



Training – Health – Retirement – Jobs

**REQUEST FOR PROPOSALS
CALL CENTER SERVICES**

**FOR THE PERIOD
June 15, 2020 to June 30, 2023**

Issued by:

SEIU Healthcare NW Training Partnership

This RFP does not commit the Training Partnership to award a contract, to pay any cost incurred in the preparation of a proposal, or to procure or to contract for services or supplies. The Training Partnership reserves the right to accept or reject any or all proposals received in response to this RFP. The SEIU Healthcare NW Training Partnership does not discriminate against any individual or contractor, on the basis of race, color, religion, gender, sexual orientation, veteran status, national origin, age, disability, political affiliation or belief.



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March 31, 2020

SEIU HEALTHCARE NW TRAINING PARTNERSHIP
Cary McManus-Davis
215 Columbia Street, Suite 300
Seattle, WA, 98104

Attention: Cary McManus-Davis / SEIU Healthcare NW Training Partnership
RE: Proposal for Call Center Services

Dear Sir(s)/Madam(s):

You are kindly requested to submit your proposal for the following items before 3 p.m. PST on April 21, 2020.

Submit an electronic copy of proposal to:

Cary McManus-Davis
Customer Relations Manager
CallCenter@myseiubenefits.org

Sincerely,

Cary McManus-Davis
Customer Relations Manager

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General Description of SEIU 775 Benefits Group

SEIU 775 Benefits Group includes a family of related organizations created and sponsored by the Service Employees International Union (SEIU) 775, the State of Washington (DSHS), and participating employers to advance the professionalism of the home care workforce through comprehensive health benefits, training and secure retirement. Caregivers are healthcare professionals who provide services to older adults and people with disabilities (clients).

SEIU 775 Benefits Group includes:

- **Health Benefits Trust (HBT):** A Taft-Hartley Trust that is responsible for providing medical, prescription drug, vision, behavioral health and dental benefits to eligible caregivers in Washington and Montana. In addition, HBT provides population health and safety services to caregivers. These benefits are provided to caregivers through the Washington State Legislature, which funded the development of the HBT in 2005.
- **Secure Retirement Trust (SRT):** A Taft Hartley Trust responsible for providing secure retirement benefits to caregivers in Washington and Montana.
- **Training Partnership (TP):** Washington state's second-largest educational institution by enrollment, providing more than 6 million hours of essential home care training since 2010.
- **Carina:** A nonprofit free service that matches verified Individual Providers (IP) with Medicaid in-home care clients. Carina works in partnership with SEIU 775 Benefits Group and DSHS to provide this service via a web-based application.

SECTION 1- OVERVIEW

1.1 Scope of work

The Benefits Group serves many types of customers whose needs are best addressed through phone and online support. In order to provide clear, useful, and compassionate customer service to these varied audiences the Benefits Group requires the support of a superior call center vendor. While also demanding exceptional service, the Benefits Group is committed to the worker-first labor principles that are borne out of our close relationship with Service Employees International Union 775. Their membership is directly served by the Benefits Group, as well as close ties with other union locals and labor groups.

The Benefits Group is made up of both Training and Health Benefits Trusts, which provide training and health benefits to union homecare workers, as well as Carina, an online caregiver/client matching platform with statewide reach. This means that a contracted call center would be required to train representatives on a wide variety of different knowledge bases, customer resolution, as well as all reference, tracking, and escalation technology that support them.

The Secure Retirement Trust (SRT) will not be included in this scope of service.

The purpose of this Request for Proposals (RFP) is to secure the services of a superior call center vendor



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who would be required to train representatives on a wide variety of different knowledge bases, customer resolution, as well as all reference, tracking, and escalation technology that support them.

The Benefits Group seeks Call Centers with the capability to provide:

- Caregivers, clients, employers, and other customers a very high level of customer service, with a priority of first-call resolution
- Utilize telephonic equipment able to track multiple call metrics as well as record and catalogue call audio
- Coordinate with the Benefits Group on the selection and use of reference materials and technology to guide customer service
- Coordinate with the Benefits Group regarding representative training on BG programs as well as general customer service training relevant to call center functions (e.g. Mental Health First Aid Training)
- Regular reporting to Benefits Group leadership on metrics established by the BG
- Provide industry-leading compensation packages (including benefits) to call center employees reflective of a worker-friendly workplace
- Provide customer service during flexible hours of operation, responsive to changing customer needs including emergencies and inclement weather
- Provide customer service in a variety of different languages, including Russian, Spanish, Vietnamese, Korean, Cantonese, Somali, Arabic, and Amharic to support our diverse population
- Find a partner that is willing to grow with us on our customer service journey

In addition, the call center vendor must be able provide services in the following areas:

Call Quality

The Call Center Vendor must:

