



Request for Information No. 2023-062 Call Center Services

Due Date: June 15, 2023
Time: 2:00PM EST
Receipt Location: Union County Government Center
Procurement Department
500 N. Main Street, Suite 709
Monroe, NC 28112
(Note: Follow the submittal instructions listed in this document to electronically upload a proposal package)

Procurement Representative

Corey Brooks
Senior Procurement Specialist
Phone: 704.283.3683
E-mail: Corey.Brooks@unioncountync.gov



TABLE OF CONTENTS

- 1 Intent of RFI 2**
- 2 RFI Submittal Details..... 2**
 - 2.1 RFI SUBMISSION DEADLINE..... 2
 - 2.2 RFI SUBMISSION REQUIREMENTS 2
 - 2.3 RFI QUESTIONS..... 2
 - 2.4 COMMUNICATION 3
- 3 PURPOSE..... 3**
 - 3.1 INTRODUCTION..... 3
- 4 OVERVIEW OF PROJECT OBJECTIVE 3**
 - 4.1 OVERVIEW 3
- 5 information requested..... 4**
 - 5.1 GENERAL CALL CENTER SERVICES 4
 - 5.2 QUALITY CONTROL 4
 - 5.3 PROJECT MANAGEMENT..... 4
 - 5.4 TECHNOLOGY 5
 - 5.5 REPORTING 5
 - 5.6 KPI'S 5
 - 5.7 BILLING 5
 - 5.8 TRAINING..... 5
 - 5.9 DISASTER RECOVERY 6
 - 5.10 SECURITY 6
- 6 Submittal Requirements 6**
 - 6.1 RFI PROPOSAL FORMAT 6
 - TAB A – COVER LETTER 6
 - TAB B- QUESTIONS REGARDING AFTER HOURS CALL CENTER SERVICES 7
 - TAB C – COST INFORMATION 7
- 7 GENERAL TERMS AND CONDITIONS..... 7**
- 8 Appendix A – RFI Submission 8**



1 INTENT OF RFI

Union County invites all interested parties with general call center experience to submit a written response to this Request for Information (RFI). A company does not need to respond to the RFI to be eligible to respond to any future solicitations. The future solicitation will be open to all potential vendors.

This RFI is being issued strictly for the purpose of gaining knowledge about current industry information regarding a utility software solution and should not be construed as an intent, commitment, or promise to acquire goods, services, supplies or solutions offered. No contract will result from any response to this RFI. Any future procurement by the County will be the subject of a separate process and subject to final budget appropriations.

2 RFI SUBMITTAL DETAILS

2.1 RFI SUBMISSION DEADLINE

All RFI submissions must electronically be received by the Union County Procurement Department no later than **2:00 PM EST on June 15, 2023**, per the instructions below. Any submittals received after this date and time shall be rejected without exception.

2.2 RFI SUBMISSION REQUIREMENTS

The RFI submission responses **must be submitted electronically** using the following link: <https://portal.unioncountync.gov/Forms/procurementsubmit>. Select the Solicitation drop down arrow and choose this RFI from the list. Complete the form, upload your RFI submission response package, and select submit. An email will be sent to the address listed on the form as your confirmation of receipt.

The RFI submission response package should be signed by an authorized representative from the company. Instructions for preparing RFI submission package is provided herein.

Paper submissions will not be accepted.

There is no expressed or implied obligation for Union County to reimburse Offerors for any expenses incurred in preparing proposals in response to this request.

2.3 RFI QUESTIONS

RFI questions will be due on or before **June 1, 2023, at 5:00 PM EST**. The primary purpose is to provide participating respondents with the opportunity to ask questions, in writing, related to the RFI.

Submit questions by e-mail to Corey Brooks at Corey.Brooks@unioncountync.gov by the deadline shown above. **The email subject line should identify the RFI number and project title.** All questions and answers may be posted as addenda on www.unioncountync.gov.



2.4 COMMUNICATION

All communications, any modifications, clarifications, amendments, questions, responses or any other matters related to this RFI must be made through the Procurement Contact noted on the cover of this RFI. If applicable, an addendum will be issued to answer questions.

