

## **Attachment B**

Set forth below are the District's responses to inquiries received:

**Question 1.** It is unclear whether prime contractors will be required to subcontract 35% or 50% (Depending on status of COVID emergency). Could you please clarify what the percentage will be?

**Response 1.** As per the Mayor's Order 2020-045, the Declaration of the Public Emergency and Mayor's Order 2020-046, the Declaration of the Public Health Emergency, currently any contract in excess of \$250,000.00 shall meet a 50% subcontracting requirement of the dollar volume of the contract to the Small Business Enterprises or Certified Business Enterprises. Please refer to Section H.3.16 of the solicitation. Currently this order is still in effect.

**Question 2.** Are DBE vendors under the DC Unified certification program (DOT) required to meet the subcontracting requirement or are there any reciprocal arrangements in place that would allow vendors under DC unified certification program to participate as a CBE for this solicitation?

**Response 2.** If an Offeror has any questions regarding their status as a SBE/CBE for the District of Columbia they should reach out to the Department of Small and Local Business Development (DSLBD) directly.

**Question 3.** Is there a pre-solicitation or pre-bid conference associated with this RFP (CFOPD-22-R-004 Cloud Contact Center (CCaaS))?

**Response 3.** The Office of the Chief Financial Officer's Office of Contracts will hold a Pre-Proposal Conference on November 17, 2021 at 1:00pm.

**Question 4.** Can companies from Outside USA apply for this solicitation? (like, from India or Canada)

**Response 4.** The District will only consider proposals that are responsive to the requirements of the solicitation.

**Question 5.** Does a company need to be present physically for meetings?

**Response 5.** Yes, the Contractor will be required to attend some meetings on site and in person.

**Question 6.** Can a company perform the tasks (related to RFP) outside USA? (like, from India or Canada)

**Response 6. The District will only consider proposals that are responsive to the requirements of the solicitation. Section B.1 of the solicitation requires the cloud application support and infrastructure to be in the United States.**

**Question 7.** Can a company submit the proposals via email?

**Response 7. No, proposals shall be submitted in accordance with Section L.12 of the solicitation.**

**Question 8.** How can one set up an account to participate in a solicitation?

**Response 8. Please refer to Section L.12.5 of the solicitation. Also, instructions on how to register are detailed on the main page of the gateway <https://dc.cobblestonesystems.com/gateway/Default.aspx>**

**Question 9.** Please clarify if the Contractor is expected to provide the storage of the audio and video files, or can they leverage OCFO's infrastructure to store these recordings. Also, please clarify if it is the screen capture video recordings that you are referencing when you say, "video files" under Section C.6.1.4 of the Solicitation.

**Response 9. The Contractor shall propose the storage for audio and video files. Yes, it is the screen capture that the RFP is referring to when it says video files.**

**Question 10.** Please clarify the different data sources internal and external to OCFO, from where the information is accessible to the solution. Are there any available APIs; or is it the responsibility of the contractor to build the APIs for those data sources. Does the solution have to write data to any data repositories? If so, please clarify the existence of APIs for the same?

**Response 10. The MITS tax application is an ERP product (Gentax) and provides support for Restful and SOAP based webservices, the Webservices can be customized and built based on contractor's proposed design specs or data extracts if need be. The contractor shall be responsible to implement the interface and providing requirements for it. (Mytax.dc.gov is the external facing portal). The integration requirement C.9.1.5 with Q-Matic is no longer required.**

**Question 11.** Please clarify the list of languages that needs to be supported for speech recognition, and any audio greetings for the IVR under Section C.6.2.2 of the solicitation.

**Response 11. Currently, the OCFO would go live with English and Spanish only. OCFO would like to have the product capability to Support additional languages in future.**

**Question 12.** Please clarify if voicemail functionality is needed as part of the scope of work.

**Response 12.** Yes, this is required.

**Question 13.** Please provide a list of applications internal and external to OCFO, within the scope of the requirement of Section C.6.2.15

**Response 13.** Since the OCFO anticipates the Cloud Contact Center will be available outside of the LAN, we seek SAML integration, which allows us to also implement MFA for the Cloud Contact Center. The District currently utilizes SAML for applications that are available on the internet and utilizes Active Directory Integration when the access is through VPN or within the District LAN. An example of applications that has SAML integration is Tableau Portal and Zendesk. Other applications such as Modernized Integrated Tax system use Active Directory Integration.

**Question 14.** Please clarify if you are referencing only to voice biometrics in Section C.6.2.16. Is creating the voiceprints for the callers, a part of the IVR requirement?

**Response 14.** Section C.6.2.16 has been amended. Please refer to Attachment A.

**Question 15.** Please clarify if both inbound and outbound calling functionality is required. Can you share the estimated call minutes for the same monthly?

**Response 15.** Both Inbound and Outbound Calling functionality is required. OCFO can't provide the call minutes, however the inbound calls make up 85% and the outbound calls make up 15% of the call volume.

**Question 16.** Out of the 130 active agents/managers, can you clarify the number of agents, managers, and any administrators that require access to the solution?

**Response 16.** Currently the OCFO has 188 agents.

**Question 17.** Can you clarify if there is a telephony carrier at OCFO that shall be used for both inbound and outbound calls or is it the responsibility of the contractor to provide the carrier and a phone number.