- Report monthly on total volume of calls from caregivers, as well as total phone and email interactions with employers;
- Maintain a service level agreed upon by the parties;
- Report average call length, total inbound calls answered, average handle time, average time of after-call work, and a range of maximum and minimum speed of answer on a monthly and quarterly basis;
- Reach a first call resolution rate agreed upon by the parties;
- Have the ability to send hard mail when needed;
- Effectively demonstrate the quality assurance program that is in place and speak to how you approach call quality;
- Perform quality assurance on representative calls with a comprehensive rating matrix;
- Have the capability to serve LEP customers via in-house language ability and language line, with commensurate measurement of the volume of use of both;
- Measure the top-5 most common subjects of calls (now via Salesforce Case Category);
- Use HIPAA-compliant technology to store all Benefits Group related user data;
- Measure the number of calls “bounced” back to incoming call queue;
- Collaborate with the Benefits Group on improvement strategies creating the best customer experience;



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- Coordinate with other call center vendors that perform work for the trusts and Carina, including sharing technology platforms;

Staffing and Training

The Call Center Vendor must:

- Gain approval from the Benefits Group of all headcount increases or decreases that may affect the price per minute;
- Report on staffing levels versus customer interactions;
- Coordinate continuing training with the Benefits Group, including updates to new-hire training as well as training for experienced workers, at least twice per year;
- Inform and consult with the Benefits Group on all upcoming call center closures;
- Report on call center representative attendance;
- Report on call center representative attrition;
- Create and operationalize a user survey for all customer interactions, including regular reporting of results;
- Work in collaboration on flexible staffing planning;

Specialty Projects

The Call Center Vendor must:

- Have the capability to perform outbound calls, including all necessary representative training and results tracking; calls will be conducted at the request of the Benefits Group. The Benefits Group will be responsible for providing call scripts, the language that the calls should be made in, the timeline, and expected deliverables.

This RFP is only for delivery of call center services to SEIU 775 Benefits Group stakeholders.

1.2 Period of Performance

The SEIU Healthcare NW Training Partnership intends to contract for Call Center Services by June, 2020. Only one vendor will be chosen to provide these services. A contract will be executed for SEIU Healthcare NW Training Partnership. The contract is expected to be awarded for a three year term that ends June 30, 2023.

If the parties mutually agree to do so, they may execute up to two extensions to this contract for the duration of one year per extension.

1.3 Eligible Applicants

Any organization that conducts call center services and is able to meet the requirements of this RFP is eligible to submit a bid.



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1.4 Vendor Onboarding and Training

Providing superior Call Center services is a requirement. Therefore, contractor requires training on Call Center processes prior to delivery of services going live June 30, 2020.

Event	Date
Contractor Logistics and Operational Training	On or about June 16, 2020 – June 18, 2020 Approximate Training Duration: 3 days in person
Contractors begin training delivery	June 30, 2020

SECTION 2 - SUBMISSION GUIDELINES

The proposal must be signed by such individual or individuals who have full authority from the bidder to bind the bidder by contract and submit such a proposal. The terms and conditions set forth in the RFP will serve as the basis for the terms and conditions of the definitive contract (Contract) to be Entered Into by the Training Partnership and the successful bidder. No other terms and conditions will be Incorporated into the final Contract except at the Training Partnership's sole discretion.

Any proposal received after the exact time specified for receipt will not be considered.

Submit an electronic copy of the proposal and other documents to:

Cary McManus-Davis
Customer Relations Manager
CallCenter@myseiubenefits.org

2.1 Offeror Organization / Profile / Technical Skills / Experience

Offeror shall identify relevant capabilities and necessary skills, qualifications, and experience that they consider appropriate to the evaluation of their ability to successfully undertake the proposed contract and meet all RFP objectives.

Any exceptions to the Master Services Agreement (MSA) and Statement of Work (SoW) must be Submitted with your proposal. A red-lined MSA and SoW must be returned. Contract-ready requirements will apply such that any changes not red-lined will be considered by SEIU Healthcare NW Training Partnership as the Offeror's indication of acceptance and will appear in the contract. If no changes are desired, please indicate so. Offeror must also submit a signed Non-Disclosure Agreement (NDA), Business Associate Agreement (BAA), and Conflict of Interest form (COI). As a Non-Profit organization, these forms are required. To access the MSA, SoW, NDA, BAA, and COI forms please see the required forms section on the webpage.

2.2 Request for Proposal Schedule

Event	Date/Time
Issue Request for Proposal (RFP)	March 31, 2020
Proposals Due Email to: CallCenter@myseiubenefits.org	April 21, 2020, by 3:00 p.m. (PST)
Notification to Vendors of Bid results	By May 1, 2020
Discuss Contracts and Award	May 5 to May 7, 2020
Contracts go live	June 15, 2020
Begin Contract Work	June 30, 2020

This schedule may be modified by the Training Partnership at their sole discretion.

