**Generic Statement of Work**

**1.0 Background**

When the President declares a disaster, XYZ Agency accepts applications from individuals and businesses for disaster assistance from the designated geographical area via a toll-free telephone number. XYZ Agency is responsible for the accurate and efficient routing and processing of fluctuating customer calls. Live agents perform the call center supported registration process.

**2.0 Purpose**

The purpose of this task order is to respond to incoming calls and accept applications from individuals and businesses for disaster assistance.

**3.0 Specific Task Requirements**

The contractor shall provide and maintain turnkey service of telephone representatives, Automated Data Processing (ADP) and telecom equipment and network services, including call processing equipment, and facilities and network services for the purpose of responding to incoming calls and accepting applications for disaster assistance. All facilities provided shall conform to the requirements sect forth in Section C.5 of the base contract and must be located within the contiguous 48 states.

A minimum of 111 workstations and 111 agents is required within 14 days of contract award. The Government requests that the contractor provide staffing up to 111 maximum within the following 14 days. The work to be performed may be distributed to no more than 6 contact centers. Each center shall have a minimum capacity of 111 agent workstations. All contact center staff will be located at the contractor’s facilities.

**3.1 Services Required**

The contractor shall provide the services identified in this section. These services are to be provided in the manner described in Section C.3 of the base contract and this task order SOW.

* Responding to inbound calls and accepting applications for disaster assistance. Only English calls will be routed to the Contractor for response under this task.
* Telecommunications Services

The contractor shall provide all technical and management services to support the task, including program management, technology management, information and relationship management, human resources management, performance management, quality assurance/quality improvement, management reports, security, contingency/disaster recovery, and value engineering, as described in Section C.3.5 of the base contract and this task order.

The contractor shall have call center(s) fully-operational and fully-staffed with a minimum of 111 phone agents trained with the Government’s curriculum within 14 days of issuance of the task order.

The contractor shall ensure that a minimum of 111 agents are trained and available to answer calls within 48 hours from the time XYZ Agency verifies network and call connectivity.

The Contractor shall adjust within 24-hours of notification

* Staffing
* Schedules and/or
* Hours of Operation

as requested by the government to meet anticipated call volume. The contractor shall maintain a fully-operational facility during the entire term of the task order.

**3.2 Hours of Coverage**

The Contractor shall be able to provide attended service for two, non-overlapping eight (8) hour shifts between the hours of 4:00 AM to 12:00 (Midnight) Central time, seven (7) days a week. The shift times will be determined by the Government. If directed by the Government, the Contractor shall provide attended service 24 hours a day, seven days a week (24 x 7 coverage).

**3.3 Performance Period**

The period of performance of this requirement is 28 days. If additional services are required beyond the period of performance, the awarded task order(s) will be modified as logical follow-on effort, using the authority that is provided for in 41 U.S.C.(c)(2).

**3.4 Proposed Work Flow**

The Caller dials a toll-free number that is provided by XYZ Agency to seek disaster assistance. The call terminates at an interactive voice response service provided by XYZ Agency. If the caller elects to speak to a Customer Service Representative (CSR), XYZ Agency will make a determination as to how the call should be routed. If XYZ Agency determines that the call should be routed to a contractor-operated center for response, the call will be directed to the contractor system for handling. Calls forwarded for live assistance are queued for handling by a qualified CSR.

After the caller is routed to a CSR, the CSR responds to the caller’s initial request and any other additional requests the caller makes. If the caller desires to register for disaster assistance, the CSR accesses an XYZ Agency disaster assistance registration database via the Intranet or Internet (to be determined by XYZ Agency), probes the caller for specific information, and records the required information needed to complete the registration process. The average time needed to complete the registration process for each caller is estimated to be 20 minutes. An on-line version of the XYZ Agency disaster assistance registration database can be viewed at the XYZ Agency’s website at www.xyz.gov/register.html.

**4.0 Staff To Be Provided**

The contractor shall provide qualified personnel in sufficient quantities to perform this task, including agents, project management, and support staff, as described in Section C.4 of the base contract. The contractor shall ensure that the staff has the appropriate qualifications and skills required to perform the task and meet minimum qualifications set forth in Section C.4.3.1 and C.4.3.2 of the base contract.

The contractor must meet the requirements of the Federal Privacy Act and upon approval from XYZ Agency, may use the contractor’s own forms for this purpose.

The contractor shall provide all recruiting, screening, hiring, and monitoring of staff for the project. The contractor shall ensure confidentiality of data and conduct security background checks for each employee prior to employee answering XYZ Agency calls. A government representative will do the fingerprinting process; however, the contractor will facilitate the DHS fingerprinting requirements for each contracted employee.

The contractor will provide a list of agent names and their social security numbers to the Project Officer and XYZ Agency’s Information Technology group so that agent login IDs can be established prior to attending training. These login IDs are required during the training process.