**Response 17.** DC-NET is our existing telephony Carrier that the OCFO will continue to use for both inbound and outbound calls. The Contractor is not expected to provide the Carrier and Phone Number.

**Question 18.** Can you clarify if there is a TTY service, that the contractor can leverage?

**Response 18.** Yes. The Contractor is required to integrate the solution to the current TTY provider (711)

**Question 19.** Can you clarify if there are existing APIs for these integrations, or does the contractor need to develop the APIs under Section C.9.1.2?

**Response 19.** The MITS tax application is an ERP product (Gentax) and provides support for Restful and SOAP based webservices, the Webservices can be customized and built based on contractor's proposed design specs or data extracts if need be. The contractor shall be responsible to implement the interface and providing requirements for it. (Mytax.dc.gov is the external facing portal). The integration requirement C.9.1.5 with Q-Matic is no longer required.

**Question 20.** Can you confirm if the solution needs to be deployed on a proposed solution on DC-Net for backhaul VOIP traffic, or can the solution be hosted on leading cloud infrastructure like Azure, AWS, or the contractor's private cloud environment under Section C.13.1.1.

**Response 20.** OCFO will use DC-Net for VOIP traffic. Other components can be hosted in Azure or AWS but shall be Gov Cloud or a hosting infrastructure that meets or exceeds the IRS pub1075 compliance requirements.

**Question 21.** Can you clarify the end date of the CCaaS Service contract under Section C.16.1.1?

**Response 21.** The District will utilize the current contract until a new system is fully implemented and live.

**Question 22.** How many total agents do you have?

**Response 22.** 188 total agents.

**Question 23.** How many concurrent agents do you have? (Max amount of users at a time)

**Response 23.** At this time, OCFO have no more than 80 concurrent agents but it can go to up to 100 users during peak call volumes.

**Question 24.** Where are your agents located?

**Response 24.** OCFO agents are located at 1101 4th Street SW in Washington DC. However, due to COVID, many are working from home currently.

**Question 25.** Where are they calling to? Where are they receiving calls from? (Countries)

**Response 25.** Most of the outbound and inbound calls are from within the USA, but a few calls may originate from anywhere in the world.

**Question 26.** Where is the company's HQ?

**Response 26. OCFO's Head Office is located at 1350 Pennsylvania Avenue, NW, Suite 203, Washington, DC 20004.**

**Question 27.** Is this mainly inbound, outbound, or both?

**Response 27. This is mainly inbound. The OCFO would like to start doing outbound campaigns with the rollout of Cloud contact Center. Outbound contact will be made by OTR collections unit and Central Collections Unit in future.**

**Question 28.** How many calls a day would you estimate a single rep to handle?

**Response 28. Depending on the type and complexity of questions and unit, some agents may answer more calls. On average OCFO customer service representatives handle 30 – 35 calls a day. The OCFO has nine (9) units with different SLA requirements. (For example, CSA average 35 calls a day and Helpdesk averages 15 calls a day).**

**Question 29.** What is the current CRM system you are using?

**Response 29. For OTR, the OCFO is utilizing Gentax built-in CRM for creating and maintaining customers. The OCFO is expecting to track the interactions in that system and would explore opportunities to interface and automate if CCAAS CRM provides additional benefits to OTR phone agents (Gentax is a product from FAST enterprises). The OCFO requires the Offeror's to propose a Lite CRM for other administrations.**

**Question 30.** What phone system are you currently using?

**Response 30. Currently the District is using Aspect Unified IP Version= 7.3 SP4, AQM Version = 8.1 SP2, and WFM Version = 8.1 SP1.**

**Question 31.** What is the timeframe for this project?

**Response 31. OCFO contemplates kicking off the project Summer 2022 and end within one year of the start date.**

**Question 32.** Is the project funded?

**Response 32. Yes**

**Question 33.** What is the budget for this project?

**Response 33. The question is not germane to the solicitation.**

**Question 34.** Who will be the main decision makers for this project?

**Response 34. Once a contract is awarded the key decision makers will be identified.**

**Question 35.** What are your pain points leading to this transition?

**Response 35. Some of the pain points are as follows:**

- i. Training agents / managers on new features**
- ii. Building the knowledge base so that we can get the best out of the new solution**
- iii. Collecting email and mobile numbers to get the best out of the new solution**
- iv. Implementing chat and chatbot**
- v. Reporting challenges**
- vi. System Transition**

**Question 36.** What are some must have or wish list items?

- a. Call recordings?
- b. Supervisor capabilities? (Listen in on agents and access their metrics)
- c. Dialer?
- d. Omni Channel Solution?
- e. IVR Capabilities
- f. Soft Phone
- g. Call Recordings
- h. Reporting
- i. Workforce Management

**Response 36. The above items are all required per the Solicitation and shall be provided.**

**Question 37.** Is reporting important? (If so what reports would you like to see?)

**Response 37. Yes. OCFO requires reports to ensure that the system functions are fully utilized and management has the oversight tools it needs.  
The following is the current list of reports we have with the existing System.  
We want to be able to customize and run the reports for the following purposes, if it is not a built-in feature of the system.**