3 PURPOSE

3.1 INTRODUCTION

Union County, NC (“County”), through Union County Water – Business Operations is issuing this Request for Information (RFI) to gather current market information for an afterhours service that can provide critical call data, superior service, and responsiveness. Additional services may include but are not limited to quality control through customer survey and out research services, custom reporting, and dispatching of calls to County personnel when required.

The County (estimated population 242,657) is located in the central, southern piedmont. The County provides its residents with a full array of services that include public safety, water/wastewater utilities and sanitation, human services, cultural and recreational activities, and general government administration.

4 OVERVIEW OF PROJECT OBJECTIVE

The purpose of this RFI is for Union County Water – Business Operations Department to acquire information to determine what afterhours call center services are available that will meet the needs of Union County as described in this document.

The objectives of this RFI are to:

- Gather information on the current afterhours call center service solution industry, including past performance, compatibility, configuration, design and implementation.
- Gather feedback and comments on the market standard and various requirements.
- Use the RFI feedback to modify the draft Technical Specifications and Terms and Conditions, wherever appropriate, to attract qualified vendors who can respond to a competitive solicitation.


4.1 OVERVIEW

Union County Water – Business Operations is seeking information from interested parties to provide general call center services on an as needed basis, generally after normal business hours, weekends, holidays, and occasionally during business hours.

Union County Water currently services approximately 51,000 customers and provides water and wastewater services.

Union County Waters’ current afterhours service answers between 150-250 inbound calls from customers per month, and currently averages 1,200 full circle call minutes from customers and Union County Water staff.

While every step is taken to alert customers of scheduled outages, calls will come in as customers realize their water service is unavailable. Unplanned outages can create call



volume spikes at any time. Outages can range from a few customers to several hundred at any time lasting as long as 24 hours.

Union County Water envisions an inclusive program that will improve its services to the citizens by providing quick and professional customer service.

The County is looking for an afterhours service that can provide critical call data, superior service, and responsiveness. Additional services may include, but are not limited to quality control through customer survey and out research services, custom reporting, and dispatching of calls to County personnel when required.

5 INFORMATION REQUESTED

The County seeks information from respondents to assist in establishing an afterhours call center solution that at a minimum will:

Establish and meet key performance standards for call center services throughout the term of the contract in order to provide acceptable customer service and satisfy the scope of work under the contract. These performance standards are calculated monthly and listed below:

5.1 GENERAL CALL CENTER SERVICES

- Provide immediate call response to citizens and contact emergency service personnel timely.
- Provide call center services 24/7, 365 days per year using live stateside representatives.
- After-hours call handling with customizable recording prompts.
- 24/7 monitored email or other available contact methods for changes, special requests, or other customer service needs between the call center and Union County Water.
- Follow prescribed call distribution and prioritization with the ability to “hold” calls not requiring emergency response.
- Provide call center services during times of unexpected emergency; closure, severe weather, or on other requests deemed an emergency by Union County Water or designated representative.
- Afterhours service must be able to handle calls in at least two languages, English and Spanish.

5.2 QUALITY CONTROL

- Provide access to afterhours service call data displaying account telephone activities through a dashboard or other similar type of account review access.
- Provide call quality assurance reviews with call center staff and provide detail to Union County Water.
- Record and make available recordings of calls received to/from the customer and Union County Water personnel.

5.3 PROJECT MANAGEMENT

- Dedicated account manager assigned for direct contact by County management for service issues, special requests, business operation issues, account billing, changes to script or other call center service provided, and resolution of performance issues.

- Provide daily/weekly/and periodic reports for tracking call volume, time, duration, agent, call type, return contact statistics by Union County Water personnel, etc. through standard or customized reporting.

5.4 TECHNOLOGY

- Customer portal or dashboard
- Automatic Call Distributor (ACD)
- Interactive Voice Response (IVR)
- Email Correspondence 24/7
- Call record inbound/outbound

5.5 REPORTING

- Contractor shall have the ability to generate or produce reports to measure call statistical data, analysis, agent performance, and efficiency to include but not limited to:
- Call Statistic Reporting:
 - Calls per hour.
 - Dropped call statistics.
 - Calls received by time of day/day or week.
 - Calls answered.
 - Time to answer.
 - Talk time min/max/avg.
 - Total call time
 - Return calls data for dispatched work.
 - Abandoned
 - Wait/hold time.

