



Request for Quote (RFQ)
Membership Service Vendor

1. Organizational Information

The Society for Neuroscience (SfN) is the world's largest organization of scientists and physicians devoted to advancing the understanding of the brain and nervous system. A membership society founded in 1969, SfN has grown to serve more than 42,000 members in 87 countries. SfN promotes scientific exchange through its annual meeting, which attracts more than 30,000 attendees from around the globe, and *The Journal of Neuroscience*, the field's most-cited peer-reviewed journal. SfN also supports the neuroscience community through professional development programming and is dedicated to sharing the excitement and progress of scientific discovery through public information and outreach. SfN advocates strongly for policies that advance science and improve health, such as robust federal research investments and the responsible use of animals in research.

2. Purpose of Request for Proposal

The Society for Neuroscience is seeking Customer Service Center from an experienced contractor (and potential subcontractors) for the purpose of designing and implementing a Support Center that will handle all phone and email inquiries related to the management of member accounts. In this capacity, the vendor will act as the initial point of contact for all customer service inquiries related to member accounts and services and will serve as the professional face of SfN with all inquirers.

Member Account Facts:

- SfN's membership reaches nearly 40,000 individual scientists and trainees every year, 35 percent of whom are outside the United States and Canada. Current, lapsed, and new members often require assistance accessing or editing the information on their account, or resolving technical errors while using the website.
- In 2013, SfN received nearly 10,000 discrete inquiries. SfN wishes to contract a vendor to act as the primary responder to these inquiries while monitoring patterns in technical errors and coordinating with SfN staff and SfN's data vendors to quickly resolve all customer requests.

The successful bidder will demonstrate the:

- Capacity to scale and/or retract operations as necessary to achieve an optimal level of service that is cost effective;
- Ability to handle all types of inquiries included in this proposal;
- Experience to implement this Customer Service Center within the given timeframes;
- Technology to report to SfN the requested metrics; and,
- Experience to recommend to SfN ways to offer the best value and cost for the proposed model.

The successful bidder will design and implement a Customer Service Center that will be fully operational by August 1, 2014, with the technology and staffing capabilities and expertise to expand as volume dictates. The focus will be on the Contractor's ability to design and implement a Customer Service Center within this period of time, with a secondary focus on the Contractor's capabilities to expand to accommodate time periods of high volume.

Technical and Personnel Requirements

The vendor should have extensive expertise in managing customer records and related processes in Personify software (version 7.5) and will be expected to conduct customer service activities directly in SfN's Personify records. SfN also coordinates with other technology vendors, such as CDS and Coe Truman, whose software systems communicate with SfN's Personify database to provide a seamless user experience; the vendor should be able to coordinate effectively with these and any other technology vendors to resolve member issues.

Vendor personnel should have a demonstrated track record of excellent customer service and ability to manage sensitive customer information, including PCI-compliant financial transactions.

3. Key Dates

Activity	Date
RFP Release Date	May 8, 2014
Vendor to Submit Questions / RFP Clarifications	May 9 to May 30
RFP Response Deadline	June 13, 2014

4. Scope of Work (SOW)

- a) The Customer Service Center shall be available to receive and respond to inbound calls and emails Monday through Friday from 9:00a.m. to 5:00 p.m. Eastern Time. SfN would like to see budget options for Customer Service Center 1) Monday through Friday availability from 9:00 a.m. to 8:00 p.m., and 2) availability 24 hours a day, seven days a week. The per-hour cost for additional overtime and weekend hours should also be provided.
- b) The Customer Service Center must be fully operational and ready to accept inbound calls and emails beginning on August 1, 2014. The Contractor shall work to refine and improve the Customer Service Center thereafter.
- c) SfN requires live Customer Service Center representatives. During non-business hours, however, SfN expects a messaging service to be available to deliver helpful information.
- d) The Customer Service Center shall maintain a highly trained staff of Customer Service Representatives ("CSR"), as is necessary to implement the Customer Service Center model that SfN proposes.
- e) The Customer Service Center shall provide high-quality customer service, focusing on the accuracy of information provided, the completeness of information, adherence to privacy laws, and overall professional customer service.
- f) The Customer Service Center shall provide quality assurance survey tools to monitor caller satisfaction. The Contractor shall work with SfN to design the details of this survey tool.
- g) Customer Service Center will act as the primary point of contact for all customer emails and phone calls related to customer accounts. Coordinate as needed with SfN staff and SfN's other technology vendors as necessary to quickly resolve all customer requests.
- h) Provide basic membership pricing and other organizational information to customers on request.
- i) Securely process (within PCI compliance requirements and guidelines) membership fee and product payments, in the Personify system, upon request from customers.
- j) Track patterns of technical errors in real time and coordinate with SfN technical support staff to quickly resolve recurring problems.
- k) Track the number and type of inquiries and report regularly to SfN membership staff. (SfN's preference would be to track inquiry types and resolution notes using Personify's contact tracking module.)