**The reports and templates are grouped into the following categories:**

## **I. Agent**

Agent Activity

Agent Disposition

Agent Disposition Summery

Agent Disposition Total

Agent Disposition Workgroup Summery

Agent Disposition Workgroup Total

Agent DNIS Activity

Agent DNIS Disposition

Agent Not Ready/Park

Agent Performance by Service Summery

Agent Performance Summery

Agent Productivity Summery

Agent Productivity Total

Agent Productivity Workgroup Summery

Agent Productivity Workgroup Total

Agent Service Daily

Agent Service DNIS Daily

Agent Service DNIS Interval

Agent Signed In

Agent Signed In Activity

Agent Signed In Service Activity

Agent State Daily

Agent State Monthly

Agent State Weekly

Agent Time Usage

Agent Workgroup Daily

Agent Workgroup Interval

Agent Workgroup Monthly

Service Agent Summery

Workgroup Agent Summery

## **II. Inbound Voice Service**

DNIS Agent Summery

Dynamic Inbound Services Effectiveness

Dynamic Inbound Services Skill Group Profile

Enterprise Routing Services by Interval

Enterprise Routing Services Monthly

Enterprise Routing Services Weekly

Inbound Call Summery

Inbound Call Summery DNIS

Inbound DNIS/ Service by Hour

Inbound DNIS Busy Hour

Inbound Staffing Summery by DNIS

Inbound Staffing Summery

Inbound Voice Service Activity

Inbound Voice Service Busy Hour

Inbound Voice Service Call Profile



Inbound Voice Service Daily  
Inbound Voice Service Disposition  
Inbound Voice Service Disposition Summery  
Inbound Voice Service Interval  
Inbound Voice Service Summery  
Inbound Voice Service Weekly  
Inbound Voice/ DNIS Calls by 30-Minute Interval  
Inbound Voice/ DNIS Calls by Day  
Inbound Voice/ DNIS Calls by Week  
Inbound Voice/ DNIS Efficiency

### **III. Outbound Voice Service**

Ofcom Summery Statistics by Service  
Outbound Abandoned Call by Hour  
Outbound Call Table Summery  
Outbound Call Table Summery Percentage  
Outbound Hold  
Outbound Table Activity  
Outbound Table Disposition  
Outbound Voice Services Activity  
Outbound Voice Services Daily  
Outbound Voice Services Disposition  
Outbound Voice Services Disposition Summery  
Outbound Voice Services Interval

Outbound Voice Services Summery

Outbound Voice Services Summery Interval

Outbound Voice Services Summery Percentage

Outbound Voice Services Weekly

Table Agent Detail

Table Agent Summery

#### **IV. M3**

M3 DNIS Summery by Day

M3 DNIS Summery by Interval

M3 DNIS Summery by Week

M3 Services Activity

M3 Services Disposition

M3 Services Object Activity

M3 Services Summery

#### **V. Recording**

Recording Summery

#### **VI. Remote Monitoring**

Remoter Monitoring Summery

#### **VII. Chat Service**

Chat Service Activity

Chat Services Disposition

Chat Services Summery

#### **VIII. Email Service**

Email Service Activity

Email Service Agent Detail

Email Services Disposition

Email Services Summery

## **IX. Workflow Service**

Workflow Service Activity

Workflow Service Disposition

Workflow Service Summery

## **X. Alerts**

Alert Summery

## **XI. Circuits**

Circuits Activity by Resources Group Half Hour

Circuits Agent Utilization by Half Hour

Circuits Agent Utilization Daily

Circuits Agent Utilization Hourly

Circuits Agent Utilization Weekly

Circuits Busy Hour

Circuits Summery

Circuits Summery by Resources Group Interval Capacity  
Utilization

Circuits Summery Daily

Circuits Summery Interval

Circuits Summery Weekly

Circuits Utilization Interval

**XII. All Services**

Application Quota

Script Objective Activity

Service Quota

Service Summery

Service Summery Daily

Service Summery Weekly

**XIII. Interactions**

Daily Service Type Summery

Interaction Analysis Daily

Interaction Analysis Hourly

Weekly Service Type Summery

**XIV. Administration**

Agent Quality Scoring

Agent Scoring Detail

Change Management

Hardware Configuration

Install History

Licensing Configuration

Licensing Count Configuration

Licensing Usage by Day

Licensing Usage by Interval

Licensing Usage by Month

Licensing Usage by Week

Licensing Configuration

Service Agent Quality Scoring

Service Agent Quality Scoring Monthly

Service Agent Quality Scoring Summery

Service Agent Quality Scoring Weekly

## **XV. Unified Communications**

Agent Expert Daily

Agent Expert Daily

Agent Expert Interval

Agent Expert Monthly

Agent Expert Weekly

Expert Daily

Expert Interval

Expert Monthly

Expert Service Daily

Expert Service Interval

Expert Service Monthly

Expert Service Weekly

Expert Usage Daily

Expert Usage Interval

Expert Usage Monthly

Expert Usage Weekly

Expert Weekly

## **XVI. Instant Message Service**

Instant Messaging Service Activity

Instant Messaging Service Disposition

Instant Messaging Service Summery

**Question 38.** Do you have any compliance requirements?

**Response 38.** Yes, the CCaaS solution must meet or exceed the IRS Publication 1075 requirements which is aligned to the NIST 800-53.

**Question 39.** What does OCFO currently utilize as a database for customers' accounts/records?

**Response 39.** MITS Gentax application is the system of record for tax application and the appropriate webservice will be built/provisioned/customized based on CCAS application needs. The District also utilize the following databases as well: Collector plus/Cubs, etims, Checkchase, Inova, and Destiny. Zendesk and Active Directory for Lanids.

