:

	2021-2022 Academic Year	2022-2023 Academic Year	2023-2024 Academic Year (To date)
Calls Presented	29,989	30,200	9,539
Calls Handled	27,418	27,514	8,563
Percent Handled	91.43%	91.11%	89.77%
Avg Handle Time	0:11:11	0:10:03	0:09:36
Calls Abandoned	2,570	2,686	976
Percent Abandoned	8.57%	8.89%	10.23%
Avg Abandoned Time	0:01:49	0:01:59	0:02:07
Avg Speed of Answer	0:02:06	0:02:24	0:02:43
Avg Abandoned Per Day	7.04%	7.36%	6.83%
Avg Queue Time	0:02:05	0:02:22	0:02:40
Avg After Call Work Time	0:03:15	0:03:34	0:03:04

Average Monthly Call Volume for 23-24 Academic Year

	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	1/1/2024 (To date as of 1/16/2024)
Calls Presented	5,357	2,210	1,802	1,602	1,425	1,740
Calls Handled	4,657	1,942	1,603	1,518	1,304	1,487