- l) Maintain the integrity of SfN’s customer database by regularly or periodically conducting activities to limit the number of duplicate records and resolving bad mail/email.
- m) Monitor the status of SfN’s customer email flags (GOOD/BAD) to identify organizations that may be gray- or black-listing the SfN.org domain and coordinate with SfN staff and the external organizations to have SfN’s domain white-listed as necessary.
- n) Provide regular written reporting on volume of inquiries, types of inquiries, and trends. At least one high-level summary of activities should be delivered on the first business day of each month (to reflect the previous month’s activity). Other reports may be requested at pre-determined intervals (weekly, quarterly, etc).

The Contractor must ensure that there are technologies and processes in place that are sensitive to, and capable of, addressing the special needs of callers including TTY or relay services to support individuals with hearing impairments.

The Contractor shall be proactive when notifying SfN of any developing situation that may impact operations, service to callers, or any other contractual issue.

The Contractor shall determine the appropriate staffing, technical and telephonic systems, and physical location for the Customer Service Center. The Contractor shall utilize the most efficient operations and work assignments to maximize the use SfN staff during low inbound call volume periods.

The Contractor shall use best practices, standards, and methodologies to provide individuals with quality service. SfN recommends that the Contractor standards be aligned with a best practice standard such as International Standards Organization (ISO) or the Customer Operations Performance Center (COPC), or have received ISO and/or COPC 2000 certification.

Reporting Requirements

The contractor shall produce, at a minimum, the following reports beginning September 1, 2014:

Name	Description	Frequency
Customer Service Center Activity	Summary Customer Service Center report that includes total calls received, average seconds to answer, average minutes per call and abandonment rate.	Daily
Inquiry Reasons	All calls received categorized (preferably in Personify) by primary inquiry reason.	Weekly
Training	A list of all training sessions held, including the date, purpose of training, number of CSR’s in attendance and if the trainees were new hires or current employees.	Monthly

Service Level Agreement

The contractor shall meet the following service level agreements (SLA). SLA #1 shall be effective during Month 1 (starting August 1) and SLAs #2 and #3 shall be enforced beginning December 1, 2014. Failure to meet any service level will result in a penalty as described in the following table. These metrics shall be reported to SfN Monthly.

Name	Description	Penalty
Operational	Customer Service Center will be operational August 1, 2014	\$200 for each business day starting August 5 the center is not operational

Abandonment Rate	Average Daily Abandonment Rate shall not exceed X% during a one-month period. A call is considered abandoned when the caller has been waiting in queue for more than 30 seconds and hangs up before being handled by a CSR	\$250 for each month that exceeds 3%
Average Seconds to Answer	Average Seconds to Answer shall not exceed 60 seconds during a business day.	\$100 for each business day that average exceeds 60 seconds

The Contractor shall also develop the following deliverables within 30 days of contract award:

- A Disaster Recovery Plan
- A Continuation of Operations Plan
- A Project Management Plan

SfN Responsibilities

The primary contact for this function is the Manager, Membership & Chapters. A primary contact for the vendor will work closely with SfN's primary contact as well as any other SfN staff as needed to make sure the necessary technical requirements are in place to ensure a seamless customer service experience for all inquirers. SfN will work closely with the vendor to provide the documentation necessary for training responders on SfN's processes and relevant policies.

5. Supplier Questions

Questions may be e-mailed to ptroxell@sfn.org. Written questions should be directly tied to the RFP by the writer. Questions should be asked in constructive order, from beginning to end, following the organization of the RFP. Each question should begin by referencing the RFP page and section number to which it relates.

NOTE: Registered bidders are NOT to contact any SfN associate directly without first clearing it with the Procurement Manager. You can contact the Procurement Manager at 202-962-4028. Anyone caught violating this rule risks being eliminated from the RFP process.

6. Proposal Preparation and Submission Instructions

Interested parties are to provide the Society with a thorough proposal using the following guidelines:

General

Proposal should be as brief as possible. Proposal should be straightforward and concise and provide "layman" explanations of technical terms that are used. Emphasis should be concentrated on conforming to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description of the offer. Proposals, which appear unrealistic in the terms of technical commitments, lack of technical competence, or are indicative of failure to comprehend the complexity and risk of this contract, may be rejected.

The bidder must follow instructions in this RFP when preparing and submitting its proposal. The bidder is advised to read thoroughly and to follow all instructions. The information required to be submitted in response to this RFP has been determined to be essential in the bid evaluation and contract award process.

Each bidder is given wide latitude in the degree of detail it elects to offer of the extent to which plans, designs systems, processes and procedures are relevant. Each bidder is cautioned, however, that insufficient detail may result in a determination that the bid proposal is materially non-responsive.

