

Solicitation 2P201007

Contact Center Solution

State of California

Bid 2P201007 Contact Center Solution

Bid Number **2P201007**
Bid Title **Contact Center Solution**

Bid Start Date **Sep 24, 2010 4:05:31 PM PDT**
Bid End Date **Oct 14, 2010 2:00:00 PM PDT**
Question & Answer
End Date **Oct 1, 2010 10:00:00 AM PDT**

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Description

The California State Teachers' Retirement System (CalSTRS) intends to award a contract to a qualified Contact Center "Software as a Service" (SaaS) provider. SaaS, also known as hosted or on-demand software, is defined by CalSTRS as software that is hosted by a vendor/service provider and made available to CalSTRS over a network on a subscription or pay-per-use basis.

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM



Request for Proposal 2P201007

Contact Center Solution

**Deadline for Submission of Written Questions:
October 1, 2010 at 10:00 a.m., Pacific Daylight Time (PDT)**

Final File Date: October 14, 2010 at 2:00 p.m., (PDT)

CalSTRS Contract Services
Dora Chandler, Contract Administrator
100 Waterfront Place, MS-30
West Sacramento, CA 95605-2807
Phone: (916) 414-4880
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September 24, 2010



REQUEST FOR PROPOSAL
Notice to Prospective Proposers

September 24, 2010

You are invited to review and respond to the California State Teachers' Retirement System (CalSTRS), Request for Proposal (RFP), entitled Contact Center Solution, RFP Number 2P201007. In submitting your proposal, you must comply with the instructions found herein.

The proposals must be received in the office of CalSTRS no later than October 14, 2010 by 2:00 p.m., Pacific Daylight Time (PDT). Proposals received after the specified date and time will be rejected.

Proposers requiring clarification of the intent and content of this RFP, or on the competitive proposal process, may request clarification only by submitting written questions to:

Dora Chandler, Contract Administrator
California State Teachers' Retirement System
100 Waterfront Place, MS 30
West Sacramento, CA 95605-2807
(916) 414-4880
FAX: (916) 414-4888
E-mail: contractservices@calstrs.com

To ensure a response, questions must be received by October 1, 2010, by 10:00 a.m., PDT, as defined in Section E, Subsection 2. Questions received by this date will be answered in writing and sent to all RFP recipients, without identifying the source of the query.

Any attempt by a Proposer to initiate contact with any member of the Teachers' Retirement Board and/or CalSTRS' staff, other than the Contract Services staff, regarding this RFP process may disqualify the Proposer from further consideration.

Please note that no *verbal* information given will be binding upon CalSTRS unless such information is issued in writing as an official addendum.

Christine Ford
Chief of Staff

Attachments

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A. INTRODUCTION AND BACKGROUND

The California State Teachers' Retirement System (CalSTRS) operates under those sections of the California Education Code known as the State Teachers' Retirement Law. CalSTRS members include California public school teachers from pre-kindergarten through community college and certain other employees of the public school system and the State of California.

CalSTRS presently occupies a new headquarters building in West Sacramento. The new building is approximately one year old and the Contact Center has been operational with the present solution since the move in date. The new building supports a population of approximately 1,300 CalSTRS personnel that include up to 100 Contact Center Agents.

As part of moving to the new headquarters building, CalSTRS installed new network systems. These network systems include new wide area network (WAN), local area network (LAN), voice-over-internet protocol (VoIP), and wireless local area network (WLAN) Systems. The current Contact Center solution uses the VoIP (Cisco) phones and is integrated with the phone system (Cisco Call Manager).

CalSTRS currently utilizes a hosted contact center solution (Genesys) with a premise-based solution for call recording (Verint-Witness), quality management (Verint-Quality Monitoring), workforce management (Verint-Impact 360 WFM) and performance management (Verint-Quality Monitoring). This RFP will replace the hosted contact center solution with a "Software as a Service" (SaaS) solution and will integrate with the on premise Verint-Impact 360 WFM-Witness, and – Quality Monitoring applications as well as with CalSTRS Cisco Call Manager, Legacy Member application and Customer Relationship Management application. The current Contact Center solution uses a custom-developed Interactive Voice Response (IVR) and a Hosted Intelligent Call Routing (HICR) Genesys application with a custom softphone on the agent's desktop. The proposed solution in response to this RFP should be a Genesys solution.

This RFP includes replacing the current functionality listed as Base Features (See Attachment 10- Required Base Features), the Technical Requirements (See Attachment 14-Technical Requirements Form) and allow for the additional functionality listed as Optional Features (See Attachment 11-Optional Features). The proposal must also include integration effort and support with the Verint application as described in Verint Features (See Attachment 13 – Verint Features).

The current solution offers standard reports and raw data for reporting needs. This RFP shall include report development functionality using a Graphic User Interface (GUI).

CalSTRS intends to award a contract to a qualified Contact Center "Software as a Service" (SaaS) provider. SaaS, also known as hosted or on-demand software, is defined by CalSTRS as software that is hosted by a vendor/service provider and made available to CalSTRS over a network on a subscription or pay-per-use basis. For the purpose of this RFP, the proposed SaaS solution will be termed as the 'Contact Center Solution'.

The term of the initial agreement shall be for the duration of the project implementation through an initial three (3) years, with two one-year options to extend.

For more information about CalSTRS, please refer to the website address at www.calstrs.com.

B. PROPOSAL OVERVIEW

CalSTRS is soliciting Contact Center providers for a Genesys-based solution that includes an Interactive Voice Response (IVR), Automated Call Distributor (ACD), and Desktop Softphone. This Contact Center solution needs to integrate with CalSTRS' VoIP solution using Cisco Call Manager as well as CalSTRS' custom Customer Relationship Management (CRM) application, Member Information Center (MIC), the Legacy Member Database (START), and Verint application (Call Recording, Quality Monitoring Workforce Management and Performance Management).

The current CalSTRS' Contact Center solution to be replaced with the proposed solution consists of a hosted IVR and hosted Genesys platform. The current desktop softphone is browser based and connects via a private Internet Protocol (IP) connection to CalSTRS. START currently resides at the State of California Data Center. The Verint and MIC reside on premise at CalSTRS. Encrypted data transport must be insured and tested where public networks are utilized. (See Exhibit C, CalSTRS Contact Center System Overview).

The current solution communicates with a .NET web service application to retrieve member information from START. This information is displayed on the agent's desktop soft phone. Upon displaying the member information, the agent's desktop soft phone launches the CalSTRS CRM web application, MIC, in a separate browser window (agent desktop pop). Launching MIC is done using a simple HTTPS URL request. The URL includes a query string variable with caller identification information to be used by MIC to retrieve information from START and display to the CalSTRS' agents. All call detail is entered into MIC by the agent; nothing is entered into the desktop soft phone. For more detailed information, please see Attachment 14 – Technical Requirements Form. The integration effort to accommodate the agent desktop pop with member information is a requirement of this RFP (See Exhibit D, Interfaces).

CalSTRS currently receives an average 1,600 calls per day. If the need arises, CalSTRS has 100 available agents logged in and ready to accept calls, but generally has 35 agents on the phones full time accepting calls. To monitor agent productivity and answer escalated member calls, there are 10 supervisors utilizing the system daily.

CalSTRS members currently call into the IVR and have several options. They can speak to an agent, use the self service feature or hear general office information. For more detail on IVR options, please see Exhibit J – Current IVR/ACD Call Flows. For security purposes, the IVR asks the members for their Date of Birth (DOB), Social Security number or Client ID. This information is compared to the START member database for validation. All confidential information in transit and at rest is encrypted and then is decrypted once it is presented to an agent. The replacement of the IVR and its capabilities are requirements of this RFP. For security policy details regarding encryption, see Exhibit E, Security Policy.

CalSTRS has an on-premise Cisco Call Manager which supports all of the Contact Center Cisco VoIP phones (Model 7945). The Contact Center solution will need to be integrated into the Cisco Call Manager in order for calls to be delivered to the Cisco VoIP phones after being queued by the ACD and then, if requested, transferred to other agents. In addition, the desktop softphone needs to be integrated with the VoIP phone so that the agents have dual use (hard and soft phone). Agents must be able to perform all functions on both the softphone and the hard phone.

Currently members' calls are routed to agents based on skills. The proposed Contact Center solution must mirror at a minimum what is available today which includes 12 separate skill groups. Each skill group is broken down into 4 levels from beginner to advanced.

The Contact Center Solution must integrate and support the Verint functionality listed in Verint Features Summary Form, Attachment 13. The current Contact Center solution is integrated with an on-premise Verint application. The Verint application consists of call recording (Verint -Witness), quality management (Verint – Witness), workforce management (Verint – Impact 360 WFM) and performance management (Verint – Quality Monitoring. The proposed SaaS must include the integration to the Verint application which includes instantaneous data feeds for queues and agent detail from the Genesys application.

The proposed solution must provide a method to build ad hoc reports. In addition, the solution should provide standardized Contact Center reporting that includes, but is not limited to: IVR call detail, queue and agent detail, service level (total and by queue) and other associated Contact Center reports. See (Exhibit K– Sample Reports)

The proposed Contact Center solution will deliver the Base Features, Features Summary Form, See Attachment 10, and Technical Requirements Form, See Attachment 14, that are currently available in the Genesys application in the hosted environment. In addition, the proposed solution should be able to provide those features listed in the Features Summary Form Optional Features, See Attachment 11. At a minimum, CalSTRS will be rolling out the proposed solution with all of the current functionality listed in Base Features and Technical Requirements. As the business needs change or grow, CalSTRS will want the option to subscribe to additional features and functionality as needed.

The proposed Contact Center solution must include redundancy and remote agent availability for emergency and disaster recovery situations as well as telework agents. The solution must have the capacity to consider all agents in all locations when routing to the next available agent. Currently, CalSTRS' hosted solution includes one (1) different location/site for failover capabilities. Also, CalSTRS has a Business Resumption Center to handle local emergencies that necessitates relocation of agents.

This Contact Center SaaS implementation timeframe will be dependent on the proposers' tasks and their durations. The term of the initial agreement shall be for three (3) years, with a two one-year option to extend following the Notice of Completion and Acceptance of the System provided and work performed as outlined within this RFP.

C. DEFINITIONS

Automated Call Distributor (ACD) – A device or system that distributes incoming calls to a specific group of soft/hard phones that agents use.

Agent –A CalSTRS' Contact Center staff member.

Automatic Number Identification (ANI) – A feature that permits subscribers to display or capture the telephone numbers of calling parties.

Business Resumption Center (BRC) – A remote site used for business resumption in the event of a disaster.

Call Flow Diagrams – Represent the high-level call flow, indicating the various prompts, interactions and computations that make up the application, along with their ordering and conditions of execution.

Contact Center Solution – The complete Software as a Service solution that is being proposed in the Request for Proposal (RFP).

Contact Center Software as a Service (SaaS) – SaaS, also known as hosted or on-demand software, is defined by CalSTRS as software that is hosted by a vendor/service provider and made available to CalSTRS over a network on a subscription or pay-per-use basis.

Customer Relationship Management (CRM) – Software application that manages customer contacts and tracks all customer interactions.

Customer – refers to CalSTRS member, school district or vendor.

Disaster Recovery Plan (DRP) – The process, policies and procedures of restoring operations critical to the resumption of business, including regaining access to data (records, hardware, software, etc.), communications (incoming, outgoing, toll-free, fax, etc.), workspace, and other business processes after a natural or human-induced disaster.

Denial of Service attack (DoS attack) – An attempt to make a computer resource unavailable to its intended users.

Encryption – The process of transforming information (referred to as plaintext) using an algorithm (called cipher) to make it unreadable to anyone except those possessing special knowledge, usually referred to as a key.

Graphical User Interface (GUI) – A type of user interface which allows people to interact with a computer and computer-controlled devices through graphical icons, visual indicators, or special graphical elements called “widgets.”

Internet Protocol (IP) – A data-oriented protocol used for communicating data across a packet-switched internetwork. IP provides the service of communicable unique global addressing amongst computers.

Information Technology (IT) – The study, design, development, implementation, support, or management of computer-based information systems, particularly software applications and computer hardware. IT deals with the use of electronic computers and computer software to convert, store, protect, process, transmit, and securely retrieve information.

Interactive Voice Response (IVR) – A phone technology that allows a computer to detect voice and touch tones using a normal phone call and provide information based on the request.

Local Area Network (LAN) – A computer network covering a small geographic area like a home, office, or group of buildings.

Lightweight Directory Access Protocol (LDAP) – An Internet protocol that email and other programs use to look up information from a server.

Leadership in Energy and Environmental Design (LEED) – A green building rating system, developed by the United States Green Building Council, which provides a suite of standards for environmentally sustainable construction.

Member Information Center (MIC) – CalSTRS custom developed customer relationship management application. This application is a GUI interface to the legacy member database (START).

Network Call Identification (NCID) – The unique call identifier that is used in all Contact Center applications.

Pilot - A simulation of technology for performance optimization, testing, training and education.

Public Switched Telephone Network (PSTN) – The network of the world's public circuit-switched telephone networks in much the same way that the Internet is the network of all the world's public IP-based packet-switched networks.

START – CalSTRS Legacy Member Database application that stores all members' information.

System – refers to Contact Center applications collectively.

Voice over Internet Protocol (VoIP) – A protocol optimized for the transmission of voice through the Internet or other packet switched networks. Often also referred to as IP Telephony, Internet telephony, or Voice over Broadband.

Voice Extensible Markup Language (XML)– A standard format for specifying interactive voice dialogues between a human and a computer. Allows voice applications to be developed and deployed in an analogous way to HTML for visual applications.

Wide Area Network (WAN)– A type of network that covers a broad area that uses routers and public communications links.

Wireless Local Area Network (WLAN) – A type of local area network which links two or more computers without using wires.

D. MINIMUM QUALIFICATIONS FOR THE PROPOSER

The Proposer must meet all of the following minimum qualifications to be given further consideration. Failure to satisfy each of the minimum qualifications identified will result in the immediate rejection of the proposal.

1. As of October 14, 2010, proposer must have at least five (5) years of experience in providing Genesys “Software as a Service” (SaaS) Solution.
2. As of October 14, 2010, proposer must have experience in integrating the Genesys solution with the Verint application (Quality Management, Call Recording Workforce Management and Performance Management) to accommodate instantaneous data feeds, as well as with Cisco Call Manager.

E. PROPOSAL REQUIREMENTS AND INFORMATION

1. Time Schedule

CalSTRS will give its best effort to adhere to the time schedule. However, CalSTRS reserves the right to amend the time schedule as it deems necessary.

<u>Event</u>	<u>Date</u>	<u>Time</u>
RFP Available to Prospective Proposers	September 24, 2010	
Written Question Submittal Deadline	October 1, 2010	10:00 am PDT
Issue Addendum for Questions & Answers	October 6, 2010	
Final Date for Proposal Submission	October 14, 2010	2:00 pm PDT
Prequalification Evaluation	October 15, 2010	
Proposal Evaluations	October 15-20, 2010	
Finalists Interviews (Optional)	October 26-28, 2010	
Notice of Intent to Award	November 5, 2010	
Contract Award Date	November 19, 2010	
Project Start Date	November 22, 2010	

2. Submission of Written Questions

Any questions Proposers may have regarding the information presented in this RFP must be received by CalSTRS' Contract Services office in writing via United States mail, e-mail at contractservices@calstrs.com, or facsimile transmission at (916) 414-4888, no later than October 1, 2010, 10:00 am PDT. To ensure questions have been received, please call Dora Chandler at (916) 414-4880. CalSTRS will answer all questions received by this deadline in writing without divulging the source of the query. Copies of all questions and CalSTRS' responses will be sent to all parties who requested the RFP. They will also be available on the Internet at <http://www.eprocure.dgs.ca.gov/default.htm>.

3. Minimum Qualifications Certification

The Proposer must complete Minimum Qualifications Certification, Attachment 15, certifying that the Proposer satisfies all minimum qualifications and requirements. Failure to certify satisfactorily may result in the immediate rejection of the proposal.

4. Proposal Requirements

To be eligible for evaluation, a proposal must adhere strictly to the format set forth below; failure to do so may result in disqualification. Proposers submitting a proposal must address each of the required sections listed below. Attachments requiring a signature must be signed by the individual who is authorized to bind the Proposer contractually. Please label and separate each section to allow for ease of review by the team of reviewers. The content and sequence of the proposal will be as follows:

<u>Section</u>	<u>Title</u>
a.	Cover Letter
b.	Table of Contents
c.	Proposer Client References
d.	Proof of Financial Solvency
e.	Proof of Security Compliance
f.	Features Summary Forms
g.	Proposer's Personnel
h.	Project Schedule
i.	Sample Manuals
j.	Current Client Service Level Agreement
k.	Disaster Recovery Plan
l.	Proposal Questionnaire
m.	Subcontracting Firm List
n.	Cost Proposal

a. Cover Letter

The Cover Letter, which shall be a part of the proposal package, must be signed by the individual who is authorized to bind the Proposer contractually. An unsigned cover letter may cause the proposal to be rejected. The letter must also contain the following:

- 1) Name of the proposing firm.
- 2) Organizational structure of the firm (e.g., corporation, partnership, etc.).
- 3) The Proposer's Federal Employer Identification Number and Corporate Identification Number, if applicable.
- 4) Address, telephone number, and facsimile number.
- 5) Name, title, telephone number and email address of the firm's representative who is designated as primary liaison to CalSTRS.
- 6) Name, title, telephone number and email address of the representative who is authorized to bind the firm in contract.
- 7) A statement to the effect that the proposal is a firm and irrevocable offer good for one (1) year.
- 8) A statement expressing the Proposer's willingness to perform the services as described in this RFP.
- 9) A statement expressing the Proposer's availability of staff and other required resources for performing all services and providing all deliverables as described in this RFP.
- 10) Should proposing firm's proposal contain proprietary information, a statement to that effect must be included in the cover letter.

b. Table of Contents

Immediately following the cover letter, there must be a comprehensive Table of Contents of the material included in the proposal. The Table of Contents must clearly identify the proposal section/subsection and the applicable page numbers.

c. Proposer Client References

The Proposer must provide four (4) active client references. The client references must be references for which the Proposer is currently providing Contact Center Software as a Service (SaaS) services similar to those identified in the Features Summary Form Required Base Features, Attachment 10, Technical Requirements Form, Attachment 14 and Scope of Work, Exhibit A. This information must be submitted on Proposer Client References, Attachment 2. CalSTRS reserves the right to contact any of the persons/companies provided, and also retains the right to conduct reference checks beyond that supplied by the Proposer. CalSTRS also reserves the right to contact the references and conduct onsite tours.

- 1) The referenced clients should be clients that have agent count of at least 50 agents and include the following components at a minimum (refer to the Features Summary Form, Attachment 10, and Technical Requirements Form, Attachment 14, for a description of these items):
 - a) Enhanced Automate Call Distribution (ACD)
 - b) Contact Routing
 - c) Interactive Voice Response (IVR)
 - d) Multimedia Queuing
 - e) Queued Contacts
 - f) Desktop Integration
 - g) Call Recording
 - h) Real Time Monitoring
 - i) Reporting
 - j) Time and Attendance
 - k) Business Continuity
 - l) Interfaces
 - m) System Administration
- 2) Each reference project submitted must include:
 - a) Name and Address of Firm
 - b) Contact Person Name, Telephone Number and E-mail Address
 - c) Begin and End Dates for Implementation of Service
 - d) Begin date of Maintenance and Operation (GoLive date)
 - e) Description of Contract Scope
 - f) Number of Agents

d. Proof of Financial Solvency

Proposers shall provide documents to demonstrate financial solvency and the capacity to fulfill the obligations of this RFP. CalSTRS may obtain independent credit statements of Proposers submitting a proposal.

The Proposer shall submit the following:

- 1) If the company is publicly held, the 10-K's for the most recent three (3) years for the proposing entity, as well as for any parent entity, or
- 2) If the company is not publicly held, provide the most recent three (3) years of audited financial statements that includes a detailed income statement, statement of cash flows, and balance sheet or substitute documentation that demonstrates financial solvency and the capacity to fulfill the obligations of this RFP.

e. Proof of Security Compliance

Proposer shall provide documents to demonstrate the latest reports of SAS70 certified security.

f. Features Summary Forms

Proposers must submit completed Features Summary Forms, (Attachments 10 and 11) and Technical Requirements Form (Attachment 14). Proposers must complete all portions of the Features Summary Forms. CalSTRS hardware and software are identified in Exhibit B, CalSTRS Hardware and Software Standards.

g. Proposer's Personnel

1) Definition of Proposer's Management Team

During the term of the Contract awarded as a result of this RFP, certain Proposer staff will have access to CalSTRS' plans and confidential information as a requirement for fulfilling their duties and CalSTRS will become dependent upon these individuals for advice and expertise. As such, the following roles and responsibilities are identified for the Proposer's Management Team as listed in the table below:

Role	Responsibilities
Account Executive	Responsible to act as an advocate for CalSTRS within the Proposer's organization. Responsible for ensuring that CalSTRS is receiving the care and services agreed upon within the Contract.
Project Manager	Contact person for all project coordination activities and problem resolution. Manage Proposer project activities as described in the approved Project Methodology. Has full authority to represent the Proposer.
Help/Service Desk Manager	Responsible for the performance and response time of the Help/Service Desk staff for all reported incidents. Responsibility for ensuring that CalSTRS is receiving the care and services agreed upon within the Contract.
Training Manager	Responsible for training plan, training materials and training classes.

Please complete Attachment 6 – Proposed Personnel Summary for the roles listed in the above table.

2) Definition of Proposer's Core Team

Provide a Core Team sufficient in numbers and experience to perform all necessary activities for successful Project activities and Maintenance and Operation of the Contact Center Software as a Service (SaaS) at the Headquarters Building in West Sacramento, as identified in the Scope of Work, Exhibit A.

3) Changes to Proposer's Management Team Members

The Proposer shall notify the CalSTRS Representative at least ten (10) working days prior to Contract finalization of any changes to Proposer's Management Team that have been identified on Attachment 6 – Proposed Personnel Summary. If members of the Proposer's Management Team and Core Team are to be replaced, CalSTRS must be allowed to review the resume for acceptable qualifications. Unless otherwise agreed to in writing by CalSTRS, the Proposer shall not remove or reassign any member of the Proposer's Management Team from the Project until their assignment has been completed. The Proposer shall not be responsible for cessation of work by such Management Team for reasons beyond its reasonable control, including:

- The death or illness of the individual; or
- As a result of a disciplinary action; or
- The resignation or termination of the individual from his or her employment with the Proposer, as long as the individual is not rehired by the Proposer as a Subcontractor.

In the event that any of the Management Team do cease work as described above, the Proposer shall provide replacement personnel with equal or greater skills and qualifications within thirty (30) calendar days. Notwithstanding any cessation of work by any Proposer's Management Team, the Proposer shall ensure that all obligations under the Contract shall continue to be performed in the interim period until a replacement can be obtained.

The Proposer shall work jointly with CalSTRS to ensure that any reassignment and/or replacement of Proposer's Management Team have minimal impact to the services provided to CalSTRS. This includes providing reasonable advance notice of such changes, and ensuring a suitable Transition Plan is developed. The Proposer shall temporarily replace members of the Proposer's Management Team for absences due to training, vacations, illness, accident or other events outside of the Proposer's control.

h. Project Schedule

Provide a draft Project Schedule, in MS Project, which will include, but is not limited to, all major milestone dates, dependencies and interactions with other tasks. The Proposer will provide tasks and any external dependencies associated with each proposed Project Phase. The draft Project Schedule will be reviewed and edited based upon findings during the Planning Phase. The Project Schedule will be base-lined once agreements on durations and dates have been made between CalSTRS and Contractor project teams.

The Project Schedule will be part of the evaluation process and will include, at a minimum, these proposed Project Phases and associated milestones that occur after Contract Award:

- 1) Project Planning
- 2) Requirement/Discovery
- 3) Design (as it relates to the integration with CalSTRS systems)
- 4) Configuration/Development
- 5) Testing (Unit and System)
- 6) UAT
- 7) Training
- 8) Implementation (GoLive)
- 9) Notice of Completion
- 10) 90 Day Acceptance Period
- 11) Maintenance and Ongoing Operations

In addition, the Proposer will provide tasks and any external dependencies associated with each proposed Project Phase. Please note the following dependencies:

- 1) A 90-day Acceptance Period will begin following the delivery of the Notice of Completion from the contractor to CalSTRS.
- 2) Maintenance and Operation begins upon the successful completion of the 90-Day Acceptance Period.
- 3) Appropriate sign offs will be defined during the project planning phase.

At Project Start, CalSTRS Project Manager will work with the selected Proposer to refine the project schedule and desires that the implementation timeline be accelerated without sacrificing quality and will assign scoring as identified in Evaluation Scoring Form, Exhibit F.

i. Sample Manuals

Proposer must submit the following sample manuals: user, training, train-the-trainer, and system administration. The manuals must be representative of the manuals that will be provided to CalSTRS for system administration and training of the Contact Center Software as a Service (including but not limited

to: Agents, Supervisors and Data Analysts). These may be submitted as electronic media.

j. Current Client Service Level Agreement

1. Proposers must submit a Service Level Agreement (SLA) that is representative of service levels that CalSTRS should expect to receive when solution goes live. A final SLA Agreement will be established as part of contract negotiations.

2. On-Going Customer Support

Contractor will provide CalSTRS with their customer support service hours.

The following support will be provided:

- Telephone, email, fax, chat and web-based support to answer questions and diagnose and resolve any issues
- On-line knowledgebase and case submission and tracking
- On-line manuals and documentation
- Quarterly on-site business reviews including all statistics, metrics and best practice recommendations

3. On-Going System Availability

For each calendar month after an initial 90-day acceptance period following the Planned Go-Live Date (or following the actual go-live date, if later than the Planned Go-Live Date), Contractor guarantees 99.9% availability for the Contact Center Solution (including the communications circuits and external network, if Contractor provides the communications circuits and external network subject to the conditions below).

Availability is calculated by Contractor in accordance with its standard practices from the operational data recorded in its systems and is based on total potential availability of 24 hours per day, 7 days per week, minus the time required for scheduled maintenance.

In the event actual availability of the Contact Center Solution during any calendar month is less than 99.9%, CalSTRS will be entitled to a credit against the Monthly Subscription Fees for that calendar month in an amount equal to three (3) times the Monthly Subscription Fee, prorated on an hourly basis, for the portion of time that the Contact Center Solution is unavailable during the calendar month, up to a maximum credit equal to that month's total Monthly Subscription Fee.

4. Response Time

Contractor will make best efforts to respond to and address problems related to the Contact Center Solution in accordance with the following Tables; Response Time, Escalations, and Notification Timeframes.

Condition	Fewer than 5 Agents Affected	5 or more Agents Affected
Down	Confirm receipt of problem within 10 minutes. Return to service or an effective work around within 4 hours for 95% of issues.	Confirm receipt of problem within 10 minutes. Return to service or an effective work around within 30 minutes for 95% of issues.
Very Limiting	Confirm receipt of problem within 10 minutes. Return to service or an effective work around within 6 hours for 95% of issues.	Confirm receipt of problem within 10 minutes. Return to service or an effective work around within 1 hour for 95% of issues.
Limiting	Return to service or an effective work around within 24 hours for 90% of issues.	Return to service or an effective work around within 12 hours for 90% of issues.
Not Limiting	Return to service or an effective work around within 48 hours for 90% of issues.	Return to service or an effective work around within 24 hours for 90% of issues.

Table 1 - Response Time

“Down”	Unable to perform work.
“Very Limiting”	Can generate very limited work output.
“Limiting”	Can generate work output, but not at peak capacity.
“Not-Limiting”	Can generate work output, but has a problem which needs to be fixed.

Contractor is responsible only for matters that are within Contractor’s control. Among the matters that are outside of Contractor’s control are power at CalSTRS’ facility, failure of CalSTRS’ equipment, failure of CalSTRS’ LAN or WAN and failure of any non-Contractor external network.

5. Escalations

Order	Contact
1	24hr On-call Line
2	Manager of Site Operations
3	Director of Service and Site Operations
4	VP of Operations

Table 2 - Escalations

6. Notification Timeframes

The following table lists the frequency of CalSTRS' notifications by the Contractor for differing severity level incidents.

Severity	Update Frequency
0	Every 15 Minutes
1	Every 30 minutes
2	Every Hour
3	Daily

Table 3 - Notification Timeframesk. Disaster Recovery Plan

Proposers must submit a detailed description of the how Disaster Recovery is managed at their network (cloud) site(s) for the proposed solution. Please supply a current copy of the Disaster Recovery Plan for those sites that support the proposed solution.

l. Proposal Questionnaire

The Proposal Questionnaire, Attachment 3, is intended to provide CalSTRS with additional specific information concerning the Proposer's capability to provide the products and services as described in this RFP. Proposers should limit their responses to this questionnaire to no more than one (1) page per question, unless otherwise stated, and submit each question in the same number order as in the questionnaire.

m. Subcontracting Firm List

The Proposer must complete and certify the Subcontracting Firm List, Attachment 9, identifying a list of subcontracting firms that will perform work for the Proposer, the kind of work each will perform, and the percentage of the total Cost Proposal that the subcontracting firm will perform if a contract is awarded to the Proposer. Proposer shall also promise and certify that if a subcontractor fails to complete the portion of the work subcontracted, the Proposer shall take over and complete that portion of the work. Proposer shall also commit to onsite project management or an agreed upon method by CalSTRS when subcontractor is onsite. Proposer is responsible for managing all onsite work by subcontractor.

n. Cost Proposal

Proposers must submit their Cost Proposal, Attachment 12 in a **separate CD/DVD contained in a separate sealed envelope marked Cost Proposal**. The Cost Proposal must be submitted in the format prescribed in the Cost Proposal, Attachment 12. Any deviation from the prescribed format which, in the opinion of CalSTRS, is material may result in the rejection of the Proposal. The costs contained in the Cost Proposal must represent the total cost to CalSTRS for setup/implementation and the per seat or concurrent costs per month for use of the Software Solution as proposed.

5. Submission of Proposal

- a. Submit two (2) copies and one (1) CD of your proposal in a sealed package. One (1) copy must contain original signatures, be labeled "Master Copy", and placed in a loose-leaf, three-ringed binder which displays the Proposer's name on the outside from cover to the spine. (Do not submit the Master Copy with spiral binding.) One (1) copy must be marked "Copy for Reproduction", which has no divider sheets or tables.
- b. All proposals must be delivered to the California State Teachers' Retirement System by October 14, 2010, 2:00 pm, PDT. Proposals received after this date and time will not be considered. Proposals must be delivered to the following address:

California State Teachers' Retirement System
100 Waterfront Place
West Sacramento, CA 95605

- c. The sealed proposal package must be plainly marked with the RFP number and title, the firm name and address, and must be marked with "DO NOT OPEN", as shown in the following example:

RFP NUMBER 2P201007
CONTACT CENTER SOLUTION
California State Teachers' Retirement System
Dora Chandler, Contract Administrator
100 Waterfront Place
West Sacramento, CA 95605
MAIL ROOM – DO NOT OPEN

- d. Proposals must be submitted for the performance of all the services described herein. Any deviation from the work specifications will not be considered and will cause a proposal to be rejected.
- e. A proposal may be rejected if it is conditional or incomplete, deemed non-responsible, or if it contains any alterations of form or other irregularities of any kind. CalSTRS may reject any or all proposals and may waive any immaterial deviation in a proposal. CalSTRS' waiver of immaterial defect shall in no way modify the RFP document or excuse the proposer from full compliance with all requirements if awarded the agreement.
- f. Costs for developing proposals in anticipation of award of the agreement are entirely the responsibility of the Proposer and shall not be charged to CalSTRS.
- g. A Proposer may modify a proposal, after its submission, by withdrawing its original proposal and resubmitting a new proposal prior to the proposal submission deadline date. Proposal modifications offered in any other manner, oral or written, will not be considered.
- h. A Proposer may withdraw its proposal by submitting a written withdrawal request to CalSTRS, signed by the Proposer or an agent authorized, through the contact person named in Section c, above. A Proposer may thereafter submit a new proposal prior to the proposal submission deadline. Proposals may not be withdrawn without cause subsequent to proposal submission deadline.
- i. CalSTRS may modify the RFP prior to the notice of intent to award by issuing an addendum to all parties that received a proposal package.
- j. Proposers are cautioned to not rely on CalSTRS during the evaluation to discover and report to the Proposer any defects and errors in the submitted documents. Proposers, before submitting their documents, should carefully proof them for errors and adherence to the RFP requirements.
- k. Proposers may submit only one (1) proposal. More than one (1) proposal from an individual, firm, partnership, corporation, or association under the same or different names will not be considered. Reasonable grounds for believing that any Proposer has submitted more than one (1) proposal, for the work contemplated herein will cause the rejection of all proposals submitted by that Proposer. If there is reason for believing that collusion exists among the

Proposers, none of the participants of such collusion will be considered in this or future procurements.

6. Evaluation Process

- a. The proposal must be organized to correspond with all requirements and formats set forth in this RFP. The proposal should be clear, concise, and must be complete. All information must be contained in the proposal. No assumptions will be made by CalSTRS regarding the intentions of the Proposer in submitting the proposal. Written Proposals must be bound and organized in a manner to facilitate ease of review by evaluators. All sections will be used in the evaluation. Proposals not providing all requested information may be rejected.
- b. All proposals submitted will be evaluated for form and content in accordance with the provisions stated in the final solicitation document. Clarifications may be requested from the Proposer at any phase of the evaluation process for the purpose of clarifying ambiguities in the information presented in the proposal.
- c. Proposals and any subsequent presentations should be submitted with the most favorable terms the Proposer can offer. If CalSTRS is unable to execute an Agreement with the apparent successful competitor, CalSTRS reserves the right to award the Agreement to the next highest scoring responsive and responsible Proposer whose proposal conforms to the requirements of this solicitation document.
- d. The purpose of the proposal evaluation process is two-fold: 1) to assess the responses for compliance with the minimum qualifications, content and format requirements; and 2) to identify the Proposers that have the highest probability of satisfactorily performing the services as described herein. The evaluation process will be conducted in a comprehensive and impartial manner as set forth herein:

1) Prequalification Evaluation

- a) Each proposal package will be date and time stamped when received.
- b) Each proposal package will be inspected to ascertain that it is properly sealed and labeled. Proposals not passing this inspection may not be accepted.
- c) All proposals will remain sealed and in a secured area until opening, at which time all proposals will be opened together.
- d) All proposals will be reviewed to determine if they satisfy the minimum qualifications specified in Section D, Minimum Qualifications for the Proposer, and contain the required submittals specified in Section E, Subsection 4, Proposal Requirements.

2) Proposal Components Evaluation

Proposals that pass the prequalification evaluation review will undergo an evaluation process conducted by a team of reviewers selected by CalSTRS' Chief Executive Officer or designee. Each team member will independently evaluate and score the proposals based on the categories enumerated in the Evaluation Scoring Form, Exhibit F. Responses receiving 500 points or more will move to the Cost Proposal evaluation phase. Any response receiving less than 500 points will not move to the next phase. Miscellaneous submittals will be rated as either Satisfactory or Unsatisfactory by the Evaluation Team. These items will receive a satisfactory status as long as the item is submitted as requested in the RFP and CalSTRS finds no outstanding issues with the item. If the item is not submitted as requested in the RFP or CalSTRS finds an issue with the item, CalSTRS may contact the Proposer to request clarification. If the clarification does not, in CalSTRS' opinion, resolve the outstanding issue and CalSTRS determines the issue to be material, CalSTRS may reject the proposal.

3) Cost Proposal

Proposals that pass the Proposal Evaluation review will have their Cost Proposal envelope opened and scored by the contract services representative of the process. Costs will be computed for all proposals that obtain a minimum of 500 points on the Proposal Evaluation. The maximum points for the Cost Proposal are 490 points. The Contact Center Software as a Service Base Features, Technical Requirements and Optional Features will be scored. Each will have a weighted percentage (60% for Base Features and Technical Requirements and 40% for Optional Features). The proposal with the lowest total cost will be rated proportionally as follows:

$$\frac{\text{Lowest Fee}}{\text{Proposer's Fee}} \times \text{Maximum Number of Points} = \text{Proposer's Score}$$

4) Finalists Interviews (Optional)

Up to three (3) of the highest scoring Proposers passing the Proposal Evaluation and Cost Proposal, may be invited to an interview with CalSTRS at West Sacramento, California. At the discretion of CalSTRS, the interview may take place at the office of the Proposers. The interview will have a maximum rating of 300 points, as identified on the Evaluation Scoring Form; Exhibit F. Interview points will be added to the Cost Proposal and Proposal Evaluation points.

7. Award and Protest

- a. If at any time during or at the conclusion of this RFP process CalSTRS determines that, in its opinion, the results of this process are unsatisfactory, CalSTRS reserves the right to discontinue this process and decline to award a contract. If a contract award is made, the contract award will be made to the Proposer having the highest cumulative score(s), but may be subject to final negotiations, and satisfaction of all requirements including the Disabled Veteran Business Enterprise (DVBE) contract participation requirements for this RFP.
- b. All Proposers will be notified of the outcome of the RFP. Notice of the selected Contractor will be on CalSTRS' website at www.calstrs.com. News releases pertaining to the award resulting from this RFP shall not be made without prior written approval by CalSTRS' Chief Executive Officer or his designee.
- c. Any Proposer may file a protest against the awarding of the contract. The protest must be filed during the five (5) business days specified in the Notice of Intent to Award. Within five (5) business days after filing the protest, the protesting Proposer shall file with CalSTRS a full and complete written statement specifying the facts, evidence to support factual allegations, laws, regulations, or procedures that provide grounds for the protest. Protests are limited to the following grounds:
 1. CalSTRS failed to substantially adhere to any specified procedures as set forth in the RFP.
 2. CalSTRS failed to apply correctly the standards for reviewing the format requirements or failed to evaluate the proposals as specified in the RFP.
 3. CalSTRS failed to follow evaluation and rating methods as specified in the RFP.
 4. CalSTRS proposes to award a contract to other than the Proposer receiving the highest rating(s) and satisfactorily meeting all requirements of the final contract negotiations.
 5. CalSTRS used a method other than that set forth in the RFP to determine contract award.
- d. Protests shall be made in writing and delivered to:

Contract Services
California State Teachers' Retirement System
100 Waterfront Place
West Sacramento, CA 95605

Once a protest has been filed, the contract may not be awarded until either the protest is withdrawn or CalSTRS has decided the matter. Following the receipt of a protest, the Chief Executive Officer (CEO) of CalSTRS will either decide the matter or refer it to a committee appointed by the Teachers' Retirement Board for final resolution. The decision by the CEO or the committee of the Board shall be final. Notification of the

decision will be sent to the protesting Proposer within thirty (30) days after a decision has been reached.