The contractor shall provide supervisory/management personnel required for effective project management.

The contractor shall verify United States citizenship for all telephone agents, supervisors, managers and quality assurance personnel.

The contractor shall ensure that all telephone agents, supervisors, managers and quality assurance personnel speak, read, and write English fluently.

The Government may direct the contractor to staff the contact center to a specified hourly band. The Government agrees to pay the contractor the price for that specified hourly band even if the actual weekly call volume is below the specified hourly volume band. If during the extension period, changes or reductions in the weekly specified hourly band are required, the Government agrees to provide a minimum of 48 hours advance notice to the contractor before the changes are expected.

**4.1 Key Personnel**

Project Manager and Site Manager are designated as Key Personnel for the purposes of supporting this task. All proposed substitutes shall meet or exceed the qualifications of the person being replaced.

**4.2 Training**

All of the contractor’s trainers, which are or may be assigned to this project, must attend at least one of the initial training sessions delivered by the Government trainers.

The contractor shall provide workspace and related equipment to support a Government training program.

* The contractor’s phone agents, supervisors/employees monitoring for quality assurance, and trainers, must complete this training.
* Classes shall be 8 hours with no more than 111 employees in each session.
* The contractor will ensure immediate release of any employee who does not successfully complete the training program as identified by the Government trainer or contractor.

The contractor shall ensure that the training environment must be operational within 48 hours of acceptance of the task order. The training environment must be equipped either with stand-alone computers or if the computers are within the XYZ Agency network, they must be physically segmented from the contractor’s network with one (1) PC per trainee.

The Contractor shall train and maintain the required staffing during the base and extension periods, including replacements of phone agents or supervisory/management personnel due to attrition.

The contractor will schedule and provide a one-half hour (1/2 hour) “pre-shift” or on-going daily agent training session prior to the beginning of each shift. The contractor shall have supervisors and quality assurance staff attend and/or conduct these “pre-shift” briefing sessions.

**5.0 Quality Assurance**

The contractor shall have supervisors and/or other qualified personnel monitor each telephone representative’s performance for quality assurance and appropriate coaching per a government supplied monitoring plan. Industry accepted customer service standards will be followed. A monitoring evaluation form will be used for this purpose. The Government will provide a sample form.

* Government accepted customer service standards dictate appropriate agent coaching through use of a government provided monitoring evaluation form.
* The contractor shall monitor each telephone representative’s performance at least one (1) time per week for the duration of the contract.

* The contractor will provide performance results, completed quality assurance evaluation forms, and summary reports to the Government’s Project Officer on a weekly basis.
* Employees who do not meet acceptable customer service standards are to be retrained or released from the assignment expeditiously.

**6.0 Off-Site Accessibility to Government**

The contractor will provide the Government with “read only” access with printing capability in XYZ location of the contractor’s call center Management Information Systems to allow real-time evaluation of workload or agent availability.

With a minimum of one (1) hour’s notice, the contractor and/or their representatives shall be available for daily meetings or conference calls conducted by the Government’s Project Officer and/or other representatives during the base period and within a minimum of four (4) hours notice during the extension periods to monitor performance and ensure task orders are accomplished.

**7.0 Telecommunications/IT**

The contractor shall provide and maintain all necessary telecommunications equipment and services to support the specified number of agents, to include appropriate hardware and software, and will immediately report any problems to XYZ Agency that cause or could potentially cause service disruptions.

The contractor shall provide and maintain an Automatic Call Distribution (ACD) switch sufficient to support all traffic and queues for the specified number of agents and associated telephone sets and headsets with appropriate hardware and software support.

The contractor shall provide to XYZ Agency the appropriate circuit ID numbers necessary to deliver calls within 48 hours of contract award. This information must include the circuit capacity, POTS (Plain Old Telephone Service) or DID (Direct Inward Dialing) numbers and the main circuit numbers if using Mega Trunks (most preferred method).

The contractor shall provide physical interface capability to T-1 trunks to the ACD sufficient to service all available telephone agents and provide for an adequate number of queue slots (30% more than actual staffed workstations).

The contractor shall provide to XYZ Agency with a minimum of 10 minutes of queue message time on the announcement boards at each site (or anywhere an XYZ Agency call might be queued).

The contractor shall develop internal controls and procedures to meet XYZ Agency’s telecommunications and/or IT performance standards. The contractor will identify performance problems and will promptly resolve them.

The contractor shall provide workspace, desktop PCs, telephones, headsets and headset adaptors for agents to enter assistance applications into a Government Furnished Equipment host system.

The contractor is responsible for physical segmentation of the contractor’s network from XYZ Agency’s network.

The contractor shall provide operations support to maintain telephones, headsets, PCs, all other equipment and software on the contractor-owned systems. The contractor shall provide on site IT support during the entire hours of operation.