- **Preparation of Proposal**

Each proposal shall be prepared simply and economically, avoiding the use of elaborate promotional material beyond those sufficient to provide a complete, accurate and reliable presentation.

- **Number of Proposal Copies**

Please submit one electronic copy of your proposal to: ptroxell@sfn.org

- **Joint Venture**

If a joint venture is submitting a bid, the agreement between the parties relating to such joint venture should be submitted with the venture's proposal. Authorized signatories from each party comprising the joint venture must sign the bid proposal.

In your proposal, please include the following information:

1) **Company Overview and Qualifications**

- Company name, address, website
- Company history and experience (years in business)
- Key Contact name and title including business phone, mobile phone and email address
- Company size (by number of employees)
 - Number of Employees Assigned to SfN's Account
- Total company annualized revenue
- Biographies of key company personnel SfN would be working with

2) **Specific Experience Related to RFP Objectives**

- Up to three (3) references of Customer Service Center work of similar size and scope. Please provide telephone numbers, names, and emails of contact persons
- Three (3) professional references for the proposed Project Manager on SfN's account. The references should be previous clients for whom the individual served for engagements comparable to those outlined in this RFP.

3) **Project Overview and Objectives**

- Provide specific objectives and the periods of time to achieve those objectives.
- Description of how the Contractor will implement the project.

4) **Work Plan and Timeline**

- The Customer Service Center is to be operational by August 1, 2014. The Contractor's work plan should detail the development and implementation, and operations and maintenance phases of the project.
- The work plan should include specific tasks and milestones.
- The work plan should include timelines for start and completion of the tasks.

5) **Price Proposal**

The budget proposal should include pricing for each of the three proposed models.

- I. 9 a.m. – 5 p.m., 5 days a week
- II. 9 a.m. – 8 p.m., 5 days a week
- III. 12:00 a.m. – 11:59 p.m., 7 days a week
- IV. Additional per-hour cost for overtime and weekend hours

7. GENERAL INFORMATION

- Neither SfN nor its representatives shall be liable for any expenses a bidder incurs in connection with preparation of a response to this RFP. Applicants should prepare their proposals simply and economically, providing a straightforward and concise description of the bidder's ability to meet the requirements of this RFP.
- The issuance of this RFP does not commit SfN to award a contract, to pay any costs incurred in the preparation of a proposal in response to this request or to actually procure the requested services.
- Request for Additional Information: Prior to the final selection, vendors may be required to submit additional information that SfN deems necessary to further evaluate the vendor's qualifications. As part of the evaluation process, vendors shall furnish such additional information as SfN may reasonably require.
- SfN will not be liable for any costs incurred by the vendor in connection with interviews (i.e., travel, accommodations, etc.) conducted as part of the evaluation or negotiation process.
- Gratuity Prohibition: Vendors shall not offer any gratuities, favors, or anything of monetary value to any associate at SfN for the purpose of influencing consideration of this proposal. If an SfN associate solicits a gratuity, the vendor is obligated to inform SfN's Deputy Executive Director (Operations).
- Right of Negotiation: SfN reserves the right to negotiate with the selected vendor the exact terms and conditions for a contract.
- Legal Compliance: In connection with the furnishing of supplies of performance of work under the contract, the contractor agrees to comply with the Fair Labor Standard Act, Equal Opportunity Employment Act, and all other applicable Federal and State laws, regulations and executive orders to the extent that the same may be applicable.
- Disqualification: No award will be made to any bidder, person or party, parent or subsidiary that is de-barred from providing services to the federal or state government, or with which SfN has an outstanding claim against or a financial dispute.
- Performance and Approval of Sub-Consultants: The vendor will perform the project as an independent contractor and not as an agent or employee of SfN. The vendor shall secure written permission from SfN before subcontracting any part of the project. Such permission should be obtained during the proposal evaluation stage.
- Licenses, Permits & Taxes: The price or prices for the work shall include full compensation for all taxes, permits, etc. that the vendor is or may be required to pay. SfN is a tax exempt entity.
- Minority/Women Business Enterprise (MWBE) Policy: It is the policy of SfN to provide minority and women owned business enterprises with equal opportunity for participating in the selling of goods and services to SfN. In cases where a vendor plans to sub-contract a portion of the work, it is required to make "A Good Faith Effort" to engage qualified MWBEs for such work. Vendors shall keep records of such efforts, when applicable, that are adequate to permit a determination of compliance with this requirement. If subcontracting is involved in the proposal, a Proposed Schedule of Minority/Women Business Enterprise Participation shall also be submitted.

- Revisions to this RFP: In the event it becomes necessary to clarify or revise this RFP, such clarification or revision will be by addendum. Any RFP addendum will be distributed to all registered bidders via the e-mail provided.