8. Disposition of Proposals

Proposals that contain proprietary information should have a statement to that effect included in the cover letter with a list of all so designated pages following the cover letter. (Please label "Proprietary Information" in the upper right hand corner of any pages so designated.) CalSTRS will use reasonable efforts to exempt such pages or items from public disclosure except to the extent required by law. CalSTRS makes no representations or warranties that such efforts will be successful. Please note that the entire proposal cannot be considered proprietary. Proposal packages may be returned only at the Proposer's expense.

9. Standard Conditions of Service

- a. All performance under the agreement shall be completed on or before the termination date of the agreement.
- b. CalSTRS considers the Proposer to be in agreement with all Sample/Agreement General Terms and Conditions, Exhibit B, unless otherwise identified on Attachment 19, Conformance with Sample Contract Requirements. The absence of specific issues identified on Attachment 19, will constitute agreement with all remaining Contract Terms and Conditions.
- c. No oral understanding or agreement shall be binding on either party.

10. Disabled Veteran Business Enterprise (DVBE) Contract Participation

The California Public Contract Code (PCC) Section 10115 et seq. requires a participation goal of three (3%) percent DVBE for contracts awarded by CalSTRS. This goal applies to the total contract dollars expended by CalSTRS annually.

It is the policy of the Teachers' Retirement Board that all contracting activities are performed in accordance with all applicable state and federal laws. The Teachers' Retirement Board has adopted a policy that directs staff to encourage, promote, and facilitate the fullest possible participation by Disabled Veteran Business Enterprise (DVBE) in contracts awarded by CalSTRS. In accordance with this policy, CalSTRS encourages its contractors to seek opportunities to do business with DVBE firms.

All Proposers must complete and return Attachment 4, Statement of Commitment to Meet Disabled Veteran Business Enterprise Contract Participation Goal or submit both Attachment 17, Disabled Veteran Business Enterprise Program Requirements, demonstrating the 3% participation and Attachment 18, Disabled Veteran Business Enterprise Incentive Information and Declaration Form.

11. Authorized/Key Personnel

- a. Authorized/Key Personnel, Attachment 5, names certain members (authorized/key individuals who perform scope of services under the Agreement that will be awarded by CalSTRS) of Proposer's staff who will exercise a significant role under this Agreement. These personnel shall be hereafter referred to (both individually and collectively) as "Authorized/Key Personnel".
- b. Proposer shall not substitute, replace, or reassign Authorized/Key Personnel without CalSTRS' prior approval. However, with CalSTRS' prior approval, the parties may agree in writing to a change in these Authorized/Key Personnel, which writing shall become a part of the Agreement awarded by CalSTRS.
- c. An Agreement awarded by CalSTRS may be terminated immediately, in CalSTRS' sole discretion and upon written notice from CalSTRS to Proposer, because of any change in or departure of Proposer's Authorized/Key Personnel.

12. Disclosure of Campaign Contributions, Charitable Contributions, and Gifts; Ban on Specified Charitable Contributions and Gifts

a. Policy

Section 600 H of the Teachers' Retirement Board Policy Manual set forth policies requiring entities engaging in business with CalSTRS to disclose campaign contributions in excess of \$250, prohibits providing charitable contributions in excess of \$250, and gifts in excess of \$390, as well as requiring the periodic disclosure of campaign contributions, charitable contributions, and gifts. A copy of the current policy is attached as Exhibit H.

b. Application of Policy to Contractor

This policy applies to all Contractors having a business relationship or seeking a business relationship with CalSTRS or to any business relationship that is considered by the Teachers' Retirement Board in a closed session meeting.

c. Disclosure of Campaign Contributions

Contractor and each of its Authorized/Key Personnel shall disclose campaign contributions, as defined by the Political Reform Act, valued in excess of \$250, made to or on behalf of any existing Teachers' Retirement Board member, candidates for Board member, Controller, Treasurer, and Superintendent of Public Instruction, and to any CalSTRS officer or employee. If the business with CalSTRS is an Investment Relationship generating at least \$100,000 annual income, disclosure of campaign contributions made to the Governor or to a candidate for the governorship must also be made, according to CalSTRS' campaign contribution regulations in Title 5, California Code of Regulations section 24010.

d. Charitable Contributions

1) Limit on Charitable Contributions

Contractor and each of its Authorized/Key Personnel shall not provide any charitable contribution, as defined by the Political Reform Act, in excess of \$250, individually or in the aggregate in any calendar year, directly to or at the request of any Teachers' Retirement Board member, or CalSTRS officer or employee.

2) Disclosure of Charitable Contributions

Contractor and each of its Authorized/Key Personnel shall disclose charitable contribution, as defined by the Political Reform Act, valued in excess of \$50, made to or at the request of any Teachers' Retirement Board member, or CalSTRS officer or employee.

e. Gifts

1) Limit on Gifts

Contractor and each of its Authorized/Key Personnel shall not provide any gifts, as defined by the Political Reform Act, in excess of \$390, individually or in the aggregate in any calendar year, to any Teachers' Retirement Board member, or CalSTRS officer or employee.

2) Disclosure of Gifts

Contractor and each of its Authorized/Key Personnel shall disclose gifts, as defined by the Political Reform Act, valued in excess of \$50, made to or at the request of any Teachers' Retirement Board member, or CalSTRS officer or employee.

f. Submission of Disclosures

Contractor and each of its Authorized/Key Personnel shall, with the submission of an initial application or proposal to do business with CalSTRS, and then with the offering of a contract for execution, submit disclosures of contributions and gifts described in this section on a form prescribed by CalSTRS. The current disclosure form required to be submitted with the submission of an application or proposal is attached as Attachment 7, Form 600 Disclosure of Contributions and Gifts. After execution of a contract, Contractor must submit annual disclosures as specified in the contract.

g. Violation of Policy by Contractor

Violations of any of the provisions of this section may, at the discretion of CalSTRS, subject the Contractor to disqualification from doing future or additional business with CalSTRS for a period of two (2) years.

13. Addenda: Errors and Omissions

CalSTRS may modify any part of the RFP in writing by issuance of an addendum. Addenda issued prior to the final filing date for submission of proposals will be sent to all parties who were sent the RFP and also available on the Internet at <http://www.eprocure.dgs.ca.gov/default.htm>. Addenda issued after the final filing date will be sent to all responding Proposers as appropriate.

If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the Proposer shall immediately notify the CalSTRS Contract Services office of such error in writing and request clarification or modification of the document. Such notice shall be given prior to the final filing date for submission of proposals. Modifications of the RFP by CalSTRS shall be made by addenda. Clarifications by CalSTRS shall be issued by written notice to all parties who were sent the RFP. If, prior to the final filing date for submission, a Proposer fails to notify CalSTRS of a known error, or an error that reasonably should have been known, the Proposer shall not be entitled to additional compensation or time by reason of the error or its late correction.

The provisions of any written amendment hereto or clarification to the original RFP issued by CalSTRS pursuant to this section shall be incorporated by reference and made a part of the contract awarded as a result of this RFP.

14. Background Investigations

Contractor shall perform a background investigation that at a minimum includes: criminal records checks, credit checks, a Social Security trace, reference checks, verification of education and previous employment, and driving records checks. CalSTRS reserves the right to request additional information as it deems necessary. Upon receipt of the results of the background investigation performed by the Contractor on its contract employee, CalSTRS in its sole discretion shall have the authority to accept or reject any contract employee from working at CalSTRS.

F. PREFERENCE PROGRAMS

Proposers who may have questions regarding the following bid preferences may contact the Office of Small Business and DVBE Certification at (916) 375-4940, for Small Business preference, DVBE incentive and the TACPA/EZA/LAMBRA Preference Program Group at (916) 375-4609.

1. Small Business Preference – <http://www.pd.dgs.ca.gov/smbus/sbpref.htm>
2. Disabled Veteran Business Enterprise Incentive – <http://www.pd.dgs.ca.gov/dvbe/dvbeincentive.htm>
3. Target Area Contract Preference Act (TACPA) – <http://www.pd.dgs.ca.gov/edip/tacpa.htm>
4. Enterprise Zone Act (EZA) – <http://www.pd.dgs.ca.gov/edip/eza.htm>
5. Local Agency Military Base Recovery Area (LAMBRA) Act – <http://www.pd.dgs.ca.gov/edip/lambra.htm>

ATTACHMENT 1

REQUIRED ATTACHMENT/SUBMITTAL CHECKLIST

 Proposer Firm Name

Please complete this checklist to confirm the items in your proposal. Place a check mark or "X" next to each item that you are submitting to CalSTRS. For your proposal to be responsive, all required attachments must be returned, including this checklist. Submit the two (2) copies of your proposal in a sealed package. One (1) copy must contain the original signatures of the individual who is authorized to bind the Proposer contractually.

<u>Attachment</u>	<u>Attachment Name/Description</u>
☐ Attachment 1	Required Attachment/Submittal Check List
☐ Attachment 2	Proposer Client References
☐ Attachment 3	Proposal Questionnaire
☐ Attachment 4	Statement of Commitment to Meet Disabled Veteran Business Enterprise Contract Participation Goal
☐ Attachment 5	Authorized/Key Personnel
☐ Attachment 6	Proposed Personnel Summary and Reference Sheet
☐ Attachment 7	Form 600 H Disclosure of Contributions and Gifts
☐ Attachment 8	Warranties Certification
☐ Attachment 9	Subcontracting Firm List
☐ Attachment 10	Features Summary Form – Required Base Features
☐ Attachment 11	Features Summary Form – Optional Features (Including Technical Requirements)
☐ Attachment 12	Cost Proposal
☐ Attachment 13	Verint Features Summary Form
☐ Attachment 14	Technical Requirements Form
☐ Attachment 15	Minimum Qualifications Certification
☐ Attachment 16	Darfur Contracting Act
☐ Attachment 17	California State Teachers' Retirement System DVBE Program Requirements
☐ Attachment 18	Disabled Veteran Business Enterprise (DVBE) Incentive Information and Declaration Form
☐ Attachment 19	Conformance with Sample Contract Requirements

ATTACHMENT 1, Continued

REQUIRED ATTACHMENT/SUBMITTAL CHECKLIST

Proposer Firm Name

Miscellaneous Submittals Name

____ Proof of Financial Solvency

- 10K's (for the most recent three years)

Or

- Audited Financial Statements (for the most recent three years)

____ Proof of Security Compliance

- SAS70 Certified Security

____ Project Schedule

____ Sample Manuals

- User
- Training
- Train-the-trainer
- System Administration

____ Disaster Recovery Plan

ATTACHMENT 2

PROPOSER CLIENT REFERENCES

 Proposer Firm Name

List below four (4) Client References, for which your firm has provided similar services as described in the Features Summary Forms, Attachment 10 & 11, Technical Requirements Forms, Attachment 14 and the Scope of Work, Exhibit A. CalSTRS reserves the right to contact any of the persons/companies provided below, and also retain this right to conduct reference checks beyond that supplied by the Proposer. CalSTRS also reserves the right to contact the references and conduct onsite tours.

Failure to complete and return this Attachment will cause your proposal to be rejected.

REFERENCE 1			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person Name:	Telephone Number Email Address		
Begin and End Dates for Implementation of Service: Begin Date of Maintenance and Operation (Go Live Date):			
Description of Contract Scope: Number of Agents:			
REFERENCE 2			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person Name:	Telephone Number Email Address		
Begin and End Dates for Implementation of Service: Begin Date of Maintenance and Operation (Go Live Date):			
Description of Contract Scope: Number of Agents:			

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ATTACHMENT 2, Continued

PROPOSER CLIENT REFERENCES

 Proposer Firm Name

REFERENCE 3			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person Name:		Telephone Number Email Address	
Begin and End Dates for Implementation of Service: Begin Date of Maintenance and Operation (Go Live Date):			
Description of Contract Scope:			
Number of Agents:			
REFERENCE 4			
Name of Firm			
Street Address	City	State	Zip Code
Contact Person Name:		Telephone Number Email Address	
Begin and End Dates for Implementation of Service: Begin Date of Maintenance and Operation (Go Live Date):			
Description of Contract Scope:			
Number of Agents:			

ATTACHMENT 3

PROPOSAL QUESTIONNAIRE

This Proposal Questionnaire is intended to provide CalSTRS with specific information concerning the firm's capability to provide services as described in this RFP. Please limit your response to this questionnaire to no more than one (1) page per question, unless otherwise stated and type each question in the same number order as in the questionnaire.

The questionnaire must be completed in the format prescribed below; all questions must be repeated in their entirety before the answers are given. Incomplete submittals and/or responses that deviate materially from this prescribed format may lead to the rejection of the proposal.

FIRM NAME: _____

MAIN ADDRESS: _____

AUTHORIZED SIGNOR NAME: _____

Title: _____

Phone: _____ Fax: _____

E-mail address: _____

CONTACT NAME: _____

Title: _____

Phone: _____ Fax: _____

E-mail address: _____

OTHER OFFICE LOCATIONS: _____

OWNERSHIP STRUCTURE:

Corporation: _____ Public _____ Private

Partnership: _____

Individual: _____ Other: _____

ATTACHMENT 3, Continued

PROPOSAL QUESTIONNAIRE**A. Proposer's Firm Background Questions**

1. Submit a statement indicating what year the firm was founded; the primary business of the firm; the firm's management structure; and the length of time the firm has been a Contact Center Software as a Service (SaaS) provider.
2. Provide information on the locations of the headquarters office and branch offices that will be providing services under the agreement. Identify the individual who has overall responsibility for the firm's operations and his/her tenure with the organization.
3. Describe your methodology for project and change management (i.e., PMBOK, ITIL, etc.) as it relates to the following items:
 1. Project Planning
 2. Requirement Discovery and Validation
 3. Design (as it relates to the integration with CalSTRS systems)
 4. Configuration/Development
 5. Testing (Unit, System, Regression and UAT)
 6. Training
 7. Implementation
 8. Transition to Maintenance and Ongoing Operations

B. Project and Deliverable Questions

4. Describe what your actions will be if milestones are not met.
5. Describe your process for dealing with unplanned disruptions of service, including a communication plan for notification and updates.
6. Describe staffing that will be provided for on-site support for CalSTRS staff during the first thirty (30) days post GoLive.

C. Security Questions

7. Describe in detail how you will provide a Contact Center Solution that adheres to and implements CalSTRS' security standards. (Security Exhibit F)

ATTACHMENT 3, Continued

PROPOSAL QUESTIONNAIRE**D. General Solution Questions**

8. The solution must be able to support both on-site and remote agents, yet still be managed as a single platform from any location. All users (whether on-site or remote) should have access to the same functionality based on their “role”. Describe how this will be accomplished.
9. Describe the technology hardware and software infrastructure that will be utilized to deliver this solution. Please include the address locations of all data centers and recovery sites. Describe redundancy and failover features as well as the backup and recovery procedure for the proposed solution.
10. Describe the network monitoring tools that are in place to identify technical issues. Describe the process for notifying CalSTRS when there is an issue that will impact CalSTRS.
11. CalSTRS requires 180 days retention of Contact Center data at the provider’s site. Please describe how the proposed solution will support this requirement. CalSTRS desires to retain Contact Center data longer than 180 days. Does your solution have the means to export or download data generated by the proposed solution?
12. Does the proposed solution require that desktop client software be installed on agents’ personal computers? Please list the desktop configurations that need to be installed on each desktop for the software to run correctly. This includes browser settings, dual monitor functionality, video card requirements, executables, etc.
13. Are the desktop requirements the same on all desktops regardless of Operating Systems, role or environment? If not, please explain.
14. CalSTRS prefers to have unified reporting capability from a single data source. Will there be two data sources – IVR and ACD - or will it be aggregated together for reporting? Describe how this will be accomplished.
15. What are the maintenance windows that may affect the proposed solution? How will you ensure the maintenance windows do not affect CalSTRS during CalSTRS’ operational hours?
16. What are the connectivity requirements between Contractor network site and CalSTRS’ HQ in West Sacramento? Between Contractor network site and remote users? Between CalSTRS’ Headquarters in West Sacramento and remote users?

ATTACHMENT 3, Continued

PROPOSAL QUESTIONNAIRE**E. Licensing Questions**

17. Describe your licensing policy. Include if licenses are based on “concurrent”, “per seat” or some other usage method. Include all licenses (Agent, Supervisor, System Administrator and Reporting). These must be included in the Cost Proposal Attachment 12.

F. Test Phases

18. Describe the testing process and the responsible party for your proposed testing phases.

G. Training Phase

19. Describe the training environment that will be made available for CalSTRS.
20. Provide a proposed training approach describing training classes needed for the entire Contact Center Solution, class outlines, and role of participants (end users, supervisors, data analyst, system administrators, etc.). Please include durations for each class, the maximum number of attendees per session and onsite or remote facilitation. (You may use more than one (1) page).
21. Describe how the manuals will be updated as system changes occur.

ATTACHMENT 4

**STATEMENT OF COMMITMENT TO MEET
DISABLED VETERAN BUSINESS ENTERPRISE
CONTRACT PARTICIPATION GOAL**

If selected as a potential contractor, _____
(Proposer Name) hereby commits to meeting or exceeding the contract participation goal of three percent (3%) Disabled Veteran Business Enterprise, in accordance with the provisions of Public Contract Code Section 10115.

Authorized Signor Name

Title

Signature

Date

ATTACHMENT 5

AUTHORIZED/KEY PERSONNEL

Proposer Firm Name

The names and titles of the personnel authorized to conduct business on behalf of the Contractor in a decision-making capacity are as follows:

Signature _____

Name (Typed) _____

Title (Typed) _____

Date _____

E-mail _____

Signature _____

Name (Typed) _____

Title (Typed) _____

Date _____

E-mail _____

Signature _____

Name (Typed) _____

Title (Typed) _____

Date _____

E-mail _____

Signature _____

Name (Typed) _____

Title (Typed) _____

Date _____

E-mail _____

ATTACHMENT 6

PROPOSED PERSONNEL SUMMARY AND REFERENCE SHEET

Proposer Firm Name

Please limit your response to this personnel summary and reference sheet to no more than one (1) page per question, unless otherwise stated and type each question in the same number order as in the personnel summary and reference sheet.

Proposers' Name	
Proposed Personnel Name	
Project Role	
1. Professional Qualifications (including any certifications) <u>Description</u>	
2. Related project experience <u>Description</u>	
3. Duties and responsibilities on the CalSTRS Contact Center Solution Project <u>Description</u>	

ATTACHMENT 8

WARRANTIES CERTIFICATION

The signature affixed hereon and dated certifies that the Proposer agrees to the incorporation of the following warranties in any contract awarded pursuant to this RFP:

1. Proposer warrants that it is willing and able to comply with California laws with respect to foreign (non-California) corporations.
2. Proposer warrants that it maintains errors and omissions insurance providing a prudent amount of coverage for negligent acts or omissions and that such coverage is applicable to Contractor's actions under the Contract.
3. Proposer warrants that it maintains or shall cause to be maintained as "All Risk Coverage" for property damage and business interruption (including computers and their peripheral equipment) subject to policy terms and conditions.
4. Proposer warrants that it will not delegate its fiduciary level of responsibilities under the Contract.
5. Proposer warrants that it has completed, obtained and performed all registrations, filings, approvals, authorizations, consents or examinations required by a government or a governmental authority for acts contemplated by the Contract.
6. Proposer warrants that its firm and its employees shall not disclose any information made available to the firm by CalSTRS for the purpose of providing services under the contract.
7. Proposer warrants that all materials provided by CalSTRS and that all copies or derivations of said materials, will be returned to CalSTRS or will be physically and/or electronically destroyed upon request by CalSTRS.
8. Proposer warrants that it will not enter into any agreements or discussions with a third party concerning such materials prior to receiving written approval from CalSTRS to do so.

ATTACHMENT 8, Continued

WARRANTIES CERTIFICATION

9. Proposer agrees to promptly notify CalSTRS of any changes in Proposer's compliance with the warranties stated herein and agrees to restore the warranties as required by CalSTRS, in the event of a lapse. In the absence of a notice to CalSTRS to the contrary, CalSTRS has the right to rely on the on-going effectiveness of each warranty contained herein.
10. If applicable, further and other warranties will be determined at the time of execution of the contract agreed upon by both the Proposer and CalSTRS.

Name of Firm

Date

Proposer's Authorized Signature

Printed Name

ATTACHMENT 9

SUBCONTRACTING FIRM LIST

Proposer Firm Name

Proposer certifies that:

___ **Some of the services required by CalSTRS shall be provided by subcontracting firms hired by the Proposing Firm.**

___ **All of the services required by CalSTRS shall be provided by the Proposing Firm.**

Listed hereinafter is the name and address of each Subcontracting Firm who will be employed, the kind of work each will perform and the percentage of the total cost of the Proposal that the Subcontracting Firm will perform.

If further space is required for the list of proposed Subcontractors additional sheets showing the required information, as indicated below, shall be attached hereto and made part of the Proposal.

SUBCONTRACTING FIRM NAME AND ADDRESS	BUSINESS LICENSE NUMBER	SERVICE THE SUBCONTRACTING FIRM WILL PROVIDE	PERCENT OF TOTAL COST FOR ALL YEARS SUBCONTRACTING FIRM WILL PERFORM

Proposer's Printed Name

Proposer's Authorized Signature

Date

ATTACHMENT 10

FEATURES SUMMARY FORM**REQUIRED BASE FEATURES**

The following table identifies those features that the Contact Center wants to include in this implementation. Those features that have been identified below as 'Base' are those that will need to be part of this RFP scope of work and will need to be included in the Cost Proposal, Attachment 12, Base Features Table 1 – Contact Center Base Feature Costs.

Items that have a check (X) in the Integration (Int.) column will require some integration with another system either within the Contractor's or CalSTRS' networks. Additional Contact Center technical requirements are listed in Attachment 14, Technical Requirements Form.

Please list supporting detail information and/or assumptions in the last column that describes the offered feature. If appropriate, include the name of the feature/tool that will provide this functionality.

At the end of this table, there is a section titled 'Additional Functionality Not Listed'. Please list any functionality that is not listed in this table but is offered by the solution proposed AND is included in one of the items listed in the Required Base Features table.

Item	Base/Opt.	Feature Name	Int.	Description	Supporting Detail/Assumptions
A. Enhanced Automated Call Distribution (ACD)					
A.1	Base	ACD Make Busy Walk Away Codes		The proposed solution allows ACD agents the ability to place themselves in a 'not ready' state by selecting another reason code. CalSTRS' prefers agents don't have to go 'ready' between every state change.	
A.2	Base	ACD Logout Agent No Answer Timer		The proposed solution defines the length of time a call rings an available ACD set before the system automatically logs out the agent. The call is then re-queued back into all of the agent groups it was in prior to the call being offered to this agent.	
A.3	Base	ACD Instantaneous Events Feature Level		The proposed solution generates a Hold Retrieve event under the following conditions: A held call is retrieved on the key line on which the agent that initiated the hold originally placed the party. Any variation will be considered Hold Abandon.	
B. Contact Routing					
B.1	Base	Contact Routing (24 hours per day, 7 days per week)		The proposed solution supports (24 hours per day and 7 days per week) Contact Center operations.	
B.2	Base	Time-of-Day Routing		The proposed solution automatically changes messages and contact routing rules after business hours and on weekends/holidays. As an example, a message could ask the customers to call back during business hours.	

ATTACHMENT 10, Continued

FEATURES SUMMARY FORM**REQUIRED BASE FEATURES**

B.3	Base	Skills-based Routing	X	The proposed solution routes all contact types using agent-based skills. Currently, there are 12 skill groups with 4 levels of experience. For example, the ability to have a voice call routed to an agent with a particular combination of skills that could handle a particular call type, such as an agent that could handle retirement questions and death benefits.	
B.4	Base	Multiple Contact Centers		The proposed solution has the capacity to support remote agents. This would provide the ability to consider agents in all locations when routing to the next available agent.	
C. Interactive Voice Response (IVR)					
C.1	Base	Remote Administration		The proposed IVR solution will have remote access capabilities for system administration and controls.	
C.2	Base	IVR Administrator		The proposed IVR solution will have easily adjustable menu prompts and call flow controls for navigation updates. Call flow options must also include capabilities for custom "up-front" messages to be recorded and invoked by the administrator.	
C.3	Base	Opt-out Navigation Data		The proposed IVR solution captures navigational information while the customer is in the IVR solution. When the customer opts out to the contact center, the IVR solution should capture the navigational details, such as the point in the IVR application where the customer pressed 0. The navigational data could then be used to report on IVR usage and an analysis of IVR efficiency.	
D. Multimedia Queuing					
D.1	Base	Queue Voice		The proposed solution queues voice calls until an agent becomes available.	
D.2	Base	Queue VoIP		The proposed solution queues voice over internet protocol (VoIP) calls until an agent becomes available.	
E. Queued Contacts					
E.1	Base	Expected Wait Time		The proposed solution will accurately inform customers of their approximate wait time while in queue. The expected wait time will be announced prior to being placed in queue. Updates will be announced periodically while in queue. Algorithm will be robust enough to accurately reflect agent availability for small to mid-range contact centers. This feature will be able to turn on or off to meet customer business needs.	
E.2	Base	Music In Queue and On Hold		The proposed solution will play music while the customers are waiting in queue and on hold. CalSTRS will have the ability to choose and change the music selection as needed.	
E.3	Base	No Entry Required		The proposed solution will continuously queue contacts without the customer having to take some action to remain in queue.	

ATTACHMENT 10, Continued

FEATURES SUMMARY FORM**REQUIRED BASE FEATURES**

E.4	Base	Informational Messages		The proposed solution will provide messages to customers while in queue and on hold. These messages could be used to extend the CalSTRS branding and facilitate public communication.	
F. Desktop Integration					
F.1	Base	Transfer	X	The proposed solution will transfer calls within the ACD application and outside of the ACD application (Cisco Call Manager) using the desktop application.	
F.2	Base	Auto Aux Out		The proposed solution will detect when an agent walks away from the phone without properly logging off or moving into "not ready". If an ACD call is routed to an agent and the agent is not at his/her desk or in the right status, the system will automatically log the agent off and place the call back in queue.	
G. Call Recording					
G.1	Base	Record Inbound and Outbound Calls	X	The proposed solution will support both audio and video/keystrokes recording on all inbound and outbound ACD business calls. A separate personal phone line must not be recorded.	
G.2	Base	Search Calls	X	The proposed solution will allow all indexed values to be able to be searched by a number of variables. Index values include Social Security Number, Client ID, date, time, agent (agent ID at least), NCID and duration of the call. The index must indicate the storage location (storage ID).	
H. Instantaneous Monitoring					
H.1	Base	Agent Auto Logoff		The proposed solution allows agents to be automatically logged off of all systems (ACD, SSO, etc.) based upon predefined business rules.	
I. Reporting					
I.1	Base	Ad Hoc Reports	X	The proposed solution must provide granular, comprehensive, field-level reporting, using flexible criteria, on an ad hoc basis for use by Customer Service staff. Solution reports are customizable in both content and format/design. CalSTRS prefers a GUI interface for ad hoc reporting capabilities.	
I.2	Base	Historical Reports	X	The proposed solution provides historical reporting of Contact Center statistics for a period of 180 days which starts at GoLive. Must be able to export/download data in XML or other supportable format.	
I.3	Base	Performance Reports	X	The proposed solution provides agents performance reporting which includes ALL states and activities by person, unit and the Contact Center Service. This will be based on but not limited to the sample reports in Exhibit K.	
I.4	Base	Easy Export	X	The proposed solution reports support the easy export of data using industry standard formats such as Excel and Comma Separated Values (CSV).	

ATTACHMENT 10, Continued

FEATURES SUMMARY FORM**REQUIRED BASE FEATURES**

I.5	Base	Easy to Print	X	The proposed solution reports to print to any LAN-based printer.	
I.6	Base	Easy to Read / Understand	X	The proposed solution reports are easy to read and understand.	
I.7	Base	Service Level Reports	X	The proposed solution provides reporting on service levels separated by individual queue, groups of queues and overall.	
I.8	Base	Web-based Interface	X	The proposed solution will provide reports accessible via a web-based interface.	
I.9	Base	Graphs	X	The proposed solution displays graphs and charts in reports in addition to printed text.	
I.10	Base	Agent-Level Reports	X	The proposed solution allows requests and receives user-friendly reports online at the agent desktop.	
I.11	Base	Cradle-to-Grave Reports	X	The proposed solution will track contacts when it first enters the system until the contact is completed.	
I.12	Base	IVR Navigational Details	X	The proposed solution will capture and report on the navigational data captured while customers use the IVR.	
J. Time and Attendance					
J.1	Base	Capture Segment Activity		The proposed solution will capture basic time and attendance information. The solution will be able to capture shift login and shift logout times and time spent on various work segments. For example the solution will be able to capture the time spent answering calls, answering secured emails, on break, at lunch, on research, etc.	
J.2	Base	Enter Time		The proposed solution provides a method for agents to record time spent on activities other than production work in the various work queues (e.g. training, meetings, projects, etc.).	
K. Business Continuity					
K.1	Base	Emergency Message		The proposed solution will be able to record an emergency message in the system and have that message played to incoming callers.	
K.2	Base	Receive Calls		The proposed solution allows for remote agents to receive incoming phone calls via CalSTRS main 800 number when the main site is inoperable.	
L. Interfaces					
L.1	Base	Americans With Disabilities Act (ADA) Compliant		The proposed solution is ADA compliant including desktop applications for select agents.	
M. System Administration					
M.1	Base	Shared Directory		The proposed solution has the ability to have a desktop soft phone shared directory.	
N. VoIP Features the Contact Center Solution Must Integrate With					
N.1	Base	Auto Attendant	X	The proposed solution has the capability for customers to be transferred to a known extension after inputting an extension number in the IVR. (Please describe if the extension will be 4, 7 or 10 digits)	
Additional Functionality Not Listed					

ATTACHMENT 11

FEATURES SUMMARY FORM**OPTIONAL FEATURES****(INCLUDING TECHNICAL REQUIREMENTS)**

The following table identifies those features and technical requirements that the Contact Center may include in subsequent implementations. Items listed as Opt. (Optional) could be part of the initial scope of work or be implemented at a later date. During the Requirement Phase, optional features and technical requirements will be discussed and implementation timelines will be finalized. The optional features and technical requirements (included in the table) must also be included in the Cost Proposal, Attachment 12, Optional Features Table 2 – Contact Center Optional Feature Costs.

Items that have a check (X) in the Integration (Int.) column will require some integration with another system either within the Contractor's or CalSTRS' networks.

Please list any supporting detail information and/or assumptions in the last column that describes the offered feature or adds more detail to the technical requirement. If appropriate, include the name of the feature/tool that will provide this functionality.

At the end of this table, there is a section titled 'Additional Functionality Not Listed'. Please list any functionality that is offered by you but is not included the Required Base Features and Optional Features tables.

Item	Base/ Opt.	Feature Name	Int.	Description	Supporting Detail/Assumptions
A. Enhanced Automated Call Distribution (ACD)					
A.4	Opt.	ACD Auto Logout		The proposed solution enables automatic log off of agents who entered defined and adjustable thresholds for activity statuses.	
A.5	Opt.	ACD Silent Monitoring – Allowed		The proposed solution allows the supervisor ability to listen in on agents' conversations, with or without the agents knowing it.	
B. Contact Routing					
B.5	Opt.	Multimedia Routing	X	The proposed solution queues contacts from a variety of media types and manage these contacts in a similar fashion as voice calls. These media types could include contacts such as fax, email, secure messaging, imaged postal mail, and web chats.	
B.6	Opt	Skills Based Routing Decisions	X	The proposed solution uses data from external data sources, such as the START mainframe application and IVR data (that could include caller entered digits and/or data obtained through database lookups performed by the IVR Solution) when making skills-based routing decisions.	

ATTACHMENT 11, Continued

FEATURES SUMMARY FORM**OPTIONAL FEATURES****(INCLUDING TECHNICAL REQUIREMENTS)**

C. Interactive Voice Response (IVR)					
C.4	Opt	Point-of-Service Survey	X	The proposed solution can offer the customer the opportunity to take a survey at the conclusion of the call. This offer would be made prior to the customer being queued. If the customer elects to take the survey, the solution will transfer the customer to the survey application when the agent disconnects. The agent should not know that the customer requested to take the survey. Independent survey should be available for each ACD and contact type (call, fax, chat, etc.) Results must be tracked to the individual agent, call data (e.g., NCID, call length, date of call, call duration, skill queue, length of time caller waited in queue before reaching an agent, etc.), and individual member profile (client ID, etc.) Questions should be changeable over time with historical data tracked.	
D. Multimedia Queuing					
D.3	Opt	Queue Correspondence	X	The proposed solution will have incoming traditional correspondence queued in a separate queue in the same way that incoming phone calls are handled. Traditional correspondence is currently scanned into CalSTRS' Imaging System and will need to be interfaced with the proposed solution.	
D.4	Opt	Queue Email	X	The proposed solution will have incoming emails, including secure emails through the On-Line Messaging System, routed to a separate queue and handled in the same way that incoming phone calls are handled.	
D.5	Opt	Queue Callbacks		The proposed solution will allow customers to leave a call back request queued like any other contact. If the customer requested a specific day and/or time, the solution would queue the callback accordingly. At the designated date/time, the solution would route the call to an agent for processing. The solution should have the ability to automatically dial the associated phone number using preview dialing.	
D.6	Opt	Queue Callbacks-Contact Center Closed		Same functionality as D.5 but available (24 hours per day and 7 days per week) which includes closed/after hours.	
D.7	Opt	Queue Live Chat Sessions	X	The proposed solution will allow customers to type messages on to an Internet screen and interactively chat with an agent. The messages should be delivered into a separate contact center queue and treated like an incoming phone call (e.g., skills-based routing, business rules, etc.).	
D.8	Opt	Queue Web Communications	X	The proposed solution will allow the customer to speak into their Personal Computer and have the voice message queued like an incoming phone call. Optionally, the customer could request a call back when an agent becomes available (see item D.5)	

ATTACHMENT 11, Continued

FEATURES SUMMARY FORM**OPTIONAL FEATURES****(INCLUDING TECHNICAL REQUIREMENTS)**

E. Queued Contact					
E.5	Opt	Virtual Queue		The proposed solution will provide the customers with the option while in queue to hang up and keep their place in queue. When it is their turn in queue, the solution will call the member back and connect them with an agent with the appropriate skill set.	
F. Desktop Integration					
F.3	Opt	Directory Dialing	X	The proposed solution will be able to dial from the agent desktop using a drop down list of destinations. This list should source data via active directory.	
F.4	Opt	Forms Library	X	The proposed solution will supply a library of commonly-used forms contained within the system that can be accessed and sent to customers using various types of transmissions, for example, postal mail, email or fax from agent desk. The forms library needs to be keyword searchable.	
F.5	Opt	Single Sign On	X	The proposed solution needs to provide a single sign on for all Contact Center Solution applications.	
F.6	Opt	Co-Browsing	X	The proposed solution has the capability to share a web browser session with a customer. For example, an agent, while speaking with a customer, could direct the customer's web browser to a given page on myCalSTRS. There should be a security mechanism that can control access based on the URL, so access can be restricted to read only or no access for the agent. For example, CalSTRS would like the agent to not be able to see the password entered on the password reset screen during a co-browse session with a customer. The security mechanism needs to be auditable at a system level.	
H. Instantaneous Monitoring					
H.2	Opt	Supervisor Dashboard		The proposed solution provides supervisors with the ability to monitor statistics instantaneously, including number of calls in the queue, wait times, average handle time, agents logged on to the system, agents' status and durations, etc. The supervisor dashboard should be customizable by CalSTRS and provide reporting capability.	
H.3	Opt	Supervisor Monitoring		The proposed solution allows supervisors to silently listen in on an agent's active call.	
H.4	Opt	Agent Dashboard		The proposed solution provides agents instantaneous detailed feedback on their current-day individual call handling statistics, via their personal computer screen. It also allows agents to view the instantaneous overall Contact Center data (e.g., number of calls in queue, longest wait time) via their desktop. Includes the ability to notify agents of events such as schedule changes and various ad-hoc notifications.	
I. Reporting					
i.13	Opt	Historical Reports		The proposed solution will be able to integrate historical data from the current CalSTRS Contact Center system into the new Contact Center Solution database.	

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ATTACHMENT 11, Continued

FEATURES SUMMARY FORM**OPTIONAL FEATURES****(INCLUDING TECHNICAL REQUIREMENTS)**

L Interfaces					
L.2	Opt	Online Secure Messaging Interface	X	The proposed solution integrates with CalSTRS' custom online messaging application into myCalSTRS.com which serves as the secure messaging system for member emails and responses provided by the Contact Center. CalSTRS' website, my.CalSTRS.com (an N tier, .NET application) has built-in functionality for secure messaging between members and Contact Center staff. Member's inbound secure messages are initially assigned to a unique queue that is worked by Contact Center staff with that skill set. (see Item D.4)	
L.3	Opt	Imaging Interface	X	The proposed solution interfaces with CalSTRS' Imaging application which is used for storing, retrieving, and viewing correspondence, forms and other documents associated with member accounts. This CalSTRS' system is an N tier, .NET custom application with a FileNet backend used to store images. CalSTRS' web site, myCalSTRS.com interacts with the CalSTRS imaging system via web service call.	
Additional Functionality Not Listed					

ATTACHMENT 12

COST PROPOSAL

Proposer Firm Name

Proposers must submit their service fees and one-time set-up labor costs in the format prescribed in Attachment 12, Cost Proposal.

Note: *Attachment 12 MUST be returned with the submission. Failure to provide this information using the prescribed format may disqualify the Proposer. The Proposer must also include hard-copy printouts of the electronic information submitted as indicated herein.*

A. Table 1 – Contact Center Base Feature Costs and Attachment 12 – Technical Requirement Costs

Description: This Cost Proposal Attachment contains all the costs proposed by the Proposer for the Contact Center Required Base Features and the Technical Requirements for the 3 year term of the contract. The Proposer shall not modify any of the information provided by CalSTRS in this Attachment.

1. **One-Time Set-Up Fee**

- a) Enter the amount for the one-time implementation charges in the Total column. All Base Features listed on Attachment 10 and Technical Requirements Form listed in Attachment 14 must be included in this cost. This must be entered on the Contact Center Base Feature Costs Table.