**Question 40.** Where does the database reside? Is it premise or cloud-hosted?

**Response 40.** MITS tax application and Central Collection unit applications are Hosted externally. Zendesk is a cloud hosted application. Qmatic is in located on premise at our 1101 server room.

**Question 41.** Does the OCFO currently utilize an Emulator to retrieve customers' sensitive data from OCFO's repository? If so, what type? E.g., 3270 terminal emulator, keyboard emulator, etc.

**Response 41.** OCFO does not use an emulator. Gentax application uses browser-based thin clients and the ERP package provides the MytaxDC portal for public view and internal portal for OTR user base.

**Question 42.** Please provide an example of how a voice interaction is typically handled once the caller is routed to an agent. Ex. Relevant caller data was presented to the agent. The agent verifies who the caller is and possibly performs updates to the caller's contact information. All updates are performed within the following applications...etc

**Response 42. Central Collection Unit: Relevant caller data is presented to the agent. The agent verifies who the caller is and possibly performs updates to the caller's contact information. All updates are performed within Collector Plus.**

**Tax: The agent will verify the caller by asking for personal identifying information and once verified the caller can be helped. Updates are completed in MITS.**

**For MITS Tax applications, The Customer can verify the identity in multiple ways**

**1) SSN#, FEIN#, ITIN#, SSL#, Name, Phone# and Address:**

**2) Acct#, Cust# for the Customers profile in the MITS**

**3) Letter# from the letters generated from the MITS.**

**4) SSN#, Shared Secret (refund amount) for Refund Inquiry**

**Question 43.** What types of security protocols are leveraged for customers' data, whether at rest or in transit?

**Response 43. MITS application uses FIPS140-2 compliant Encryption standards for end to end Communications. All of the OCFO's portals uses HTTPS and SSL certs. SSL certs are also used for securing all Webservices and Data base communications, SFTP over SSH/SSL for file transmissions. The OCFO uses AES 256 encryption. System and application-level access controls are in place and need manger/ Supervisor approvals to access the data or application.**

**Question 44.** How many unique data sets captured within the existing IVR that supports the querying of account status, password reset or any other specific call self-service capability? E.g., Account number, Federal Tax ID, Last 6 of SSN, etc

**Response 44. SSN# and the last refund amount/Tax due on original return. OCFO requires the ability to expand the self-service by using Customer ID, Letter ID and other personally identifiable information. The OCFO is open to other best practices proposed. See Response 42 for additional feedback.**

**Question 45.** What physical security practices do the agents adhere to when handling a caller's information during an interaction? E.g., Pause all recordings (Call & Screen)

**Response 45. Agents don't have access to pause or stop recordings. The OCFO timeout and lock the laptop after 5 minutes of inactivity.**

**Question 46.** Does OCFO currently utilize VDIs? If so, which one?

**Response 46.** The OCFO does not utilize VDI.

**Question 47.** Does OCFO leverage Restful APIs or SOAP?

**Response 47.** Yes, the OCFO has some SOAP, API, as well as REST API it utilizes. See Response 10 for additional details.

**Question 48.** Would you expect the Zendesk users to have an embedded client within Zendesk? Or, is it okay if the Zendesk/helpdesk users working within Genesys Cloud. Please refer to Section C.9.1.2 of the Solicitation.

**Response 48.** The OCFO may or may not want to have the Zendesk or the future Helpdesk solution client to be embedded in the CCaaS solution. The District is open to see what is proposed by the Offeror.

**Question 49.** How many users are currently using the Zendesk solution? Please refer to Section C.9.1.4 of the Solicitation.

**Response 49.** Thirty agents currently use the Zendesk solution.

**Question 50.** What types of custom reports do each of the 9 units have today? Please list the metrics and filters. Please refer to Section C.8.1.2 of the Solicitation.

**Response 50.** All current Aspect reports – customized detailed active and historical reports. The DataViews application offers over 50 predefined reports and templates that cover most reporting activities performed by contact centers. The reports and templates are grouped into different categories and are described in the response to question 37.

**Question 51.** What is your Data Analytics Tool today (Tableau, Power BI, etc ) Please refer to Section C.8.1.2 of the Solicitation.?

**Response 51.** Tableau, Power BI, as well as Cognos exists within the OCFO. The cloud contact center solution shall have an in-built reporting tool for standard reports. When the data needs to be mixed with other sources, then one of the analytics tools can be utilized. Currently the OCFO uses Aspect's Data view and Workforce management tool for reporting, forecasting, and data analysis.

**Question 52.** Can you please clarify solutions options needed for Biometric technology? Please refer to Section C.6.2.16 of the Solicitation.



**Response 52. This functionality assists agents answering questions based on voice pattern using pop up technology from knowledge repository database and is required. Please see revisions to Section C.6.2.16 via Attachment A.**

**Question 53.** As per Section C.3.1 Objectives, OCFO lists that Reporting and data analytics limitations are a current pain point for CSA administration. Can you please list out the key metrics and KPIs that the CSA management track on a daily/monthly/annual basis so we can ensure all necessary metrics can and will be captured?

