



**# EI00273~2023RFP Contact Center Solutions (CCaaS)**

**SCOPE DOCUMENT**

**RESPONSE DUE DATE – FRIDAY, OCTOBER 27, 2023 (1 PM ET)**

Contents

1. General Overview ..... 3

1.1 Project Overview and Objectives ..... 3

2. Standard RFP Provisions ..... 3

2.1 RFP Deadline ..... 3

2.2 Tentative Schedule of Key Events..... 3

2.3 Evaluation Process and Criteria..... 3

2.4 Sole Point of Contact for the RFP ..... 4

3. Scope of Products and Services ..... 5

3.1 Services ..... 5

3.2 Value-Added Services..... 6

3.3 No Exclusions..... 6

4. Pricing ..... 6

5. Appendix ..... 6

5.1 Definitions ..... 6

## 1. General Overview

### 1.1 Project Overview and Objectives

E&I Cooperative Services, Inc. ("E&I") is requesting proposals for **Contact Center Solutions (CCaaS)** to result in a contracting solution for use by its Members. E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics.

The primary goals and objectives of E&I are to:

- (1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements,
- (2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and
- (3) enhance our position as the premier Procurement Cooperative for Education.

## 2. Standard RFP Provisions

### 2.1 RFP Deadline

E&I will accept proposals submitted in response to this RFP only on the Jaggaer tool until 1:00 PM EST, on October 27, 2023 (the "Submittal Deadline"). The timeline for the RFP can be found in Section 2.2

### 2.2 Tentative Schedule of Key Events

The following is a tentative schedule of events for this RFP:

Activity	Planned Date
Request for Proposal issued ("Open Date")	09/27/2023
<b>5 PM ET Deadline</b> for submission of RFP-related written questions ("Q&A Submission Close Date")	10/18/2023
E&I Response to RFP-related questions	10/20/2023
<b>1 PM ET Deadline for Receipt of Proposals ("Close Date")</b>	10/27/2023
Evaluation and Supplier Clarifications Begin	10/28/2023
Negotiations Begin with Shortlisted Suppliers	11/17/2023
Anticipated Award(s)	12/15/2023
Acceptance and Execution of Agreement	12/27/2023
Implementation	01/05/2024

### 2.3 Evaluation Process and Criteria

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in the award. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.

No.	Criteria	Criteria Overview	Points
1	<b>Contract Alignment &amp; Connection</b>	<ul style="list-style-type: none"> <li>Contract connection process to Member</li> <li>Contract channeling to E&amp;I (direct, net new, etc.)</li> </ul>	10
2	<b>Supplier Diversity</b>	<ul style="list-style-type: none"> <li>Certifications and Designations</li> <li>Company Program and Overall Commitment to Supplier Diversity Reporting, Metrics, &amp; KPI's</li> </ul>	10
3	<b>Supplier Capability</b>	<ul style="list-style-type: none"> <li>Company Experience</li> <li>Service Capability</li> <li>E-Procurement</li> <li>Performance Tracking &amp; Reporting</li> <li>Quality Management</li> <li>Training, Support &amp; Account Management</li> <li>Compliance</li> </ul>	20
4	<b>Economic Value and Financial Overview</b>	<ul style="list-style-type: none"> <li>Contract Administrative and Marketing Fee (CAF)</li> <li>Financial Offer Requirements &amp; Proposal</li> <li>Financial Reporting Capabilities</li> </ul>	25
5	<b>E&amp;I Risk Profile</b>	<ul style="list-style-type: none"> <li>RFP response quality</li> <li>Litigation</li> <li>Financial Health</li> <li>Existing contracts with direct competitors</li> </ul>	10
6	<b>Scope Questions</b>	<ul style="list-style-type: none"> <li>Questions related to the scope of the RFP</li> </ul>	15
7	<b>RFP Exceptions</b>	<ul style="list-style-type: none"> <li>Supplier Performance Expectations</li> <li>Compliance with RFP specifications</li> <li>Compliance with Master Agreement terms &amp; conditions</li> <li>Compliance with Members' institutional policies, federal, state, and local legal and regulatory requirements, and policies</li> </ul>	10

## 2.4 Sole Point of Contact for the RFP

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**Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date.** Violation of this provision may be grounds for rejecting a proposal response. See Section 2.7 in the Cover Letter on how to submit questions.

### 3. Scope of Products and Services

E&I is seeking proposals from qualified, experienced, financially sound, and responsible Contact Center Solution providers for the delivery of robust, flexible and cost-effective Contact Center as a Service (CCaaS) solutions for its Members. Proposed CCaaS solutions should be able to support E&I Members in efficiently handling inquiries, streamlining operations, improving communication, and overall providing better services to students, faculty and staff. E&I desires to partner with a company that can improve the efficiency of its Members' communication services across various communication channels.

E&I desires the broadest possible selection of services being offered over the largest possible geographic area and to the largest possible cross-section of E&I's current and future Members. The intent of this solicitation is to provide E&I Members with a comprehensive offering of services to meet their various needs.