2. **Monthly Service Charge**

- a) Use the following criteria to calculate the Monthly Service Charge and enter the unit cost per item:
- 1) 100 agents (CalSTRS current usage is approx 35 agents per day. An additional 65 users (potential agents) are logged in and available to take calls if the demand is high)
 - 2) 20 supervisory agents (CalSTRS current usage is approximately 10 supervisors per day)
- b) Multiply the Monthly Service Charge by the number of months for the Fiscal Year (FY). The Fiscal Year for CalSTRS is July through June.
- 1) FY 10/11 – 3 months (Assumes GoLive of April of 2011)
 - 2) FY 11/12 – 12 months
 - 3) FY 12/13 - 12 months
 - 4) FY 13/14 – 9 months

ATTACHMENT 12, Continued

COST PROPOSAL

Total – Sum the amounts for FY 10/11, FY 11/12, FY 12/13 and FY 13/14 and enter the results.

3. **Total Contact Center Base Features and Technical Requirements for All Fiscal Years**

- a) Sum the Monthly Service Charge Total and the One-Time Setup Fee and enter the results.

4. **Incremental Monthly Cost to Add an Agent**

- a) Enter the monthly service charge that will be incurred if CalSTRS requests to add an agent.

5. **Incremental Monthly Cost to Add a Supervisory Agent**

- a) Enter the monthly service charge that will be incurred if CalSTRS requests to add a supervisory agent.

6. **Hourly Rate to Support Requests for Changes**

- a) Enter the hourly rate that will be charged to support Requests for Changes outside of the ongoing maintenance costs.

B. Table 2 – Contact Center Optional Feature Costs

Description: This table provides the costs for each Optional Feature and includes Technical Requirements that CalSTRS may select either for this implementation or at a later date. The description of Optional Features and Technical Requirements are contained in the Optional Features Summary Form, Attachment 11. The Proposer shall not modify any of the information provided by CalSTRS in this Attachment.

7. **One-Time Set-Up Fee for Optional Features**

- a) Enter the amount of the incremental one-time charges for project management, design, development/configuration and implementation for each Optional Feature in the Total column. If there is no set-up fee for that feature, please enter zero in the column.

ATTACHMENT 12, Continued

COST PROPOSAL**8. Monthly Service Charges**

- a) Enter the Monthly Service Charge (per seat, per feature, or per month charge) for each individual Optional Feature listed in Item 7 (One-Time Setup Fee). Please list all Optional Features in the table. If no monthly service charge applies to the feature, please place a zero in the field. Use the following criteria to calculate the Monthly Service Charge and enter the unit cost per item:
- 1) 100 agents (CalSTRS current usage is approx 35 agents per day. An additional 65 users (potential agents) are logged in and available to take calls if the demand is high)
 - 2) 20 supervisory agents (CalSTRS current usage is approximately 10 supervisors per day)

ATTACHMENT 12, Continued

COST PROPOSAL**Table 1**
Contact Center Base Feature Costs

Contact Center Base Features and Technical Requirements	# of Units	Unit Cost	Monthly Service Charge	FY 10/11 (3 months)	FY 11/12 (12 months)	FY 12/13 (12 months)	FY 13/14 (9 months)	Total
Total One-Time Setup Fee								
Monthly Service Charge								
Total Contact Center Base Features All Fiscal Years								
Incremental Monthly Cost to Add an Agent								
Incremental Monthly Cost to Add a Supervisory Agent								
Hourly Rate for Request for Changes (e.g., new report, add an ACD)								

ATTACHMENT 12, Continued

COST PROPOSAL**Table 2**
Contact Center Optional Feature Costs

Contact Center Optional Features including Technical Requirements	Unit Cost	# of Units	Monthly Service Charge	Total
<i>One-Time Setup Fee (Please include all costs for each Optional Feature)</i>				
<i>Monthly Service Charge (Please list all Optional Features from above)</i>				

ATTACHMENT 13

VERINT FEATURES SUMMARY FORM

The following table identifies those Verint Impact 360 features (Quality Monitoring, Call Recording, Workforce Management and Performance Management) that have been implemented with the current solution. The current Verint system will not be replaced with the Proposer's solution. The Verint system resides at CalSTRS in West Sacramento. The proposed solution must be able to support and integrate with these features listed in this table.

Item	Base/ Opt.	Feature Name	Int.	Description
1.	Base	Archive Calls		The proposed solution will support the Verint solution so that voice recordings are automatically archived according to business rules. If a call is current, it can be instantly retrieved.
2.	Base	Index Calls		The proposed solution will support the Verint solution so that calls will be visible in the index immediately upon hanging up the call. Index variables must include Caller ID, Client ID number, Social Security Number, date, time, and agent (agent ID at least), and the duration of the call. The index must indicate the storage location (storage ID).
3.	Base	Play Calls		The proposed solution will support the Verint solution for the user to select one or more calls from a list for retrieval.
4.	Base	Play Options		The proposed solution will support the Verint solution so that selected calls can be replayed, with rewind and pause facilities, on the selected medium (phone, CD, PC).
5.	Base	Record Calls		The proposed solution will support the Verint solution so that every business call is digitally recorded (audio and visual/keystrokes), and visible in the recording index. Any failure to record is reported by the system immediately to the system administrator. Supervisors can listen-in as they currently do. Agents have two (2) phone lines, personal line and ACD. Personal calls on the agents separate personal phone line will not be recorded.
6.	Base	End-to-End Record		The proposed solution will support the Verint solution so that when transferring a call to another agent, the call recording (both audio and video/keystrokes) will continue. The call must be indexed under the original agent. The call will also be indexed for the additional agent(s). All call segments will be recorded and indexed so that the entire call can be played back. Must also support recording a 3-way call.
B. Quality Assurance				
7.	Base	Real-time Screen Capture	X	The proposed solution will support the Verint solution to have the ability to record both workstation video and telephone audio for QA review on both inbound and outbound calls. The solution will support the recording of video from both single and dual monitors.
8.	Base	Copy Quality Assurance Calls		The proposed solution will support the Verint solution with the ability to copy selected QA recordings into additional folders where they can be used for training purposes.
9.	Base	QA Forms		The proposed solution will support the Verint solution's use of QA forms when scoring agents. These forms will be customizable and support functions such as missing field detection and alerts, mandatory fields, and version control. The solution will be able to support an unlimited number of forms.
10.	Base	Listen to Calls		The proposed solution will support the Verint solution with the ability for a designated person to be able to select calls for review from a list, and have the calls sent to them for rating. Alternatively, all calls identified for review will be sent automatically to the appropriate person. Using the call selection parameters defined by management, the system will identify calls for one or all agents for a given period
11.	Base	Print forms		The proposed solution will support the Verint solution with the ability to easily print forms and export data to common formats such as Comma Separated Values (CSV).
12.	Base	QA Data Retention		The proposed solution will support the Verint solution with the ability to save a proportion of QA recordings and scoring data indefinitely.

ATTACHMENT 13, Continued

VERINT FEATURES SUMMARY FORM

13.	Base	Rate Calls		The proposed solution will support the Verint solution so that for any call, the QA analyst and/or supervisor will rate the call for quality assurance. The supervisor might receive the call automatically (e.g., e-mail), select a call from a list of random calls, or retrieve via the index. The rating is recorded in the system. This feature is available on the supervisors' desktop application.
C. Reporting				
14.	Base	Forecast Deviation	X	The proposed solution will support the Verint solution for the ability to report on agents' actual work times and the deviations from the forecasted work schedules. On a daily basis, this report will compare the forecast to the actual. This report will highlight flaws in the agent work schedule forecasting and in the schedule compliance and adherence.
15.	Base	Compliance and Adherence Reports	X	The proposed solution will support the Verint solution so that adherence reports are available showing the variance between time actually spent in a particular work function (e.g., answering member calls) against time scheduled to be in that work function (historical workforce schedule). Reports will be viewable by individual agents, daily, weekly, and monthly intervals.
D. Workforce Management				
16.	Base	Scheduling Agents	X	The proposed solution will support the Verint solution with the ability to schedule agents across multiple channels and multiple locations.
17.	Base	Overview	X	The proposed solution will support the Verint solution with the ability to send real time Contact Center data to the Workforce Management application to manage intraday schedule management.

ATTACHMENT 14

TECHNICAL REQUIREMENTS FORM

The following table identifies the technical requirements that must be implemented as part of the proposed Contact Center solution. All items will be part of this RFP Scope of Work and must be included when pricing items in the Cost Proposal, Attachment 12, Contact Center Base Feature Costs Table.

Items that have a check (X) in the Integration (Int.) column will require some integration with another system either within the Contractor's or CalSTRS' networks. The last column describes the technical area with which the integration needs to be implemented.

Please list any supporting detail information and/or assumptions that apply to each of the technical requirements.

ATTACHMENT 14, Continued

TECHNICAL REQUIREMENTS FORM

Item	Technical Name	Int.	Description	Supporting Detail/Assumptions	Technical Area
T.1	Authenticate Member	X	The proposed IVR solution must attempt to authenticate the customer before allowing customer access to sensitive information and/or transferring customers to the Contact Center. The authentication process will need to interact with the ADABAS/Natural mainframe application via a web service interface. Authentication must be done by matching the birth date entered by the caller against the birth date on START and matching the SSN or Client ID entered by the caller against his/her START record.		Integration – START
T.2	START and MIC Interfaces	X	The proposed IVR solution must be able to interface with two existing CalSTRS applications – START and MIC. The IVR solution must interface with START to obtain member information based on SSN or Client ID and date of birth entered by the caller. START – The Interactive Voice Response (IVR) solution allows a CalSTRS' member to retrieve automated account and payment information from START over the phone. The member is prompted by the IVR solution for SSN or Client ID and birth date. The IVR solution then calls a web service to retrieve the member's information from START. MIC (Member Information System) – MIC is an internet browser application. The Contact Center application residing on the Contact Center Agent's workstation, launches an MIC browser session upon receiving a phone call. MIC is launched using a URL containing unique call identifiers passed from the Contact Center application.		Integration – START, MIC

ATTACHMENT 14, Continued

TECHNICAL REQUIREMENTS FORM

T.3	Interactive Voice Response (IVR)	X	The proposed solution must include an IVR system with the ability to prompt the user with a choice, and then pass the response collected to the client applications using screen pop. The choices could include routing to an agent, a Contact Center queue, or to selected messages to be played while the customer is in queue or on hold. The IVR should also have the ability to take data from the customer, such as Client ID, SSN, DOB, or account number and validate the data against a database to perform an action such as routing. All calls must have a unique identifier (NCID).		IVR / Integration – START, MIC
T.4	Internal Transfers w/Data	X	The proposed solution will be able to transfer both a phone call and the MIC screen within the Contact Center. This includes warm transfers, (introducing callers) and conference calls. An example is escalating a call to a supervisor.		Call Transfers / Integration - MIC
T.5	Performance Under Load		The proposed solution will be able to manage 125% of maximum call volume including successful IVR handling and ACD delivery. Under 125% of maximum load, there is no degradation or call delay. This must be tested to be a fulfilled requirement.		Performance
T.6	Response time		The proposed solution will allow for speedy agent login. It will not take more than 60 seconds total to log into all Proposer's systems.		Performance
T.7	Integration with Wall Boards		The proposed solution will display contact center statistics with the use of flat screens television wall boards.		Reporting
T.8	Instantaneous Reporting	X	The proposed solution sends instantaneous Contact Center data to the workforce management application (Verint) to manage intra day schedule management. Data is immediately accessible in the Verint application.		Reporting
T.9	Reports		The proposed solution will provide CalSTRS with configurable alarm system operations reports including factors such as system volumes, failures, and predictions about capacity problems.		Reporting
T.10	Remote Agents	X	The proposed solution supports agents located at remote sites during normal operations as well as during a disaster event.		Business Continuity
T.11	Degraded Service	X	The proposed solution must operate in a degraded service mode in the event of a major system component failure. For example, if the automated authentication process fails, agents can still use manual authentication and answer member calls.		Business Continuity
T.12	Easy to Invoke CalSTRS BRC Routing	X	In the event of an emergency, the proposed solution must allow calls to easily be rerouted to remote site.		Business Continuity

ATTACHMENT 14, Continued

TECHNICAL REQUIREMENTS FORM

T.13	Universal ID	X	The proposed solution supports the concept of a "Universal ID" across the Contact Center Service applications, such that data from different systems can be associated with a particular contact. The unique identifier used today is the Network Call Identification (NCID).		Security
T.14	Data Security	X	The proposed solution conforms to CalSTRS Information Security Office (ISO) standards. (See Exhibit E)		Security
T.15	Encrypted Circuits	X	The proposed solution includes that any data being passed over external connections will be encrypted using industry standard methods that are in compliance with CalSTRS' ISO standards.		Security
T.16	Fine Grained Access/Permissions	X	The proposed solution provides a fine grained access/permissions system that allows for the assignment of rights down to an individual field level.		Security
T.17	Role-Based Security	X	The proposed solution will be able to define, manage, and assign roles for the purpose of securing user access to data, system functions and capabilities.		Security
T.18	Adjust Parameters		The proposed solution will allow CalSTRS' system administrators, using an administration interface, to set parameters for the system access/permissions and operations.		Security
T.19	Remote Administration		The proposed solution provides a means for remote administration either from CalSTRS' HQ building, or remote locations.		Security
T.20	Wireless Headsets	X	The proposed solution supports the use of wireless headsets. At a minimum, the proposed solution must support these models: (Models: Plantronics H261N, SupraPlus, GM Netcom GN2000 and Wireless CS55)		Phone
T.21	Single Hard phone	X	The proposed solution allows agents to use a CalSTRS provided VoIP Cisco telephone (Model 7945) on the desktop that supports business calls, personal calls and Contact Center calls.		Phone
T.22	Soft phone	X	The proposed solution provides a windows Graphical User Interface (GUI) soft phone that provides other telephony capabilities to include but is not limited to: 1. Transfer (blind) 2. Conference 3. Hold/retrieve 4. Enter phone number to dial out 5. Agent state 6. Log in/Log out 7. Call Detail (such as ANI) 8. Member information (such as client ID)		Phone
T.23	Soft phone/ Hard phone Integration	X	The proposed solution does not prohibit agents from using their hard phone when handling members' calls.		Phone

ATTACHMENT 15

MINIMUM QUALIFICATIONS CERTIFICATION

Proposer Firm Name

The Proposer must substantiate that the firm satisfies each of the following minimum qualifications, to CalSTRS' satisfaction, to be given further consideration for a contract award. The statement must contain sufficient information as prescribed to assure CalSTRS of its accuracy. Failure to provide complete information, based on CalSTRS' sole judgment, will result in the immediate rejection of the proposal.

1. As of October 14, 2010, Proposer has had _____ years of experience in providing a "Software as a Service" (SaaS).
2. As of October 14, 2010, Proposer has _____ years, _____ months experience in integrating the Genesys solution with the Verint Impact 360 applications (Quality Management, Call Recording Workforce Management and Performance Management) to accommodate instantaneous data feeds, as well as with Cisco Call Manager.

Proposer's Authorized Signature

Printed Name

Title

Date

ATTACHMENT 16
DARFUR CONTRACTING ACT

Proposer Firm Name

Pursuant to Public Contract Code section 10478, if a bidder or proposer currently has or within the previous three years had business activities or other operations outside of the United States, it must certify that it is not a “scrutinized” company as defined in Public Contract Code section 10476.

Therefore, to be eligible to submit a bid or proposal, please complete only one of the following three paragraphs (via initials for Paragraph # 1 or Paragraph # 2, or via initials and certification for Paragraph # 3):

1. _____ We do not currently have and have not, within the previous three (3)
 Initials years, had business activities or other operations outside of the United
 States.

OR

2. _____ We are a scrutinized company as defined in Public Contract Code section
 Initials 10476, but we have received written permission from the Department of
 General Services (DGS) to submit a bid or proposal pursuant to Public
 Contract Code section 10477(b). A copy of the written permission from
 DGS is included with our bid or proposal.

OR

3. _____ We currently have, or we have had within the previous three years,
 Initials business activities or other operations outside of the United States,
 + certification but we certify below that we are not a scrutinized company as defined in
 below Public Contract Code section 10476.

CERTIFICATION For # 3.

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective proposer/bidder to the clause listed above in # 3. This certification is made under the laws of the State of California.

Proposer/Bidder Firm Name (Printed)	Federal ID Number
By (Authorized Signature)	
Printed Name and Title of Person Signing	

ATTACHMENT 17

**CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM DVBE PROGRAM
REQUIREMENTS**

IMPORTANT NOTICE

**CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM
DISABLED VETERAN BUSINESS ENTERPRISE PROGRAM REQUIREMENTS**

On July 28, 2009 Governor Schwarzenegger signed legislation amending Public Contract Code 10115.2 and 10115.15 to delete the Disabled Veteran Business Enterprise (DVBE) Program element known as the **"Good Faith Effort"** from DVBE program participation requirements.

In accordance with the legislation, DVBE Participation Requirement, Option B (Good Faith Effort), is hereby deleted in its entirety. Bidders must choose either Option A (Goal Attainment) or Option C (Business Utilization Plan) in order to be deemed responsive to the DVBE Participation Requirement.

For additional information read the [Narrative](#) provided by the California Department of General Services

<http://www.pd.dgs.ca.gov/dvbe/default.ht>

ATTACHMENT 17, Continued

DOCUMENTATION OF DISABLED VETERAN BUSINESS ENTERPRISE CONTACTS

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM
DISABLED VETERAN BUSINESS ENTERPRISE PROGRAM REQUIREMENTS

Authority: The Disabled Veteran Business Enterprise (DVBE) Participation Goal Program for California State Teachers' Retirement System (CalSTRS) contracts is established in Public Contract Code (PCC), section 10115 et seq., Military and Veterans Code section 999 et seq., and the California Code of Regulations, Title 2 (2 CCR), section 1896.60 et seq.

The minimum DVBE participation percentage is 3% for this solicitation.

Introduction: The bidder must document either option **A**, or **C** to comply with this solicitation's DVBE program requirements. Bids or proposals (hereafter called "bids") that fail to fully document one of the DVBE program requirements options shall be considered non-responsive and ineligible for award.

All information submitted by the intended awardee to comply with this solicitation's DVBE requirements will be verified by CalSTRS. If evidence of an alleged violation is found during the verification process, CalSTRS shall initiate an investigation with this information in accordance with the requirements of the PCC, Section 10115, et seq. and the Military and Veterans Code, Section 999 et seq. and follow the investigatory procedures required by the 2 CCR, section 1896.80.

Only State of California, Office of Small Business and DVBE Certification (OSDC) certified DVBEs who perform a commercially useful function relevant to this solicitation may be used to satisfy the DVBE program requirements. The criteria for performing a commercially useful function are contained in the California Military and Veterans Code Section 999(b)(5)(B)(i). A DVBE contractor, subcontractor or supplier is considered performing a commercially useful function when it meets the following criteria:

- (1) The person or entity is responsible for the execution of a distinct element of the work of the contract, carries out the obligation by actually performing, managing or supervising the work involved, and performs work that is normal for its business services and functions; and
- (2) The person or entity is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

CalSTRS will verify each DVBE subcontractor/supplier certification with the OSDC to ensure DVBE eligibility.

To meet the DVBE program requirements, bidders must complete and fully document one of the two following compliance options:

Option A – Commitment to full DVBE participation: For a bidder who is a DVBE or who is able to meet the commitment to use identified DVBE(s) to fulfill the full DVBE participation goal.

Option C – Business Utilization Plan: For a bidder using an approved DVBE Business Utilization Plan (BUP) to satisfy DVBE participation requirements. Applies only to solicitations for goods or information technology.

Please Read All Instructions Carefully. These instructions contain information about the DVBE program requirements, bidder responsibilities, and requirements for performing and documenting each of the two available options as detailed below. Bidders are responsible for thorough review and compliance with these instructions. Document your option selection on the attached AD 840 form, Documentation of Disabled Veteran Business Enterprise Program Requirements.

OPTION A – COMMITMENT: Commit to meet or exceed the DVBE participation requirement in this solicitation by Method A. Bidders must document DVBE participation commitment by completing and submitting the attached AD 840 form. Failure to complete and submit the AD 840 form as instructed shall render your bid non-responsive

The bidder must provide, prior to contract award, a written agreement signed by the bidder and each proposed DVBE subcontractor. The written agreement will include the (1) DVBE scope of work; (2) work to be performed by the DVBE; (3) term of intended subcontract with the DVBE; (4) anticipated dates the DVBE will perform the required work; (5) rate and conditions of payment; (6) total amount of contract to be paid to the DVBE; and (7) the percentage of the entire contract that will be awarded to the DVBE, with each DVBE subcontractor. If this information is contained in the bidder's DVBE written agreement of intent, the agreement may be attached to the AD 840 form. If further verification is necessary, CalSTRS will obtain additional information to verify the above requirements.

Method A. Certified DVBE Bidder:

- a. Commit to performing at least 3% of the contract bid amount with your firm or in combination with other DVBE(s).
- b. Document DVBE participation on AD 840 (Side 1) form and attach copy of all applicable certifications.
- c. A DVBE working in combination with other DVBEs shall be requested to submit proof of its commitment by submitting a written agreement with the DVBE(s) identified in its bid's AD 840 form. When requested, the written agreement must be submitted to the address or facsimile number specified and within the timeframe identified in the

notification. Failure to submit the requested written agreement as specified may be grounds for bid rejection.

OPTION C – THE DVBE BUSINESS UTILIZATION PLAN (BUP): option permits bidders to submit an approved DVBE BUP to satisfy DVBE participation solicitation requirements up to 3%. DVBE BUPs apply only to solicitations for goods and information technology (IT) goods and services. DVBE BUPs are a company's commitment to expend a minimum of 3% of its total statewide contract dollars with DVBEs – this percentage is based on all of its contracts in the State, not just those with the CalSTRS. DVBE BUPs must be submitted to and approved by the DGS-PD prior to the bid due date. Please call the DGS-PD, Office of Small Business and DVBE Outreach and Education at (800) 559-5529 for assistance. Bidders choosing this option must properly complete and submit an AD 840 (Side 1) form and include a copy of its approval letter with the bid. Failure to submit these documents shall render your bid non-responsive.

Designation of Option - Check the appropriate box(es) to indicate the option(s) with which you choose to comply, complete the applicable sections and attach the required supporting documentation. You are advised to read all instructions carefully prior to completing this form. Remember that only California certified DVBEs who can provide related goods and/or services may be used to satisfy these program solicitation requirements.

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FORM AD 840

☐ **OPTION A: I commit to meeting the full DVBE contract participation requirement.**
Complete AD 840, Section A.

☐ **OPTION C: I submit a copy of my firm's "Notice of Approved DVBE Business Utilization Plan."**

A. Full information must be provided.

For contract participation commitment, at least one DVBE must be listed. DVBEs must perform a commercially useful function. List the specific goods and/or services with the dollar and/or percentage value(s) that the DVBE(s) commit(s) to provide and the DVBEs tier (prime contractor=0, subcontractor to prime contractor=1, subcontractor to Tier 1 subcontractor =2, etc.) If both the estimated dollar amount and percentage are listed, the higher value supercedes. Attach additional pages to list all other DVBE subcontractors/suppliers (you may use AD 840A form). During contract performance, all requests for substituting named DVBEs must be made in accordance with the provisions of California Code of Regulations, Title 2, Section 1896.64I.

Date Contacted	DVBE Company Name (If you are the Prime and a DVBE enter your name, if not, enter the solicited subcontractor.)			
DVBE Contact Name & Reference #	Telephone Number ()	Fax Number ()	E-mail (if available)	
Street Address, City, State and Zip Code				
☐ YES, I am, or will subcontract with, the listed DVBE to provide the following goods and/or services:				
Specific Goods and/or Services		Estimated \$ and/or % \$ / %		Tier
☐ NO, I am unable to subcontract with the DVBE for the following business reasons:				
Date Contacted	DVBE Company Name (If you are the Prime and a DVBE enter your name, if not, enter the solicited subcontractor.)			
DVBE Contact Name & Reference #	Telephone Number ()	Fax Number ()	E-mail (if available)	
Street Address, City, State and Zip Code				
☐ YES, I am, or will subcontract with, the listed DVBE to provide the following goods and/or services:				
Specific Goods and/or Services		Estimated \$ and/or % \$ / %		Tier
☐ NO, I am unable to subcontract with the DVBE for the following business reasons:				

Use AD 840A form (add additional pages as necessary) to list all other DVBE contacts.

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Contact Center Solution

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Step 1. Contact the CalSTRS contracting official to identify potential DVBE subcontractors/ suppliers, and document this contact as required.

Date	Contact Name Contract Services	Telephone Number (916) 414-4880
Describe Result		

Step 2. Contact all of the following and document your contacts as required: Other state and federal agencies and local organizations to identify potential DVBE subcontractors/suppliers. **Other State Agency** – Procurement Division, Office of Small Business and DVBE Certification (Certification Office)

PHONE CONTACT OR ONLINE SEARCH	Date	Telephone Number (916) 322-5060 (916) 375-4940	Contact Name	☐ I contacted the Certification Office for a list of California certified DVBEs.
	Date	Internet Address http://www.pd.dgs.ca.gov/smbus		☐ I searched the Certification Office's online database to identify California certified DVBEs.
Describe Result				
Federal Agency – U.S. Small Business Administration (SBA) online database.				
Date	Internet Address http://www.pro-net.sba.gov			☐ I searched the federal online database for California DVBEs.
Describe Result				
Local DVBE Organizations – Contact at least one local DVBE organization. Refer to the DVBE Resource Packet for a list of acceptable contacts. (http://www.pd.dgs.ca.gov/smbus - select "DVBE Resource Packet")				
Date	Organization Name	Contact Name	Telephone Number and/or Internet Address	
Describe Result				
Date	Organization Name	Contact Name	Telephone Number and/or Internet Address	
Describe Result				

Step 3. Publish advertisements: Two (2) advertisements – One (1) ad in an accepted trade paper; and one (1) ad in an accepted DVBE focus paper (See the DVBE Resource Packet for a list of accepted publications); unless the paper is dual purpose (fulfilling both trade and focus requirements), in which case one (1) ad is acceptable. Copy(ies) of the advertisement(s) must be attached.

Focus Paper Name (List Full name)	Contact Name	Telephone Number ()
Address	Date Ad Published	
Trade Paper Name (List Full name)	Contact Name	Telephone Number ()
Address	Date Ad Published	
☐ I certify the ad was placed to reach both trade and focus audiences through this one publication.		
Trade and Focus Paper Name (List Full name)	Contact Name	Telephone Number ()
Address	Date Ad Published	

Additional Documentation of Disabled Veteran Business Enterprise Contacts
FORM AD 840A may be used as a continuation from Section A of Form AD 840.

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FORM AD 840A

Date Contacted		DVBE Company Name		
DVBE Contact Name		Telephone Number ()	Fax Number ()	E-mail
Street Address, City, State and Zip Code				
OR	☐ Yes, I will subcontract with the listed DVBE to provide the following goods and/or services.			
	Specific Goods and/or Services		Estimated \$ and/or % \$ / %	Tier
	☐ No, I am unable to subcontract with the DVBE for the following business reasons:			
Date Contacted		DVBE Company Name		
DVBE Contact Name		Telephone Number ()	Fax Number ()	E-mail
Street Address, City, State and Zip Code				
OR	☐ Yes, I will subcontract with the listed DVBE to provide the following goods and/or services.			
	Specific Goods and/or Services		Estimated \$ and/or % \$ / %	Tier
	☐ No, I am unable to subcontract with the DVBE for the following business reasons:			
Date Contacted		DVBE Company Name		
DVBE Contact Name		Telephone Number ()	Fax Number ()	E-mail
Street Address, City, State and Zip Code				
OR	☐ Yes, I will subcontract with the listed DVBE to provide the following goods and/or services.			
	Specific Goods and/or Services		Estimated \$ and/or % \$ / %	Tier
	☐ No, I am unable to subcontract with the DVBE for the following business reasons:			
Date Contacted		DVBE Company Name		
DVBE Contact Name		Telephone Number ()	Fax Number ()	E-mail
Street Address, City, State and Zip Code				
OR	☐ Yes, I will subcontract with the listed DVBE to provide the following goods and/or services.			
	Specific Goods and/or Services		Estimated \$ and/or % \$ / %	Tier
	☐ No, I am unable to subcontract with the DVBE for the following business reasons:			

ATTACHMENT 18

**Disabled Veteran Business Enterprise (DVBE) Incentive Information
And Declaration Form**

The Disabled Veteran Business Enterprise (DVBE) Participation Goal Program for State contracts is established in Public Contract Code (PCC) section 10115 et seq., Military and Veterans Code (MVC) section 999 et seq., and California Code of Regulations (CCR), Title 2, section 1896.60 et seq. The DVBE Participation Program was established to acknowledge disabled veterans for their service and to further DVBE participation in state contracting, promote competition and encourage greater economic opportunity.

Every year, state agencies must report to the governor and the legislature their total DVBE contracting participation. If the minimum three percent (3%) goal is not met, the state agency must provide their reasons for not meeting the goal and an implementation plan for further DVBE participation improvement.

The PCC 10115 et seq. requires a goal of three percent (3%) DVBE participation on contracts awarded by CalSTRS. The Teachers' Retirement Board has adopted a policy that directs staff to encourage, promote, and facilitate the fullest participation by Disabled Veteran Business Enterprise (DVBE) in contracts awarded by CalSTRS:

- a) Contractor agrees that as a contractor of CalSTRS it will meet the requirements of 3% DVBE participation in this contract opportunity.
- b) Document DVBE participation on AD 840 form and attach a copy of all applicable certifications. (Form AD 840 is attached as a part of Attachment 9)
- c) You may also qualify to bid if you have an approved DVBE Business Utilization Plan (BUP) approved by DGS before the bid date. In that plan you must certify that you will expend a minimum of 3% of your statewide contract dollars with the DVBE(s). (This percentage is based on all of your contracts in the state, not just those with CalSTRS.)

To further assist in fulfilling the requirements of DVBE participation the state passed into law SB115 which gave a bid incentive to Proposers who utilized DVBE. The incentive will be applied on this RFP. **If you fulfill the 3% goal you will be given a bid incentive of 10 points added to your score before the points are calculated.**

1. Proposer Declaration Instructions: All prime Proposers (the firm submitting the bid) must complete the Declaration Form.
 - a. Identify all current certifications issued by the State of California. If the prime Proposer has no California certification(s), check the line labeled "None" and proceed to Item #2. If the prime Proposer possesses one or more of the following certifications, enter the applicable certification(s) on the line:

- Microbusiness (MB)
- Small Business (SB)
- Small Business Nonprofit Veteran Service Agency (SB/NVSA)
- Disabled Veteran Business Enterprise (DVBE)

- b.** Mark either “Yes” or “No” to identify whether subcontractors will be used for the contract. If the response is “No”, proceed to Item #1.c. If “Yes”, enter on the line the distinct element of work contained in the contract to be performed or the goods to be provided by the prime Proposer. Do not include goods or services to be provided by subcontractors.

Proposers certified as MB, SB, SB/NVSA, and/or DVBE must provide a commercially useful function as defined in Military and Veterans Code Section 999(b)(5)(B)(i) for DVBEs and Government Code Section 14837(d)(1) and (2) for small/microbusinesses. For questions regarding commercially useful function determinations made in conjunction with certification approval, contact the Department of General Services, Procurement Division, Office of Small Business and DVBE Certification (OSDC), OSDC Certification and Compliance Unit via email at: osdshelp@dgs.ca.gov.

Bids must propose that certified Proposers provide a commercially useful function for the resulting contract or the bid will be deemed non-responsive and rejected by the State. For questions regarding the solicitation, contact the procurement official identified in the solicitation.

Note: A subcontractor is any person, firm, corporation, or organization contracting to perform part of the prime’s contract.

- c.** This item is only to be completed by businesses certified by California as a DVBE.
- (1) Declare whether the prime Proposer is a broker or agent by marking either “Yes” or “No”. The Military and Veterans Code Section 999.2 (b)(i) defines “broker” or “agent” as any individual or entity, or any combination thereof, that does not have title, possession, control and risk of loss of materials, supplies, services or equipment provided to any awarding department, unless one or more certified disabled veterans has fifty-one percent (51%) ownership of the quantity and value of the materials, supplies, services, and of each piece of equipment provided under the contract. (2) If bidding rental equipment, mark either “Yes” or “No” to identify if the prime Proposer owns at least 51% of the equipment provided (quantity and value). If **not** bidding rental equipment, mark “N/A” for “not applicable.”
- 2.** If no subcontractors are proposed, do not complete the table. Read the certification at the bottom of the form and complete “Page ____ of ____” on the form. If subcontractors will be used, complete the table listing all subcontractors. If necessary, attach additional pages and complete the “Page ____ of ____” accordingly. **Column Labels - Subcontractor Name, Contact Person, Phone Number & Fax Number**—List each element for all

subcontractors. **Subcontractor Address & Email Address**—Enter the address and if available, an Email address. **CA Certification (MB, SB, DVBE or None)**—If the subcontractor possesses a current State of California certification(s), verify on the OSDC website (www.pd.dgs.ca.gov/smbus) that it is still valid and list all current certifications here. Otherwise, enter “None”. [Note: A SB/NVSA should not be participating as a subcontractor].

Work performed or goods provided for this contract—Identify the distinct element of work contained in the contract to be performed or the goods to be provided by each subcontractor. Certified subcontractors must provide a commercially useful function for the contract. (See paragraph 1.b above for code citations regarding the definition of commercially useful function.) If a certified subcontractor is further subcontracting a greater portion of the work or goods provided for the resulting contract than would be expected by normal industry practices, attach a separate sheet of paper explaining the situation.

Corresponding % of bid price—Enter the corresponding percentage of the total bid price for the goods and/or services to be provided by each subcontractor. Do not enter a dollar amount.

Good Standing?—Provide a response for each subcontractor listed. Enter either “Yes” or “No” to indicate that the prime Proposer has verified that the subcontractor(s) is in good standing for all of the following:

- Possesses valid license(s) for any license(s) or permits required by the solicitation or by law
- If a corporation, the company is qualified to do business in California and designated by the State of California Secretary of State to be in good standing
- Possesses valid State of California certification(s) if claiming MB, SB, and/or DVBE status
- Is **not** listed on the OSDC website as ineligible to transact business with the State

51% Rental?—This pertains to the applicability of rental equipment. Based on the following parameters, enter either “N/A” (not applicable), “Yes” or “No” for each subcontractor listed. Enter “N/A” if the:

- Subcontractor is NOT a DVBE (regardless of whether or not rental equipment is provided by the subcontractor) or
- Subcontractor is NOT providing rental equipment (regardless of whether or not subcontractor is a DVBE) Enter “**Yes**” if the subcontractor is a California certified DVBE providing rental equipment and the subcontractor owns at least 51% of the rental equipment (quantity and value) it will be providing for the contract. Enter “**No**” if the subcontractor is a California certified DVBE providing rental equipment but the subcontractor does NOT own at least 51% of the rental equipment (quantity and value) it will be providing.

ATTACHMENT 18 – CONTINUED

DECLARATION FORM

GSPD-05-105 (EST 8/05)

1. Prime Proposer information (Please review Declaration Form Instructions above prior to completion):**a. Identify current California certification(s) (MB, SB, SB/NVSA, DVBE):**
_____ **or None** _____**b. Will subcontractors be used for this contract? Yes ___ No ___**

(If yes, indicate the distinct element of work your firm will perform in this contract e.g., list the proposed products produced by your firm, state if your firm owns the transportation vehicles that will deliver the products to the State, identify which solicited services your firm will perform, etc.). Use additional sheets, as necessary.

c. If you are a California certified DVBE:Are you a broker or agent? **Yes ___ No ___**

If the contract includes equipment rental, does your company own at least 51% of the equipment provided in this contract (quantity and value)?

Yes ___ No ___ N/A ___**2. If no, subcontractors will be used, skip to certification below. Otherwise, list all subcontractors for this contract on a separate sheet of paper: pursuant to the directions specified in Attachment 18, Disabled Veterans Business Enterprise (DVBE) Incentive Information and Declaration Form Section 2.****CERTIFICATION: By signing below, I certify under penalty of perjury that the information provided is true and correct.**_____
Proposer's Authorized Signature_____
Printed Name_____
Title_____
Date

ATTACHMENT 19

CONFORMANCE WITH SAMPLE CONTRACT REQUIREMENTS

Proposer Organization Name

CalSTRS considers the Proposer to be in agreement with all Sample Agreement/General Terms and Conditions, Exhibit B, unless otherwise identified herein. The absence of specific issues identified in the table below will constitute agreement with all remaining Sample Contract Terms and Conditions.

<i>Item #</i>	<i>Contract Section</i>	<i>Comment</i>

Name of Organization

Date

Proposer's Authorized Signature

Printed Name

SCOPE OF WORK

Section I – Contractor Responsibilities

A. Overall Responsibilities

The Contractor is responsible for all activities required to ensure the Contact Center Solution Project at CalSTRS headquarters building meets all the requirements identified in the RFP. CalSTRS intends to award a contract to a qualified Contact Center “Software as a Service” (SaaS) provider. SaaS, also known as hosted or on-demand software, is defined by CalSTRS as software that is hosted by a vendor/service provider and made available to CalSTRS over a network on a subscription or pay-per-use basis. For the purpose of this RFP, the proposed SaaS solution will be termed as the ‘Contact Center Solution’. Activities in the delivery of this solution include, but are not limited to:

1. Managing the Contact Center Solution Project, in coordination with CalSTRS’ Project Manager, according to the approved Project Schedule and Project Methodology ensuring all milestones are met.
2. Managing the Maintenance and Operation and providing all services and support on an ongoing basis for the Contact Center Solution project as described herein and as identified in the Features Summary Forms, Required Base and Optional (as implemented) Features, Attachments 10 and 11 and Technical Requirements Form, Attachment 14.
3. Procuring all hardware and software required to provide a Software as a Service (SaaS) solution to the Contact Center as described herein and as identified in the Features Summary Forms, Required Base and Optional (as implemented) Features, Attachments 10 and 11 and Technical Requirements Form, Attachment 14.
4. Providing all labor for the Contractor Management and Core Team as identified in proposal attachments.
5. Performing the project planning, detailed design, configuration/development, installation, testing, system service and support to provide the Contact Center Solution as described herein and as identified in Features Summary Forms, Required Base and Optional (as implemented) Features, Attachments 10 and 11, and Technical Requirements Form, Attachment 14.
6. Integrating with CalSTRS systems as needed including the on-premise Verint application which includes instantaneous data feeds/updates. Implement support for the Verint application as described in Verint Features Summary Form, Attachment 13.