**Response 53. Ensure 85% of all calls are answered within 2.5 minutes during non-peak season, October 1, 2020 thru January 2021 and June 1, 2021 thru September 30, 2021; 80% of all calls are answered within 5 minutes during peak season, January 2021 thru May 31, 2021. Compliance will be based on Aspect reports.**

**Question 54.** As per Section C.4.3 OCFO Call Center Hours, Peak call volume period commences in mid-January and extends through end of June. Please confirm the following:

- a. When does OCFO plan to finalize a decision on new CCaaS and Partner in this RFP?
- b. When does OCFO want to start the implementation project for new CCaaS?
- c. When does OCFO want the new CCaaS solution to be cutover and live?
- d. Does the OCFO expect to deploy the new solution during this peak call volume season?

**Response 54. See the District's response below:**

- a. This District expects to make a decision during Spring 2022
- b. The implementation is planned to begin Summer 2022.
- c. The OCFO needs to go-live immediately after the cutover and acceptance criteria are met for each of the phases, with the first phase in early 2023 and last phase by summer 2023. There should not be any interruption of services during the cutover for each unit during each phase.
- d. The solution will not be deployed or go live during the peak call volume season.

**Question 55.** As per Section C.4.3. Business Units to be Supported, Do the 9 business units listed share Agent/Customer Services Resources?

**Response 55.** Currently, the nine business units do not share agents/customer service resources. In the near future, OCFO would like to see the possibility of cross training, and ability to handle overflow.

**Question 56.** Section C.4.4 Table 1 indicates a total of 130 Active Agents/Managers. Table 2 breaks down each business unit # of Agents and totals 188. (eService 20; CSA Main Call Center 45; CCU;21; Compliance Collections 25; OCIO Helpdesk 20; QRDT 25; ROD 14; Unclaimed Property 18; OTR Fraud Hotline 0)

- a. Please confirm the minimum annual baseline total of active Agents/Managers that Vendors should quote in the Pricing Summary.
- b. Please indicate if OCFO requests Named License Types or Concurrent License Types.
- c. Please indicate expected Agent Total during Peak Call Volume due to seasonality.

**Response 56.** See response below:

- a. OCFO currently has 188 agents. The Offeror shall provide pricing based on the District's current utilization which is 188 agents. Administrators.
- b. OCFO prefer concurrent license type over named license but either solution is acceptable.
- c. There will be 100 agents maximum utilizing the system during peak time frames.

**Question 57.** Section C.4.4. Table 1. 4/1/20-3.31.21 states Abandon Rate was 14% and % Calls Answered was 73%. Does the CSA Management have specific goals to decrease/increase these metrics? If yes, what is the desired future Abandon Rate? What is the future desired % Calls Answered?

**Response 57.** Ensure 85% of all calls are answered within 2.5 minutes during non-peak season, October 1, 2020 thru January 2021 and June 1, 2021 thru September 30, 2021; 80% of all calls are answered within 5 minutes during peak season, January 2021 thru May 31, 2021. Compliance will be based on Aspect reports. Ideal Target Abandonment during non-peak season is under 5%.

**Question 58.** Section C.4.4. Table 2 and Section C.6.2.19 states CSA callback (Virtual Hold).

- a. Please confirm if the CSA currently uses callback technology provided by manufacturer VHT (previously known as Virtual Hold).

- b. Please confirm if the OCFO expects the CSA to continue using the VHT callback technology and if the vendor should expect to integrate with VHT technology.
- c. Please confirm if the OCFO expects the vendor to implement their own callback technology in place of VHT branded callback technology.

**Response 58. See the response below:**

- a. **No, the District uses virtual hold technology from Aspect.**
- b. **No.**
- c. **Yes, for the future state we'd request that Virtual Hold come with the CcaaS. OCFO requires Virtual Hold technology that enables callers to select a call back phone number, best time to call back, schedule and call the X at the specified time. The Offeror can propose their own callback technology.**

**Select a call back phone number**

**Best time to call back.**

**Schedule and call the customer at the specified time**

**The vendor can pick their own Callback technology. District currently utilize aspect for its virtual Hold.**

**Question 59.** As per Section C.5.2 Contractor Responsibilities # 3, OCFO expects a phased cutover approach. Please indicate how many phases the OCFO expects there to be across the 9 business units.

**Response 59. OCFO expect three Phases, with the smallest unit being first and the Largest unit being the last.**

**Phase 1 – Helpdesk**

**Phase 2 - Collections, Return Integrity Unit, Recorder of Deeds, Central Collections Unit, Unclaimed property, Fraud Hotline**

**Phase 3 - e-Services, Customer Service Administration**

**Question 60.** As per Section C.5.2 Contractor Responsibilities # 4, dates for deliverables shall be determined by the contractor's implementation methodology/project schedule. For reference, can the OCFO please indicate ideal expected Project Start and Finish Dates?

**Response 60. OCFO's ideal start of the Project is Summer 2022 and go live in phases, with the first phase to start in early 2023 and final phase being the tax department**

**customer service finishing up by Summer 2023. The OCFO and the Contractor will strive to enable for a smaller unit to go live sooner than early 2023.**

**Question 61.** Per Section C.4.4, Is the CCaaS vendor expected to provide Telecom/Carrier Services? Or is the OCFO planning to leverage existing Carrier Services (provided by OCTO) to connect to new CCaaS platform?

**Response 61. OCFO plan to leverage Existing Carrier services provided by OCTO DC-NET.**

**Question 62.** Per Section C.5.12. On-Going Support, please confirm if the OCFO is expecting CCaaS vendor to provide a dedicated Customer Success Manager to assist with on-going support efforts and platform evolution initiatives over the duration of the CCaaS contract.

