



February 7, 2023

To: All Potential Respondents

From: Julie Janssen, Purchasing Agent

Subject: 005-RFP-0214-2022 Secretary of State Business Services Division Call Center

### Addendum Two

The following changes are being made to the above RFP:

- Q1. Would you please share more detail on the types of inquiries that we should expect?**
- A1. Questions are related specifically to the Business Services Division program. The most common questions are procedural in nature:
- How do I log into Fast Track Filing?
  - How do I set up an LLC?
  - How do I change my registered agent/registered office address?
  - How do I reinstate my administratively-dissolved entity?
  - How do I change/add directors/officers?
  - How do I renew my notary commission?
  - Why are you doing this to me?
- Q2. Will the call center staffing requirement be different on Holidays? Please list the Holidays with unique staffing requirements.**
- A2. Respondent should address this in their proposal.
- Q3. The State has given that there "is an approximate 4000 calls per month at 2.5 minutes a call" What is the average talk time? And what is the average time for after-call work?**
- A3. Data for FY22 shows an average "engage time" of 2:47 and average "wrap time" of 0:17.
- Q4. What is the current average after-call work time for operators?**
- A4. Data for FY22 shows an average "wrap time" of 0:17.
- Q5. What is the monthly average number of chats per month?**
- A5. Chat is not currently offered. Zero.
- Q6. What is the monthly average number of emails per month?**
- A6. Estimated average number of emails is between 200-300 a month.
- Q7. What is the monthly average number of one-way text messages per month?**
- A7. Text is not currently offered. Zero.
- Q8. What is the monthly average number of two-way text messages per month?**
- A8. Text is not currently offered. Zero.

- Q9. What is the current average wait time for phone calls?  
Q9. Data for FY22 shows an average “engage time” of 2:47 and average “wrap time” of 0:17.
- Q10. What is the current average after-call work time for operators?  
A10. Data for FY22 shows and average “wrap time” of 0:17.
- Q11. Historically, how long did it take to train a new employee to be prepared to take live calls (# of days)?  
A11. Eight to ten days.
- Q12. Historically, has there been a live call portion of new employee training (nesting)? On average, how many additional days did it take before a new employee could take calls unassisted?  
A12. Yes, the trainee spends three days in the classroom, then the remaining days listening in on live calls. “New trainees are taking calls without someone sitting with them after the stated eight to ten days, with assistance available of nearby trained staff. A semi-assisted period is significantly longer.
- Q13. Section 1.4 (page 3). What is the volume and percentage of “electronic correspondence”, i.e. email, social media, chat?  
A13. Estimated average number of emails is between 200-300 a month. Chat and Text is not currently offered.
- Q14. Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?  
A12. See section 3.3 Cost Proposal in the solicitation document listed below. The Respondent is asked to provide their best pricing structure.
- Q15. Is previous experience with any specific customer information systems, phone systems, or software required?  
A15. Previous experience is a mandatory requirement per Section 4.1.1. The State is requesting Respondent to provide and operate a call center that includes their own customer information, phone and software system.
- Q16. What is the minimum simultaneous inbound call capacity?  
A16. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q17. What is the maximum wait time?  
A17. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q18. What is the maximum hold time?  
A18. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q19. What percentage of inbound calls must be answered by a live operator?

- A19. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q20. What percentage of calls must be resolved without a transfer, second call, or a return call?
- A20. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q21. What is the maximum percentage of calls that can be terminated by the caller without resolution?
- A21. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q22. Is there a minimum or maximum number of operators and supervisors?
- A22. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q23. What is the required degree of dedication for the call center?
- A23. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q24. What is the required degree of dedication for the operators?
- A24. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q25. What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?
- A25. The Agency is requesting the Respondent provide this information in Exhibit 13.
- Q26. What are the recording and storage requirements for non-phone communications?
- A26. The Agency is requesting the Respondent provide this information in Exhibit 13.
- Q27. What is the current number of seats for operators and supervisors at your existing call center?
- A27. The State does not have an existing call center. The Secretary of State Business Services currently provides the services in house. This staff files business, notaries, and lien documents, as well as performs front desk duties in addition to answering calls. There are currently seven FTE answering calls.
- Q28. The stated objective is as follows: Objectives The State of Iowa Secretary of State seeks a contractor to provide and operate a call center for its Business Services Division. The Secretary of State is seeking to be more responsive to the Iowa business community with a dedicated call center with extended hours for small business and local entrepreneurs. But in the Background it states this: 1.5 Background. The Secretary of State Business Services currently provides the services in house. Calls are received by our Business Services Division staff, mostly clerk-specialists. This staff files business, notaries, and lien documents, as well as performs front desk duties in addition to answering calls. There are currently seven FTE answering calls. Is the goal to replace the current contact center?
- A27. The State does not have an existing call center. The current staff will continue to be responsible for other duties.