B. General Responsibilities

The responsibilities identified in this section are applicable throughout the entire Contact Center Solution Project.

1. Deliverables

- a) Provide all required deliverables, as specified in the Deliverable Delivery table below and on the project schedule. All deliverables listed need CalSTRS' approval in order for the Contractor to receive credit for submission.

Deliverable Name	Phase Due
1. Status Reports	All phases
2. Project Schedule	Baselined Version – Planning Phase
3. Project Management Plan	Planning Phase
4. Requirement Deliverable	Requirement/Discovery Phase
5. Traceability Matrix	Requirement/Discovery Phase
6. Call Flows	Requirement/Discovery Phase
7. Contact Center Migration and Integration Plan	Design Phase
8. Test Plan	Configuration/Development Phase
9. Training Plan	Configuration/Development Phase
10. GoLive Support Plan	Test Phase
11. Closeout Documentation	GoLive Phase
12. Service Level Reports	90-Day Acceptance Phase

Table 1.0 Deliverable Delivery Schedule

1. Status Reports
 - i. Provide weekly written status reports including project current and next period activities, risks and issues. Highlights of project schedule changes should be noted in weekly status reports.

2. Project Schedule

- i. Baseline the project schedule once it is an approved final project schedule. Show baseline start and finish dates on master project schedule.
- ii. All tasks need to have predecessors linking dependent tasks. No hard coding of dates.
- iii. CalSTRS' tasks need to be included in the project schedule.
- iv. Include CalSTRS' review cycles for deliverables. These deliverables will be further defined in project planning.
- v. Update the project schedule weekly showing % complete on all tasks.
- vi. Submit the updated project schedule weekly to CalSTRS at the same time the weekly status report is submitted.
- vii. Include all milestones.

3. Project Management Plan

- i. Plan should contain the following sections which include but are not limited to: Project Teams roles and responsibilities (Contractor and CalSTRS'), Project Milestones, Stakeholder Communication, Contract Deliverables, Quality Management, Risk Management and Project Closeout.
- ii. Problem identification and resolution process needs to include issue resolution and escalation procedures.
- iii. Deliverable review process including days for Contractor and CalSTRS review cycles. To be agreed upon in project planning.

4. Requirement Deliverable

- i. After Requirement/Discovery meetings, this document will address the detailed requirements (elaborating from RFP – Attachments 10, 11, 13 and 14) and will discuss how the Contractor's solution will meet each requirement.
- ii. Deliverable will also include network and systems integration as well as satisfying American Disabilities Act (ADA), security and any other requirements included in the RFP outside of Attachments 10 and 11.

5. Traceability Matrix

- i. Matrix is an Excel spreadsheet and references how the Contractor will satisfy each CalSTRS Contact Center Solution requirement.
- ii. Each requirement will be mapped to a test case that will test and validate each requirement.

6. Call Flows

- i. After Requirement/Discovery meetings, the call flow diagrams will be documented using Microsoft Visio (2003).
- ii. IVR and ACD call flow diagrams need to be included.
- iii. All entry points need to be represented.
- iv. Contact Center, Disaster Recovery, Help/Service Desk, and Client Outreach and Guidance IVRs need to be documented with Call Flow diagrams.

7. Contact Center Migration and Integration Plan

- i. This plan will discuss the transition steps needed for the new Contractor to take over from the exiting Contractor (800 number, desktop configurations, etc.) There should be no business interruptions, during transition.
- ii. Addresses MIC, START and Verint integrations and how they will convert from the old solution to the new solution with no interruptions.

8. Test Plan

- i. Test plan includes testing methodology and all testing activities which include but are not limited to: unit testing, system testing, regression testing, test cases, test scripts, expected test results, entrance and exit criteria for each testing phase, incident tracking methods and frequency of testing meetings.
- ii. Incident Priority Definitions will be mutually agreed upon during the test plan development. These definitions will be used to identify incident priorities during all phases of testing.
- iii. Test plan will be developed and approved before the Testing phase begins.

9. Training Plan

- i. The Training Plan will include the following for each type of class given:
 1. Detailed training class schedule containing dates
 2. Each class duration
 3. Responsibilities for training environment preparation
 4. Maximum number of participants for each class
 5. Detailed description of each class content including agendas (content must be CalSTRS specific)
 6. Expected learning outcomes for each class
 7. Form of training (i.e. in class, remote via webex) and the necessary hardware and software needed
 8. Type of training (i.e. Train the Trainer, End user)
 9. Data preparation for training environment
 10. Identify what training materials will be used and provide samples

- ii. The Training Plan will be delivered and approved by CalSTRS 30 days prior to the start of training.
- iii. The Contractor will provide all printed user manuals for all attendees for each class, including an electronic copy.

10. GoLive Support Plan

- i. The plan will include the details around the GoLive event. Who will supply support during 30 days post GoLive, when, and how it will be provided, must be documented.
- ii. The plan should include how communication will be shared with the Contact Center staff and Project team members throughout GoLive support.
- iii. This will be a collaborative effort between the Contractor and CalSTRS Project Manager.

11. Closeout Documentation

- i. Provide final, as-built Call Flow Diagrams reflecting the exact IVR and ACD designs and updated Requirement Deliverable (if changed) upon receipt of the Notice of Completion. Include an explanation of all the differences between the Contact Center Solution Project as defined in the RFP and the implemented Contact Center Solution. Update this documentation reflecting any changes and/or revisions at the conclusion of the Acceptance Period.
- ii. Traceability Matrix is complete with requirement mapping to each test case with successful results or an agreed-upon statement why the requirement wasn't met by the Contractor.

12. Service Level Reports

- i. Work with CalSTRS Project Manager to develop the Service Level indicators and targets that will be tracked and reported.
- ii. Provide monthly Service Level reports during 90-Day Acceptance Period and Maintenance and Operations to CalSTRS, describing service levels achieved and any issues that caused service levels to not be met.

2. Coordination with Other Vendors

- a) Coordinate with other Systems Integrators and/or Vendors as identified by CalSTRS, as needed.

3. Trouble-shooting

- a) Perform trouble-shooting and respond to/resolve all issues associated with the development/configuration, testing and operational use of the Contact Center Solution during the identified Project phases.

4. Risk Identification

- a) Identify and report any risks identified and then develop the risk mitigation strategy to be taken to address those that arise.

5. Reporting of Issues

- a) Report any issues associated with the development/configuration, testing and operational use of the Contact Center Solution to CalSTRS Representative or designee. Definitions will be agreed upon between the Contractor and CalSTRS for reporting issue/incident.

6. Customer Support

- a) Provide Project Management support during CalSTRS work hours. Back up Project Management resources must be provided and properly transitioned.
- b) At a minimum, provide on-site service and support during the following project phases:
 - i. Project Kick Off Meeting
 - ii. Requirement/Discovery Phase
 - iii. Testing Phase (UAT)
 - iv. GoLive Support Phase
 - v. First 30 days of Acceptance Period

7. Disruptions to Service

- a) Planned Disruptions to Service
 - i. All planned disruptions to the Contact Center must be communicated to CalSTRS in writing at least two (2) weeks in advance of the planned event.
 - ii. Contractor will schedule planned disruptions outside of CalSTRS' normal hours of operation unless advance approval has been obtained from CalSTRS. CalSTRS normal hours of operation are from 7 AM until 6 PM, Monday through Friday, excluding California State holidays.

C. **Configuration Responsibilities**

The Configuration responsibilities identified in this section are not specific to any particular phase. The Contractor will determine, in coordination with CalSTRS Project Manager, the most appropriate Project phase in which to perform the configurations in order to meet Project schedule dates and milestones.

1. Configure the Contact Center Solution components to provide the features identified as BASE in the Features Summary Form, Attachment 10, and to implement the Technical Requirements Form, Attachment 14 direction from CalSTRS' Project Manager. The Base features in Attachment 10 and Attachment 14 are:

a)	Enhanced ACD	Items A.1 through A.3
b)	Contact Routing	Items B.1 through B.4
c)	Interactive Voice Response (IVR)	Items C.1 through C.3
d)	Multimedia Queuing	Items D.1 through D.2
e)	Queued Contacts	Items E.1 through E.4
f)	Desktop Integration	Items F.1 through F.2
g)	Call Recording	Items G.1 through G.2
h)	Real Time Monitoring	Items H.1
i)	Reporting	Items I.1 through I.12
j)	Time and Attendance	Items J.1 through J.2
k)	Business Continuity	Items K.1 through K.2
l)	Interfaces	Items L.1
m)	System Administration	Items M.1
n)	VoIP Features the Contact Center Solution Must Integrate With	Item N.1
o)	Technical Requirements Form	Items T.1 through T.25
2. Configure the Contact Center Solution to provide any Optional Features (Attachment 11) selected by CalSTRS.
3. Configure the Contact Center Solution to allow for expansion of the campus to include additional building(s) or locations in the future.
4. Configure the Contact Center Solution to have a web accessible unified system for maintenance and administration functions. The Solution must be available by remote agents and support various levels of security.

D. **Responsibilities Specific to Project Phases**

The Contact Center Solution Project is defined in a number of phases. Each phase must be completed prior to the next phase beginning. Those project phases and the Contractor responsibilities for each are identified in this section.

1. Planning Phase

- a) Provide CalSTRS Project Manager Contact information for all Management and Core Team members.
- b) Perform with CalSTRS Project Manager a detailed review of the Features Summary Forms, Base Items, Attachment 10 and Technical Requirements Form, Attachment 14.
- c) Provide a draft MS Project schedule for CalSTRS review and approval.
- d) Provide the Project Management Plan document for CalSTRS review and approval.
- e) Provide the Problem Identification and Resolution Process for CalSTRS review and approval (this may be included in Item 1.d).
- f) Facilitate, in collaboration with the CalSTRS Project Manager, the Project Kick Off meeting for all project team members.

2. Requirement/Discovery Phase

- a) Facilitate requirement/discovery meetings and review RFP requirements including Attachments 10, 11 and 14 and other RFP requirements with Contractor's Project Team, and CalSTRS Project Team.
- b) Develop a Requirement Deliverable which includes details of how the Contractor's solution will satisfy each feature in Attachments 10 and 14, any optional features chosen in Attachment 11 and other RFP requirements including Security.
- c) CalSTRS reviews and approves the Requirement Deliverable.
- d) Develop a Traceability Matrix format for all RFP requirements (to be completed during Notice of Completion Phase).
- e) CalSTRS reviews and approves the Traceability Matrix format.
- f) Facilitate IVR meetings to review current call flow diagrams and recommended changes.
- g) Develop the Call Flow Diagrams, including IVR and ACD for the following groups: Contact Center, Client Outreach and Guidance, and Disaster Recovery.
- h) CalSTRS reviews and approves the Call Flow Diagrams.

3. Design Phase

- a) The design will accommodate the following:
 - 1) CalSTRS administrative responsibilities will be performed by the Contact Center staff.
 - 2) No CalSTRS' confidential/sensitive data will reside at the Contractor's site unless specifically approved by CalSTRS Representative or designee.
 - 3) Contact Center Solution will accommodate 20 supervisors for the initial roll out.
 - 4) Contact Center Solution will accommodate 100 agents for the initial roll out.
 - 5) Contact Center Solution will accommodate 1,000 to 3,000 contacts daily.
 - 6) Integration with CalSTRS Member Information Center (MIC) and START applications.
 - 7) Integration with Verint (on premise) Quality Assurance, Call Recording, Workforce Management and performance applications.
 - 8) Integration with Cisco Call Manager (on premise) to include functionality of answering and transferring member calls on the VoIP phones.
 - 9) Procure all equipment, components, accessories, software and licenses including all miscellaneous materials, items and components required to create a fully functioning Contact Center Solution.

4. Development/Configuration Phase

- a) Perform selected configurations as required by the Requirement Deliverable.
- b) Develop the required integration for the items listed in the Design Phase.
- c) Unit test all configurations and custom development effort.
- d) Develop the Test Plan including all Test Cases and/or scripts and receive CalSTRS approval.
- e) Coordinate with CalSTRS Representative or designee to test the integration effort (MIC, START and Verint).

5. Test Phase

- a) Execute the Test Plan.
- b) Update Traceability Matrix with Test Cases.
- c) Gain CalSTRS Representative or designee approval of the test results.

6. Training Phase

- a) Execute the Training Plan for the following number of attendees:
 - i. End-user - 100
 - ii. Train the Trainer - 10
 - iii. Supervisors - 20
 - iv. System Administration - 10
- b) Prepare for Training:
 - i. Set up a training environment including software installations, data entry and any other associated tasks.
 - ii. Ensure that the training environment is set up and ready for training before deploying a trainer to the CalSTRS site.
 - iii. Develop customized Train the Trainer, End User, Supervisor and System Administration Training manuals for all systems. Training manuals should only reference systems, processes, and functionally that are part of CalSTRS' implemented solution.
 - iv. Copy the appropriate number of Training Manuals for trainings.
 - v. The Contractor will arrive one day before training and validate that the environment is ready for training and that all training materials are available.

7. Notice of Completion Phase

- a) The Contractor submits a Notice of Completion when the Contractor considers the Contact Center Solution to be ready to deliver to CalSTRS. With this request the Contractor will provide the completed Traceability Matrix with all test results to CalSTRS' Project Manager for review and approval.
- b) Resolve all items still needing attention that were identified during the CalSTRS review of the tests and provide proof of resolution to CalSTRS Representative or designee for review and approval.
- c) Provide final as-built Call Flow Diagrams and Requirement Deliverable to CalSTRS Project Manager for review and approval upon receipt of the Notice of Completion.

8. GoLive Phase
 - a) Coordinate with CalSTRS and move all integration effort into Production
 - b) Execute the GoLive Support Plan
9. 90-day Acceptance Period
 - a) Ensure the new Contact Center Solution operates without a major interruption, as defined in Item 9a.c, Table 5.0 90-Day Acceptance, for the entire 90-day Acceptance Period.
 - b) If any of the interruptions listed occur during the 90-day acceptance period, as defined in Item 9.a.c, Table 5.0 90-Day Acceptance, the 90-day clock will restart.
 - c) 90-day Acceptance Criteria will be developed, and agreed upon between Contractor and CalSTRS during the planning phase of the project.
 - d) Gain CalSTRS Representative acceptance of the Contact Center Solution the end of the Acceptance Period.
 - e) Monthly subscription fees will commence once the Notice of Completion has been submitted to CalSTRS. If during the 90-Day Acceptance Period the clock stops, subscription fees will stop until the system is back in operation and the clock is restarted.
10. Maintenance and Operations Period
 - a) Respond to CalSTRS requests for incidents, modifications, new reports, additions, etc. Conduct system testing and regression testing on all fixes.
 - b) Resolve outages in accordance with the agreed upon schedule.
 - c) Perform hardware and software upgrades and coordinate with CalSTRS Change Management Board. CalSTRS requires a 2-week notice for these types of changes.
 - d) Provide CalSTRS with quarterly reports on performance to service levels.

Section II - CalSTRS Responsibilities

The following are identified as CalSTRS responsibilities that support the Contractor's responsibilities as outlined in Section I of this Scope of Work.

1. Planning Phase
 - a. Provide names and contact information of all CalSTRS contacts for the Contact Center Solution Project.
 - b. Review with the Contractor the Feature Summary Forms. Make changes or sign off on changes by the Contractor.
 - c. Provide a final list of all CalSTRS Contact Center staff that will be using the new Contact Center Solution including agents, supervisors and system administration.
 - d. Work with the Contractor to develop, review and approve the following: (Service Level Reports are due throughout the life of the project not just during the Planning Phase)
 - e. Provide a review and approval process designating the number of days for the review and approval cycle and the process for obtaining the approvals.
2. Provide direction to the vendor for all Contact Center Solution configuration specifications.

CalSTRS Hardware and Software Standards

Standard Cisco VoIP Phone
Model 7945

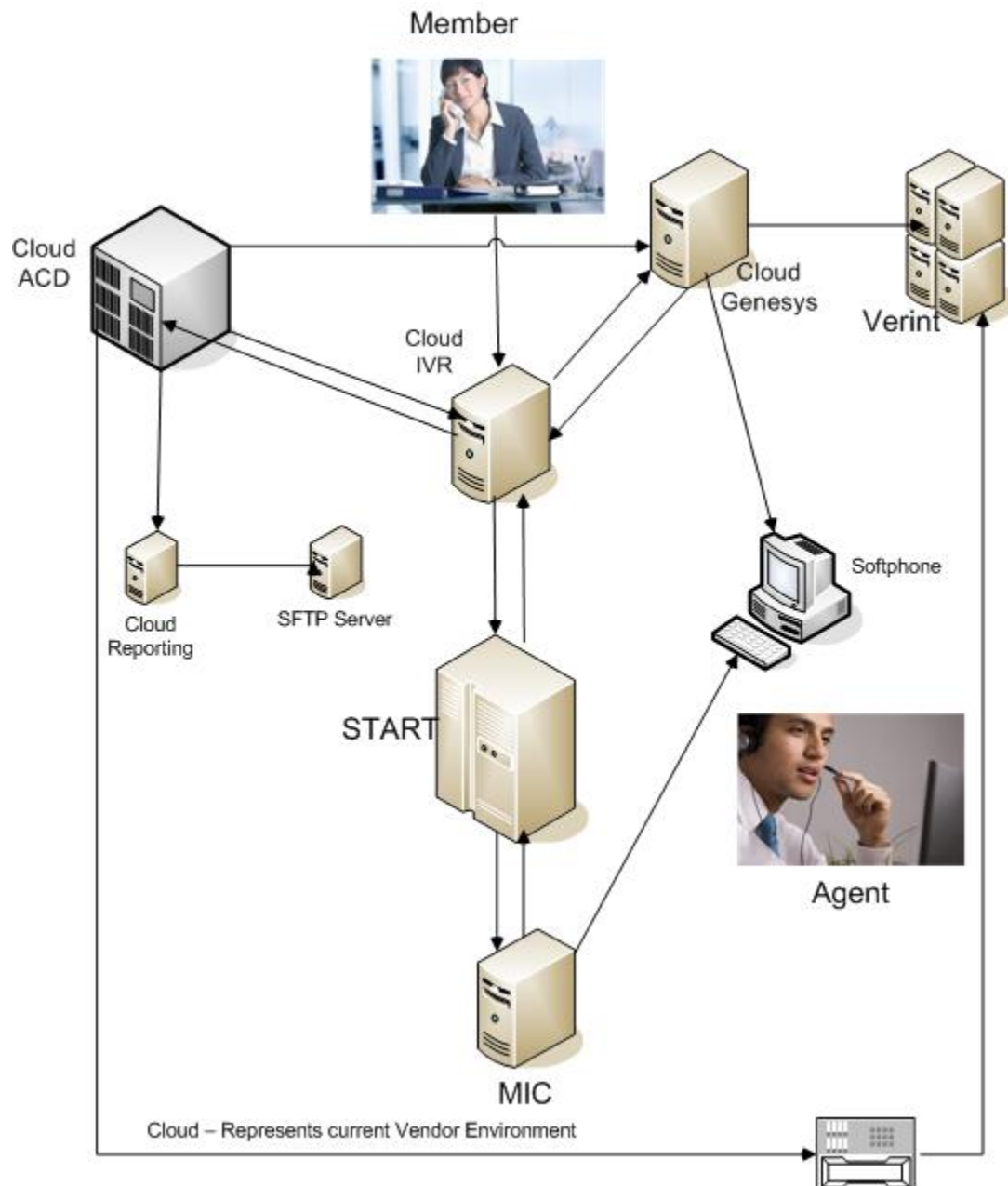
PC Hardware Standards:
Dell Optiplex GX780
3 GB RAM
Intel Core 2 Quad 2.66GHz Processor
300 GB Hard Drive
512MB Video Card
Floppy Drive
DVD ROM

PC Software Standards:
Windows XP SP3
Microsoft Office Professional 2003
Attachmate MyExtra 7.11
Microsoft Visio 2003
Microsoft Project 2003
Adobe Acrobat 7.0
Symantec Antivirus Corporate Edition 10
Internet Explorer 7

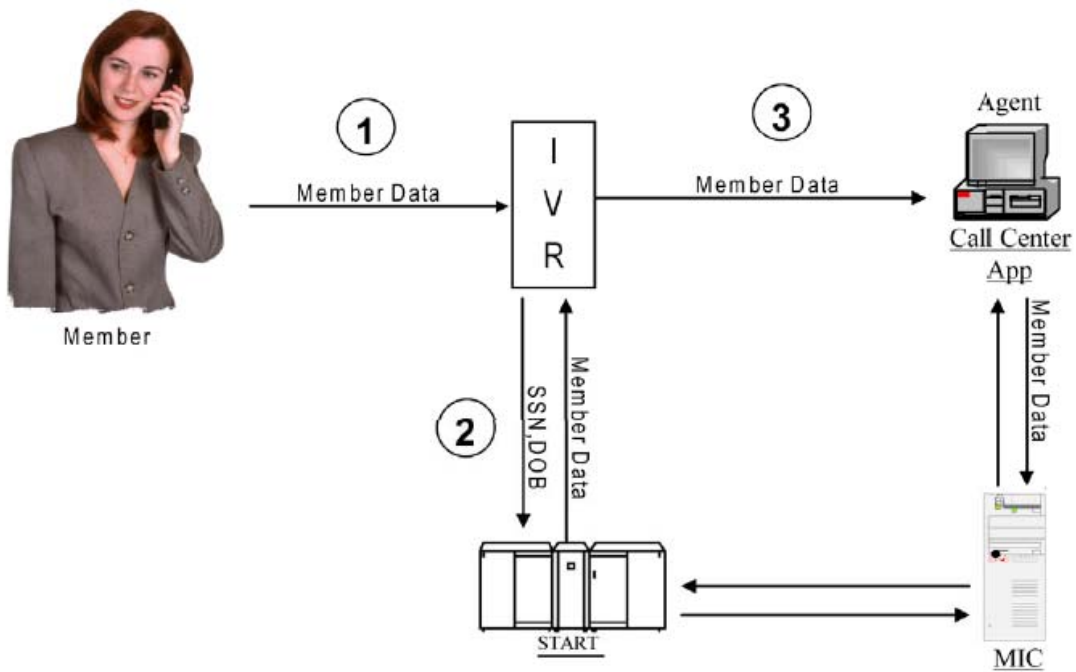
Verint Software:
Impact 360 Workforce Management – V10.0.3.205.s680
Verint QM – V7.8.1 Build 468
Witness Viewer -V7.8.3 Build 1429

Call Manager Software:
Cisco Call Manager – 6.1.4.2227-1

CalSTRS Contact Center System Overview



Interfaces



Standard Security Policy

The application must adhere to the following CalSTRS security standards:

- a. The transmission of CalSTRS data must be encrypted end to end in compliance with CalSTRS Encryption Policy and standards when outside of the CalSTRS network.
 - i. Data may be encrypted with the following encryption algorithms:
 1. 3DES, Blowfish, RSA, IDEA, and AES.
 - ii. Symmetric encryption keys must be 256 bits or higher
 - iii. Asymmetric encryption keys must be 3072 bits or higher
 - iv. Elliptic Curve Cryptography encryption may be used with asymmetric keys at least 256 bits in length
- b. CalSTRS confidential data at rest must be encrypted in compliance with CalSTRS Encryption Policy and standards when outside of the CalSTRS network.
 - i. Data may be encrypted with the following encryption algorithms:
 1. 3DES, Blowfish, RSA, IDEA, and AES.
 - ii. Symmetric encryption keys must be 256 bits or higher
 - iii. Asymmetric encryption keys must be 3072 bits or higher
 - iv. Elliptic Curve Cryptography encryption may be used with asymmetric keys at least 256 bits in length
- c. Password strength must be in compliance with CalSTRS Password Policy and standards.
 - i. Must consist of alphanumeric characters (to include at least one number, one upper case letter, and one lower case letter)
 - ii. Must be a minimum of eight (8) characters in length (no spaces)
 - iii. Must never be used in scripts or macros
 - iv. Account locked out after five (5) unsuccessful login attempts
 - v. May not be the same as the identification component (userid)
 - vi. Must be changed by the user at the next logon whenever it is reset
 - vii. Guest accounts or accounts with empty passwords may never be used
 - viii. The use of built-in password enforcement mechanisms must be utilized to ensure that passwords conform to the password policy
 - ix. Distribution of initial passwords must use methods that ensure only the intended authorized individuals receive the password
 1. Telephone – once the recipient has had their identity verified by an authorized account administrator
 2. Postal service - independent from any identification component (userid) or password protected media
 3. Email - independent from any identification component (userid) or password protected media

- x. Initial password must conform to the password policy
- d. Audit Logging:
- i. An audit record must be kept of every log in and log off of the hosted system. The audit record must include the date and time (hour, minutes, and seconds) of the log in/log off, name of the end user, and the event type (i.e., successful logon).
 - ii. An audit record must be kept of every unsuccessful log in attempt to the hosted system. The audit record must include the date and time (hour, minutes, and seconds) of the unsuccessful log in, name of the end user, and the event type.
 - iii. An audit record must be kept of every time an end user's account is disabled by the hosted system. The audit record must include the date and time (hour, minutes, second), name of the end user, and the event type.
 - iv. An audit record must be kept of every transaction that adds, deletes or modifies CalSTRS information. The audit record must include the date and time (hour, minutes, seconds), name of the end user, the type of action taken (add, change, delete), and what was added, changed or deleted.
 - v. An audit record must be kept of every attempt to access information that the end user is not authorized to access. The audit record must include the date and time (hour, minutes, seconds), name of the end user, what the end user attempted to access, and the event type.
 - vi. An audit record must be kept for each and every activity, successful or failed, within the hosted system by trusted users/administrators. The audit record must include the date and time (hour, minutes, seconds), name of the trusted user/administrator, the activity attempted/performed by the trusted user/administrator, and the event type.
 - vii. Audit records must be kept for a minimum of 1 year (12 months)
- e. CalSTRS data and structure must not be visible to other Vendor customers or be available to use in Vendor "general" literature and benchmarking.

Request for Proposal 2P201007
 Contact Center Solution
 Exhibit F
 Page 1 of 1

EXHIBIT F - EVALUATION SCORING FORM

 Name of Firm

For CalSTRS Evaluation Team Use: This form must be used to record your scores for each firm. Please use a separate form for each proposing firm. This form may be duplicated as necessary. ***Must have a minimum of 500 points for the Proposal Evaluation in order for the Cost Proposal to be evaluated.**

Proposal Evaluation	Maximum Points Breakdown
Proposal Components: (such as) ▪ Client References ▪ Features Summary - Base (Attachment 10) ▪ Technical Requirements (Attachment 14) ▪ Features Summary – Optional (Attachment 11) ▪ Management References ▪ Project Schedule	350 Points
Proposal Questionnaire: (such as) ▪ Proposer's Firm Background Questions ▪ Project and Deliverable Questions ▪ General Solution Questions ▪ Licensing Questions ▪ Test Phase Questions ▪ Training Phase Questions	260 Points
Submittal: ▪ Service Level Agreement	100 Points
DVBE Incentive: (If applicable)	10 points
Proposal Evaluation Grand Total	*720 Points
Cost Proposal ▪ Base costs** (60%) ▪ Optional costs** (40%)	284 Points 206 Points 490 Points
**Evaluation includes One Time project costs and Maintenance and Operations costs.	
Finalist Interview (optional)	300 Points
TOTAL	1510 Points

STATE OF CALIFORNIA
STANDARD AGREEMENT
STD 213 (Rev 06/03)

AGREEMENT NUMBER

REGISTRATION NUMBER

1. This Agreement is entered into between the State Agency and the Contractor named below:

STATE AGENCY'S NAME

California State Teachers' Retirement System (CalSTRS)

CONTRACTOR'S NAME

2. The term of this Agreement is: through

3. The maximum amount of this Agreement is:

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work

X page(s)

Exhibit B – Budget

X page

Exhibit C – Teachers Retirement Board Policy Manual Section 600H

3 pages

Exhibit D – Disclosure of Contributions and Gifts

2 pages

Exhibit E – Authorized/Key Personnel

1 page

Exhibit F - CalSTRS' Contractor Background Investigation Policy

3 page

Exhibit G - Certification of Contractor's Employee Background Investigation Form

1 page

Exhibit H - Personal History Statement

1 page

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.**CONTRACTOR**

CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.)

BY (Authorized Signature)



DATE SIGNED(Do not type)

PRINTED NAME AND TITLE OF PERSON SIGNING

ADDRESS

STATE OF CALIFORNIA

AGENCY NAME

California State Teachers' Retirement System (CalSTRS)

BY (Authorized Signature)

DATE SIGNED(Do not type)

PRINTED NAME AND TITLE OF PERSON SIGNING

Robin Madsen, Interim Chief Financial Officer

ADDRESS

100 Waterfront Place

West Sacramento, CA 95605-2807

**California State Teachers'
Retirement Use Only****APPROVED AS TO FORM****CalSTRS LEGAL COUNSEL**☐ Exempt

A. INTRODUCTION

The California State Teachers' Retirement System (CalSTRS) and Contractor Name (Name (Contractor) enter into this Agreement/Contract to provide (Briefly describe history and/or services to be provided. If applicable include Attachment/Exhibit.)

B. AGREEMENT LIAISONS**1. Contractor**

- a) Contractor liaison for services shall be Name, Title, Telephone number, E-mail address.
- b) Correspondence may be addressed to mail address.

2. CalSTRS

- a) CalSTRS liaison for services shall be Name, Title, Telephone number, E-mail address and Mail Stop ##.
- b) Contract Services Office, Name, Title, Telephone number, E-mail address and Mail Stop 30, for questions related to the agreement contract.
- c) Support Accounting, Office, Name, Title, (916) 414-4376 Telephone number, E-mail address and Mail Stop 29, for questions related to invoices/payments.
- d) Correspondence may be addressed to the California State Teachers' Retirement System, 100 Waterfront Place, Mail Stop (number above), West Sacramento, CA 95605-2807 or PO Box 15275, Sacramento, CA 95851-0275.
- e) Any notices to be given shall be in writing and served to CalSTRS either personally or delivered by mail to the address listed above, including:

Branch Name
Name, Deputy Chief Executive Officer
Mail Stop ##

C. TERM

The term of this Agreement shall be from (start date) or upon final signature of both parties approval of CalSTRS' Fiscal Officer, whichever occurs later, through (end date).

D. FEES

The total amount of this Agreement shall not exceed \$, unless amended in writing and signed by the CalSTRS' Accounting Officer.

Fees shall be calculated as .

We reserve the right to charge an additional fee to Registered Investment Advisor's to offset our costs related to the services provided, relative to this contract.

E. BUDGET DETAIL AND PAYMENT PROVISIONS**1. Invoicing and Payment**

- a) For services satisfactorily rendered, and upon receipt and approval of the invoices, CalSTRS agrees to compensate the Contractor for actual expenditures incurred in accordance with the rates specified herein, which is attached hereto and made a part of this Agreement.
- b) Invoices shall be submitted in triplicate not more frequently than monthly in arrears to:

Support Accounting Office (MS 29)
California State Teachers' Retirement System
PO Box 15275
Sacramento, CA 95851-0275

- c) Invoice(s) must include: 1) CalSTRS' Agreement Number; 2) contractor's name, address and telephone number; 3) itemized description of services including detailed cost and date(s) of services; 4) fiscal year in which services were rendered; and 5) total amount of invoice.

2. Budget Contingency Clause

- a) It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, CalSTRS shall have no liability to pay any funds whatsoever to Contractor or to furnish any other considerations under this Agreement and Contractor shall not be obligated to perform any provisions of this Agreement.
- b) If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, CalSTRS shall have the option to either cancel this Agreement with no liability occurring to CalSTRS, or offer an agreement amendment to Contractor to reflect the reduced amount.

3. Prompt Payment Clause

Payment will be made in accordance with, and within the time specified in, Government Code Chapter 4.5, commencing with Section 927.

4. Travel

Contractor's travel expenses that are necessary, requested and authorized by CalSTRS shall be reimbursed at a rate not to exceed that authorized under State law and the Department of Personnel Administration rules for California State excluded/non-represented employees as described in Attachment X, Business and Travel Reimbursements for Excluded/Non-represented Employees or will be processed in the most economical method available. Reimbursement will be made upon receipt of a correct Travel Expense Claim (Standard Form 262), Attachment X, submitted in duplicate with actual expense receipts attached.

F. GENERAL TERMS AND CONDITIONS**1. Timeliness**

Time is of the essence in this Agreement.

2. Approval

This Agreement is of no force or effect until signed by both parties. Contractor may not commence performance until approval has been obtained.

3. Amendment

No amendment or variation of the terms of this Agreement shall be valid unless made in writing and signed by the parties. No oral understanding or Agreement not incorporated in the Agreement is binding on any of the parties.

4. Taxes

Unless otherwise required by law, CalSTRS is exempt from Federal excise taxes. CalSTRS will only pay for any state or local sales or use taxes on the services rendered or goods supplied to CalSTRS pursuant to this Agreement.

5. Severability

Should any provision(s) of this Agreement be declared or found to be illegal, unenforceable, ineffective or void, then each party shall be relieved of any obligations arising in such provision(s); the balance of this Agreement, if capable of performance shall remain and continue in full force and effect.

6. Force Majeure

Neither party shall be liable to the other for delay in or failure of performance, nor shall any such delay in or failure of performance constitute default, if such delay or failure is caused by "Force Majeure." Such causes may include, but are not restricted to, Acts of God or of the public enemy, acts of the State in its sovereign capacity, fires, floods, power failure, disabling strikes, epidemics, quarantine restrictions, and freight embargoes.

7. Nondiscrimination

During the performance of this Agreement, Contractor and its subcontractors, as well as their agents and employees, shall not unlawfully discriminate, harass or allow harassment, against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (including health impairments related to or associated with a diagnosis of cancer for which a person has been rehabilitated or cured), age (40 or over), marital status, and use of family and medical care leave pursuant to federal law. Contractors and subcontractors, as well as their agents and employees, shall ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Contractor and subcontractors, as well as their agents and employees, shall comply with the provisions of the Fair Employment and Housing Act (Government Code, section 12900 et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 7285.0 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code,

section 12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Contractor and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement.

Contractor shall include the nondiscrimination and compliance provisions of this clause in all subcontracts to perform work under this Agreement.

8. Assignment

This Agreement is not assignable by the Contractor, either in whole or in part, without the consent of CalSTRS in the form of a formal written agreement.

9. Disputes

Any dispute concerning a question of fact arising under the terms of this Agreement which is not disposed of within a reasonable period of time by Contractor and CalSTRS employees normally responsible for the administration of this Agreement shall be brought to the attention of the Executive Officer (or designated representative) of each organization for joint resolution. At the request of either party, CalSTRS shall provide a forum for the discussion of the disputed item(s), at which time a third party, mutually agreed upon by the parties to this Agreement, shall be requested to assist in the resolution of the dispute. If agreement cannot be reached through the application of high level management attention, either party may assert its other rights and remedies within this Agreement or within a court of competent jurisdiction.

CalSTRS and Contractor agree that, the existence of a dispute notwithstanding, they will continue without delay to carry out all their responsibilities under this Agreement which are not affected by the dispute.

10. Confidentiality

Contractor, in course of its duties, may handle investment, financial, accounting statistical, personal, technical and other data and information relating to CalSTRS and its members. All such information is confidential, and, unless permitted by CalSTRS in writing, Contractor shall not disclose such information, directly or indirectly, or use it in any way, either during the term of the Agreement or any time thereafter, except as required to perform its duties under this Agreement. Any disclosure of information contrary to this provision shall be considered a material breach of this Agreement. Contractor warrants that only those who are authorized and required to such materials will have access to them. Failure to comply with this provision will subject Contractor to liability, including all damages to CalSTRS and third parties. Contractors who may, in the course of their duties, have access to any CalSTRS information and/or assets, must individually sign a CalSTRS Information Security Confidentiality and Non-Disclosure Agreement prior to engaging work with CalSTRS.

11. Contractor Employee Relationship

Contractor understands and acknowledges that the personnel provided to CalSTRS under this Agreement are the employees of the Contractor or Independent Contractors who have a contractual relationship with the Contractor. Contractor agrees to indemnify, defend and hold harmless CalSTRS from any and all claims made against it including, but not limited to, claims for salaries, liability for tax withholding, workers' compensation, disability or miscellaneous employment benefits, whether based on tort, contract or other theories of recovery arising out of injury, disability, or death of Contractors' employees or Independent Contractors.

Contractor shall perform a background investigation on all contract employees working at CalSTRS under this Agreement. Contractor's background investigation shall consist of the components prescribed in CalSTRS' Contractor Background Investigation Policy (Exhibit X). Compliance with CalSTRS' Contractor Background Investigation Policy must be affirmed with submission of Certification of Contractor's Employee Background Investigation Form (Exhibit X) for each contract employee providing services to CalSTRS under this Agreement. Further, all contract employees must submit to CalSTRS the Personal History Statement (Exhibit X) identifying any relatives of the contract employee that are CalSTRS members, beneficiaries, or employees.

12. Titles/Section Headings

Titles or headings are not part of this Agreement, are for convenience of reference only, and shall have no effect on the construction or legal effect of this Agreement.

13. Choice of Law

This Agreement shall be administered, construed, and enforced according to the laws of the State of California (without regard to any conflict of laws provisions) to the extent such laws have not been preempted by applicable federal law. Any suit brought hereunder (including any action to compel arbitration or to enforce any award or judgment rendered thereby) shall be brought in the state or federal courts sitting in Sacramento, California, the parties hereby waiving any claim or defense that such forum is not convenient or proper. Each party agrees that any such court shall have in personam jurisdiction over it and consents to service of process in any manner authorized by California law.

14. Independent Contractor

Contractor, and the agents and employees of Contractor, in the performance of this Agreement, shall act in an independent capacity and not as officers or employees or agents of CalSTRS or the State of California.

15. Counterparts

This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

16. Unenforceable Provision

In the event that any provision of this Agreement is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this Agreement have force and effect and shall not be affected thereby.

17. Entire Agreement

This Agreement contains all representations and the entire understanding between the parties with respect to the subject matter herein. If applicable, the competitive process as it may have been amended and clarified by CalSTRS prior to the award of this Agreement as well as the Contractor's proposal/bid shall be considered part of this Agreement. However, in the event a conflict in interpretation arises, the Agreement shall prevail. Any correspondence, memoranda or agreements shall be replaced in total by this Agreement.