**Response 62. Yes, The OCFO requires the Contractor to provide a dedicated Customer Success Manager to assist with on-going support efforts and platform evolution initiatives over the duration of the CCaaS contract.**

**Question 63.** Per Section 6.2.20 IVR Capabilities, please confirm that all capabilities in this section 1-9 are to be included in the CCaaS vendor's Statement of Work and Professional Services Pricing for initial deployment.

**Response 63. Yes.**

**Question 64.** Please confirm if the OCFO expectation under Section C.6.25 # 16 is for the CCaaS Vendor to provide an integrated knowledge base for agent and customer FAQ or if there is an existing Knowledge Management System that the CCaaS vendor should integrate with.

**Response 64. Currently OCFO doesn't utilize Knowledge Management System. The OCFO requires that the CCaaS Contractor to provide an integrated knowledge management system/integrated knowledge base for agent and customer FAQ.**

**Question 65.** Please confirm if web-based surveys post phone call interaction are accepted for Section C.7.1.4.

**Response 65. Yes, the customer shall be able to receive the survey on their phone or email or are sent to our survey tool on mytax.dc.gov**

**Question 66.** As per Section L.12.3 All documents should be in a .pdf file. Please confirm if the response templates provided by OCFO in Excel are permitted to be resubmitted in Excel format, or if all Excel sheets must be converted to .pdf.

**Response 66. Yes, those files can be uploaded in Excel format.**

**Question 67.** To respond to Response Template C 1.3 Connectivity, please provide detail about existing telephony environment (e.g., PBXs) that new CCaaS vendor must integrate with.

**Response 67. OCTO manages, monitor and provides the SIP session subscription to the OCFO. All DID (Direct Inward Dialing) numbers are also provided by OCTO. The CCaaS solution shall use the existing DID's and SIP sessions provided by OCTO. There is no integration with the existing Aspect Unified Phone System.**

**Question 68.** To respond to Response Template C 1.5, Please provide estimate on anticipated future growth of total agent count. Baseline Estimate? Seasonal Peak Volume Estimate?

**Response 68. Total OCFO future growth estimates is 300. The current state is 188.**

**Question 69.** NIST SP 800-53 Rev 4 was superseded by NIST 800-53 Rev 5. Please verify and confirm that NIST SP 800-53 Rev 4 is the appropriate requirement for this CCaaS Solution/Submission, regarding compliance primarily relating to IRS Pub1075.

**Response 69. IRS PUB1075 is in the process of revising to align to NIST 800-53 Rev5. OCFO will follow Publication 1075 guidelines at the time of implementation.**

**Question 70.** Does DC OCFO have a contract vehicle in mind for this procurement? (Will this be a standalone agreement? Some elements appear to point towards using EIS.)

**Response 70. The District contemplates award of a standalone Requirements of contract with Firm Fixed Unit Price.**

**Question 71.** Does the phased rollout under Section C.5.2 have a fixed feature set planned, or are all features requested from the RFP expected to be turned on Day 1?

**Response 71. The solution with all its required features shall be turned on Day 1 for the unit/phase that are going live. OCFO expects to go live in three phases.**

**Question 72.** Since IRS PUB 1075 requirements are usually met by complying and offering FEDRAMP systems, is that a requirement of this RFP under Section C.3.2.b?

**Response 72. No, FEDRAMP is not a requirement. The District requires the CCAS solution for DC to undergo a 3rd party independent audit before the**

**implementation to show that security controls meet or exceeds IRS 1075 Guidelines.**

**Question 73.** The RFP states there are 130 agents and managers, but the counts are not consistent when other departments are added from Table 1 and Table 2 of Section C.4.4. How many agents and supervisors are to be priced?

**Response 73. Current license numbers are at 188.**

**Question 74.** Please describe or provide the types of integration points that are available on the QMATIC system that need to be used to provide the integration under Section C.9.1.5, 2.

**Response 74. Please refer to Attachment A.**

**Question 75.** Is the contractor also expected to provide network functions for citizens to call the contact center (i.e. IP Toll Free and VILO services) Please refer to C.13.1

**Response 75. The Contractor is not expected to provide IP toll free services. All telephony subscription will be provided by OCTO/DC-NET.**

**Question 76.** (a) What sorts and types of social media integration is the OCFO looking for (i.e. Twitter etc,) Monitoring, integration with agents as a channel, brand awareness tracking? Please refer to C.6.1.1

(b) Does the FISMA Moderate request translate to FEDRamp requirements for cloud deployments? Please refer to C.6.1.1

**Response 76 Please refer to the capabilities requested in Section C.6.2.25 related to Social Media. No, FEDRAMP is not a requirement. The District requires the CCAAS solution for DC to undergo a 3rd party independent audit before the implementation to show that security controls meet or exceeds IRS 1075 Guidelines.**

**Question 77.** Will DC OCFO extend the date for questions or allow for a second phase of questions/exceptions?

**Response 77. The due date for the first round of questions has passed. However, the District may provide a date for a second round of questions.**

**Question 78.** Will OCFO consider additional terms and conditions, in the vendor's response or through negotiation after award that may be necessary, including service terms specific to the solution?