Q28. Based upon the objective as stated is the respondent going to be responsible for setting up and operating the new contact center?

A28. Yes they are.

Q29. If so, then does the new call center have to be in state or can it be located anywhere?

A29. The State requires a headquarters or call center location in the continental United States. The Agency is requesting the Respondent provide any Iowa locations in Exhibit 14.

Q30. The training section also states: Describe the skills and time required by State of Iowa personnel for initial and ongoing call center staff/operator training. Provide an estimate of State of Iowa staff time required to complete the training. Is it the states intent to staff and operate the call center?

A30. No.

Q31. Are respondents required to hire all Iowa based staff for the call center? We are asking for clarification because it states on page 15, Exhibit 14 - Location and Staffing - "describe the ability to staff the call center by lowans". Then on page 18, 4.1, under respondent requirements it states "A headquarters or call center located in the continental United States".

A31. The State requires a headquarters or call center location in the continental United States. The Agency is requesting the Respondent provide any Iowa locations in Exhibit 14. The Agency is requesting the Respondent provide if any locations are staffed by lowans in Exhibit 14.

Q32. Please clarify if the state would allow a call center located in Maryland or Virginia with both office and remote workers, or is the State requiring all staff, both office and potentially remote workers to be based in solely in Iowa.

A32. Yes – The State would allow a call center located in Maryland or Virginia with both office and remote workers. There is no mandatory requirement for staff to be located solely in Iowa.

Q33. Is the organization fully informed and aware of how live chat and chatbots improve Customer satisfaction, reduce support agent turnover, and reduce a call center's labor expenditure by 80%?

A33. Not at this time. The Agency is requesting the Respondent provide this information in Exhibit 13.

Q34. If so, how is the organization aware of chatbot benefits? Has the org seen a live demo?

A35. Not at this time. The Agency is requesting the Respondent provide this information in Exhibit 13.

Q35. Is the organization considering a chatbot to complement the call center? Why or why not?

A35. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 13.

Q36. If so, would you work directly with a Live Chat and AI Chatbot developer as a subcontractor due to their complexities? Or would the chatbot developer need to subcontract with the primary vendor?

A36. The developer would need to work with the primary Respondent.

Q37. Are there any interests in using an automated self-service solution, AI enabled BOT, for extended night and week-end support?

A37. The Agency is requesting the Respondent provide this information in Exhibit 13.

- Q38. What system is the Secretary of State currently using?**  
A38. The State is requesting Respondent to provide and operate a call center that includes their own customer information, phone and software system.
- Q39. Will you provide system training to the vendor's agents?**  
A39. The State is requesting Respondent to provide and operate a call center that includes their own customer information, phone and software system.
- Q40. Will you provide training on program processes?**  
A40. The State is requesting Respondent to provide and operate a call center that includes their own customer information, phone and software system.
- Q41. Will the State of State compensate the vendor's staff for training?**  
A41. The Agency is requesting the Respondent provide this information in Exhibit 12.
- Q42. How many FTEs will be required on Day 1, Day 60, Day 90, and ongoing?**  
A42. The Agency is requesting the Respondent provide this information in Exhibit 11.
- Q43. Is a Work-from-Home arrangement permitted?**  
A43. Yes. The Agency is requesting the Respondent provide if the ability for their operators to work from home and if the locations are staffed by office locations or work from home in Exhibit 14.
- Q44. Section 3: Form & Content of Proposals, 3.3, Cost Proposal, Pg 16. We request the State provide a spreadsheet or cost proposal form to ensure a commensurable appraisal by the Evaluation Committee.**  
A44. See section 3.3 Cost Proposal in the solicitation document listed below. The Respondent is asked to provide their best pricing structure. The State does not post Scored Specification points until the day the solicitation closes.
- Q45. Is it the states intent to staff and operate the call center?**  
A45. No. It is the State's intent that the Contractor will staff and operate the call center.
- Q46. What is the current average wait time for phone calls?**  
A46. Data for FY22 shows an average "engage time" of 2:47 and average "wrap time" of 0:17.
- Q47. Does the DAS require a call center locally in Iowa or vendor can provide support remotely?**  
A47. The State requires a headquarters or call center location in the continental United States. The Agency is requesting the Respondent provide any Iowa locations in Exhibit 14.
- Q48. Can the contractor employ remote staff located in the State of Iowa?**  
A48. Yes.
- Q49. Do the vendors need to provide letters of reference issued by vendors' clients or vendor can provide the reference contact details along with the requested information?**  
A49. Per Exhibit 5 – Respondent is to provide letter of reference from three previous or current clients with a contract person and telephone number for each reference letter.
- Q50. Please provide a breakdown for each component listed in the evaluation criteria.**