18. Compensation

The consideration to be paid Contractor, as provided herein, shall be as compensation for all of Contractor's expenses incurred in the performance hereof, including travel, per diem, and taxes, unless otherwise expressly so provided.

19. Knowledge Transfer

Where appropriate, Contractor's obligations under the terms of this Agreement include a "knowledge transfer" to CalSTRS. "Knowledge transfer" is defined as that personal and/or technical knowledge or information which will enable, or enhance the ability of, CalSTRS staff to maintain and operate contracted-for programs, equipment and facilities.

If the Agreement includes the purchase of equipment, "knowledge transfer" shall also include education and training, including all relevant documentation, to enable CalSTRS to maintain the equipment based on Contractor's methodology. The Contractor agrees that CalSTRS may reproduce such documentation for its own use in maintaining the equipment.

Any additional training or instruction necessary to realize the "knowledge transfer" shall be provided at no additional cost to CalSTRS.

G. AFFIRMATIVE COVENANTS

1. Permits and Licenses

Contractor shall carry out its duties and responsibilities herein in accordance with, be limited in the exercise of its rights by, and observe and comply with, all federal, state, city and county laws, rules or regulations affecting services under this Agreement. Contractor shall procure and keep in full force and effect during the term of this Agreement all permits and licenses necessary to accomplish the work contemplated in this Agreement.

2. Reports and/or Meetings

- a) Contractor shall provide oral or written progress reports as requested by CalSTRS to determine if Contractor is performing to expectations or is on schedule, to provide communication of interim findings, and to afford occasions for discussing and resolving problems encountered.
- b) Contractor shall meet with CalSTRS' staff and/or the Board upon request to discuss progress on the Agreement or to present findings, conclusions and recommendations.

3. Audit

- a) During and for three years after the term of this Agreement, Contractor shall permit the Bureau of State Audits, CalSTRS, and its authorized representatives, and such consultants and specialists as needed, at all reasonable times during normal business hours to inspect and copy, at the expense of CalSTRS, books and records of Contractor relating to its performance of this Agreement.
- b) Contractor shall be subject to examination and audit by the Bureau of State Audits, CalSTRS, and CalSTRS' representatives during the term of this Agreement and for three years after final payment under this Agreement. Any examination or audit shall be confined to those matters connected with the performance of this Agreement, including, but not limited to, the costs of administering this Agreement. Contractor shall cooperate

fully with the Bureau of State Audits, CalSTRS, and/or CalSTRS' authorized representatives in connection with any examination or audit. All adjustments, payments, and/or reimbursements determined to be necessary by any examination or audit shall be made promptly by the appropriate party.

4. Additional Documents

Contractor and CalSTRS agree to execute such additional documents, and perform such further acts, as may be reasonable and necessary to carry out the provisions of this Agreement.

5. Disabled Veteran Business Enterprise (DVBE) Participation Requirements

The California Public Contract Code (PCC) Section 10115 et seq. requires a participation goal of three (3%) percent DVBE for contracts awarded by CalSTRS. This goal applies to the total contract dollars expended by CalSTRS annually.

The Teachers' Retirement Board has adopted a policy that directs staff to encourage, promote, and facilitate the fullest possible participation by Disabled Veteran Business Enterprise (DVBE) in contracts awarded by CalSTRS. In accordance with this policy, CalSTRS encourages its contractors to seek opportunities, to do business with DVBE firms.

In compliance with the statutory requirements and with respect to the execution of this Agreement:

- a) Contractor agrees that, as a Contractor of CalSTRS, it will meet the requirements of the Board's policies regarding the 3% disabled veteran business enterprise (DVBE) participation goal.
- b) Contractor, in contracting for goods and services pursuant to this Agreement, shall make good faith efforts to comply with the Board's objectives and policy regarding DVBE participation. Contractor shall report such efforts and the level of participation by DVBEs to CalSTRS in the format prescribed by CalSTRS.
- c) Nothing shall be construed to authorize any contractor to discriminate in the solicitation or acceptance of bids for subcontracting, or for materials or equipment, on the basis of race, color, sex, ethnic origin or ancestry.
- d) Contractor agrees to provide CalSTRS or its delegate with any information reasonably necessary to comply with the obligations set forth in the applicable provisions of PCC sections 10115, et seq. Upon reasonable notice, Contractor shall permit CalSTRS or its delegate access to its premises during normal business hours to interview employees and to inspect and copy books, records, accounts, and other materials for the purpose of determining compliance with the applicable provisions of PCC sections 10115, et seq. and Title 2, California Code of Regulations, sections 1896.60, et seq. Contractor agrees to maintain such records for a period of three (3) years after final payment under this Agreement. Contractor further agrees to make this paragraph applicable to all subcontracts entered into hereunder.

6. Reportable Interests

Contractor shall not directly or indirectly receive any benefit from recommendations made to CalSTRS and shall disclose to CalSTRS any personal investment or economic interest of Contractor which may be enhanced by the recommendations made to CalSTRS. Contractor acknowledges that the System is subject to the provisions of the Fair Political Practices laws of

California (Government Code section 81000, et seq., and all regulations adopted thereunder, including, but not limited to, Title 2, California Code of Regulations, section 18700) and Contractor shall comply promptly with any requirement thereunder. If required by law, Contractor shall require its Authorized/Key personnel named [in response to Section (), in the Request for Proposal] and all later substitutions therefore to file Statements of Economic Interests in compliance with CalSTRS' Conflict of Interest Code (Title 25, California Code of Regulations, section 22000560 et seq.). . All such reports shall be filed simultaneously with the Staff.

7. Authorized/Key Personnel

- a) Exhibit X, Contractor Name Authorized/Key Personnel, names certain members (authorized/key individuals who perform scope services under this Agreement) of Contractor's staff who will exercise a significant role under this Agreement. These personnel shall be hereafter referred to (both individually and collectively) as "Authorized/Key Personnel".
- b) Contractor shall not substitute, replace or reassign Authorized/Key Personnel without CalSTRS' prior approval. However, with CalSTRS' prior approval, the parties may agree in writing to a change in these Authorized/Key Personnel, which writing shall become a part of this Agreement.
- c) This Agreement may be terminated immediately, in CalSTRS' sole discretion and upon written notice from CalSTRS to Contractor, because of any change in or departure of Contractor's Authorized/Key Personnel.

8. Changes in Control, Organization or Authorized/Key Personnel

Contractor shall promptly, and in any case within five (5) calendar days, notify CalSTRS in writing: (i) if any of Contractor's representations and warranties, as set forth in this Agreement, cease to be true at any time during the term of this Agreement; (ii) of any change in Contractor's staff who exercise a significant administrative, policy, or consulting role under this Agreement, including without limitation the Authorized/Key Personnel; (iii) of any change in the majority ownership, control, or business structure of Contractor; or (iv) of any other material change in Contractor's business, partnership or corporate organization. All written notices from Contractor under this provision shall contain sufficient information to permit CalSTRS to evaluate the changes within Contractor's personnel or organization under the same criteria as was used by CalSTRS in its award of this Agreement to Contractor. Contractor agrees to provide CalSTRS with such additional information as CalSTRS may request.

9. Indemnification

Contractor agrees to indemnify, defend and hold harmless the State of California, CalSTRS, the CalSTRS Teachers' Retirement Board, the California State Teachers' Retirement Fund, and all of the officers, trustees, agents and employees of the foregoing, from and against any and all losses, costs, liabilities, damages or deficiencies, including interest, penalties and attorneys' fees, which (i) arise out of or are due to a breach by Contractor of any of its representations, warranties, covenants or other obligations contained in this Agreement, or (ii) are caused by or resulting from Contractor's acts or omissions constituting bad faith, willful misfeasance, negligence or reckless disregard of its duties under this Agreement, or (iii) accrue or result to any of Contractor's subcontractors, materialmen, laborers or any other person, firm or corporation furnishing or supplying services, material or supplies in connection with the performance of this Agreement.

10. Compliance with Statutes and Regulations

Contractor warrants and certifies that in the performance of this Agreement, it will comply with all applicable statutes, rules, regulations and orders of the United States and the State of California and agrees to indemnify CalSTRS against any loss, cost, damage or liability by reason of Contractor's violation of this provision.

11. Subcontractors

- a) Contractor shall perform the work contemplated with resources available within its own organization. No other portion of the work pertinent to this Agreement shall be subcontracted without written authorization by CalSTRS. The subcontractor must be mutually agreed upon in advance by both parties.
- b) Contractor shall require any subcontractor agree to be bound by all provisions, of this Agreement as applicable.

12. Notice of Proceedings

Contractor shall promptly notify CalSTRS in writing of any investigation, examination or other proceeding involving Contractor, or any Authorized/Key Personnel, commenced by any regulatory agency which proceeding is not conducted in the ordinary course of Contractor's business.

H. NEGATIVE COVENANTS

1. Publicity

No publicity release or announcement concerning this Agreement or the transactions contemplated herein shall be issued by Contractor without advance written approval by CalSTRS.

2. Services or Procurement Resulting from Agreement

Neither Contractor, nor any of its subsidiaries, officers or directors, may submit a bid for or be awarded a contract for the provision of services, procurement of goods or supplies, or any other related action which is required, suggested, or otherwise deemed appropriate on the advice or recommendations that Contractor provides under this Agreement.

I. CONTRACTOR CERTIFICATION CLAUSES

1. Statement of Compliance – Nondiscrimination

Contractor's signature affixed hereon and dated shall constitute a certification under the penalty of perjury under the laws of the State of California that Contractor has, unless exempted, complied with the nondiscrimination program requirements of Government Code section 12990 (a-f) and Title 2, California Code of Regulations, section 8103 et seq.

2. Americans with Disabilities Act

By signing this Agreement, Contractor assures CalSTRS that it complies with the Americans with Disabilities Act (ADA) of 1990, (42 U.S.C. 12101 et seq.), which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA.

3. National Labor Relations Board Certification

Contractor, by signature hereto, does swear under penalty of perjury that no more than one final unappealable finding of contempt of court by a Federal court has been issued against Contractor within the immediately preceding two-year period because of Contractor's failure to comply with an order of a Federal court which orders Contractor to comply with an order of the National Labor Relations Board.

4. Labor Code/Workers' Compensation

Contractor is aware of the provisions which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions within the Labor Code Section 3700, and Contractor affirms to comply with such provisions, before commencing the performance of the work of this Agreement.

5. Illegal Alien

Contractor will comply with 8 U.S.C. §1621 et seq. and shall not knowingly employ or contract with an illegal alien to perform work.

6. Drug-Free Workplace

Contractor will comply with the requirements of Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

- a) Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.
- b) Establish a Drug-Free Awareness Program to inform employees about:
 - 1) The dangers of drug abuse in the workplace;
 - 2) The person's or organization's policy of maintaining a drug-free workplace;
 - 3) Any available counseling, rehabilitation and employee assistance programs; and,
 - 4) Penalties that may be imposed upon employees for drug abuse violations.
- c) Every employee who works on the proposed Agreement will:
 - 1) Receive a copy of the company's drug-free policy statement; and,
 - 2) Agree to abide by the terms of the company's statements as a condition of employment on the Agreement.

Failure to comply with these requirements may result in suspension of payments under the Agreement or termination of the Agreement or both and Contractor may be ineligible for award of any future Agreements if CalSTRS determines that any of the following has occurred: (1) the Contractor has made false certification, or (2) violated the certification by failing to carry out the requirements as noted above. (Government Code Section 8350 et seq.)

7. Contractor Name Change

An amendment is required to change the Contractor's name as listed on this Agreement. Upon receipt of legal documentation of the name change CalSTRS will process the amendment.

Payment of invoices presented with a new name cannot be paid prior to approval of said amendment.

8. Corporate Qualifications To Do Business in California

- a) When agreements are to be performed in the state by corporations, CalSTRS will verify that the Contractor is currently qualified to do business in California in order to ensure that all obligations due to the state are fulfilled.
- b) "Doing Business" is defined in the Revenue & Taxation Code Section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the state not be subject to the franchise tax.
- c) Both domestic and foreign corporations (those incorporated outside of California) must be in good standing in order to be qualified to do business in California. CalSTRS will determine whether a corporation is in good standing by calling the Office of the Secretary of State.

9. Resolution

A county, city, district, or other local public body must provide CalSTRS with a copy of a resolution, order, motion, or ordinance of the local government body which by law has authority to enter into an agreement, authorizing execution of this Agreement.

10. Payee Data Record Standard Form 204

This form must be completed by all contractors that are not another state agency or other governmental entity.

11. Conflict of Interest

Contractor is aware of the following provisions regarding current or former state employees. If Contractor has questions on the status of any person rendering services or involved with the Agreement, CalSTRS must be contacted immediately for clarification.

Current State Employees (PCC 10410):

- a) No officer or employee shall engage in any employment, activity or enterprise from which the officer or employee receives compensation or has a financial interest and which is sponsored or funded by any state agency, unless the employment, activity or enterprise is required as a condition of regular state employment.
- b) No officer or employee shall contract on his or her own behalf as an independent contractor with any state agency to provide goods or services.

Former State Employees (PCC 10411):

- a) For the two-year period from the date he or she left state employment, no former state officer or employee may enter into a contract in which he or she engaged in any negotiations, transactions, planning, arrangements or any part of the decision-making process relevant to the contract while employed in any capacity by any state agency.

- b) For the 12-month period from the date he or she left state employment, no former state officer or employee may enter into a contract with any state agency if he or she was employed by that state agency in a policy-making position in the same general area as the proposed contract within the 12-month period prior to his or her leaving state service.

If Contractor violates any provisions of above paragraphs, such action by Contractor shall render this Agreement void. (PCC 10420)

Members of boards and commissions are exempt from this section if they do not receive payment other than payment of each meeting of the board or commission, payment for preparatory time and payment for per diem. (PCC 10430 (e))

12. Air or Water Pollution Violation

Under the laws of the State of California, the Contractor shall not be: (1) in violation of any order or resolution not subject to review promulgated by the State Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.

13. Expatriate Corporations

Contractor hereby declares that it is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code Sections 10286 and 10286.1, and is eligible to contract with the State of California.

14. Domestic Partners (For Contracts over \$100,000)

For contracts executed or amended after January 1, 2007, the Contractor certifies that Contractor is in compliance with Public Contract Code section 10295.3.

J. SPECIAL TERMS AND CONDITIONS

1. Evaluation of Contractor

Pursuant to Public Contract Code section 10369, the Staff shall evaluate Contractor's performance under the terms and conditions of this Agreement within sixty (60) days after the completion of Contractor's performance under this Agreement. If the evaluation indicates unsatisfactory performance, a copy will be sent to the Department of General Services, the Office of Legal Services and to Contractor who may file a response to the evaluation. The evaluation and response shall remain on file for thirty-six (36) months and shall not be public records.

2. Disclosure of Campaign Contributions, Disclosure and Limits on Charitable Contributions, and Gifts

a) Policy

Section 600 H of the Teachers Retirement Board Policy Manual sets forth policies requiring entities engaging in business with CalSTRS to disclose campaign contributions in excess of \$250, prohibits providing charitable contributions in excess of \$250, and gifts in excess of \$390, as well as requiring the periodic disclosure of campaign contributions, charitable contributions, and gifts. A copy of the current policy is attached as Exhibit X.

b) Application of Policy to Contractor

This policy applies to all Contractors having a business relationship or seeking a business relationship with CalSTRS or to any business relationship that is considered by the Teachers Retirement Board in a closed session meeting.

c) Disclosure of Campaign Contributions

Contractor and each of its Authorized/Key Personnel (Exhibit X) shall disclose campaign contributions, as defined by the Political Reform Act, valued in excess of \$250, made to or on behalf of any existing Teachers Retirement Board member, candidates for Board member, Controller, Treasurer, and Superintendent of Public Instruction, and to any CalSTRS officer or employee.

d) Charitable Contributions

1) Limit on Charitable Contributions

Contractor and each of its Authorized/Key Personnel shall not provide any charitable contribution, as defined by the Political Reform Act, in excess of \$250, individually or in the aggregate in any calendar year, directly to or at the request of any Teachers Retirement Board member, or CalSTRS officer or employee.

2) Disclosure of Charitable Contributions

Contractor and each of its Authorized/Key Personnel shall disclose charitable contribution, as defined by the Political Reform Act, valued in excess of \$50, made to or at the request of any Teachers Retirement Board member, or CalSTRS officer or employee.

e) Gifts

1) Limit on Gifts

Contractor and each of its Authorized/Key Personnel shall not provide any gifts, as defined by the Political Reform Act, in excess of \$390, individually or in the aggregate in any calendar year, to any Teachers Retirement Board member, or CalSTRS officer or employee.

2) Disclosure of Gifts

Contractor and each of its Authorized/Key Personnel shall disclose gifts, as defined by the Political Reform Act, valued in excess of \$50, made to or at the request of any Teachers Retirement Board member, or CalSTRS officer or employee.

f) Submission of Disclosures

Contractor and each of its Authorized/Key Personnel shall, with the offering of this contract for execution and annually thereafter, submit disclosures of contributions and gifts described in this section on a form prescribed by CalSTRS. The current disclosure form required to be submitted with the signing of the contract is attached as Exhibit X. Annual

disclosures shall be due by April 1st of each year and forms will be provided to Contractor and its personnel by CalSTRS.

g) Violation of Policy by Contractor

Violations of any of the provisions of this section may, at the discretion of CalSTRS, subject the Contractor to disqualification from doing future or additional business with CalSTRS for a period of two (2) years.

h) Changes in Laws or Policy

CalSTRS reserves the right to amend, upon prior written notice, the above provisions to conform with any subsequent amendments to the political reform laws and CalSTRS policies. Contractor shall have the right to terminate the Contract upon thirty (30) days written notice should it deem any such amendment unacceptable.

3. Liability for Injury to Persons or Damage to Property

- a) The Contractor shall be liable for damages arising out of injury to the person and/or damage to the property of CalSTRS, employees of CalSTRS, or any other person(s) other than agents or employees of the Contractor, designated by CalSTRS for any purpose, prior to, during, or subsequent to delivery, installation, acceptance, and use of the goods and/or services either at the Contractor's site or at CalSTRS place of business, provided that the injury or damage was caused by the fault or negligence of the Contractor.
- b) Contractor shall not be liable for damages arising out of or caused by an alteration or an attachment not made or installed by the Contractor, or for damage to alterations or attachments that may result from the normal operation and maintenance of the Contractor's equipment.

4. Limitation of Actions

No action, regardless of form, arising out of this Agreement may be brought by either party more than two (2) years after the cause of action has arisen, or in the case of nonpayment, more than two (2) years from the date of the last payment, except where either party (within two years after a cause of action has arisen) provides the other party in writing a notice of a potential cause of action, disclosing all material facts then known by the notifying party concerning such cause of action, then the notifying party may bring an action based on the matter so disclosed at any time prior to the expiration of four (4) years from the time the cause of action arose.

5. Written Commitments

Any written commitment by the Contractor relative to the services herein shall be binding upon the Contractor. Failure of the Contractor to fulfill any such commitment shall render the Contractor liable for damages due to CalSTRS. Such written commitments include, but is not limited to: 1) any warranty or representation made by the Contractor in any publication, drawings, or specifications accompanying or referred to in the proposal which pertains to the responsiveness of the proposal to the Request for Proposal, and 2) any written notification of or affirmation or representation as to the above which is made by the Contractor in or during the course of negotiations and which is incorporated into a formal amendment to the proposal.

6. Child Support Compliance Act

For any contract in excess of \$100,000, the contractor acknowledges in accordance there with, that:

- a) The Contractor recognizes the importance of child and family support obligations and shall fully comply with all applicable state and federal laws relating to child and family support enforcement, including, but not limited to, disclosure of information and compliance with earnings assignment orders, as provided in Chapter 8 (commencing with section 5200) of Part 5 of Division 9 of the Family Code; and
- b) The Contractor, to the best of its knowledge is fully complying with the earnings assignment orders of all employees and is providing the names of all new employees to the New Hire Registry maintained by the California Employment Development Department.

7. Priority Hiring Considerations

If this Agreement is for services in excess of \$200,000, the Contractor shall give priority consideration in filling vacancies in positions funded by the contract to qualified recipients of aid under Welfare and Institutions Code Section 11200 in accordance with PCC Section 10353.

8. Antitrust Claims

The Contractor by signing this Agreement hereby certifies that if these services or goods are obtained by means of a competitive bid, the Contractor shall comply with the requirements of the Government Codes Sections set out below.

- a) The Government Code Chapter on Antitrust claims contains the following definitions:
 - 1) "Public purchase" means a purchase by means of competitive bids of goods, services, or materials by the State or any of its political subdivisions or public agencies on whose behalf the Attorney General may bring an action pursuant to subdivision (c) of Section 16750 of the Business and Professions Code.
 - 2) "Public Purchasing body" means the State or the subdivision or agency making a public purchase. Government Code Section 4550.
- b) In submitting a bid to a public purchasing body, the bidder offers and agrees that if the bid is accepted, it will assign to the purchasing body all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Sec. 15) or under the Cartwright Act (Chapter 2 commencing with Section 16700) of Part 2 of Division 7 of the Business and Professions Code), arising from purchases of goods, materials, or services by the bidder for sale to the purchasing body pursuant to the bid. Such assignment shall be made and become effective at the time the purchasing body tenders final payment to the bidder. Government Code Section 4552.
- c) If an awarding body or public purchasing body receives, either through judgment or settlement, a monetary recovery for a cause of action assigned under this chapter, the assignor shall be entitled to receive reimbursement for actual legal costs incurred and may, upon demand, recover from the public body any portion of the recovery, including treble damages, attributable to overcharges that were paid by the assignor but were not paid by

the public body as part of the bid price, less the expenses incurred in obtaining that portion of the recovery. Government Code Section 4553.

- d) Upon demand in writing by the assignor, the assignee shall, within one year from such demand, reassign the cause of action assigned under this part if the assignor has been or may have been injured by the violation of law for which the cause of action arose and (1) the assignee has not been injured thereby, or (2) the assignee declines to file a court action for the cause of action. Government Code Section 4554.

K. TERMINATION

1. Termination at Option of CalSTRS

This Agreement may be terminated in whole or in part at any time upon 30 calendar days' written notice by CalSTRS, for any reason. Upon receipt of a termination notice, Contractor shall promptly discontinue all services affected unless the notice specifies otherwise.

In the event CalSTRS terminates all or a portion of this Agreement for any reason, it is understood that CalSTRS will provide payment to Contractor for satisfactory services rendered prior to the termination, but not in excess of the maximum Agreement amount.

2. Termination for Default

In such event, CalSTRS shall pay Contractor only the reasonable value of the services rendered. At CalSTRS sole discretion, CalSTRS may offer an opportunity to cure any breach(es) prior to terminating for default.

3. Termination For Insolvency

Contractor shall notify CalSTRS immediately in writing in the event that Contractor files any federal bankruptcy action or state receivership action, any federal bankruptcy or state receivership action is commenced against Contractor, Contractor is adjudged bankrupt, or a receiver is appointed and qualifies. In the event of any of the foregoing events, or if CalSTRS determines, based on reliable information, that there is a substantial probability that Contractor will be financially unable to continue performance under this Agreement, CalSTRS may terminate this Agreement and all further rights and obligations immediately [by giving five (5) days' notice in writing in the manner specified herein].

4. Convenience

If after notice of termination for failure to fulfill Agreement obligations, it is determined that Contractor had not so failed, the termination shall be deemed to have been effected for the convenience of CalSTRS.

5. Completion

In the event of termination for default, CalSTRS reserves the right to take over and complete the work by agreement or other means. In such case, Contractor will be liable to CalSTRS for any additional cost incurred by CalSTRS to complete the work whether reimbursed or not.

6. Effect of Termination

All duties and obligations of CalSTRS and Contractor shall cease upon termination of this Agreement, except that:

- a) Each party shall remain liable for any rights, obligations, or liabilities arising from activities carried on by it under this Agreement prior to the effective date of termination.
- b) Contractor shall provide for the return of all records of CalSTRS to CalSTRS or its designee and shall cooperate fully to effect an orderly transfer of services.

**TEACHERS RETIREMENT BOARD POLICY MANUAL
SECTION 600H**

H. Disclosure of Campaign Contributions, Charitable Contributions, and Gifts; Recusal Requirement; and Ban on Specified Gifts

1. Campaign Contributions¹

Any party who engages in business with CalSTRS for gain shall disclose campaign contributions, as defined under the California Political Reform Act, valued in excess of \$250, made to or on behalf of any existing CalSTRS Board member, candidates for Board member, Controller, Treasurer, Superintendent of Public Instruction, CalSTRS officer or employee.

2. Charitable Contributions

No party who engages in business with CalSTRS for gain shall provide any charitable contribution to a charitable entity, valued in excess of \$250 individually or in the aggregate in any calendar year, made at the request of any Board member, or CalSTRS officer or employee.

3. Gifts

A. No party who engages in business with CalSTRS for gain shall provide gifts to Board members or to CalSTRS officers or employees exceeding the following limits:

- i. Gifts, including meals or entertainment, with a cumulative value exceeding \$390 individually or in the aggregate in any calendar year, given to any Board member or CalSTRS officer or employee. The dollar amount of this limit shall be adjusted biennially in each odd numbered year to reflect the cost of living adjustments made by the Fair Political Practices Commission to the gift limit contained in Government Code section 89503.
- ii. This gift prohibition shall not extend to meals or related expenses provided under the following circumstances:

¹ Additional provisions governing investment relationships can be found in regulations at Title 5, California Code of Regulations sections 24010 through 24013, effective November 28, 2007. The regulations may also be found at www.calstrs.com.

- a. Food, beverages and registration at group events to which substantial numbers of employees of an institution are invited;
 - b. Actual and reasonable expenses for food, beverages, travel, lodging and/or registration provided to permit participation in a meeting directly tied to official or professional duties if participation has been approved in writing by the Chief Executive Officer (for CalSTRS staff) or by the CalSTRS Board (for Board members).
- B. Any party who engages in business with CalSTRS for gain shall disclose gifts aggregating more than \$50 in value made to Board members, or to CalSTRS officers or employees.

4. Recusal

- A. Any Board member who receives campaign contributions, charitable contributions, or gifts that individually or in the aggregate exceed the amount of \$250 in a calendar year shall recuse himself/herself from any involvement in a matter involving the maker of the contributions or gifts for a period of 12 months following the date of the most recent contribution or gift.
- B. Any Board member who returns, donates, or reimburses the donor for gifts subject to these restrictions within 30 calendar days of receipt of the gift shall not be subject to the recusal requirement. Gifts may be returned, donated or reimbursed as specified in California Code of Regulations, Title 2, Division 6, Chapter 9.5, section 18943.

5. Time and Coverage of Disclosures

Disclosure of campaign contributions, charitable contributions, and gifts shall be required as follows:

- A. Upon submission of an initial application or proposal to do business with the System (for the preceding 12-month period).
- B. At the time the final decision is to be made regarding the business proposal (to cover the interim period following the initial application).
- C. Annually, for the previous calendar year. (CalSTRS will use FPPC guidelines to determine which officials in a specific firm must file disclosure statements.)

6. Sanctions for Violation of Policy

Any violation of this policy may lead to disqualification from future business with the System for a period of two years following a determination by the Board that a violation has occurred. The General Counsel is responsible for causing an investigation of any reported violation to be made and shall report any documented violation to the Board for action.

7. Application of Policy

Nothing in this policy supersedes any provision of State law. Those entities engaged in business with the System may also have reporting requirements under the Political Reform Act, California Government Code section 81000 et seq. Also, Board members who are either elected to the Board by a CalSTRS constituency or who are appointed to the Board but also serve as an elected official of a local body are subject to Government Code section 84308, which prohibits the receipt, solicitation or direction of a campaign contribution of more than \$250 while a matter affecting a financial interest of the maker of the contribution is pending, and for three months following the date a decision is rendered on the matter. Section 84308 also requires recusal of the Board member from any involvement in the matter if a contribution over \$250 has been received within the preceding 12 months, unless the contribution was returned no later than 30 days from the time the Board member knew or should have known about the contribution and the matter involving the maker of the contribution.

*Reference: Education Code Section 22363
Amended December 7, 2006
Amended June 6, 2007
Amended February 7, 2008*

CONTRACTOR BACKGROUND INVESTIGATION POLICY

BACKGROUND:

It is the policy of the California State Teachers' Retirement System (CalSTRS) to require all Contractors who contract with CalSTRS to gather and consider background history information in determining if contracted employees who provide services for CalSTRS meet the general standards for employment.

In evaluating contract employees under these provisions, Contractor must give particular emphasis to the business needs arising from CalSTRS' fiduciary responsibility for CalSTRS funds, its obligation to protect the personal data it holds and maintain the integrity of the retirement system, and its policy to provide a safe and secure workplace.

This includes, but is not limited to preventing contractors or their employees from using their employment or access to CalSTRS systems and data to:

- Carry out identity theft or related activities;
- Inappropriately alter member retirement benefits;
- Embezzle funds from CalSTRS;
- Engage in any activity that would damage CalSTRS reputation or member trust;
- Initiate any act of workplace violence, discrimination, or sexual harassment.

CalSTRS' contractor background investigation requirements consist of criminal record checks, civil check, reference checks, and verification of education and previous employment. In addition, CalSTRS contractors will check the driving records of their employees being considered for positions in which driving is a regularly assigned duty. The information gathered in this process is subject to strict confidentiality provisions in order to protect the privacy of those persons whose backgrounds are reviewed under this policy.

STANDARDS AND GUIDELINES:

The following outlines the standards and guidelines for considering information obtained through the various components of the background investigation process. When the information gathered through the individual parts of the process does not provide definitive conclusions as to the contracted personnel's suitability for employment, the background investigation results shall be considered collectively in reaching this determination. While these decisions must be reached through case-by-case review, Contractor must apply these standards and guidelines as consistently as possible.

Contracted personnel will be deemed unsuitable for CalSTRS employment if the background investigation process results in findings that meet any of the criteria identified as follows:

Criminal Record Checks

1. Any conviction at any time, or currently has any charges pending, for any of the following offenses:

- Any form of fraud, deceit or misrepresentation
 - Embezzlement
 - Forgery
 - Identity theft/stolen credit card use
 - Any other offense involving misappropriation of funds, abuse of access to financial or personal records, unauthorized access to financial or personal records, falsification of documents or records, or other crimes of moral turpitude.
2. Any conviction or current charges pending for offenses such as the following:
 - Theft, burglary, car jacking or home invasion crimes.
 - Shoplifting
 - Receiving stolen property
 - Bad checks
 3. Any conviction for any violent crime or currently has charges pending for such an offense.
 4. Convictions other than those specified above will be deemed unsuitable for employment as a contractor with CalSTRS when their record of convictions indicates or suggests a continuing pattern of behavior that is inconsistent with any of the general qualifications for employment or the CalSTRS business concerns specified in the Background section, above.

Civil Checks

Civil history reveals a continuing pattern of credit abuse that supports the conclusion that he or she lacks one or more of the general qualifications for employment, such as honesty, integrity, and/or good judgment.

These determinations require careful case-by-case review of any credit problems, with particular emphasis on the following questions:

- Are the credit problems isolated to a particular point in time, or to a particular vendor with whom the individual may be having a dispute, or do they constitute a general pattern?
- Are there specific mitigating factors that explain the credit problems, such as illness or divorce?
- What effort has the individual made to correct the credit problems?
- How recent are the problems, and what has the credit record been since they occurred?

Reference Checks

Reference check information may disqualify contracted personnel from consideration for any CalSTRS employment when it reveals or confirms that the contracted personnel lack one or more of the general qualifications for employment such as honesty, integrity, and/or good judgment.

Fraud in Securing Appointment

Any information contracted personnel provided for employment with Contractor (on applications, resumes, background questionnaires, etc.) is substantively untruthful. Contractor will verify that information provided by prospective contracted personnel (including education and past work experience) is credible. Contractor will conduct a Social Security trace to aid in this verification.

Driving Record Checks

A serious driving violation, such as driving under the influence of alcohol or drugs, or reckless driving, within the past three years. Driving record checks are only applicable when driving a motor vehicle is a regularly assigned duty.

REQUIREMENTS:

Contractor shall certify that it has performed its background investigation of the contracted employee, reviewed and verified the background information in a manner consistent with CalSTRS' Contractor Background Investigation Policy, and determined that said employee is qualified to perform services for CalSTRS. Such certification will be made with submission of the Certification of Contractor's Employee Background Investigation form, provided to Contractor by CalSTRS, prior to full execution of agreement.

Contractor shall provide CalSTRS with the contracted employee's completed Personal History Statement, provided to Contractor by CalSTRS. Information the contracted employee provides concerning relatives who are CalSTRS members or beneficiaries and/or CalSTRS employees will be used to implement safeguards to prevent the contracted employee from working on or accessing the records/accounts of his or her relatives.