**8.0 Deliverables**

The Contractor shall provide the following deliverables in accordance with the schedule set forth below:

* Have training rooms operational within 48 hours of task order award.
* Provide a minimum of 111 operational workstations and have the operation staffed to a minimum of 111 agents within 14 days of task order award.
* Provide weekly performance and quality assurance reports.
* Provide off-site access to view and print real-time Call Center Management Information Systems data.
* Provide weekly staffing and actual hours worked reports.

**9.0 Performance Standard**

The contractor should adhere to Citizen Customer Service Level (CSLIC) recommended standards for contact centers, whenever applicable. High-level standards include: (1) Respond by email within two business days to 90% of emails received; (2) Give callers an estimate of phone wait time after 30 seconds on hold; (3) Answer letters or estimate response time within 15 days of receiving original inquiry; and (4) Keep citizen wait on walk-in service to 15 minutes. The contractor should review and adhere to the recommendations in the CSLIC report, entitled “Proposed Performance Measures, Practices and Approaches for Government-wide Customer Contact Activities” and the supporting documentation by MITRE on the [USA Services website](http://www.howto.gov/sites/default/files/citizen-service-levels-interagency-committee-final-report.doc) .

The Contractor’s performance shall be measured in accordance with the performance levels and sample calculations specified below.

*Adherence to Government directed schedule requests:*

*Weekly Government Requested Hours / Weekly Available Hours\* Staffed*

*Expected Target Performance: 75% or better*

\*Available Hours are hours in which the agent was on a call or waiting for a call.

**10.0 Government On-Site Personnel**

The contractor shall provide workstations for Government site coordinator with the ability to view real time call center performance data and rights to pull agent activity and call traffic related reports.

The contractor shall provide:

* Workspace,
* Telephones, and
* Two (2) PCs with connectivity to the Government’s XYZ Agency wide area network and standard office software.

The contractor shall provide one (1) dedicated workspace PC with MIS software for real-time viewing, reports, and printing.

The contractor shall provide or make available standard office supplies for Government personnel to assist in the administration of the project.

The contractor shall provide an on-site location for sending and receiving faxes, copying, shipping and receiving for the Government.

The contractor shall provide on request real time reports on call center performance.

Reports shall be consistent with industry standard reporting techniques such as average handle time, offered and answered calls, average speed of answer, available agents, calls abandoned, deflected, etc. and shall be current up to the time of request. (See Attachments B and C for sample formats of call center performance reports).

**11.0 Government Responsibilities**

**11.1 Staffing/Training**

The Government shall provide Information Technology staff support on site to assist with the operation and connectivity of the Government software.

The Government will be on-site with program technical advisor/coordinator to support daily call center operations.

The Government will ensure an appointed Federal employee Project Officer with oversight responsibilities for the Call Center Contract.

The Government will provide technical persons to attend the “pre-shifts”.

The Government will provide a trainer and course materials during ramp-up at each facility. Training includes registration logic overviews, taking a call, and accurately entering information into a custom designed computer based system.

The Government will determine the hours of operation, may adjust daily according to Government needs and will provide a 24-hour notification to Contractor of such changes.

**11.2 Quality Assurance**

The Government will supply a quality assurance monitoring plan and monitoring evaluation form used for this purpose.

**11.3 Off-Site Accessibility to Government**

The Government’s Project Officer will establish daily and/or weekly meetings or conference calls with the contractor and/or their representatives to monitor performance and ensure specific task orders are accomplished.

**11.4 Telecommunications/IT**

The Government shall provide an Information Technology staff person to assist with the operation and maintenance of the Government network, it is expected that a hand-off will occur after two (2) weeks of operation.

The Government will provide T1 data connection to the XYZ Agency wide area network. This includes T-1 circuits and network router. Protection of data transfers over the T1 data connection to the XYZ Agency wide area network is critical. XYZ Agency is responsible for system administration of the wide area network and all Government furnished equipment. The Ethernet interface of the GFE router will be the contractor network data hand off.

The Government will ensure segmentation of the interconnection between the XYZ Agency wide area network and the contractor’s network using an approved firewall to mitigate any potential vulnerability. The Government will ensure implementation of XYZ Agency’s Security Policy requirements for non-XYZ Agency connections (e.g., firewall, auditing, antivirus software, patch management, remote access, etc.).

The Government shall ensure a contractor or Federal employee is trained as an appointed Information System Security Officer and assigned responsibilities for the Call Center Facility.

The Government will provide telephone usage charges on the 800 network.

The Government will provide software or web interface for the registration intake system used to create electronic record of applicants.

The Government will provide applicable queue announcement scripts for recording on the contractor’s internal call routing system. These may be provided in the form of previously recorded *.wav* files.

The Government’s Project Officer and on-site coordinator will review the vendor payment schedules prior to submission to the Government Finance office to validate the total hours.