5.6 KPI'S

- Meet established criteria for service delivery, dropped calls, abandon rate, quality, etc.
 - Answer 100% inbound calls
 - Talk Time < 240 seconds average.
 - Hold Time < 120 seconds in an active call waiting status.
 - Dispatch time < 1minute
 - Citizen or UCW complaints about the call center services < 1% of incoming calls answered.
 - Copies of all complaints and their resolution will be sent to the UCW Customer Service Manager, or delegated representative, the next business day.

5.7 BILLING

- The afterhours service shall provide with the monthly invoice a call report detailing at a minimum; time billed, number of calls, detailed overage information, cost breakdown and totals, etc.
- The after-hours service shall provide and send separate monthly invoices for each billing period outstanding by mail or electronically at the end of each billing period.

5.8 TRAINING

- ALL TRAINING COSTS ARE THE CONTRACTOR'S RESPONSIBILITY. Union County Water will not accept any separate invoicing for training and/or associated expenses.

- The afterhours service shall train and manage staff assigned to Union County Water including, but not limited to; sensitivity awareness, communicating with confidence and competence, dealing with an irate caller, de-escalation, and adhere to confidentiality policies and procedures.

5.9 DISASTER RECOVERY

- Afterhours service shall have a disaster recovery plan to protect against possible service interruption due to an emergency event such as fire, floods, hurricanes, winter weather, etc.
- After-hours service shall have in place processes and procedures for restoring service for situations where a reported service interruption cannot be resolved within four (4) hours.

5.10 SECURITY

- All afterhours service personnel are responsible for:
 - Ensure access control to provide information only to authorized personnel.
 - Appropriate levels of access, without compromising confidentiality, privacy or security.
 - System of access control, function rights, redaction level security, and audit trails.
 - System administration of security controls to folders and documents.

6 SUBMITTAL REQUIREMENTS

6.1 RFI PROPOSAL FORMAT

Along with providing information requested in other sections of this RFI, the County is asking all Respondents to submit a response containing the information listed below.

The proposal should be organized and identified by section as follows:

- **Tab A** – Cover Letter
- **Tab B** – Questions Regarding Utility Software Solution
- **Tab C** – Cost Information
- **Tab D** – Required Forms

TAB A – COVER LETTER

Provide the following information about your company. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.


1. Legal Company Name and DBA (if applicable)

Corporate Headquarters:

Address
Telephone Number
Website Address

Location Providing Service (if different from headquarters):

Address
Telephone Number

- 
2. Name of Single Point of Contact
Title
Direct Telephone Number and/or extension
Email Address
 3. Name of Person with Binding Authority
Title
Address
Direct Telephone Number and/or extension
Email Address
 4. Briefly describe your company's purpose, history, mission and values and explain how they will support the services listed in this RFI. Describe your interest in this type of project and the unique advantage your firm and team bring.

TAB B- QUESTIONS REGARDING AFTER HOURS CALL CENTER SERVICES

The County request vendors to provide the following information:

1. After-Hours call center services solutions available that may be beneficial for Union County Water for the purposes stated in this RFI.
2. Configuration information detailing the After-Hours call center services solutions.
3. Typical implementation plan

TAB C – COST INFORMATION

The County is seeking the best estimates of a Water Utility Customer Information and Billing System to provide a utility solution and implementation cost that can be obtained from Respondents based upon the information provided in this RFI. The cost information and all information that we receive in response to this RFI will be used as planning estimates (if applicable). No contractual agreement will be made.

7 GENERAL TERMS AND CONDITIONS

The County will not be obligated as a result of this RFI. No contract will result from any response to this RFI. Any future procurement by the County will be the subject of a separate process and subject to final budget appropriations.

Information submitted in response to this RFI will become the property of the County and as such, may be subject to public review.

Information that is confidential or trade secret must be clearly marked as such and separated from the rest of the response. Union County is required to follow North Carolina laws regarding releasing confidential information.

The County will not pay for any information herein requested nor is it liable for any cost incurred by the vendor.



8 APPENDIX A – RFI SUBMISSION

RFI# 2023-062 Call Center Services

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

County/State/Zip: _____

Email Address: _____

Phone Number: _____

Website Address: _____