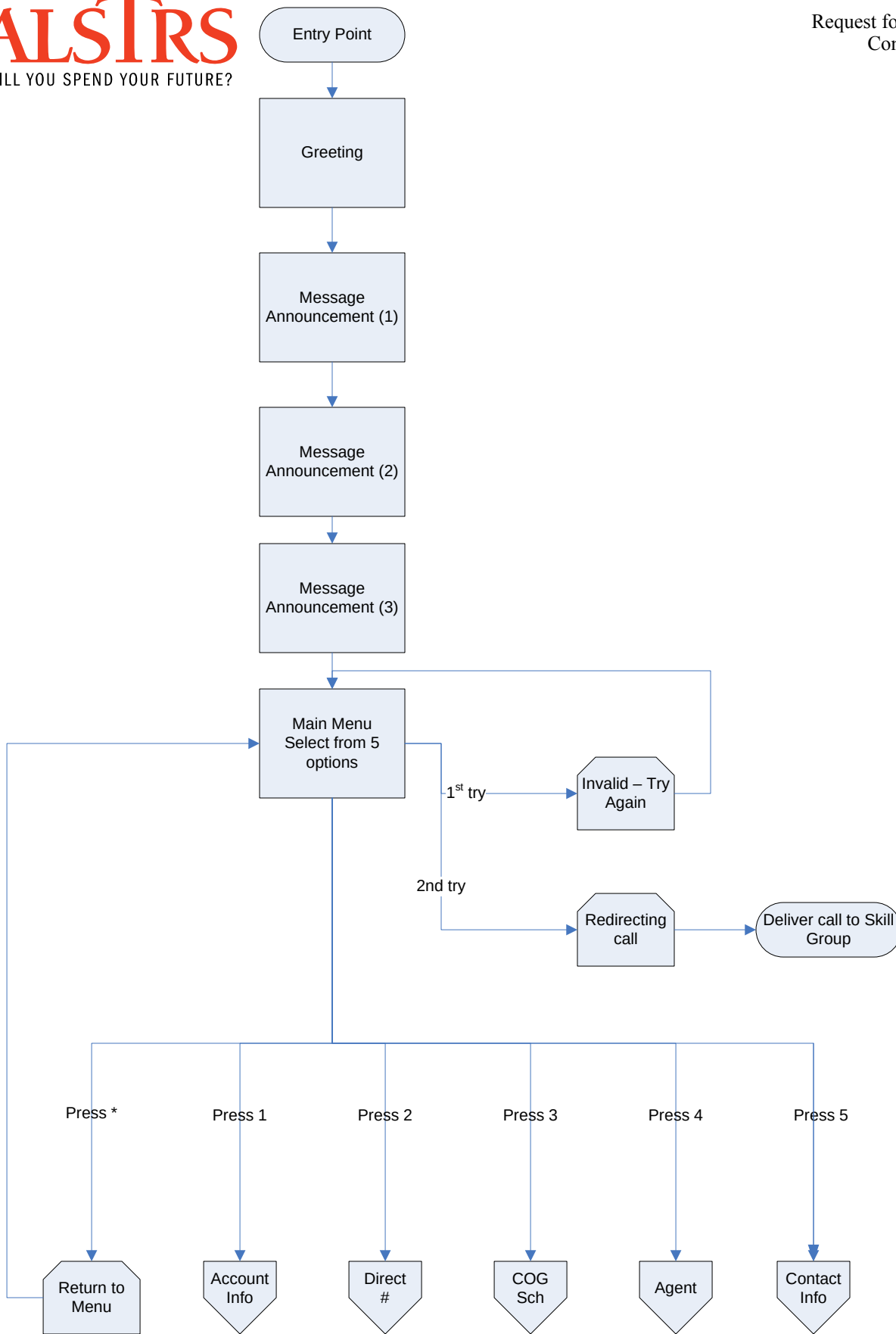
CalSTRS' Human Resources Office shall conduct background investigations for contracted employees that provide the following services at CalSTRS' facility:

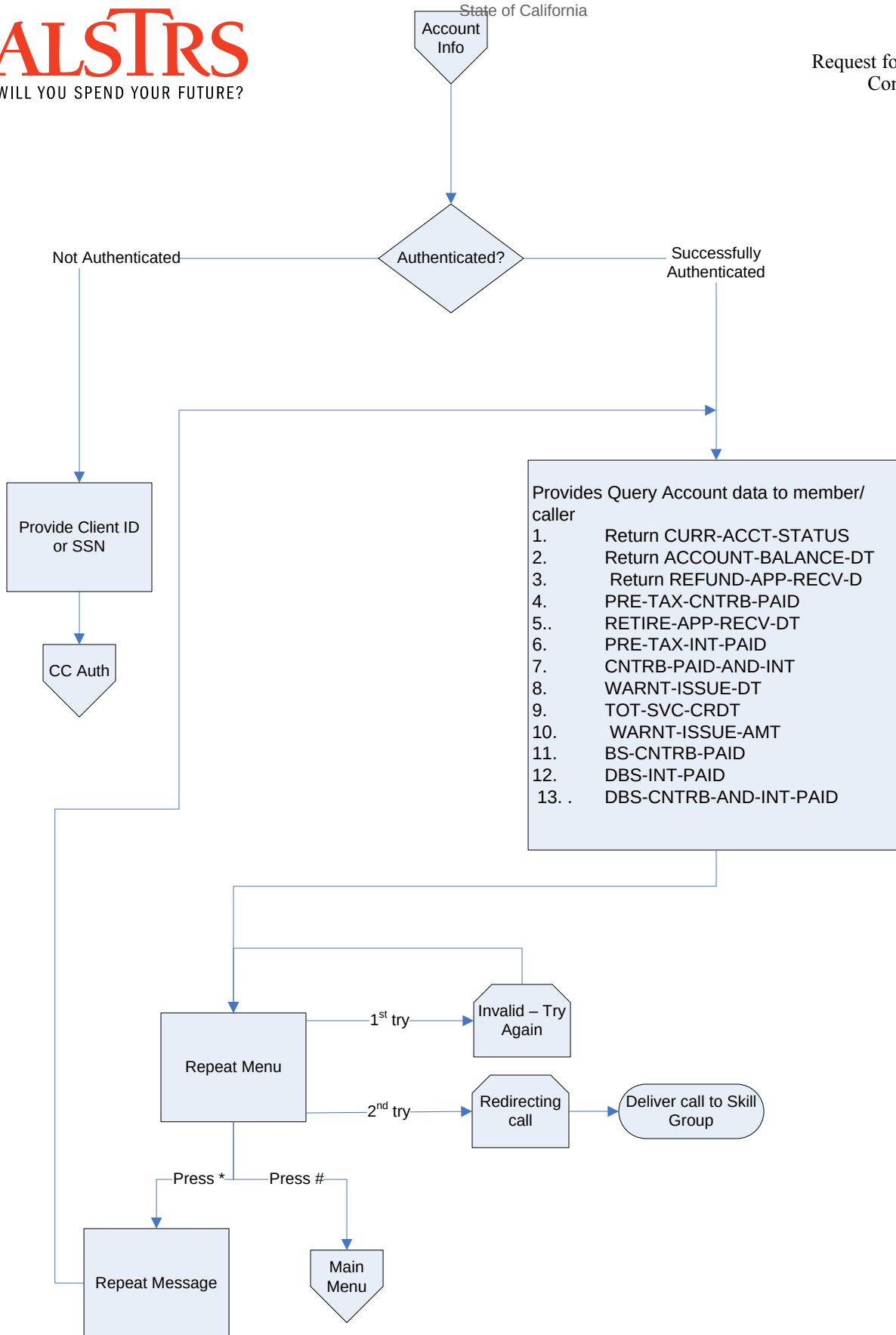
- Information technology contractors who will have access to confidential information
- Student assistants
- Benefits counselors

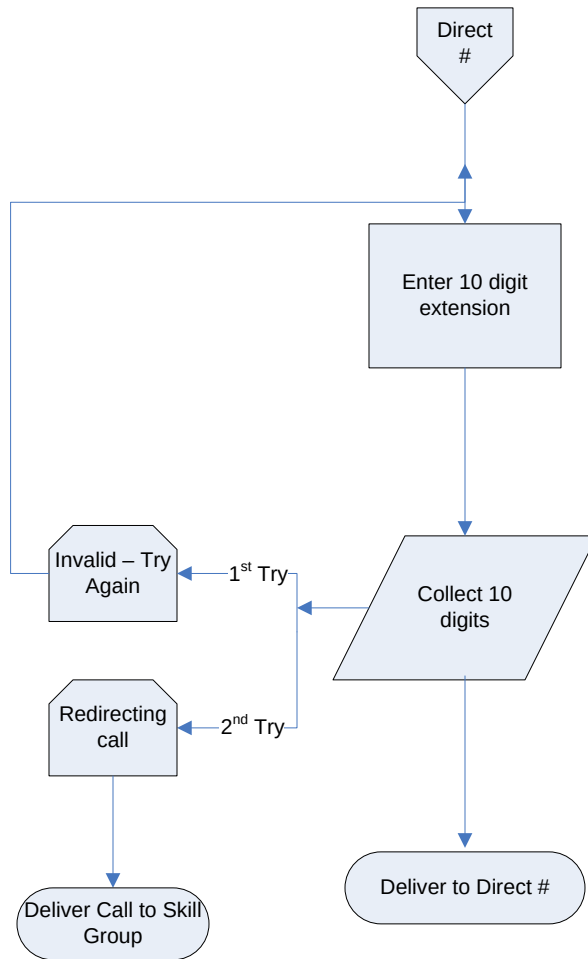
EXCEPTIONS:

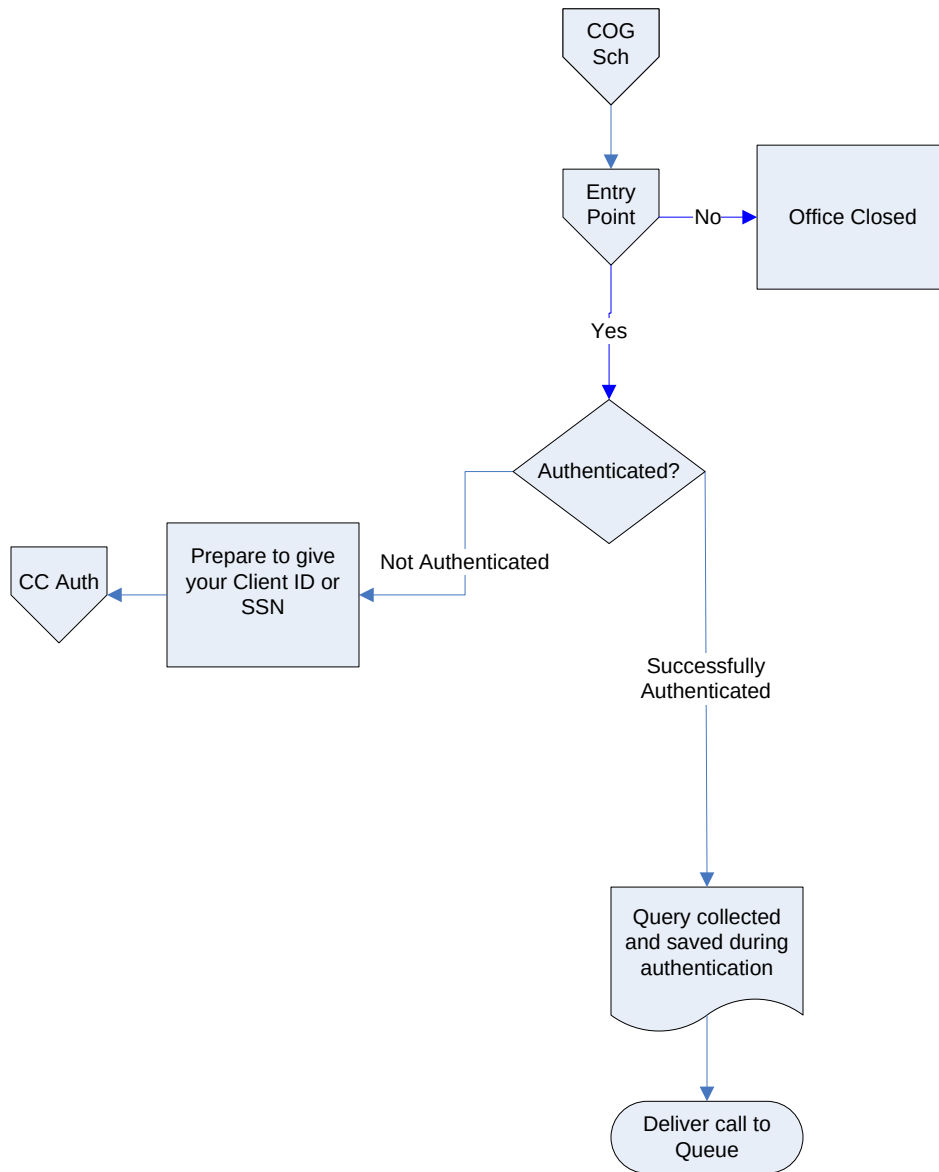
Any request for a waiver of the policy provisions should be directed to the manager of the Contract Services Unit, who will thereafter forward the request to the CalSTRS CEO for consideration and approval, on a case-by-case basis. Exceptions to the Contractor Background Investigation Policy may include but are not limited to the following circumstances:

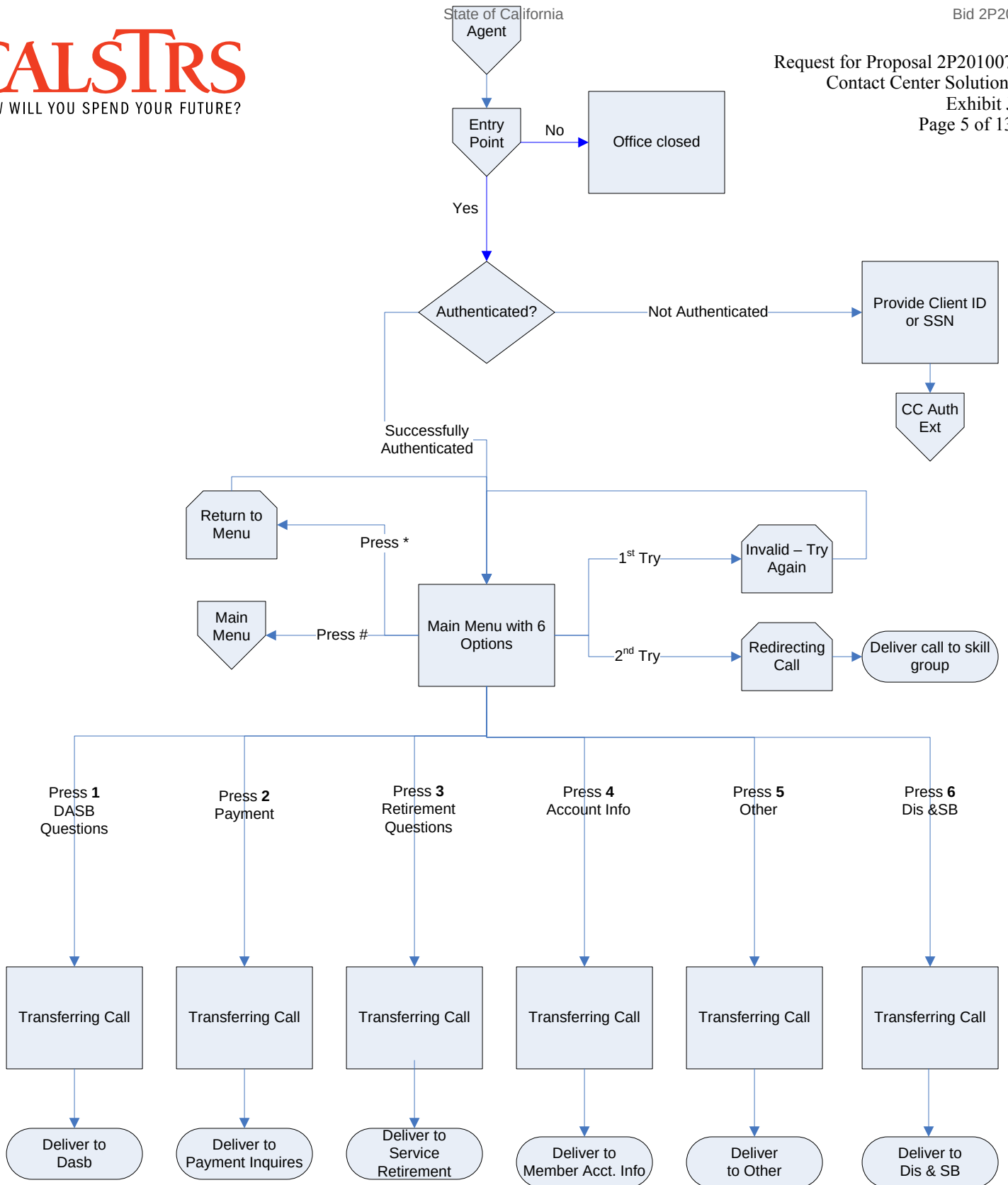
- Contracted personnel will not have access to restricted areas of CalSTRS (e.g., printers providing services off-site and delivering product)
- Contracted personnel will not have access to confidential/sensitive data (e.g., lecture style training)
- State or local governmental entities are unable to comply (in these circumstances, CalSTRS will conduct the background investigation process for potential contracted personnel).