2.3 Instructions to Prospective Contractors

Submission / Proposal Format

Offeror should submit their proposed response in the following preferred format:

RFP Response

Links to all forms and spreadsheets that require submission are located on the RFP Submission Website. In addition to the RFP Forms, bidder must provide the following:

Forms and Documentation

1. **Proposal Response Certification:** Must be included in the proposal and contain the bidder's certification of the submission.
2. **Non-Disclosure:** Submission required in order to bid.
3. **Conflict of Interest:** Submission required in order to bid.

Bidder Response Worksheets

1. **Background and Experience:** Describe your company.
2. **Cost proposal Worksheet:** Bidders must include a detailed breakdown of all costs included in arriving at quoted rates.

SECTION 3 - RFP CONDITIONS

3.1 Closing Submission Date

Proposals must be submitted no later than 3:00 p.m. PST on April 21, 2020. It is the responsibility of the Offeror to ensure that the proposal is received by SEIU Healthcare NW Training Partnership by the date and time specified above. Late proposals will not be considered.

3.2 Inquiries

During the period of submission, any questions or clarifications will be responded to within two



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business days of submission. **Inquiries may be submitted beginning 3/31/20 through no later than 3:00 p.m. PST on 4/15/20. Inquiries will not be accepted after 3:00 pm PST on 4/15/20. Inquiries concerning this RFP should be emailed to: CallCenter@myseiubenefits.org.**

The SEIU Healthcare NW Training Partnership will utilize a shared Google document where each question asked will be placed along with the answer for all participants to see. To view the Google spreadsheet please visit this Google folder link: [Call Center Vendor Q&A](#)

3.3 Conditions of Proposal

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Offeror and will not be reimbursed by SEIU Healthcare NW Training Partnership.

3.4 Proposal Price

The prices submitted in the proposal must include everything necessary for the performance of the Contract including, but not limited to, inbound and outbound calls, after call work, training, management, and equipment costs.

3.5 ISA Red-Lined Changes

Any material changes made from the proposed MSA and SoW will be evaluated negatively when Selecting a vendor with whom to further negotiate.

3.6 Non-disclosure Agreement

In order to protect all parties, a non-disclosure agreement is appropriate prior to negotiations. A vendor who is unwilling to sign a non-disclosure agreement will be evaluated negatively.

3.7 Negotiation

Negotiation sessions may be held to work out contract details and other expectations of the parties' applicable services/work, based on the RFP, and the proposal(s) submitted.

3.8 Proposal Revisions

Proposal revisions must be received prior to the RFP submission / closing date and time.

3.9 Right to Reject

SEIU Healthcare NW Training Partnership reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be drafted based upon the factors described in this RFP.

3.10 Award of Contract

The award will be made by the Training Partnership to the bidder(s) whose proposal will be most advantageous to the Training Partnership with respect to price, conformance to the specifications, quality and other factors as evaluated by the Training Partnership, all at the Training Partnership's sole discretion. The Training Partnership is not required nor constrained to award the contract to the bidder proposing the lowest price.



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3.11 Notifications of Award

It is expected that a decision will be made within four weeks of the closing date of this RFP, pending a Board vote. All parties will be notified of the decision once the vote has been passed.

3.12 Disclosure

All documents submitted by the Offeror shall become the property of SEIU Healthcare NW Training Partnership. Proposal information is proprietary and as such shall be treated as confidential. Information pertaining to SEIU Healthcare NW Training Partnership obtained by the Offeror as a result of participation in this project is confidential and must not be disclosed without written authorization from of SEIU Healthcare NW Training Partnership.

SECTION 4-EVALUATION PROCESS

4.1 Evaluation Process

The Training Partnership will evaluate all acceptable proposals based on the criteria identified and RFP Conditions in Section 3.

4.2 Evaluation Criteria

Delivery Schedule: The ability of the bidder to deliver the service in a timeframe Acceptable to the Benefits Group.

Proposal Cost: The rate for providing this service as described below:

Inbound Calls	Vendor must supply cost per minute of inbound call work, including all time spent in-call as well as after-call work; Benefits Group will propose, yearly, an annualized foreseen call volume and will pay, monthly, 1/12 of that total, with any overage paid at the established cost per minute, and any underage being "banked" for future use by the Benefits Group
Outbound Calls/Special Projects	Vendor must supply cost per-contact-made when doing outbound call work, this number will be multiplied by .75 of the total number of contacts supplied by the Benefits Group to determine the price of each outbound call special project

Bidders Experience and Credentials: Bidder's relevant experience and expertise in providing these services.

Translation and Localization: The ability of the bidder to deliver the services in multiple languages.

Quality Assurance: The adequacy of the bidder's quality assurance strategy.