**Response 78. The District may consider this request prior to award of a contract.**

**Question 79.** Will OCFO consider alternative terms to the Insurance Requirements in section I.30?

**Response 79.** The District may consider this request prior to award of a contract.

**Question 80.** Will DC OCFO extend the due date from Dec. 9 by 2 weeks?

**Response 80.** The due date has been revised to January 5, 2022 at 2:00PM.

**Question 81.** Would the District be open to limiting the Certified Business Enterprise Subcontracting Requirements to professional services and exclude licensing cost?

**Response 81.** The Offeror shall include all factors related to the Subcontracting Requirement in their waiver request.

**Question 82.** Can a prime contractor utilize their sub-contractor's past performance with their proposal submission?

**Response 82.** Offerors shall provide all relevant past performance that demonstrates their capability to provide the required services.

**Question 83.** There is a CCaaS Total Cost line item noted in the base year pricing matrix, but not in Option years 1 – 9? The CCaaS charges of proposed product are recurring charges every year. are the CCaaS charges mentioned in the BASE year considered for YEAR 1 to 9 as well?

**Response 83.** The Pricing Matrix allows for pricing totals across all periods for all requirements.

**Question 84.** Will OCFO exclude a Contractor's SLA and Performance Objective metric issues if determined to be caused by OCTO managed infrastructure, including firewalls and MPLS circuits?

**Response 84.** Yes, certain exceptions like maintenance windows and District control entities, such as OCTO managed infrastructure, including firewalls and MPLS circuits can be excluded from SLA calculation.

**Question 85.** Under Section C.6.1.1, What mechanism will OCFO utilize to audit compliance with NIST 800-53 rev4 moderate controls?

**Response 85.** The District hires 3rd party contractors on annual basis and audits its Contractors to audit the subsystems to verify the IRS pub1075 compliance and controls of the DC applications. The violations are tagged by severity and needs to be addressed in a time bound manner to be brought into

**compliance. The OCFO would like Contractors to go through Self Evaluation and security practices in place, before 3rd party's verification.**

**Question 86.** Please provide additional detail on the requirement for biometrics under Section C.6.2.16 with example use-cases.

**Response 86.** Section C.6.2.16 has been amended. Please refer to Attachment A.

**Question 87.** What type of service is required to satisfy the requirement for an automated call line under Section C.7.1.5 Item 10? (i.e. NLP/IVR)

**Response 87.** An IVR technology that is integrated with the workforce management tool to automatically recognize the out of the office selection from the caller and forecast accordingly.

**Question 88.** What access methods (i.e. REST API) are available under Section C.9.1.3 for the MITS system?

**Response 88.** The MITS tax application is an ERP product (Gentax) and provides support for Restful and SOAP based webservices, the Webservices can be customized and built based on contractor's proposed design specs or data extracts if need be. The contractor shall be responsible to implement the interface and providing requirements for it. (Mytax.dc.gov is the external facing portal). The integration requirement C.9.1.5 with Qmatic is no longer required.

**Question 89.** Per Section C.9.1.5, What access methods (i.e. REST API) are available for the Qmatic system?

**Response 89.** Please refer to Attachment A

**Question 90.** Please define the type of access required to satisfy the "integration point"

**Response 90.** The central connectors provide access to the central modules and proxy connections to relevant Queue Agent hosted connectors. The Queue Agent connectors provide access to the Queue Agent modules and proxy connections to central modules. Connector proxying is achieved via the WebSocket communication channels between central and Queue Agent.

**Question 91.** Please provide additional context on the requirement of Section C.15.1.1 for "Response time latency no more than 36 milliseconds on average per calendar year" – we are not clear on what is being measured.

**Response 91.** CCAS is a something new for the District and OCFO would like to ensure that the data and voice quality is not compromised between the OTR Agent's Computer to the CCAS data center. So, data transmission and ping response is measured. Per Cisco recommendation Jitter that exceeds 40ms will cause



**severe deterioration in call quality. High levels of jitter is usually a consequence of slow speeds or congested networks. Therefore, the Contractor shall keep the jitter under 36 milliseconds on average per year.**

**Question 92.** Per Section C.17.1, What mechanism will OCFO utilize to audit compliance with IRS 1075?

**Response 92.** The District hires 3rd party contractors on annual basis and audits its Contractors to audit the subsystems to verify the IRS pub1075 compliance and controls of the DC applications. The violations are tagged by severity and needs to be addressed in a time bound manner to be brought into compliance. The OCFO would like Contractors to go through Self Evaluation and security practices in place, before 3rd party's verification.

**Question 93.** Will there be a dedicated POC or resource provided by OCFO to help with the SSR under Section C.17.4? What is the estimated number of man hours required by the vendor to help with this task?

**Response 93.** The District has a dedicated person on the team to assist in creating and consolidating the SSR, the CCAS Contractor shall still be responsible to provide all the artifacts and provide all the required input annually to submit the SSR report to Safeguards. It can take about 80-160 hrs. approximately depending on the number of controls that needs to be addressed at the Contractor's end when doing for the first time. Maintaining the SSR should not take more than 40 hours afterwards.

**Question 94.** Do you have existing tools/licenses for performance testing (C.5.8.2) that you would use to test the selected product?

**Response 94.** The OCFO does not have any existing tools for performance testing and would like contractors to propose the tools to ensure the performance objectives are met.