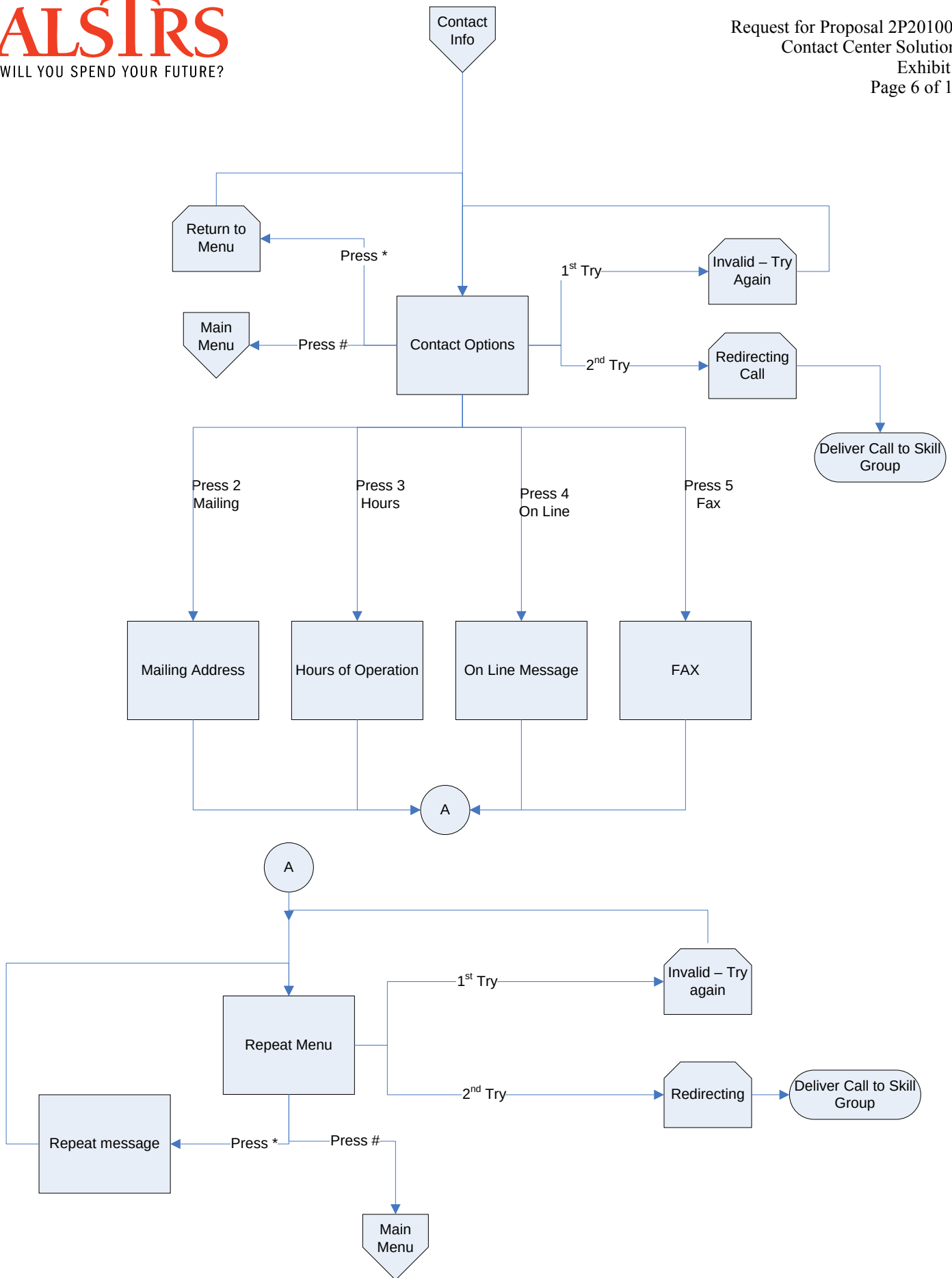


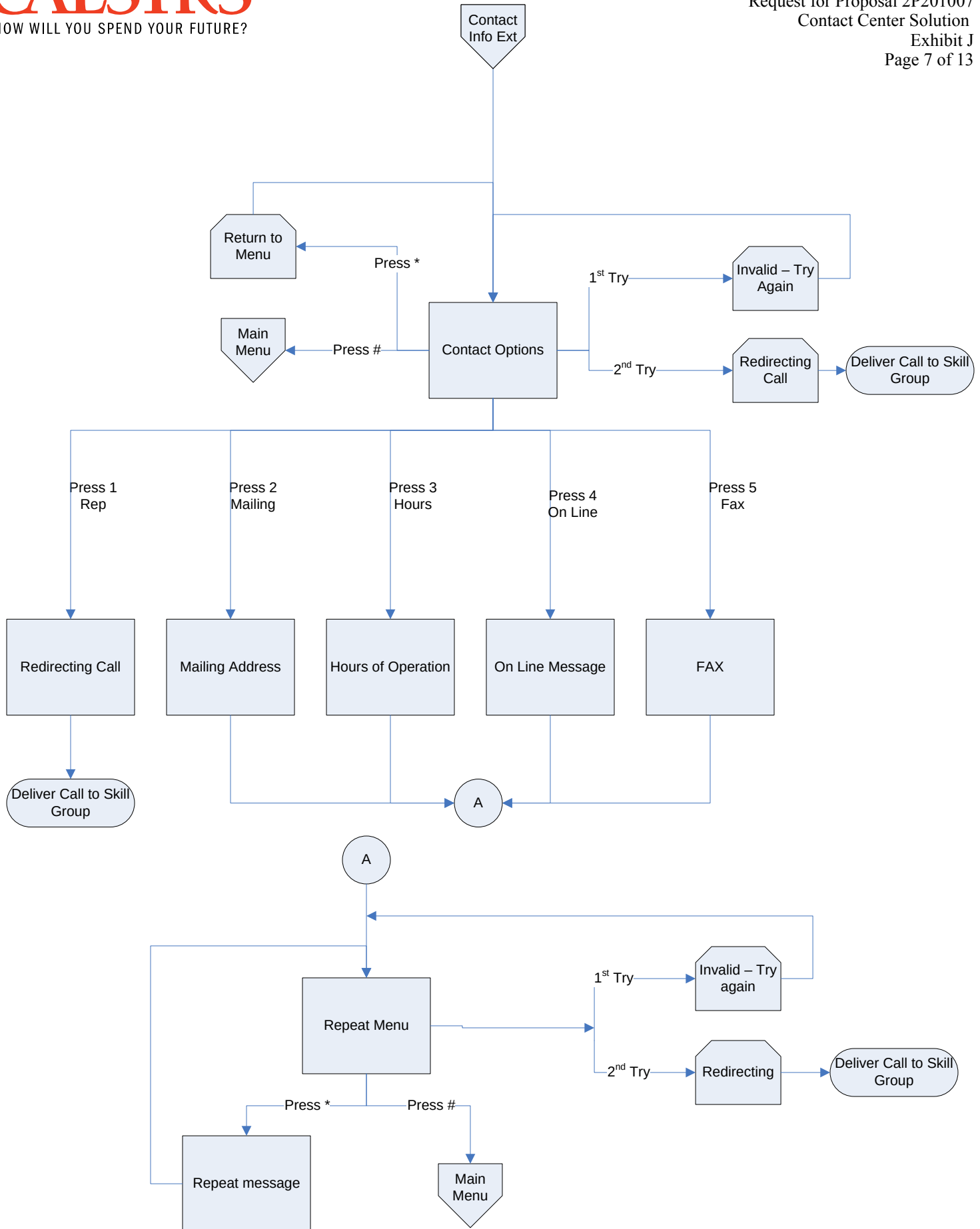


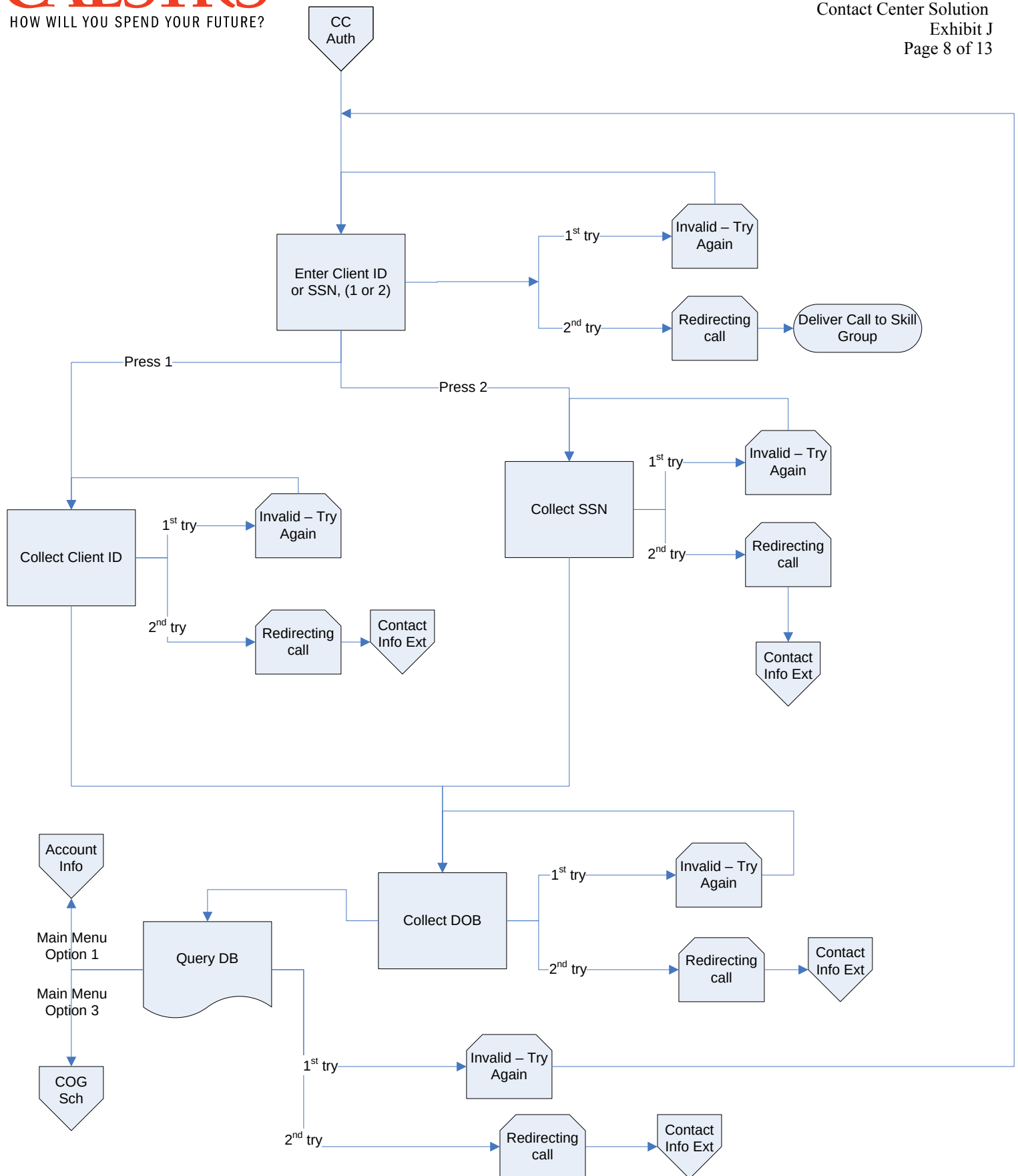


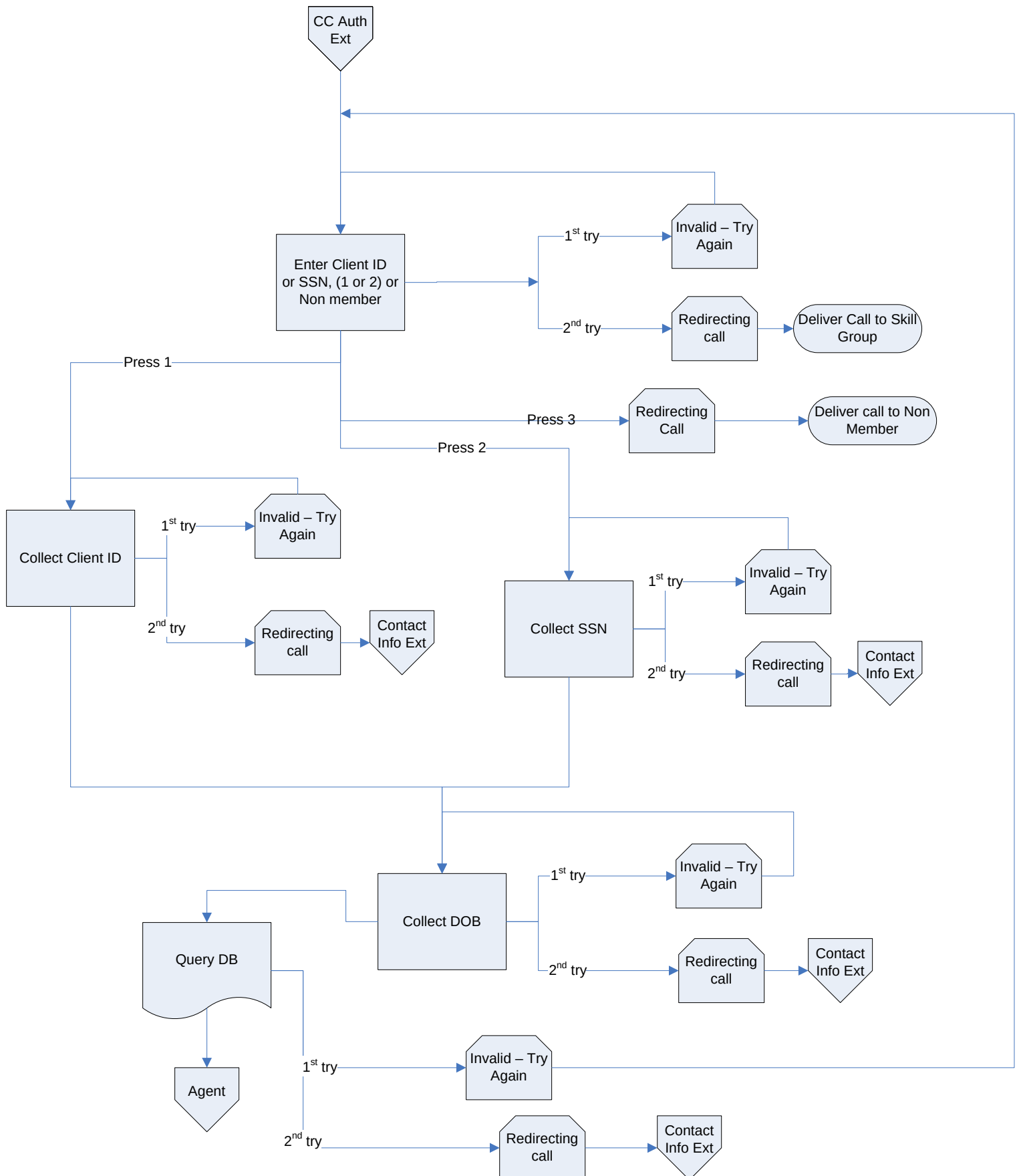


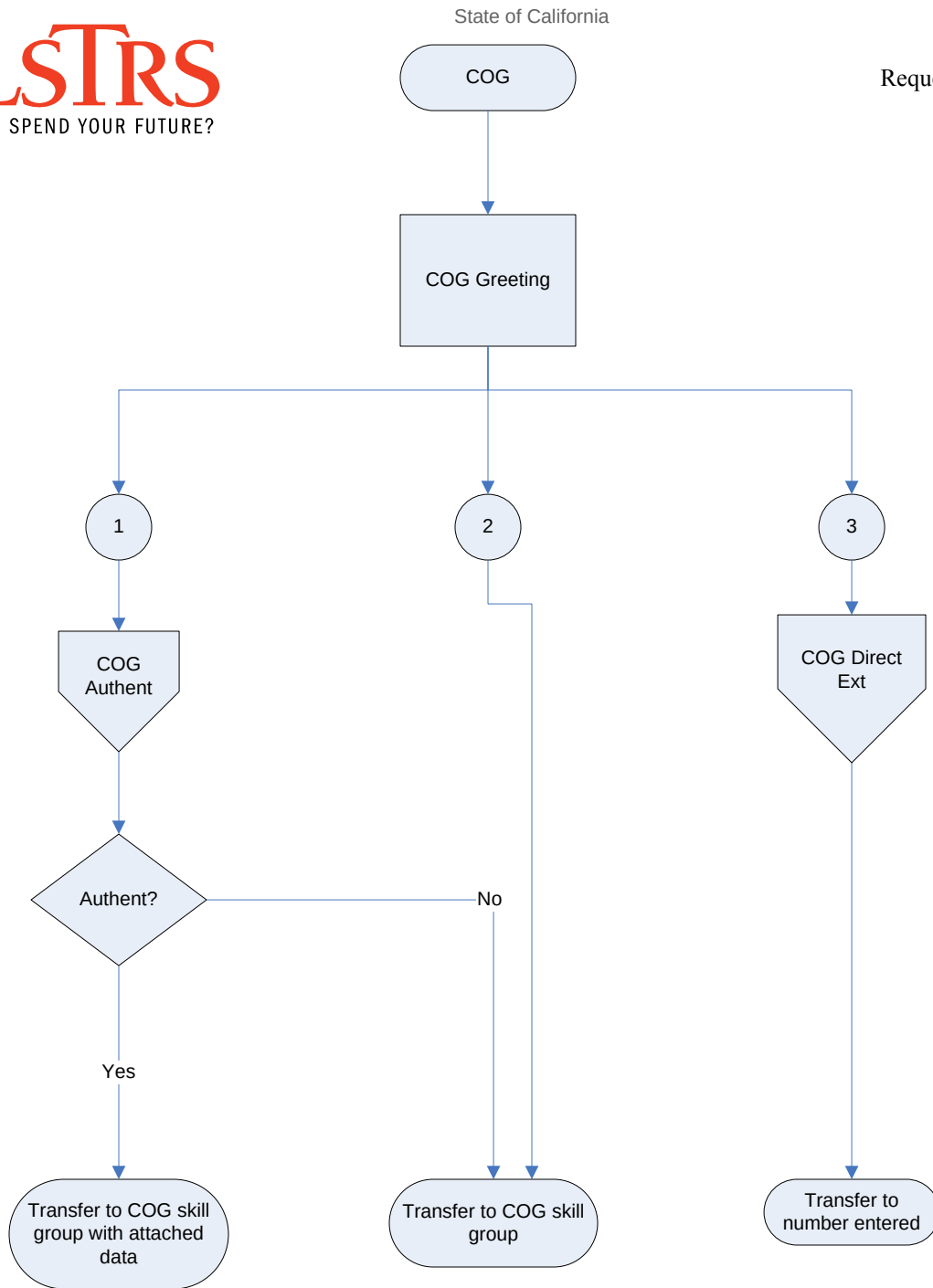


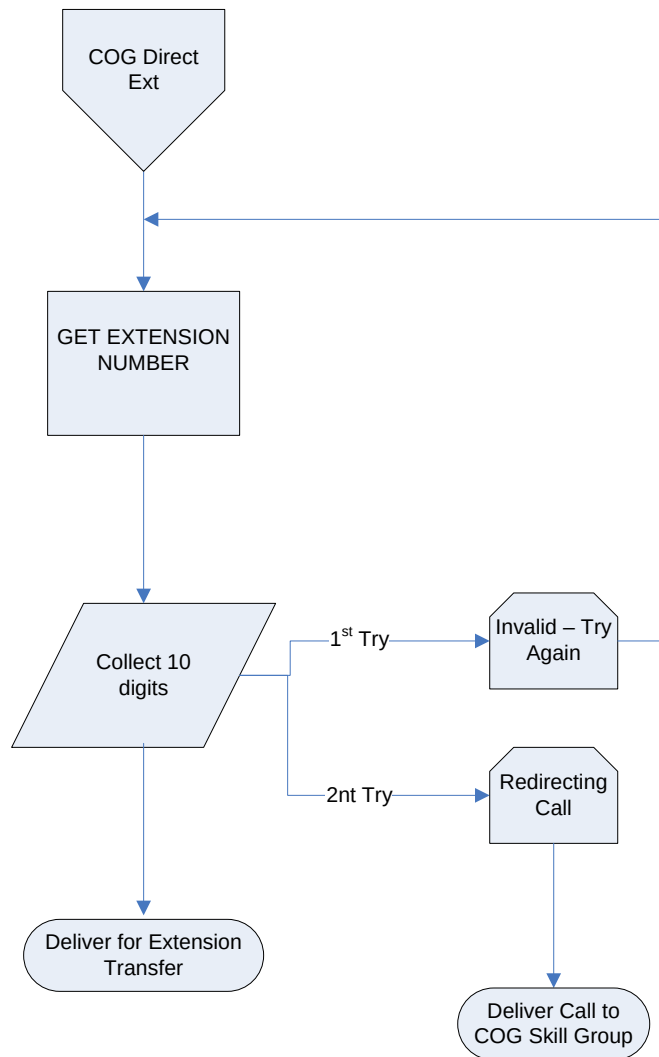


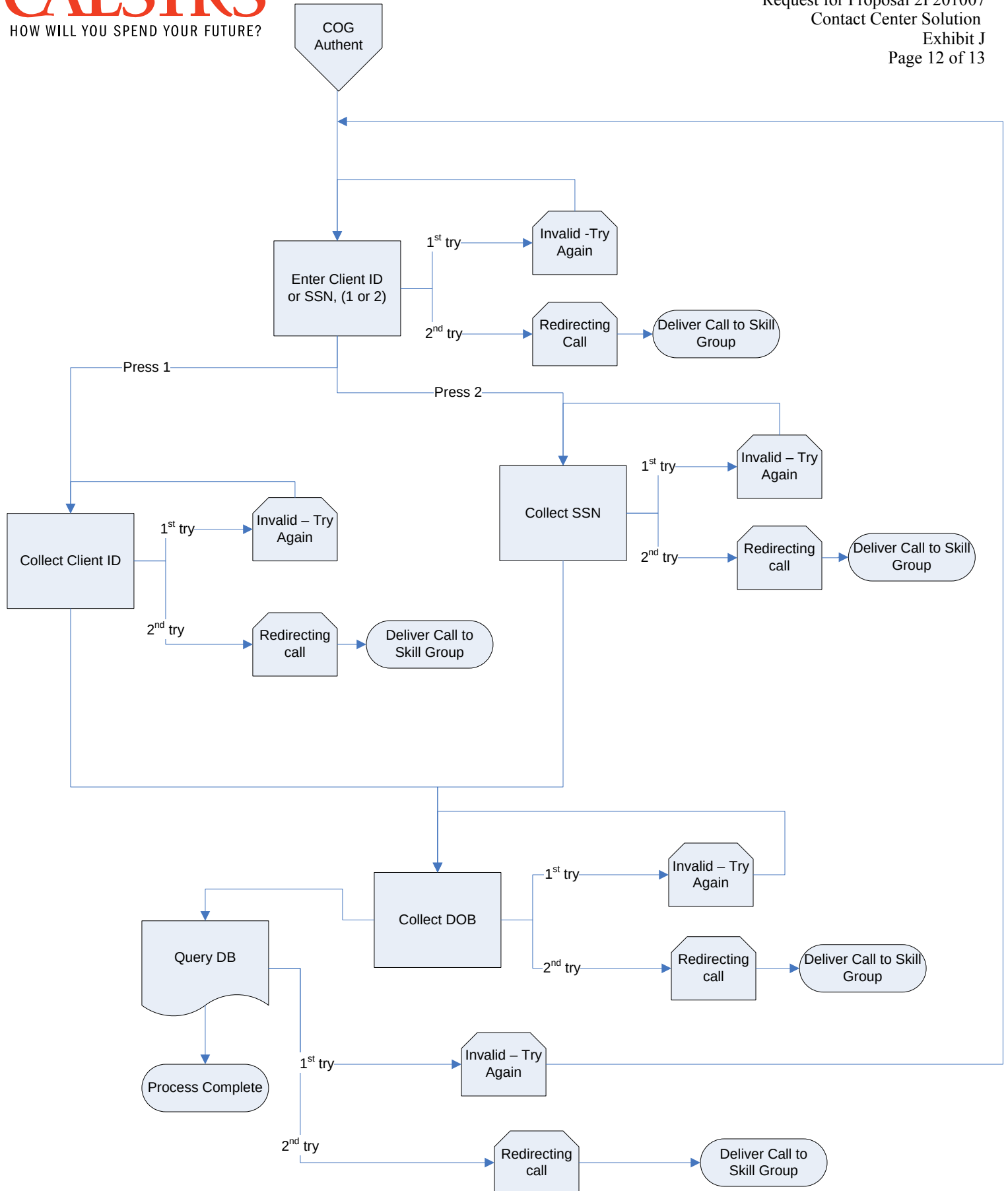


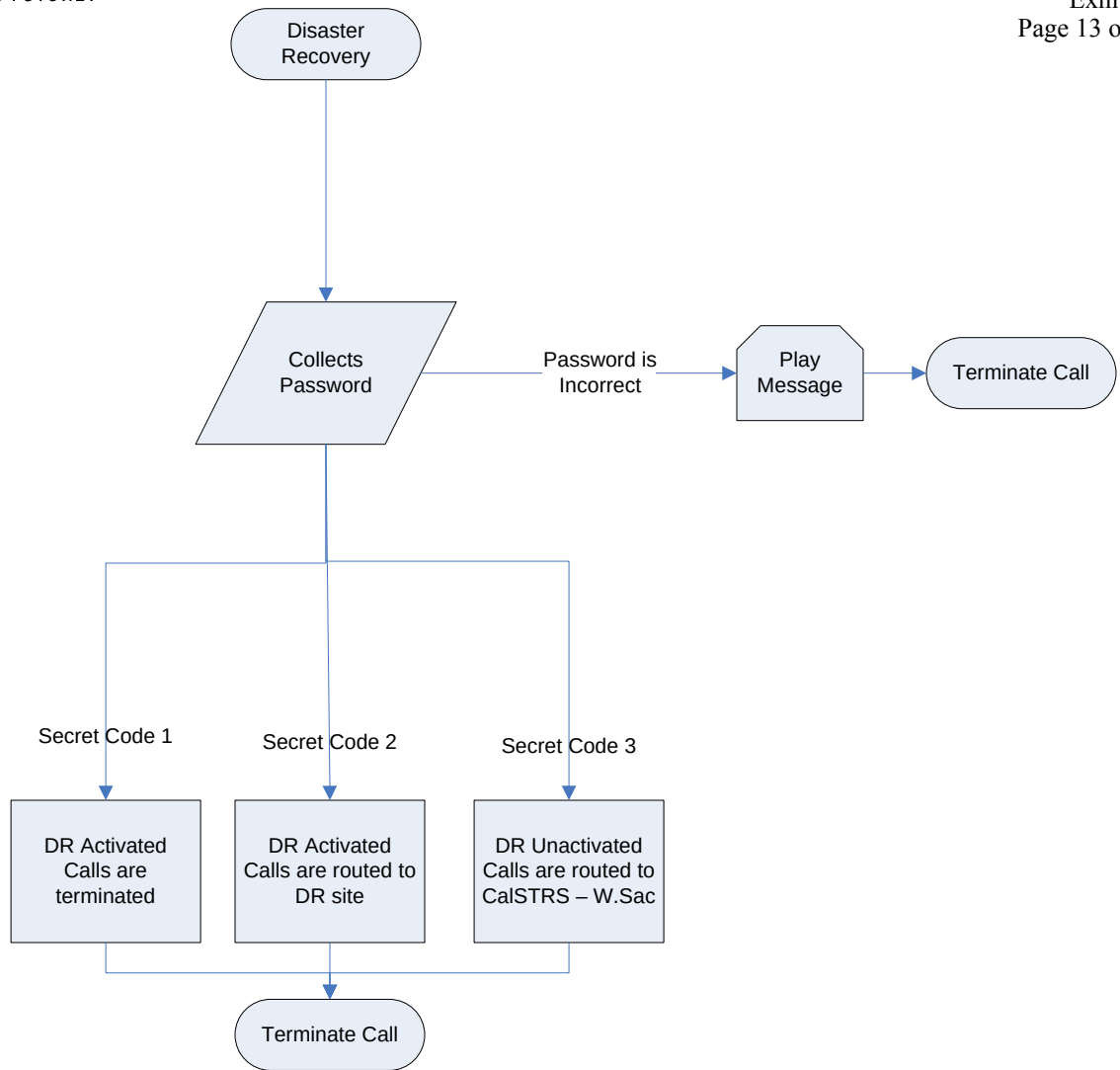












CALSTRS

CONTACT CENTER REPORTING

Customer Service Division

SAMPLE SYSTEM REPORTS

CALSTRS

CONTACT CENTER REPORTING

Customer Service Division

Call Center Statistics Report

Call Center Statistics

Date	<u>Call</u>			<u>Average Handle Time</u>			<u>Phone Hours</u>				<u>Service Levels</u>						
	Forecast	Actual	Variance	Forecast	Actual	Variance	Scheduled	Actual	Abandoned	ASA	AvgTalk Time (mm:ss)	AvgHold Time (mm:ss)	AvgACW Time (mm:ss)	AvgHandle Time (mm:ss)	Percent Time On ACW	Service Level	Occupancy
June 2009																	
06/01/2009	1347	1468	8.98%	509	458	-9.93%	195	195	266	380	04:57	00:11	02:31	07:39	31%	13%	96%
06/02/2009	1228	1149	-6.43%	514	429	-16.62%	205	177	46	77	04:50	00:06	02:13	07:09	24%	69%	77%
06/03/2009	922	1008	9.33%	499	403	-19.20%	173	160	27	44	04:37	00:07	02:00	06:43	21%	77%	71%
06/04/2009	902	921	2.11%	501	373	-25.39%	171	171	6	15	04:39	00:06	01:29	06:14	13%	95%	56%
06/05/2009	882	977	10.77%	508	413	-18.56%	189	173	15	32	04:53	00:10	01:52	06:54	17%	83%	65%
Weekly:	5281	5523	7.52%	506	415	-17.94%	933	876	360	110	04:47	00:08	02:01	06:56	21%	67%	73%
06/08/2009	1191	1324	11.17%	508	482	-5.03%	197	184	193	241	05:08	00:09	02:46	08:03	33%	12%	96%
06/09/2009	1092	1083	-0.82%	499	444	-11.02%	178	160	32	50	04:51	00:06	02:28	07:24	28%	68%	84%
06/10/2009	945	930	-1.59%	475	410	-13.71%	170	150	38	61	04:46	00:07	01:58	06:50	20%	72%	71%
06/11/2009	733	838	14.32%	501	428	-14.46%	166	148	41	79	04:55	00:08	02:06	07:09	20%	62%	67%
06/12/2009	879	926	5.35%	508	438	-13.71%	147	136	46	64	05:02	00:08	02:08	07:18	24%	67%	83%
Weekly:	4840	5101	6.65%	498	440	-11.59%	858	778	350	99	04:56	00:07	02:17	07:21	25%	56%	80%
06/15/2009	1179	1380	17.05%	509	446	-12.27%	205	183	147	194	04:49	00:09	02:28	07:27	31%	25%	94%
06/16/2009	1059	1076	1.61%	499	450	-9.75%	180	157	112	159	04:57	00:11	02:23	07:31	27%	43%	86%
06/17/2009	959	952	-0.73%	499	466	-6.47%	170	146	109	199	05:10	00:09	02:28	07:47	27%	40%	85%
06/18/2009	880	852	-3.18%	486	485	-0.21%	149	126	186	360	05:02	00:11	02:52	08:05	32%	18%	91%
06/19/2009	989	869	-12.13%	487	453	-7.10%	191	173	12	20	05:04	00:11	02:18	07:33	19%	91%	63%
Weekly:	5066	5129	6.94%	496	460	-7.16%	895	785	566	186	05:00	00:10	02:30	07:40	27%	43%	84%
06/22/2009	1197	1267	5.85%	499	452	-9.25%	211	202	39	71	04:58	00:13	02:22	07:33	24%	73%	79%
06/23/2009	1087	1008	-7.27%	488	467	-4.32%	176	156	63	131	05:10	00:10	02:28	07:48	26%	53%	84%
06/24/2009	947	1030	8.76%	475	424	-10.74%	178	182	23	33	04:51	00:08	02:06	07:04	19%	84%	67%
06/25/2009	920	995	8.15%	491	472	-3.80%	159	158	63	121	05:11	00:10	02:31	07:52	26%	52%	83%
06/26/2009	1023	884	-13.59%	482	490	1.54%	168	164	38	77	05:19	00:10	02:41	08:10	24%	62%	73%
Weekly:	5174	5184	8.72%	487	461	-5.32%	891	862	226	87	05:06	00:10	02:26	07:42	24%	65%	77%
06/29/2009	1683	1426	-15.27%	475	455	-4.24%	234	220	40	61	04:58	00:12	02:25	07:35	26%	66%	82%
06/30/2009	1444	1369	-5.19%	475	439	-7.57%	203	209	33	55	04:42	00:10	02:27	07:19	27%	66%	80%
Weekly:	3127	2795	10.23%	475	447	-5.91%	436	429	73	58	04:50	00:11	02:26	07:27	26%	66%	81%
Monthly:	23488	23732	7.71%	495	444	-10.08%	4,013	3,729	1575	115	04:57	00:09	02:19	07:25	25%	59%	79%
Total:	23488	23732	7.71%	495	444	-10.08%	4,013	3,729	1575	115	04:57	00:09	02:19	07:25	25%	59%	79%

Request for Proposal 2P201007

Contact Center Solution

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Page 1 of 1

Monday, March 01, 2010



CONTACT CENTER REPORTING

Customer Service Division

Call Center Performance Report

Call Center Performance Report

Date	Day	Volume	Talk Time hh:mm	Wait Time hh:mm	Hold Time hh:mm	Phone Time hh:mm	ACW Time hh:mm	Tot Phone Time hh:mm	AvgTalk Time mm:ss	AvgHold Time mm:ss	AvgACW Time mm:ss	AvgHandle Time mm:ss	Occupancy (%)	Service Level (%)
June 2009														
06/01/2009	M	1468	121:10	7:43	4:19	133:12	61:35	194:47	04:57	00:11	02:31	07:39	96%	13%
06/02/2009	T	1149	92:33	40:25	1:59	134:57	42:26	177:23	04:50	00:06	02:13	07:09	77%	69%
06/03/2009	W	1008	77:27	46:41	1:55	126:03	33:33	159:36	04:37	00:07	02:00	06:43	71%	77%
06/04/2009	R	921	71:24	75:32	1:27	148:23	22:47	171:10	04:39	00:06	01:29	06:14	56%	95%
06/05/2009	F	977	79:26	60:49	2:36	142:51	30:17	173:08	04:53	00:10	01:52	06:54	65%	83%
Weekly Total:		5523	442:00	231:10	12:16	685:26	190:38	876:04	04:48	00:08	02:04	07:00	73%	67%
06/08/2009	M	1324	113:06	6:52	3:10	123:08	61:13	184:21	05:08	00:09	02:46	08:03	96%	12%
06/09/2009	T	1083	87:26	26:10	1:48	115:24	44:24	159:48	04:51	00:06	02:28	07:24	84%	68%
06/10/2009	W	930	73:47	44:00	1:46	119:33	30:25	149:58	04:46	00:07	01:58	06:50	71%	72%
06/11/2009	R	838	68:43	48:07	1:47	118:37	29:16	147:53	04:55	00:08	02:06	07:09	67%	62%
06/12/2009	F	926	77:38	23:02	2:06	102:46	33:03	135:49	05:02	00:08	02:08	07:18	83%	67%
Weekly Total:		5101	420:40	148:11	10:37	579:28	198:21	777:49	04:57	00:07	02:20	07:24	80%	56%
06/15/2009	M	1380	110:55	11:46	3:35	126:16	56:47	183:03	04:49	00:09	02:28	07:27	94%	25%
06/16/2009	T	1076	88:46	22:22	3:18	114:26	42:36	157:02	04:57	00:11	02:23	07:31	86%	43%
06/17/2009	W	952	81:54	22:20	2:22	106:36	39:11	145:47	05:10	00:09	02:28	07:47	85%	40%
06/18/2009	R	852	71:28	11:05	2:32	85:05	40:47	125:52	05:02	00:11	02:52	08:05	91%	18%
06/19/2009	F	869	73:23	63:34	2:41	139:38	33:20	172:58	05:04	00:11	02:18	07:33	63%	91%
Weekly Total:		5129	426:26	131:07	14:28	572:01	212:41	784:42	04:59	00:10	02:29	07:39	84%	43%
06/22/2009	M	1267	104:56	42:30	4:32	151:58	49:57	201:55	04:58	00:13	02:22	07:33	79%	73%
06/23/2009	T	1008	86:46	24:52	2:46	114:24	41:27	155:51	05:10	00:10	02:28	07:48	84%	53%
06/24/2009	W	1030	83:10	61:03	2:17	146:30	35:57	182:27	04:51	00:08	02:06	07:04	67%	84%
06/25/2009	R	995	86:00	26:57	2:49	115:46	41:44	157:30	05:11	00:10	02:31	07:52	83%	52%
06/26/2009	F	884	78:27	43:43	2:21	124:31	39:34	164:05	05:19	00:10	02:41	08:10	73%	62%
Weekly Total:		5184	439:19	199:05	14:45	653:09	208:39	861:48	05:05	00:10	02:25	07:40	77%	65%
06/29/2009	M	1426	118:13	39:12	4:44	162:09	57:21	219:30	04:58	00:12	02:25	07:35	82%	66%
06/30/2009	T	1369	107:24	42:04	3:40	153:08	56:01	209:09	04:42	00:10	02:27	07:19	80%	66%
Weekly Total:		2795	225:37	81:16	8:24	315:17	113:22	428:39	04:51	00:11	02:26	07:27	81%	66%
Weekly Total:		23732	1954:02	790:49	60:30	2805:21	923:41	3729:02	04:56	00:09	02:20	07:26	79%	59%
Grand Total:		23732	1954:02	790:49	60:30	2805:21	923:41	3729:02	04:56	00:09	02:20	07:26	79%	59%

CALSTRS

CONTACT CENTER REPORTING

Customer Service Division

Average Calls Offered & Answered Interval Report

Average Calls Offered And Answered by Interval

From 06/01/2009 To 06/30/2009

Interval	Calls Offered	Calls Answered	Calls Abandoned	Service Level
07:00 AM	15	14	1	86%
07:30 AM	17	17	1	91%
08:00 AM	42	36	3	70%
08:30 AM	50	44	4	47%
09:00 AM	58	55	4	55%
09:30 AM	66	63	3	60%
10:00 AM	71	68	4	67%
10:30 AM	67	63	4	61%
11:00 AM	65	59	4	53%
11:30 AM	69	66	5	51%
12:00 PM	53	51	4	64%
12:30 PM	57	54	3	63%
01:00 PM	58	53	3	52%
01:30 PM	63	59	4	60%
02:00 PM	65	62	4	63%
02:30 PM	66	62	4	65%
03:00 PM	66	63	4	62%
03:30 PM	62	55	5	43%
04:00 PM	58	54	4	48%
04:30 PM	47	43	5	52%
05:00 PM	18	19	1	75%
05:30 PM	10	10	0	97%



CONTACT CENTER REPORTING

Customer Service Division

Call Center Agent Detail Report

Call Center Agent Detail Report

From: 4/1/2009

To: 4/30/2009

Answered Talk Time Wait Time Hold Time ACW Training Prep Time Meeting Project Restroom Break Lunch Tech Assist

Peer1 Average: (0-12)	885	83:27 44%	31:42 17%	4:23 2%	33:18 18%	1:00 1%	0:08 0%	6:00 3%	1:36 1%	2:53 2%	10:53 6%	13:15 6%	0:15 0%
Peer2 Average:(13-36)	928	76:29 43%	35:41 20%	1:01 1%	29:34 16%	1:29 1%	0:14 0%	6:27 4%	2:19 1%	4:36 3%	10:11 6%	11:08 6%	0:30 0%
Peer3 Average: (over 36)	770	64:16 36%	39:39 22%	1:31 1%	29:30 17%	0:47 0%	1:15 1%	8:26 5%	0:52 0%	5:08 3%	10:36 6%	13:57 8%	0:32 0%
Call Center Average:	626	68:19 41%	32:51 20%	1:58 1%	28:26 17%	1:02 1%	0:31 0%	6:21 4%	1:33 1%	3:58 2%	9:32 6%	11:31 7%	0:27 0%
	536	71:11 42%	23:34 14%	8:12 5%	33:02 19%	1:49 1%	0:00 0%	4:00 2%	3:41 2%	0:09 0%	9:23 6%	15:06 9%	0:28 0%

Agent Name:

Agent ID:

Time In Service:

3 Month(s)

Peer Group:

Peer 1

Date	Volume	Talk	Wait	Hold	ACW	Training	Prep Time	Meeting	Project	Restroom	Break	Lunch	T.Assist	LogIn	Ready	1stAnswer	Last Walk	LogOut
April 2009																		
4/1/2009	36	5:37	0:08	0:38	2:43	0:00	0:00	0:00	0:00	0:00	0:29	0:28	0:00	7:29 AM	7:29 AM	7:31 AM	4:20 PM	4:54 PM
		56%	1%	6%	27%	0%	0%	0%	0%	0%	5%	5%	0%	Walk Code:		Code = 100 - Wrapup		
4/2/2009	40	4:49	0:27	0:19	2:03	0:00	0:00	0:35	0:00	0:00	0:29	0:34	0:04	7:21 AM	7:29 AM	7:36 AM	4:22 PM	4:30 PM
		52%	5%	3%	22%	0%	0%	6%	0%	0%	5%	6%	1%	Walk Code:		Code = 100 - Wrapup		
Weekly:	76	10:26	0:35	0:57	4:46	0:00	0:00	0:35	0:00	0:00	0:58	1:02	0:04					
		54%	3%	5%	24%	0%	0%	3%	0%	0%	5%	5%	0%					
4/6/2009	34	4:42	0:28	0:33	2:46	0:00	0:00	0:00	0:00	0:00	0:30	0:47	0:00	7:12 AM	7:29 AM	7:39 AM	4:23 PM	4:41 PM
		48%	5%	6%	28%	0%	0%	0%	0%	0%	5%	8%	0%	Walk Code:		Code = 100 - Wrapup		
4/7/2009	28	4:52	0:32	0:50	2:22	0:00	0:00	0:42	0:00	0:00	0:22	0:32	0:00	7:09 AM	7:09 AM	7:50 AM	4:25 PM	4:52 PM
		48%	5%	8%	23%	0%	0%	7%	0%	0%	4%	5%	0%	Walk Code:		Code = 100 - Wrapup		
4/8/2009	30	4:18	0:16	0:20	1:46	0:00	0:00	1:13	0:00	0:00	0:32	0:57	0:00	7:09 AM	7:28 AM	7:35 AM	4:30 PM	4:33 PM
		46%	3%	4%	19%	0%	0%	13%	0%	0%	6%	10%	0%	Walk Code:		Code = 100 - Wrapup		
4/9/2009	33	3:12	1:56	0:16	2:13	0:00	0:00	0:00	0:00	0:05	0:28	0:59	0:08	7:11 AM	7:29 AM	7:44 AM	4:24 PM	4:32 PM
		34%	21%	3%	24%	0%	0%	0%	0%	1%	5%	11%	1%	Walk Code:		Code = 100 - Wrapup		
4/10/2009	32	4:24	1:31	0:43	1:41	0:00	0:00	0:00	0:00	0:00	0:29	1:00	0:00	7:06 AM	7:30 AM	7:51 AM	4:30 PM	4:34 PM
		45%	15%	7%	17%	0%	0%	0%	0%	0%	5%	10%	0%	Walk Code:		Code = 100 - Wrapup		
Weekly:	157	21:28	4:43	2:42	10:48	0:00	0:00	1:55	0:00	0:05	2:21	4:15	0:08					
		44%	10%	6%	22%	0%	0%	4%	0%	0%	5%	9%	0%					

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Date	Volume	Talk	Wait	Hold	ACW	Training	Prep	Time	Meeting	Project	Restroom	Break	Lunch	T.Assist	LogIn	Ready	1stAnswer	Last Walk	LogOut
4/14/2009	40	4:06	0:51	0:22	1:56	0:00	0:00	0:00	0:00	0:00	0:00	0:34	0:59	0:00	7:12 AM	7:30 AM	7:49 AM	4:24 PM	4:37 PM
		47%	10%	4%	22%	0%	0%	0%	0%	0%	0%	6%	11%	0%	Walk Code:		Code = 100 - Wrapup		
4/15/2009	23	3:36	0:45	0:28	1:02	0:00	0:00	0:00	0:00	0:00	0:00	0:30	1:01	0:00	7:10 AM	7:29 AM	7:35 AM	4:42 PM	4:47 PM
		49%	10%	6%	14%	0%	0%	0%	0%	0%	0%	7%	14%	0%	Walk Code:		Code = 100 - Wrapup		
4/16/2009	23	3:06	1:56	0:18	0:46	1:49	0:00	0:00	0:00	0:00	0:03	1:27	0:00	0:00	7:11 AM	7:30 AM	7:50 AM	4:35 PM	4:37 PM
		33%	21%	3%	8%	19%	0%	0%	0%	0%	1%	15%	0%	0%	Walk Code:		Code = 100 - Wrapup		
Weekly:	86	10:48	3:32	1:08	3:44	1:49	0:00	0:00	0:00	0:00	0:03	2:31	2:00	0:00					
		43%	13%	5%	15%	6%	0%	0%	0%	0%	0%	10%	8%	0%					
4/21/2009	27	3:55	1:58	0:31	1:42	0:00	0:00	0:00	0:00	0:00	0:00	0:31	0:59	0:00	7:16 AM	7:29 AM	7:37 AM	4:24 PM	4:34 PM
		41%	20%	5%	18%	0%	0%	0%	0%	0%	0%	5%	10%	0%	Walk Code:		Code = 100 - Wrapup		
4/22/2009	29	2:58	2:48	0:16	1:41	0:00	0:00	0:00	0:00	0:00	0:00	0:31	0:59	0:00	7:14 AM	7:29 AM	7:32 AM	4:30 PM	4:33 PM
		32%	30%	3%	18%	0%	0%	0%	0%	0%	0%	6%	11%	0%	Walk Code:		Code = 100 - Wrapup		
4/23/2009	23	3:44	2:31	0:16	1:26	0:00	0:00	0:00	0:00	0:00	0:00	0:32	0:58	0:00	7:07 AM	7:29 AM	7:35 AM	4:30 PM	4:41 PM
		40%	27%	3%	15%	0%	0%	0%	0%	0%	0%	6%	10%	0%	Walk Code:		Code = 100 - Wrapup		
4/24/2009	34	4:04	1:56	0:32	1:35	0:00	0:00	0:00	0:00	0:00	0:00	0:29	0:59	0:00	7:13 AM	7:29 AM	7:30 AM	4:29 PM	4:35 PM
		42%	20%	6%	17%	0%	0%	0%	0%	0%	0%	5%	10%	0%	Walk Code:		Code = 100 - Wrapup		
Weekly:	113	14:41	9:13	1:35	6:24	0:00	0:00	0:00	0:00	0:00	0:00	2:03	3:55	0:00					
		39%	24%	4%	17%	0%	0%	0%	0%	0%	0%	5%	10%	0%					
4/27/2009	21	2:25	0:33	0:24	1:08	0:00	0:00	0:00	0:00	3:41	0:00	0:16	0:57	0:08	7:05 AM	7:29 AM	7:30 AM	4:37 PM	4:37 PM
		25%	6%	4%	12%	0%	0%	0%	0%	39%	0%	3%	10%	1%	Walk Code:		Code = 100 - Wrapup		
4/28/2009	29	3:09	1:16	0:23	3:19	0:00	0:00	1:30	0:00	0:00	0:01	0:14	0:57	0:04	7:06 AM	7:30 AM	7:34 AM	4:16 PM	6:02 PM
		29%	12%	4%	30%	0%	0%	14%	0%	0%	0%	2%	9%	1%	Walk Code:		Code = 100 - Wrapup		
4/29/2009	23	3:56	2:03	0:25	1:23	0:00	0:00	0:00	0:00	0:00	0:00	0:30	1:00	0:00	7:14 AM	7:31 AM	7:44 AM	4:27 PM	4:30 PM
		42%	22%	4%	15%	0%	0%	0%	0%	0%	0%	5%	11%	0%	Walk Code:		Code = 100 - Wrapup		
4/30/2009	31	4:18	1:39	0:38	1:30	0:00	0:00	0:00	0:00	0:00	0:00	0:30	1:00	0:04	7:18 AM	7:30 AM	7:47 AM	4:28 PM	4:31 PM
		45%	17%	7%	16%	0%	0%	0%	0%	0%	0%	5%	10%	1%	Walk Code:		Code = 100 - Wrapup		
Weekly:	104	13:48	5:31	1:50	7:20	0:00	0:00	1:30	3:41	0:01	1:30	3:54	0:16						
		35%	14%	5%	18%	0%	0%	3%	10%	0%	4%	10%	1%						
Monthly:	536	71:11	23:34	8:12	33:02	1:49	0:00	4:00	3:41	0:09	9:23	15:06	0:28						
		42%	14%	5%	19%	1%	0%	2%	2%	0%	6%	9%	0%						
Total:	536	71:11	23:34	8:12	33:02	1:49	0:00	4:00	3:41	0:09	9:23	15:06	0:28						
		42%	14%	5%	19%	1%	0%	2%	2%	0%	6%	9%	0%						

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CONTACT CENTER REPORTING

Customer Service Division

Agent Activity Report

Agent Activity Report

Track Agent performance

Request for Proposal 2P201007

Contact Center Solution

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Start Date: May 1, 2010 06:00
 End Date: May 31, 2010 23:59
 Selected Skill: Authenticate_TO, DASH, Mem_Acct_Info, New_Member, Other, Pay_Ing, Schedule, Service_Ret
 Selected Object Types: Agent
 Selected Object:

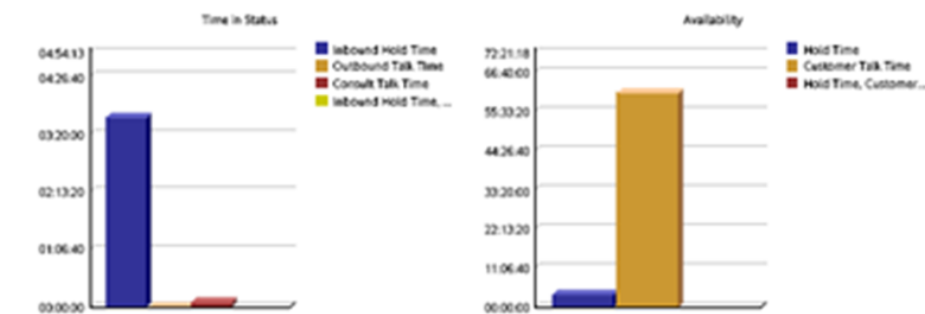
Summary for



Calls	Customer Related Calls	Inbound	Outbound	Service Related Calls	Internal	Internal Answered	Consult Calls	Consult Answered	Unknown Calls	After Call Work	Dials	Internal Dialed	Consult Dialed
735	735	735	0	8	0	0	8	8	0	686	0	0	0
	%Customer Related Calls	%Inbound Calls	%Outbound Calls	%Service Related Calls	%Internal Calls	%Internal Answered	%Consult Calls	%Consult Answered	%Unknown Calls	%After Call Work	%Dials	%Internal Dialed	%Consult Dialed
	100.0%	100.0%	0.0%	1.1%	0.0%	0.0%	1.1%	1.1%	0.0%	93.3%	0.0%	0.0%	0.0%



Inbound Abandoned While Ringing	Transfer Made	Transfer Taken	Conferences	Forwarded	Hold	Inbound Hold	Outbound Hold	Short Calls
0	0	0	29	0	124	124	0	1



Login Time	Talk Time	Hold Time	Inbound Hold Time	Wait Time	After Call Work Time	Non-Consult Hold Time	Other Time	Ring Time	Dial Time	Offhook Time	Not Ready Time
Occupancy	% Talk Time	% Hold Time	% Inbound Hold Time	% Wait Time	% After Call Work Time	% Non-Consult Hold Time	% Other Time	% Ring Time	% Dial Time	% Offhook Time	% Not Ready Time

Agent Activity Report*Track Agent performance*

Start Date: May 1, 2010 00:00

End Date: May 31, 2010 23:59

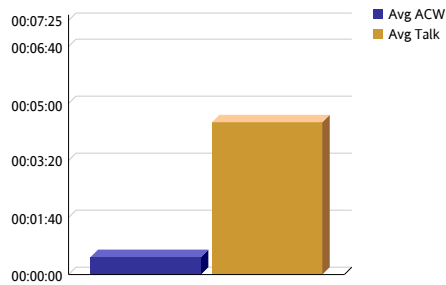
Selected Skill: Authenticate_TO, DASB, Mem_Acct_Info, Non_Member, Other, Pay_Inq, Schedule, Service_Ret

Selected Object Types: Agent

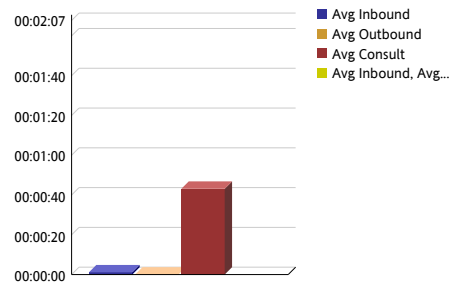
Selected Object:

Total Talk Time	Customer Talk Time	Inbound Talk Time	Outbound Talk Time	Service Related Talk	Internal Talk	Consult Talk
60:48:13	60:48:13	60:48:13	00:00:00	00:05:45	00:00:00	00:05:45
%Customer Talk Time	%Inbound Talk Time	%Outbound Talk Time	%Service Related Talk	%Internal Talk	%Consult Talk	
100.00%	100.00%	0.00%	0.16%	0.00%	0.16%	

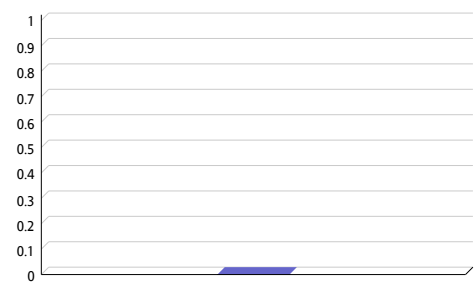
Availability Averages (sec)



Time in Status Averages (sec)



Average Calls Per Hour



Avg ACW	Avg Inbound	Avg Outbound	Avg Consult	Avg Talk	Avg Calls per Hour	Avg Customer Talk Time	Avg Dialing Time	Avg Hold Time	Avg Internal Talk Time	Avg Ringing Time	Avg Service Related Talk
00:00:30	00:00:01	00:00:00	00:00:43	00:04:27	0.00	00:04:57	00:00:00	00:00:17	00:00:00	00:00:00	00:00:00



CONTACT CENTER REPORTING

Customer Service Division

Call Center Agent Overall Report

Call Center Agent Overall Report

Agent Name:

Agent ID:

Date	Volume	Talk hh:mm	Wait hh:m	Hold hh:mm	ACW hh:mm	Training hh:mm	Prep Time	Meeting hh:mm	Project hh:mm	Restroom hh:mm	Talk (%)	Wait (%)	Hold (%)	ACW (%)	Training (%)	Prep Time	Meeting (%)	Project (%)	Restroom (%)
April 2009																			
4/1/2009	36	5:37	0:08	0:38	2:43	0:00	0:00	0:00	0:00	0:00	56%	1%	6%	27%	0%	0%	0%	0%	0%
4/2/2009	40	4:49	0:27	0:19	2:03	0:00	0:00	0:35	0:00	0:00	52%	5%	3%	22%	0%	0%	6%	0%	0%
Weekly:	76	10:26	0:35	0:57	4:46	0:00	0:00	0:35	0:00	0:00	54%	3%	5%	24%	0%	0%	3%	0%	0%
4/6/2009	34	4:42	0:28	0:33	2:46	0:00	0:00	0:00	0:00	0:00	48%	5%	6%	28%	0%	0%	0%	0%	0%
4/7/2009	28	4:52	0:32	0:50	2:22	0:00	0:00	0:42	0:00	0:00	48%	5%	8%	23%	0%	0%	7%	0%	0%
4/8/2009	30	4:18	0:16	0:20	1:46	0:00	0:00	1:13	0:00	0:00	46%	3%	4%	19%	0%	0%	13%	0%	0%
4/9/2009	33	3:12	1:56	0:16	2:13	0:00	0:00	0:00	0:00	0:05	34%	21%	3%	24%	0%	0%	0%	0%	1%
4/10/2009	32	4:24	1:31	0:43	1:41	0:00	0:00	0:00	0:00	0:00	45%	15%	7%	17%	0%	0%	0%	0%	0%
Weekly:	157	21:28	4:43	2:42	10:48	0:00	0:00	1:55	0:00	0:05	44%	10%	6%	22%	0%	0%	4%	0%	0%
4/14/2009	40	4:06	0:51	0:22	1:56	0:00	0:00	0:00	0:00	0:00	47%	10%	4%	22%	0%	0%	0%	0%	0%
4/15/2009	23	3:36	0:45	0:28	1:02	0:00	0:00	0:00	0:00	0:00	49%	10%	6%	14%	0%	0%	0%	0%	0%
4/16/2009	23	3:06	1:56	0:18	0:46	1:49	0:00	0:00	0:00	0:03	33%	21%	3%	8%	19%	0%	0%	0%	1%
Weekly:	86	10:48	3:32	1:08	3:44	1:49	0:00	0:00	0:00	0:03	43%	13%	5%	15%	6%	0%	0%	0%	0%
4/21/2009	27	3:55	1:58	0:31	1:42	0:00	0:00	0:00	0:00	0:00	41%	20%	5%	18%	0%	0%	0%	0%	0%
4/22/2009	29	2:58	2:48	0:16	1:41	0:00	0:00	0:00	0:00	0:00	32%	30%	3%	18%	0%	0%	0%	0%	0%
4/23/2009	23	3:44	2:31	0:16	1:26	0:00	0:00	0:00	0:00	0:00	40%	27%	3%	15%	0%	0%	0%	0%	0%
4/24/2009	34	4:04	1:56	0:32	1:35	0:00	0:00	0:00	0:00	0:00	42%	20%	6%	17%	0%	0%	0%	0%	0%
Weekly:	113	14:41	9:13	1:35	6:24	0:00	0:00	0:00	0:00	0:00	39%	24%	4%	17%	0%	0%	0%	0%	0%
4/27/2009	21	2:25	0:33	0:24	1:08	0:00	0:00	0:00	3:41	0:00	25%	6%	4%	12%	0%	0%	0%	39%	0%
4/28/2009	29	3:09	1:16	0:23	3:19	0:00	0:00	1:30	0:00	0:01	29%	12%	4%	30%	0%	0%	14%	0%	0%
4/29/2009	23	3:56	2:03	0:25	1:23	0:00	0:00	0:00	0:00	0:00	42%	22%	4%	15%	0%	0%	0%	0%	0%
4/30/2009	31	4:18	1:39	0:38	1:30	0:00	0:00	0:00	0:00	0:00	45%	17%	7%	16%	0%	0%	0%	0%	0%
Weekly:	104	13:48	5:31	1:50	7:20	0:00	0:00	1:30	3:41	0:01	35%	14%	5%	18%	0%	0%	3%	10%	0%
Monthly:	536	71:11	23:34	8:12	33:02	1:49	0:00	0:00	3:41	0:09	42%	14%	5%	19%	1%	0%	2%	2%	0%
Total:	536	71:11	23:34	8:12	33:02	1:49	0:00	0:00	3:41	0:09	42%	14%	5%	19%	1%	0%	2%	2%	0%

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Contact Center Solution
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CONTACT CENTER REPORTING

Customer Service Division

Call Center Agents Summary Report

Call Center Agents Summary Report

From: 4/1/2009

To: 4/30/2009

Answered Talk Time Wait Time Hold Time ACW Talk Wait Hold ACW

Peer1 Average:	885	83:27	31:42	4:23	33:18	44%	17%	2%	18%
Peer2 Average:	928	76:29	35:41	1:01	29:34	43%	20%	1%	16%
Peer3 Average:	770	64:16	39:39	1:31	29:30	36%	22%	1%	17%
Call Center Average:	626	68:19	32:51	1:58	28:26	41%	20%	1%	17%

Agent ID	Agent Name	Answered	Talk Time	Wait Time	Hold Time	ACW	Talk	Wait	Hold	ACW	Time In Service
5718		626	85:23	26:09	6:47	31:48	57%	17%	5%	21%	3 Month(s)
5717		939	95:12	26:59	5:13	23:06	63%	18%	3%	15%	3 Month(s)
638		536	71:11	23:34	8:12	33:02	52%	17%	6%	24%	3 Month(s)
601		922	82:19	27:15	2:53	31:49	57%	19%	2%	22%	3 Month(s)
4312		816	59:19	29:20	0:48	29:47	50%	25%	1%	25%	5 Month(s)
633		919	57:51	35:47	2:06	33:23	45%	28%	2%	26%	11 Month(s)
626		836	75:59	31:13	1:45	27:31	56%	23%	1%	20%	11 Month(s)
5715		1260	75:42	42:36	1:33	21:47	53%	30%	1%	15%	14 Month(s)
612		745	74:03	30:07	1:02	21:17	59%	24%	1%	17%	22 Month(s)
624		690	75:44	24:12	0:29	44:57	52%	17%	0%	31%	22 Month(s)
625		609	55:05	25:19	2:17	31:27	48%	22%	2%	28%	22 Month(s)
5719		1010	64:49	41:38	1:27	15:24	53%	34%	1%	12%	22 Month(s)
636		814	67:42	28:46	0:20	17:04	59%	25%	0%	15%	22 Month(s)
614		885	69:50	34:09	0:13	15:59	58%	28%	0%	13%	23 Month(s)
4371		964	74:29	30:41	1:05	27:00	56%	23%	1%	20%	26 Month(s)
615		480	78:46	18:11	0:04	31:55	61%	14%	0%	25%	26 Month(s)
620		719	39:21	35:18	0:37	21:58	40%	36%	1%	23%	31 Month(s)
610		516	40:42	23:11	0:24	28:06	44%	25%	0%	30%	31 Month(s)
603		673	59:12	50:38	4:38	16:30	45%	39%	4%	13%	37 Month(s)
4370		519	48:30	32:12	0:09	24:06	46%	31%	0%	23%	37 Month(s)
630		547	62:20	33:50	0:52	25:45	51%	28%	1%	21%	39 Month(s)
607		665	55:58	28:23	0:52	24:14	51%	26%	1%	22%	39 Month(s)
634		812	60:39	17:42	0:21	27:37	57%	17%	0%	26%	39 Month(s)
5711		793	60:10	42:31	0:12	20:49	49%	34%	0%	17%	51 Month(s)
602		687	45:12	32:03	2:05	18:22	46%	33%	2%	19%	72 Month(s)
632		464	34:00	36:28	3:24	27:36	34%	36%	3%	27%	88 Month(s)
4801		750	78:48	26:52	0:13	28:05	59%	20%	0%	21%	92 Month(s)
629		596	38:33	34:33	0:06	36:18	35%	32%	0%	33%	142 Month(s)



CONTACT CENTER REPORTING

Customer Service Division

Queue Spectrums Activity Summary Report

Queue Spectrums Activity Summary Report

Start Date: Jun 9, 2010 00:00

End Date: Jun 9, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_DASB, VQ_Mem_Acct_Info, VQ_Non_Member, VQ_Other, VQ_Pay_Inq, VQ_Schedule, VQ_Service_Ret

Queue Activity Summary

Spectrum	Answered	Pct Answered	Abandoned	Pct Abandoned	Distributed	Pct Distributed	Cleared	Pct Cleared
0 - 30	79	6.3%	106	8.4%	80	6.3%	35	2.8%
31 - 60	6	0.5%	33	2.6%	6	0.5%	0	0.0%
61 - 90	7	0.6%	15	1.2%	7	0.6%	0	0.0%
91 - 120	7	0.6%	11	0.9%	8	0.6%	0	0.0%
121 - 150	10	0.8%	12	1.0%	11	0.9%	0	0.0%
151 - 180	17	1.3%	12	1.0%	17	1.3%	0	0.0%
181 - 210	24	1.9%	14	1.1%	24	1.9%	0	0.0%
211 - 240	21	1.7%	5	0.4%	21	1.7%	0	0.0%
241 - 270	31	2.5%	4	0.3%	32	2.5%	0	0.0%
271 - 300	25	2.0%	6	0.5%	25	2.0%	0	0.0%
301<	679	53.8%	95	7.5%	682	54.1%	0	0.0%
Summary	906	71.8%	313	24.8%	913	72.4%	35	2.8%