If a supplier's sole area of expertise is limited to one or more of the services listed below (Ex. Call Routing and Queuing), then a supplier can respond to one or more services as a response to this RFP.

**Suppliers are expected to provide an exhaustive list of services they are willing to provide to E&I Members.**

#### 3.1 Services

##### 3.1.1 Multichannel / Omni-channel Communication Services

Provide various communication channels such as voice calls, e-mail, SMS and live chat to handle inbound inquiries and to allow prospective and current students, parents, staff, alumni and others to interact with the university using their preferred method.

##### 3.1.2 Interactive Voice Response Systems

Provide self-service options by including features such as interactive voice response (IVR) systems and knowledge bases to automate interactions, enabling students, faculty, and staff to access information and perform tasks without the need for direct assistance from a live agent.

##### 3.1.3 Conversational AI bots

Provide AI-powered conversational chatbots capable of assisting students, faculty, and staff by responding to common questions and automating routine tasks. These bots should be integrated across all communication channels including websites, messaging platforms and mobile applications to provide 24/7 assistance.

##### 3.1.4 Call Routing and Queuing

Provide call routing to ensure that incoming calls are directed to the right department or agent based on predefined rules. Call queuing should prioritize incoming calls based on importance and hold callers in queue while providing them with approximate wait times and periodically updating them on their position in the queue.

##### 3.1.5 CRM Integration

Allow agents to seamlessly access information and update student data in the CRM system, thus improving data consistency and operational efficiency.

##### 3.1.6 Analytics and Reporting

Provide analytics and reporting services on real-time and historical data to assess contact center performance and enable E&I Members to analyze trends, measure service quality and make informed decisions or continuous improvement.

##### 3.1.7 Notifications / Outbound Communication

Provide a feature to rapidly disseminate critical information during emergency situations via notifications across various communication channels. This feature can also be used to share information related to career networking events, fundraising galas, volunteer opportunities etc. thereby increasing alumni engagement.

### 3.2 Value-Added Services

#### 3.2.1 Appointment Scheduling

Allow current and prospective students to book appointments with academic advisors, counselors, other faculty, and staff, thereby streamlining the process of seeking guidance related to admissions, financial aid, career services, etc.

#### 3.2.2 IT Help Desk Services

Provide 24x7 support for technical issues and troubleshooting (if needed) as well as cover up for resource constraints within Member institutions. Allows students, faculty, and staff to utilize IT Help Desk Services for remote support related to software installation, updates, hardware malfunctions, network connectivity, account access, etc.

#### 3.2.3 Mobile Accessibility

Improve user experience by allowing students, faculty and staff to access the contact center's services via mobile applications, allowing them to seek support and gather information on the go.

### 3.3 No Exclusions

No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent's catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

## 4. Pricing

Supplier must complete the 'Pricing Sheet' and upload it on the Jaggaer tool. The first tab 'Instructions' in the 'Pricing Sheet' lists out the different sections and pricing requested by E&I. Please ensure to review the 'Instructions' tab before you start filling in the pricing.

## 5. Appendix

### 5.1 Definitions

The following are the definitions of general terms used in this RFP.

**DAYS:** All days specified are based on calendar days unless otherwise noted.

**EDUCATION:** The combination of Higher Education and K-12.

**GO TO MARKET:** Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

#### Contract Region Key States

Northeast	CT, MA, ME, NH, NY, RI, VT
Mid-Atlantic	DC, DE, MD, NJ, PA, VA, WV
Southeast	AL, FL, GA, KY, MS, NC, SC, TN
Central	AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX
Great Lakes	IL, IN, MI, OH, WI
Western	AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

**GREATEST BENEFIT:** The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

**HIGHER EDUCATION:** All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

**HUBS:** Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

**K-12:** All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

**MANUFACTURER:** Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

**MAY:** Indicates something that is not mandatory but permissible/desirable.

**MEMBERS:** Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

**MONTH END:** Shall mean the last calendar day of each month.

**MOST RESPONSIBLE:** A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

**MUST, SHALL, WILL:** The words “shall,” “must,” or “will” are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder’s material deviation from any of the mandatory requirements.

**RMWBE:** Minority, Woman-owned Business Enterprises.

**NATIONAL AGREEMENT:** E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

**REGIONAL AGREEMENT:** E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

**RESPONDENT:** Entity who submits a proposal to an RFP.

**RESPONSIBLE:** A Respondent is responsible if they are capable or qualified to perform the work.

**RESPONSIVE:** A proposal is responsive if it meets all of the requirements of the RFP.

**SHALL, MUST, WILL:** Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

**SHOULD:** Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

**SOLE POINT OF CONTACT:** The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

**SUCCESSFUL RESPONDENT:** The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with “Payee,” “Offeror,” “Contractor,” “Vendor,” and “Supplier”). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term “contractor” shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

**SUPPLIER:** Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.