**Question 95.** Would the OCFO like the primary vendor to engage third party vendors for performance testing at an additional cost? If yes, kindly provide which areas of performance would you like to test so that we can engage the right third-party vendor/vendors.

**Response 95.** The District requires performance testing but doesn't require that the primary vendor engage with a third-party vendor. The OCFO would like to Simulate at least the following conditions

**1) Response times and Quality of Data and Voice Transmission at peak loads with stats provided to us**

**2) Simulate Virtual call holds for 500 –1000 customers**

**3) Simulate IVR verification of refund status**

**We would require CCAS vendor to provide us the industry best standards and provide us the guidance based on experience at other implementations**

**4) Capacity of the concurrent calls in the queue**

**5) Capacity of concurrent agents logged in to the system**

**6) Quality of voice, latency, jitter**

**Question 96.** Can you list all use cases for chatbots and virtual assistant (C.6.2.5.) that are needed on day 1 of Go-Live?

**Response 96.** Chatbots should answer all general questions, such as Due dates, Hours, Filing Methods, Payment methods, Locations, upcoming important deadlines, Phone numbers, Hours of operations, Register/Sign up to mytax, specific information on how to interact with various OCFO units.

**When specific taxpayer questions' need escalation, the agent needs to be able to see, how they interacted with chatbot. Chatbot should assist the agent in providing answers, if a canned answer is available.**

**If the interaction needs to become a call from the agent interaction, Chat should be able to further transfer to a voice call, with the understanding of the interaction, visible to the call taker.**

**Question 97.** Can you provide number of use cases for chatbot and virtual assistant that you envisage? Also, provide a breakup of the number which are based on FAQs (i.e. static information) and based on API integration with backend system (i.e. dynamic information)

**Response 97.** For MITS taxes: OCFO has 2 divisions for the Customer Service, one is called e-services that address the customers issues with Portal Sign-up issues, OCFO plans to have a chatbot for this division; Secondly, OCFO has a CSA team which handles tax inquires that will be another Chat bot. Other units within the OCFO would benefit from the development of a Chatbot. The FAQ for all 9 units will be unique and we must work with each department to build Chatbot FAQ's. The OCFO requires that the Chatbot do an API/web service call and provide the status of a refund or tax filing base on authentication of shared secret.

**Question 98.** Can you please elaborate the requirement under Section C.6.2.16? An example would helpful. Is the functionality needed on day-1 of Go Live? "The solution shall provide biometrics technology to track trending questions or use voice

biometrics to pop up valuable information that agents may need to contextualize a conversation”

**Response 98. Section C.6.2.16 has been amended. Please refer to Attachment A.**

**Question 99.** Do you want screen recording for 100% of calls (C.6.2.21)? Is it ok if the older calls need few hours for playback?

**Response 99. OCFO would like 100% recording with a retention of 90 to 120 days.**

**Question 100.** Is there an existing browser-based Agent Desktop application that you want to leverage for C.6.2.22?

**Response 100. No, the Contractor shall provide a robust desktop application. Currently OCFO is using the Aspect 3rd party license-based desktop application**

**Question 101.** Do you need attachments J.1.1 to J.1.8 to be submitted along with the RFP response or are these documents to be submitted by the shortlisted vendors?

**Response 101. Offerors have to submit all attachments with their proposal.**

**Question 102.** As per C.6.1.3, following a successful system implementation, the Contractor shall be responsible for management and system administration, including maintenance and on-going support in compliance with established levels of support. Is OCFO requesting a "Managed Service" offering that addresses ongoing CCaaS Administrative and Configuration Changes? If yes, can OCFO estimate the total number of Professional Services hours that are estimated to be needed per month after initial implementation?

**Response 102. The OCFO requires the Offeror to propose to the District on what level of support their customers require and what levels of managed services CCAS to be provided as a package or ala-carte system for District's post implementation. Currently, the OCFO is unable to predict the number of service hours.**

**Question 103.** As per C.7.1.4 The OCFO shall be able to design and update post-interaction customer surveys. As per C.7.1.5 Capabilities of Workforce Management shall include the following capabilities: Automated Resource Scheduling (ARS) based on the CSRs input. Please provide an example of the use case described in C.7.1.5(2) ARS based on CSR's input.

**Response 103. The OCFO requires the system to be able to hold historical call/resource (agent) data to be able to predict its' needs for any given period in the future and ensure that it is properly staffed.**

**Question 104.** Under Section 13.2.1, Is OCFO requesting that the CCaaS connect to the on premise PBX or just transfer calls to the PBX?

**Response 104. The CCaaS is required to transfer the numbers from the PBX to CCaaS, no connection is required to the existing PBX.**

**Question 105.** As per Section C.15.1.1, Response time latency is required to be no more than 36 milliseconds on average per calendar year. How will the millisecond average per calendar year be calculated? ie. The process, endpoints, calculation to be used.

**Response 105. CCAS is a something new for the District and OCFO would like to ensure that the data and voice quality is not compromised between the OTR Agent's Computer to the CCAS data center. So, data transmission and ping response is measured. Per Cisco recommendation Jitter that exceeds 40ms will cause severe deterioration in call quality. High levels of jitter is usually a consequence of slow speeds or congested networks. Therefore, the Contractor shall keep the jitter under 36 milliseconds on average per year.**

**Question 106.** Will the District consider proposed revisions of the solicitation terms and conditions?

**Response 106. The District may consider this request prior to award of a contract.**