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CONTACT CENTER REPORTING

Customer Service Division

Queue Activity Summary Report

Queue Activity Summary Report

Start Date: Aug 30, 2010 00:00

End Date: Aug 30, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_DASB, VQ_Mem_Acct_Info, VQ_Non_Member, VQ_Other, VQ_Pay_Inq, VQ_Schedule, VQ_Service_Ret

Queue Summary

Queue Name	Entered	Service Factor (AT/E-SA)	Distributed	% Distributed	Distributed In Threshold	% Distributed In Threshold	Answered	% Answered	Answered In Threshold	% Answered In Threshold	Abandoned	% Abandoned	Cleared	% Cleared
VQ_Non_Member	80	0.911	78	98%	72	90%	78	98%	72	90%	2	2%	0	0%
VQ_Other	420	0.905	420	100%	381	91%	417	99%	380	90%	0	0%	0	0%
VQ_Authenticate_TO	205	0.901	198	97%	182	89%	197	96%	182	89%	7	3%	0	0%
VQ_Service_Ret	122	0.852	122	100%	104	85%	122	100%	104	85%	0	0%	0	0%
VQ_Schedule	68	0.838	66	97%	57	84%	64	94%	57	84%	2	3%	0	0%
VQ_DASB	60	0.949	59	98%	56	93%	59	98%	56	93%	1	2%	0	0%
VQ_Pay_Inq	107	0.888	107	100%	95	89%	107	100%	95	89%	0	0%	0	0%
VQ_Mem_Acct_Info	126	0.905	126	100%	115	91%	125	99%	114	90%	0	0%	0	0%

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Queue Activity Summary Report

Start Date: Aug 30, 2010 00:00

End Date: Aug 30, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_DASB, VQ_Mem_Acct_Info, VQ_Non_Member, VQ_Other, VQ_Pay_Inq, VQ_Schedule, VQ_Service_Ret

Queue Summary

Abandoned	Short Abandoned	Short Abandon While Ringing	Long Abandoned	Long Abandoned In Threshold	Abandoned In Threshold	Abandoned Out of Threshold	Abandoned While Ringing	Abandoned While Ringing In Threshold	Abandoned While Ringing Out of Threshold	Total Time to Distribute	Total Time to Answer	Total Time to Abandon	Max Time to Distribute	Max Time to Answer	Max Time to Abandon
2	1	0	1	-1	0	2	0	0	0	1,526	1,526	94	296	296	87
0	0	0	0	0	0	0	0	0	0	8,804	8,705	0	380	380	0
7	3	0	4	-3	0	7	0	0	0	4,929	4,892	455	382	382	221
0	0	0	0	0	0	0	0	0	0	4,601	4,601	0	351	351	0
2	0	0	2	0	0	2	0	0	0	2,254	2,182	66	462	462	52
1	1	0	0	-1	0	1	0	0	0	1,139	1,139	6	338	338	6
0	0	0	0	0	0	0	0	0	0	2,904	2,904	0	391	391	0
0	0	0	0	0	0	0	0	0	0	2,232	2,227	0	220	220	0

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Queue Activity Summary Report

Start Date: Aug 30, 2010 00:00

End Date: Aug 30, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_DASB, VQ_Mem_Acct_Info, VQ_Non_Member, VQ_Other, VQ_Pay_Inq, VQ_Schedule, VQ_Service_Ret

Queue Summary

Avg Time to Distribute	Avg Time to Answer	Avg Time to Abandon
19.1	19.1	1.2
21.0	20.7	0.0
24.0	23.9	2.2
37.7	37.7	0.0
33.1	32.1	1.0
19.0	19.0	0.1
27.1	27.1	0.0
17.7	17.7	0.0

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CALSTRS

CONTACT CENTER REPORTING

Customer Service Division

Queue Summary Report by Intervals

Queue Summary Report by Intervals (30 min. - GMT)

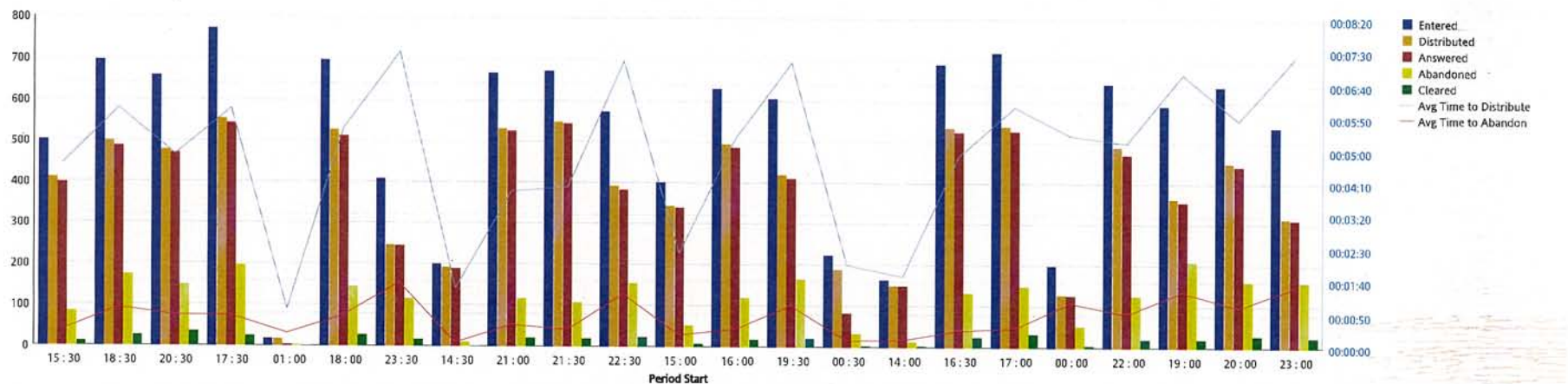
Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity



Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
00:00	VQ_Authenticate_TO	86	42	14	00:03:36	00:29:23	42	14	00:03:36	00:29:23	28	00:01:06	00:14:36	4
	VQ_Mem_Acct_Info	65	48	17	00:05:43	00:32:25	47	17	00:05:31	00:32:25	15	00:01:24	00:22:25	0
	VQ_Service_Ret	47	37	2	00:08:08	00:33:29	36	2	00:08:02	00:33:29	8	00:00:48	00:17:49	0
00:00		198	127	33	00:05:23	00:33:29	125	33	00:05:17	00:33:29	51	00:01:08	00:22:25	4
00:30	VQ_Authenticate_TO	134	107	20	00:01:55	00:19:27	36	20	00:00:40	00:19:27	24	00:00:10	00:04:16	3
	VQ_Mem_Acct_Info	66	61	17	00:02:10	00:12:06	27	17	00:00:52	00:12:06	5	00:00:06	00:06:35	0
	VQ_Service_Ret	23	20	12	00:02:40	00:14:53	20	12	00:02:40	00:14:53	3	00:00:22	00:08:06	0
00:30		223	188	49	00:02:04	00:19:27	83	49	00:00:56	00:19:27	32	00:00:10	00:08:06	3
01:00	VQ_Authenticate_TO	3	2	0	00:01:46	00:02:40	2	0	00:01:46	00:02:40	1	00:00:03	00:00:10	0

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Queue Summary Report by Intervals (30 min. - GMT)

Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity

Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
01:00	VQ_Mem_Acct_Info	15	14	0	00:00:45	00:01:36	1	0	00:00:04	00:01:11	1	00:00:23	00:05:46	0
01:00		18	16	0	00:00:55	00:02:40	3	0	00:00:21	00:02:40	2	00:00:19	00:05:46	0
14:00	VQ_Authenticate_TO	57	48	38	00:01:09	00:12:08	48	38	00:01:09	00:12:08	6	00:00:15	00:11:54	3
	VQ_Mem_Acct_Info	61	57	31	00:02:37	00:16:32	57	31	00:02:37	00:16:32	4	00:00:15	00:08:37	0
	VQ_Service_Ret	46	44	33	00:01:28	00:11:07	44	33	00:01:28	00:11:07	2	00:00:01	00:00:31	0
14:00		164	149	102	00:01:47	00:16:32	149	102	00:01:47	00:16:32	12	00:00:11	00:11:54	3
14:30	VQ_Authenticate_TO	80	75	59	00:01:17	00:15:28	75	59	00:01:17	00:15:28	5	00:00:03	00:03:41	0
	VQ_Mem_Acct_Info	68	64	46	00:01:51	00:14:49	63	46	00:01:50	00:14:49	4	00:00:13	00:13:05	0
	VQ_Service_Ret	51	51	40	00:01:13	00:12:58	50	40	00:01:12	00:12:58	0	00:00:00	00:00:00	0
14:30		199	190	145	00:01:27	00:15:28	188	145	00:01:27	00:15:28	9	00:00:06	00:13:05	0
15:00	VQ_Authenticate_TO	156	117	56	00:01:47	00:21:23	115	56	00:01:45	00:21:23	33	00:00:25	00:15:44	6
	VQ_Mem_Acct_Info	138	127	46	00:02:52	00:21:38	126	46	00:02:51	00:21:38	10	00:00:12	00:09:59	1
	VQ_Service_Ret	106	97	37	00:02:32	00:18:10	97	37	00:02:32	00:18:10	9	00:00:18	00:11:02	0
15:00		400	341	139	00:02:21	00:21:38	338	139	00:02:20	00:21:38	52	00:00:18	00:15:44	7
15:30	VQ_Authenticate_TO	211	153	26	00:04:06	00:19:27	145	26	00:03:46	00:19:27	51	00:00:31	00:15:41	7
	VQ_Mem_Acct_Info	152	133	22	00:05:11	00:20:25	132	22	00:05:07	00:20:25	17	00:00:14	00:15:52	2
	VQ_Service_Ret	137	121	20	00:04:43	00:19:37	119	20	00:04:38	00:19:37	14	00:00:23	00:12:15	2
15:30		500	407	68	00:04:36	00:20:25	396	68	00:04:25	00:20:25	82	00:00:24	00:15:52	11
16:00	VQ_Authenticate_TO	240	164	22	00:04:46	00:20:36	160	22	00:04:35	00:20:36	64	00:00:37	00:09:38	
	VQ_Mem_Acct_Info	209	174	23	00:05:24	00:21:11	171	23	00:05:13	00:21:11	31	00:00:20	00:09:43	

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Queue Summary Report by Intervals (30 min. - GMT)

Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity

Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
16:00	VQ_Service_Ret	180	155	16	00:05:50	00:20:49	154	16	00:05:47	00:20:49	23	00:00:22	00:11:38	2
16:00		629	493	61	00:05:17	00:21:11	485	61	00:05:08	00:21:11	118	00:00:27	00:11:38	18
16:30	VQ_Authenticate_TO	300	207	44	00:04:11	00:18:22	203	44	00:04:02	00:18:22	74	00:00:25	00:08:47	19
	VQ_Mem_Acct_Info	193	158	26	00:05:28	00:17:41	156	26	00:05:19	00:17:41	31	00:00:28	00:11:19	4
	VQ_Service_Ret	197	169	40	00:05:15	00:17:21	165	40	00:05:01	00:17:21	26	00:00:24	00:13:00	2
16:30		690	534	110	00:04:50	00:18:22	524	110	00:04:41	00:18:22	131	00:00:26	00:13:00	25
17:00	VQ_Authenticate_TO	301	199	22	00:05:01	00:27:47	194	22	00:04:54	00:27:47	80	00:00:36	00:16:51	22
	VQ_Mem_Acct_Info	214	180	16	00:07:19	00:27:09	174	16	00:06:56	00:27:09	31	00:00:26	00:15:44	3
	VQ_Service_Ret	203	160	15	00:06:27	00:27:08	158	15	00:06:20	00:27:08	36	00:00:23	00:11:07	7
17:00		718	539	53	00:06:06	00:27:47	526	53	00:05:55	00:27:47	147	00:00:29	00:16:51	32
17:30	VQ_Authenticate_TO	334	211	35	00:05:21	00:32:11	207	35	00:05:14	00:32:11	107	00:00:37	00:11:50	16
	VQ_Mem_Acct_Info	229	178	29	00:05:58	00:30:22	176	29	00:05:52	00:30:22	48	00:00:57	00:18:39	3
	VQ_Service_Ret	208	163	13	00:07:10	00:30:43	158	13	00:06:59	00:30:43	39	00:00:49	00:16:07	6
17:30		771	552	77	00:06:01	00:32:11	541	77	00:05:54	00:32:11	194	00:00:46	00:18:39	25
18:00	VQ_Authenticate_TO	303	197	41	00:04:11	00:30:03	187	41	00:03:53	00:30:03	86	00:00:58	00:27:57	20
	VQ_Mem_Acct_Info	217	173	24	00:06:24	00:28:44	169	24	00:06:06	00:28:44	39	00:00:41	00:14:57	5
	VQ_Service_Ret	175	155	28	00:06:45	00:30:42	154	28	00:06:44	00:30:42	18	00:00:32	00:18:46	2
18:00		695	525	93	00:05:31	00:30:42	510	93	00:05:18	00:30:42	143	00:00:46	00:27:57	27
18:30	VQ_Authenticate_TO	256	160	34	00:04:55	00:39:05	156	34	00:04:42	00:39:05	86	00:01:16	00:22:53	13
	VQ_Mem_Acct_Info	240	177	41	00:06:20	00:41:19	176	41	00:06:16	00:41:19	53	00:01:00	00:31:55	8

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Queue Summary Report by Intervals (30 min. - GMT)

Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity

Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
18:30	VQ_Service_Ret	197	159	30	00:07:06	00:43:10	153	30	00:06:39	00:43:10	32	00:00:32	00:23:56	6
18:30		693	496	105	00:06:01	00:43:10	485	105	00:05:48	00:43:10	171	00:00:58	00:31:55	26
19:00	VQ_Authenticate_TO	249	122	4	00:05:25	00:41:29	117	4	00:05:10	00:41:29	116	00:01:46	00:32:03	11
	VQ_Mem_Acct_Info	186	129	6	00:08:01	00:42:02	128	6	00:07:56	00:42:02	50	00:01:00	00:20:26	7
	VQ_Service_Ret	155	111	5	00:08:07	00:41:59	108	5	00:07:52	00:41:59	42	00:01:18	00:24:50	2
19:00		590	362	15	00:06:57	00:42:02	353	15	00:06:45	00:42:02	208	00:01:24	00:32:03	20
19:30	VQ_Authenticate_TO	246	144	0	00:06:19	00:40:20	141	0	00:06:13	00:40:20	91	00:01:14	00:38:14	11
	VQ_Mem_Acct_Info	197	146	1	00:07:15	00:40:43	141	1	00:07:07	00:40:43	45	00:01:04	00:31:33	6
	VQ_Service_Ret	161	129	0	00:08:33	00:41:20	127	0	00:08:25	00:41:20	28	00:00:45	00:31:52	4
19:30		604	419	1	00:07:13	00:41:20	409	1	00:07:06	00:41:20	164	00:01:03	00:38:14	21
20:00	VQ_Authenticate_TO	272	169	20	00:04:52	00:33:22	167	20	00:04:43	00:33:22	85	00:01:10	00:21:27	18
	VQ_Mem_Acct_Info	198	147	16	00:06:28	00:32:59	143	16	00:06:08	00:32:59	44	00:01:01	00:24:03	7
	VQ_Service_Ret	167	133	18	00:06:26	00:32:58	132	18	00:06:25	00:32:58	31	00:00:46	00:16:55	3
20:00		637	449	54	00:05:46	00:33:22	442	54	00:05:36	00:33:22	160	00:01:01	00:24:03	28
20:30	VQ_Authenticate_TO	293	189	39	00:04:07	00:26:12	185	39	00:04:02	00:26:12	80	00:00:41	00:21:14	24
	VQ_Mem_Acct_Info	207	159	35	00:05:38	00:25:23	158	35	00:05:34	00:25:23	40	00:00:57	00:25:25	8
	VQ_Service_Ret	157	127	29	00:05:10	00:23:29	125	29	00:05:00	00:23:29	27	00:00:44	00:16:08	3
20:30		657	475	103	00:04:51	00:26:12	468	103	00:04:45	00:26:12	147	00:00:46	00:25:25	35
21:00	VQ_Authenticate_TO	271	189	54	00:03:33	00:23:51	188	54	00:03:33	00:23:51	70	00:00:47	00:20:43	24
	VQ_Mem_Acct_Info	188	163	35	00:04:38	00:22:41	159	35	00:04:28	00:22:41	20	00:00:19	00:12:44	8

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Queue Summary Report by Intervals (30 min. - GMT)

Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity

Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
21:00	VQ_Service_Ret	206	177	36	00:03:46	00:25:00	177	36	00:03:46	00:25:00	25	00:00:28	00:16:41	4
21:00		665	529	125	00:03:56	00:25:00	524	125	00:03:53	00:25:00	115	00:00:33	00:20:43	21
21:30	VQ_Authenticate_TO	281	206	81	00:03:05	00:20:02	204	81	00:03:01	00:20:02	62	00:00:30	00:15:48	13
	VQ_Mem_Acct_Info	216	180	41	00:04:28	00:23:12	179	41	00:04:26	00:23:12	31	00:00:26	00:14:53	4
	VQ_Service_Ret	174	160	33	00:05:00	00:18:55	160	33	00:05:00	00:18:55	12	00:00:18	00:11:12	2
21:30		671	546	155	00:04:02	00:23:12	543	155	00:03:59	00:23:12	105	00:00:26	00:15:48	19
22:00	VQ_Authenticate_TO	271	179	41	00:04:15	00:33:10	172	41	00:04:11	00:33:10	71	00:00:54	00:24:26	15
	VQ_Mem_Acct_Info	209	174	38	00:06:04	00:35:39	168	38	00:05:50	00:35:39	28	00:00:42	00:32:11	5
	VQ_Service_Ret	164	136	31	00:05:36	00:35:04	130	31	00:05:22	00:35:04	25	00:00:58	00:19:52	0
22:00		644	489	110	00:05:11	00:35:39	470	110	00:05:01	00:35:39	124	00:00:51	00:32:11	20
22:30	VQ_Authenticate_TO	233	135	13	00:05:45	00:34:11	134	13	00:05:42	00:34:11	83	00:01:36	00:31:28	11
	VQ_Mem_Acct_Info	186	132	3	00:08:12	00:33:52	127	3	00:07:41	00:33:52	46	00:01:26	00:29:09	8
	VQ_Service_Ret	153	123	6	00:08:22	00:35:36	119	6	00:08:01	00:35:36	24	00:00:46	00:24:03	4
22:30		572	390	22	00:07:15	00:35:36	380	22	00:06:58	00:35:36	153	00:01:19	00:31:28	23
23:00	VQ_Authenticate_TO	242	111	7	00:05:15	00:31:25	111	7	00:05:15	00:31:25	85	00:01:47	00:31:28	16
	VQ_Mem_Acct_Info	163	116	2	00:09:43	00:33:36	115	2	00:09:38	00:33:36	37	00:01:18	00:24:56	5
	VQ_Service_Ret	132	86	3	00:08:22	00:29:22	85	3	00:08:14	00:29:22	36	00:01:18	00:26:10	4
23:00		537	313	12	00:07:23	00:33:36	311	12	00:07:19	00:33:36	158	00:01:31	00:31:28	25
23:30	VQ_Authenticate_TO	172	81	4	00:05:22	00:33:29	80	4	00:05:13	00:33:29	60	00:01:08	00:20:40	4
	VQ_Mem_Acct_Info	133	90	2	00:09:18	00:38:31	90	2	00:09:18	00:38:31	34	00:02:11	00:37:41	3

Sep 1, 2010

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10:38:18

Queue Summary Report by Intervals (30 min. - GMT)

Start Date: Jul 1, 2010 00:00

End Date: Jul 31, 2010 23:59

Queue Name: VQ_Authenticate_TO, VQ_Mem_Acct_Info, VQ_Service_Ret

Period Breakdown: 30 Minute Periods

Queue Activity

Period Start	Queue Name	Entered	Distributed	Distributed In Threshold	Avg Time to Distribute	Max Time to Distribute	Answered	Answered In Threshold	Avg Time to Answer	Max Time to Answer	Abandoned	Avg Time to Abandon	Max Time to Abandon	Cleared
23 : 30	VQ_Service_Ret	101	74	2	00:08:36	00:33:18	73	2	00:08:31	00:33:18	20	00:01:38	00:32:59	3
23 : 30		406	245	8	00:07:27	00:38:31	243	8	00:07:22	00:38:31	114	00:01:36	00:37:41	16
Summary		11,881	8,774	1,640	00:05:24	00:43:10	8,496	1,640	00:05:14	00:43:10	2,592	00:00:47	00:38:14	409

Sep 1, 2010

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10:38:16

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CONTACT CENTER REPORTING

Customer Service Division

Caller ANI Counts Report

Caller ANI Counts Report

Request for Proposal 2P201007

Contact Center Solution

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Start Date: Aug 1, 2010 00:00

End Date: Aug 31, 2010 23:59

Call Threshold: Min - 10 Max - 10000

Toll Free Number Dialed: 8002285453

Caller ANI	Caller Region	Caller State	Total Number of Calls	Toll Free Call Duration (secs)	Average Call Duration	Minimum Call Duration	Maximum Call Duration
	MODESTO	CA	11	6607	00:10:06	00:00:10	00:19:53
	LSAN DA 01	CA	12	5777	00:08:01	00:00:03	00:27:08
	LSAN DA 01	CA	11	7880	00:11:56	00:00:37	00:29:34
	LSAN DA 01	CA	11	10406	00:15:46	00:00:31	00:31:03
	IRVING	TX	38	437	00:00:11	00:00:04	00:00:38
	CASPER	WY	11	6831	00:10:21	00:00:17	00:25:33
	BEVERLYHLS	CA	27	2987	00:01:50	00:00:08	00:02:23
	INGLEWOOD	CA	47	15477	00:05:29	00:00:17	00:45:36
	W ANGELES	CA	11	2920	00:04:25	00:00:01	00:18:49
	CMTN GRDN	CA	10	3380	00:05:38	00:00:06	00:09:01
	TORRANCE	CA	183	20472	00:01:51	00:00:05	00:09:22
	TORRANCE	CA	134	14535	00:01:48	00:00:05	00:11:04
	INGLEWOOD	CA	10	3937	00:06:33	00:00:06	00:30:24
	W ANGELES	CA	12	1200	00:01:40	00:00:41	00:03:13
	PLAYDELREY	CA	10	2185	00:03:38	00:00:04	00:20:48
	PLAYDELREY	CA	24	4288	00:02:58	00:00:54	00:19:25
	CHICGOZN01	IL	15	886	00:00:59	00:00:11	00:05:30
	CARMEL	IN	18	5747	00:05:19	00:00:15	00:25:42



CONTACT CENTER REPORTING

Customer Service Division

Filtered ANI Report

Filtered ANI Report

Start Date: May 23, 2010 00:00

End Date: Jun 7, 2010 23:59

State:

Region:

Caller Ani:

Toll Free Number: n/a

Unique Call ID	Caller ANI	Call Start Time	Toll Free Number Dialed	Caller Region
00092300129500076710853815680005		May 24, 2010 6:52:49 AM	8002285453	SCRM MAIN
00092300129500075510853836140006		May 24, 2010 7:26:57 AM	8002285453	SCRM MAIN
00092300129500053210855799750001		May 26, 2010 1:59:40 PM	8002285453	SCRM MAIN
00092300129500072410857425820004		May 28, 2010 11:09:44 AM	8002285453	SCRM MAIN
00092300129500076410860734950001		Jun 1, 2010 7:05:00 AM	8002285453	SCRM MAIN
00092300129500075610860743000003		Jun 1, 2010 7:18:24 AM	8002285453	SCRM MAIN
00092300129500074010863644390003		Jun 4, 2010 3:54:04 PM	8002285453	SCRM MAIN

Filtered ANI Report

Start Date: May 23, 2010 00:00

End Date: Jun 7, 2010 23:59

State:

Region:

Caller Ani:

Toll Free Number: n/a

Caller State	Toll Free Call Duration	IVR Call Duration	Queue Duration	Agent Duration
CA	00:00:17	00:00:18	00:00:00	00:00:00
CA	00:00:07	00:00:08	00:00:00	00:00:00
CA	00:00:04	00:00:05	00:00:00	00:00:00
CA	00:00:05	00:00:05	00:00:00	00:00:00
CA	00:00:46	00:00:47	00:00:00	00:00:00
CA	00:00:18	00:00:18	00:00:00	00:00:00
CA	00:01:45	00:01:46	00:00:00	00:00:00



CONTACT CENTER REPORTING

Customer Service Division

Toll-Free Inbound Call Summary Report

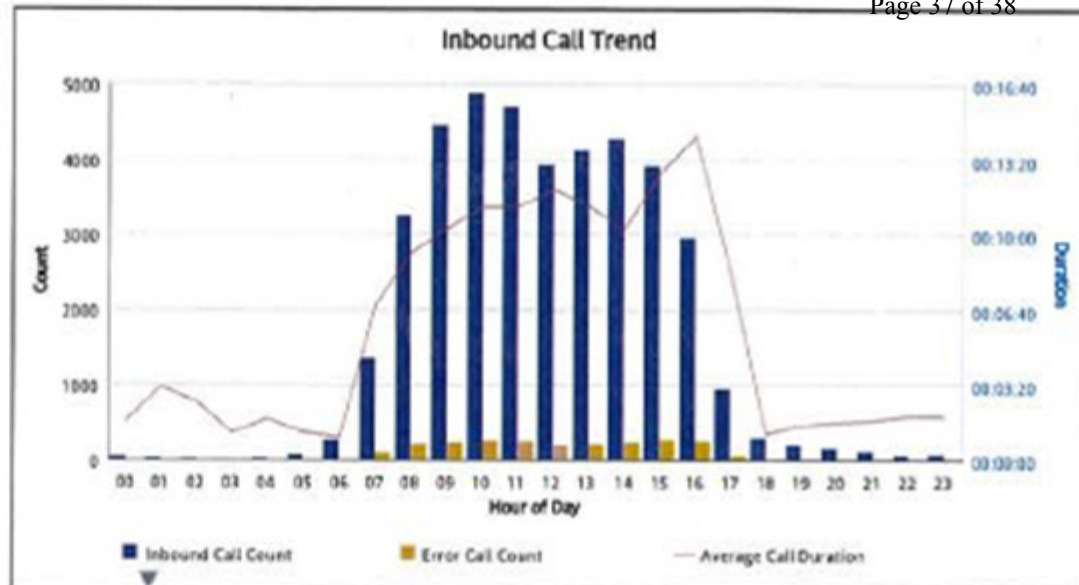
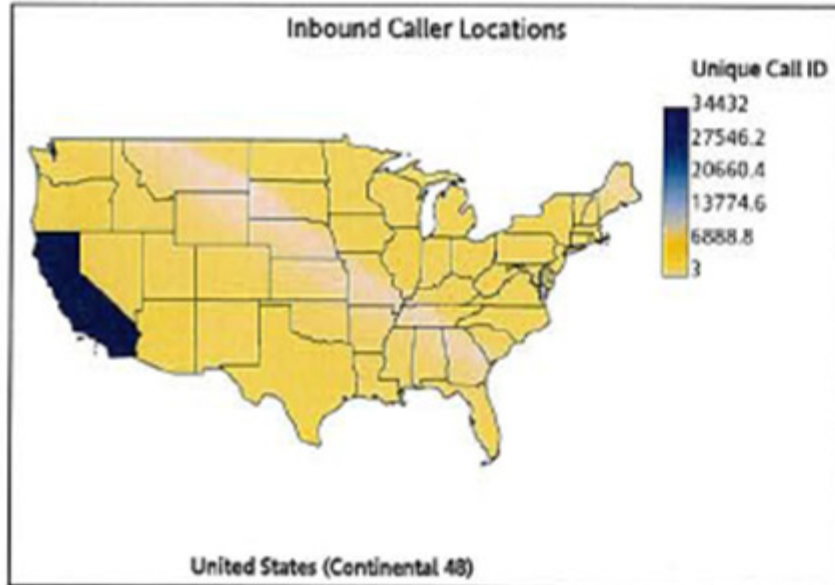
Toll-Free Inbound Call Summary Report

State of California

Bid 2P201007

Start Date: Jul 1, 2010 03:00
End Date: Jul 31, 2010 23:59
Dialed Number: 8002285453

Request for Proposal 2P201007
Contact Center Solution
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Daily Summary Information

Inbound Calls: 40,054
Inbound Call Segments: 69,066
Average Call Segments per Call: 1.71
Normal Clearing Call Count: 37,868
Error Call Count: 2,186
Total Inbound Call Duration (min): 430,639.2
Average Inbound Call Duration: 00:10:45
Maximum Inbound Call Duration: 02:21:28
Minimum Inbound Call Duration: 00:00:00
Median Inbound Call Duration: 00:07:36
Std. Dev. Inbound Call Duration: 00:11:00

30 Minute Detail

Call Period	Inbound Call Count	Error Call Count	Inbound Call Duration (min)	Average Call Duration	Maximum Call Duration	Minimum Call Duration
00:00	35	0	53.3	00:01:31	00:03:16	00:00:14
00:30	20	0	42.1	00:02:06	00:04:04	00:00:00
01:00	15	0	51.6	00:03:26	00:12:40	00:01:12
01:30	8	0	22.7	00:02:50	00:05:01	00:01:21
02:00	12	1	27.0	00:02:15	00:06:35	00:00:00
02:30	8	0	25.1	00:03:50	00:09:00	00:00:17
03:00	0	0	9.7	00:01:12	00:03:59	00:00:06
04:00	13	0	20.8	00:01:43	00:05:18	00:00:00
04:30	13	0	25.0	00:01:55	00:05:33	00:00:06
05:00	34	0	37.9	00:01:56	00:04:40	00:00:04
05:30	44	1	58.4	00:01:19	00:04:10	00:00:05
06:00	81	1	114.8	00:01:25	00:07:47	00:00:08
06:30	191	2	160.2	00:00:50	00:07:49	00:00:04
07:00	659	47	4704.2	00:07:08	00:48:14	00:00:01
07:30	691	53	4582.5	00:06:37	01:12:06	00:00:00
08:00	1,518	105	12,233.8	00:08:01	01:40:29	00:00:00
08:30	1,735	90	17,601.4	00:10:07	01:19:21	00:00:00
09:00	2,143	96	22,214.8	00:10:21	01:02:44	00:00:00
09:30	2,300	123	23,430.9	00:10:11	01:05:51	00:00:00
10:00	2,413	125	27,661.3	00:11:27	01:17:44	00:00:00
10:30	2,453	135	26,783.8	00:10:55	01:07:22	00:00:00
11:00	2,407	133	26,915.8	00:10:48	01:53:13	00:00:00
11:30	2,203	107	26,711.2	00:11:42	01:21:46	00:00:00
12:00	2,503	88	24,343.3	00:12:09	01:47:39	00:00:00
12:30	1,513	96	22,582.3	00:11:48	01:22:36	00:00:00
13:00	2,020	91	22,981.6	00:11:22	01:25:37	00:00:00
13:30	2,096	105	23,401.5	00:11:09	01:10:50	00:00:00
14:00	2,201	104	22,236.6	00:10:06	01:08:49	00:00:00
14:30	2,046	113	21,264.1	00:10:17	01:38:26	00:00:00
15:00	1,987	114	23,508.9	00:11:09	01:29:22	00:00:00
15:30	1,927	155	26,228.2	00:13:36	02:21:28	00:00:00
16:00	1,648	137	24,246.6	00:14:42	02:13:46	00:00:00
16:30	1,304	103	18,133.0	00:13:54	01:39:52	00:00:00
17:00	571	38	5,627.7	00:09:51	01:19:03	00:00:01
17:30	367	23	2,180.1	00:09:56	00:57:51	00:00:00
18:00	152	0	166.8	00:01:05	00:07:14	00:00:00
18:30	135	0	165.4	00:01:13	00:08:08	00:00:00
19:00	92	2	151.5	00:01:30	00:07:06	00:00:00
19:30	91	0	128.2	00:01:24	00:06:18	00:00:01
20:00	72	0	113.4	00:01:34	00:11:23	00:00:00
20:30	75	0	130.0	00:01:43	00:05:04	00:00:00
21:00	64	0	119.0	00:01:51	00:07:05	00:00:00
21:30	50	0	81.1	00:01:37	00:06:03	00:00:04

Longest Calls

Call Origination Time	Charged Party ANI	Number Dialed	Call Duration	Call Disposition
Jul 26, 2010 3:34:34 PM		8002285453	02:21:28	Mixed Release Codes
Jul 26, 2010 4:11:41 PM		8002285453	02:13:46	Mixed Release Codes
Jul 26, 2010 3:45:30 PM		8002285453	02:12:46	Mixed Release Codes
Jul 26, 2010 4:18:05 PM		8002285453	02:06:20	Mixed Release Codes
Jul 26, 2010 3:54:18 PM		8002285453	02:06:07	Mixed Release Codes
Jul 26, 2010 3:54:27 PM		8002285453	02:05:25	Mixed Release Codes
Jul 26, 2010 4:00:46 PM		8002285453	02:05:05	Mixed Release Codes
Jul 26, 2010 3:59:20 PM		8002285453	02:01:20	Mixed Release Codes
Jul 26, 2010 3:53:57 PM		8002285453	02:00:06	Mixed Release Codes
Jul 12, 2010 11:13:27 AM		8002285453	01:53:13	Normal Clearing

Top Call Dispositions

Error Call Count	Call Disposition
37,825	Normal Clearing
1,563	Mixed Release Codes
81	Interworking - Unspecified
71	Temporary Failure
64	Network Out Of Order
43	Normal - Unspecified
2	No User Responding
2	Recovery On Timer Expired
1	Protocol Error - Unspecified
1	No User Responding (User Alerted)
1	Resource Unavailable - Unspecified

Toll-Free Inbound Call Summary Report

Start Date: Jul 1, 2010 00:00
 End Date: Jul 31, 2010 23:59
 Dialed Number: 8002285453

Daily Summary Information

Inbound Calls: 40,054
 Inbound Call Segments: 69,066
 Average Call Segments per Call: 1.71
 Normal Clearing Call Count: 37,868
 Error Call Count: 2,186
 Total Inbound Call Duration (min): 430,639.2
 Average Inbound Call Duration: 00:10:45
 Maximum Inbound Call Duration: 02:21:28
 Minimum Inbound Call Duration: 00:00:00
 Median Inbound Call Duration: 00:07:36
 Std. Dev. Inbound Call Duration: 00:11:00

30 Minute Detail

Call Period	Inbound Call Count	Error Call Count	Inbound Call Duration (min)	Average Call Duration	Maximum Call Duration	Minimum Call Duration
22:00	31	0	57.9	00:01:52	00:09:07	00:00:09
22:30	31	0	61.1	00:01:58	00:07:14	00:00:06
23:00	43	0	82.5	00:01:55	00:07:48	00:00:11
23:30	28	0	53.7	00:01:55	00:04:29	00:00:27

Longest CallsTop Call Dispositions

Form 600-H

ATTACHMENT 7

Print Form

DISCLOSURE OF CONTRIBUTIONS AND GIFTS

Pursuant to Section 600.H. of the Teachers' Retirement Board Policy Manual, entitled "Disclosure of Campaign Contributions, Charitable Contributions, and Gifts, Recusal Requirement, and Ban on Specified Gifts" any party and its Authorized/Key Personnel who engages in business with CalSTRS for gain is required to make specific public disclosures. Contracting Entities and each of their Authorized/Key Personnel must complete and file separate forms. The below identified party or its Authorized/Key Personnel hereby make the following disclosures. (Please attach other sheets if more space is needed for disclosure and indicate enclosures.)

Identification of Filer

Name of Entity / Contractor:

Authorized / Key Personnel or
Person Making Disclosure:

Reported
on behalf ☐
of Entity

Relationship Category

(Please choose the one that is most appropriate to this relationship):

☐ **Investment**

☐ Investment Mgr ☐ Consultant ☐ Independent Fiduciary

☐ Broker Dealer ☐ General Ptr ☐ Other Services: _____

☐ **Non-Investment**

Contractor / Consultant -
Description of Service Provided:

Investment Asset Class

(Check all that apply):

- ☐ Absolute Return
☐ Fixed Income
☐ Global Equity
☐ Innovation & Risk
☐ Operations
☐ Private Equity
☐ Real Estate
☐ Other

Mailing
Address:

Number

Street

City/Locality

State/Province

Zip

Telephone:

E-mail Address:

Filing and Disclosure Period

This disclosure of campaign contributions, charitable contributions, and gifts is in response to the following filing requirement:

☐	Upon submission of an initial application or proposal to do business with CalSTRS for the preceding 12-month period.
☐	With the submission of the contract for execution (signature) to cover the interim period since the initial application.
☐	Annual disclosure for the previous calendar year.

Form 600-H

ATTACHMENT 7, Continued

Print Form

1. Disclosure of Campaign Contributions

Disclosure of Campaign Contributions valued in excess of \$250 made to or on behalf of any a) existing Teacher's Retirement Board member, b) candidates for Board member, Controller, Treasurer, and Superintendent of Public Instruction, and c) CalSTRS officer or employee. The term "contribution" is defined in the Political Reform Act regulations, in Title 2, California Code of Regulations (CCR) section 18215. If the business is an Investment Relationship, disclosure of campaign contributions made to the Governor or candidates for the governorship must also be made, according to CalSTRS' Campaign Contribution regulations in Title 5, CCR section 24010.

Value of Contribution	Description if other than monetary	Date of Contribution	Identity of Recipient of Contribution

☐ Nothing to report

☐ Attachment is enclosed

2. Disclosure of Charitable Contributions

Disclosure of charitable contributions valued in excess of \$250 made at the request of any Teachers' Retirement Board member or CalSTRS officer or employee to any charitable organization.

Value of Contribution	Description of Contribution (monetary or in-kind)	Date of Contribution	Identity of Recipient of Contribution	Identity of Requester of Contribution

☐ Nothing to report

☐ Attachment is enclosed

3. Disclosure of Gifts

Disclosure of gifts, including meals, entertainment, or travel, valued in excess of \$50 made to any Teachers' Retirement Board member or CalSTRS officer or employee.

Value of Gift	Description of Gift	Date Gift Given	Identity of Recipient of Gift

☐ Nothing to report

☐ Attachment is enclosed

I have exercised all reasonable due diligence in preparing this disclosure statement on my own behalf or on behalf of the reporting entity identified above. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attachments is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature

Title

Printed Name

Date

Question and Answers for Bid #2P201007 - Contact Center Solution

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.

Question Deadline: Oct 1, 2010 10:00:00 AM PDT