- A50. The State does not post Scored Specification points until the day the solicitation closes.
- Q51. How many points are allocated for pricing?
- A51. The State does not post Scored Specification points until the day the solicitation closes.
- Q52. What is the minimum score for the Technical Proposal?
- A52. The State does not post Scored Specification points until the day the solicitation closes.
- Q53. Is 24/7 availability required?
- A53. 24/7 availability is not a mandatory requirement. The Agency is requesting the Respondent provide their availability information in Exhibit 13.
- Q54. Are you expecting to be open during holidays?
- A54. Respondent shall address this in their proposal.
- Q55. Can you please provide an overview on what telephony, hardware, and software the bidder will provide and what the DAS will provide.
- A55. Respondent will be providing all telephones, hardware and software systems for the Call Center.
- Q56. Is the DAS providing the telephony solution or is the Vendor to provide?
- A56. Respondent will be providing all telephones, hardware and software systems for the Call Center.
- Q57. Does the Contractor need to make their own training Material?
- A57. Yes.
- Q58. Will all the staff hired by the Contractor to execute this contract need the approval of DAS before onboarding?
- A58. No.
- Q59. Will the selected vendor partner be required to connect to any technology systems in order to provide the requested services as outlined in the RFP? If so, please list the systems which will be required.
- A59. No, not at this time. The Contractor shall be providing all hardware and software systems.
- Q60. Will any special licenses need to be held by agents or selected vendor partner in order to provide the requested services as outlined in the RFP?
- A60. No special licensees are needed.
- Q61. Answer customer service phones and electronic correspondence. Is electronic correspondence email, chat or both
- A61. Email, Chat and Text.
- Q62. Section 3 Paragraph 3.2 Exhibit 14: Is it a requirement to have agents physically located in Iowa? Is there a deduction in evaluation points if not met?
- A62. The State requires a headquarters or call center location in the continental United States. The Agency is requesting the Respondent provide any Iowa locations in Exhibit 14. The Agency is requesting the Respondent provide if any locations are staffed by Iowans in Exhibit 14.
- Q63. I have a few questions regarding the Call center bid for the Secretary of State business services position. Bid # 005-RFP-0214-2022. I was hoping I could locate them in the Statement of Work.

However, I was unable to locate that information in the RFP. Can you provide me with the location of the SOW if possible?

A63. The Agency is requesting the Respondent provide this information in their technical proposal and the scope of work will be agreed upon in the Contract.

Q64. Section 4.2 (page 18). Does the state want real-time dashboard visibility?

A64. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.

Q65. Section 4.2 (page 18). Does the State desire AI functionality including chatbots and/or voicebots?

A65. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 11.

Q66. Section 4.2 (page 18). Does the State desire the ability to conduct automated post-contact surveys with end customers?

A66. There is no mandatory requirement. The Agency is requesting the Respondent provide this information in Exhibit 13.

Q67. Section 4.5 (page 19). This section states that the contractor shall provide quarterly reports on all sales made under this contract within the State. Can you clarify this requirement?

A67. The State is requesting a quarterly report of all invoicing made from Contractor to Agency during Quarter period.

Q68. Requests a report on all sales made. Is the Respondent providing a point-of-sale solution to take payments, or is this a report on the States provided product/services sales ordering and payment processing platform?

A68. The State is requesting a quarterly report of all invoicing made from Contractor to Agency during Quarter period.

Q69. Please provide the full Special Terms document referenced in the General Terms and Conditions for Service Contracts/Solicitations for review.

A69. See link to [Terms and Conditions for Services](#).

Q70. Is there any preference for Small, Women or Minority Owned businesses?

A70. All preference information is provided in Section 5.5 of the RFP document.

Q71. Can you please provide a greater explanation of your expectations related to any required subcontracting to minority-owned, women-owned, or other types or categories of small or disadvantaged businesses? For example, what is required with the proposal, and what is required to comply during the term of the contract?

A71. All preference information is provided in Section 5.5 of the RFP document.

Q72. Can you please provide greater details regarding your bid bond and/or performance bond requirements related to this contract? For example, what is required with the proposal, and what is required to comply during the term of the contract?

A73. The State is not currently requiring a Performance Bond for the resulting Contract.

**Please acknowledge receipt of this addendum by signing in the space provided below, and return this letter with your offer (do not send back separately).**

I hereby acknowledge receipt of this addendum.

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Signature

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Date

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Typed or Printed Name