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General Services Administration

Federal Acquisition Service

Technology Transformation Services

Centers of Excellence

1800 F Street NW | Washington, DC | 20405

HUDCentral Contact Center

DRAFT Request for Quote

Details

From: {{CO-Name}}, Contracting Officer (CO), General Services Administration (GSA), National Capital Region (NCR), Assisted Acquisition Services (AAS)

Issued for: GSA, FAS, Technology Transformation Services (TTS), Centers of Excellence (CoE)

Subject: DRAFT Request for Quotation (RFQ)

Date: MONTH DD, 20YY

Set-aside: {{Set-aside}}

Contract vehicles: Open Market
Alliant 2 GWAC
GSA Schedule 70 SIN 132-20 Automated Contact Center
GSA Schedule 70 SIN 132-32 Term Software
GSA Schedule 70 SIN 132-33 Perpetual software license
GSA Schedule 70 SIN 132-34 Software Maintenance Service
GSA Schedule 70 SIN 132-40 Cloud
GSA Schedule 70 SIN 132-45 Highly Adaptive Cybersecurity Services (HACS)
GSA Schedule 70 SIN 132-51 IT Professional Services
GSA Schedule 70 SIN 132-55 Subscription Services
GSA Schedule 70 SIN 500 Order-Level Materials (OLMs)

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DRAFT RFQ - HUDCentral Contact Center

Deadlines and response formats

Item	Date responses due	Format
RFQ Questions and Answers	MONTH DD, 20YY at noon, eastern	Google Form (see section 2.1 for details)
Technical Challenge Question	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.2 for details)
Technical Volume	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.3 for details)
Pricing Volume	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.4 for details)

1.0 Statement of Work

1.1 Background

1.1.1 Introduction

The mission of the Centers of Excellence (CoE), housed within the General Services Administration (GSA), is to accelerate Information Technology (IT) modernization, improve the public experience, and reduce legacy IT spending across the Government. CoE accomplishes this by centralizing top government tech talent, leveraging private-sector best practices, and operating with a teaming mindset across Government departments and agencies. To better align with the dynamic effects of such a transformation, CoE provides agency partners with a shared service solution for professional services.

The Contact Center CoE provides a centralized suite of offerings to help agencies manage and enhance their customer contacts where they need assistance the most. At the U.S. Department of Housing and Urban Development (HUD), the Contact Center CoE has been tasked to analyze the current state of HUD's contact center operations and provide a future state contact center modernization and optimization strategy. The Contact Center CoE has evaluated HUD's contact center modernization needs by

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DRAFT RFQ - HUDCentral Contact Center

capturing HUD's contact center pain points and leveraging contact center best practices. Through this assessment, the Contact Center CoE has identified opportunities for improvement in the following areas: contact center governance, management and operations, self-service tools, emerging technologies, internal business processes and systems to manage day-to-day performance, acquisition solutions, and customer experience.

The Contact Center CoE has determined the need for creation of a single, front-door contact center, called HUDCentral. HUDCentral is an omnichannel, outsourced, enterprise-wide front-door contact center and Knowledge Management (KM) solution that will improve mission delivery, drive cost savings, and help HUD achieve President's Management Agenda (PMA) Cross Agency Priority (CAP) Goals.

1.1.2 HUD background

HUD's mission is to create strong, sustainable, inclusive communities and quality affordable homes for all. Its current goal is to refocus the organization on its core mission and modernize its approach by leveraging private-sector partnerships, strengthening the housing market, and encouraging affordable housing investment, while redesigning internal processes. Contact center optimization will support HUD's objectives to use resources more effectively and maximize service delivery. Finding and increasing efficiencies throughout the agency is key to doing more with less. Tremendous opportunity exists to improve HUD's processes, starting with modernizing the Department's information technology and then integrating technological improvements into changes in service delivery to maximize the benefits across the agency. Improving the efficiency of HUD operations will allow the best use of resources and even better implementation of Department priorities.

1.1.3 Current state of the HUD contact center landscape

HUD's external-facing contact centers are fragmented across 5 formal contact centers, 65 field offices, and 37 "shadow" lines (program-specific 1-800 numbers lacking formal contact center infrastructure), which results in duplicative efforts and inconsistent customer experience. HUD does not currently share contact center technologies enterprise-wide, and duplicative systems are currently in use across the agency (e.g., there is no common KM solution). Opportunities for improvement exist across contact

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DRAFT RFQ - HUDCentral Contact Center

center operations, including governance, telephony, Customer Relationship Management (CRM), data analytics, KM, workforce planning, and use of innovative technologies (e.g., Artificial Intelligence (AI) chatbot).

1.1.4 HUDCentral - The future state solution

HUD has a need to establish HUDCentral, an enterprise-wide, omnichannel, outsourced, centralized, front-door contact center with an ecosystem of supporting infrastructure, technology, and organizational management that provides internal and external customers with timely, accurate, and consistent services. This new contact center will expand communication channel offerings to include live chat, SMS/MMS, AI chatbot, and Intelligent IVR. All communications channels will be integrated (as opposed to operating in parallel) through CRM and other tools to create a truly consistent and coordinated omnichannel experience. This HUDCentral Contact Center will be enabled through the creation of a new centralized, robust, continuously evolving KM solution that consolidates existing knowledge at HUD. This KM solution will integrate with a CRM tool to supply consistent information for all interactions with customers, regardless of channel.

HUDCentral will segment and address calls according to the following Tier structure: HUD has a need to establish HUDCentral, an enterprise-wide, omnichannel, outsourced, centralized, front-door contact center with an ecosystem of supporting infrastructure, technology, and organizational management that provides internal and external customers with timely, accurate, and consistent services. This new contact center will expand communication channel offerings to include live chat, Short Message Service (SMS)/Multimedia Messaging Service (MMS, AI chatbot, and Intelligent interactive voice response (IVR). All communications channels will be integrated (as opposed to operating in parallel) through CRM and other tools to create a truly consistent and coordinated omnichannel experience. This HUDCentral Contact Center will be enabled through the creation of a new centralized, robust, continuously evolving KM solution that consolidates existing knowledge at HUD. This KM solution will integrate with a CRM tool to supply consistent information for all interactions with customers, regardless of channel.

HUDCentral will segment and address calls according to the following Tier structure:

- **Tier 0:** Self-service channels (e.g., Web, Chatbot, IVR); operated by the Contractor
- **Tier 1:** Simple service requests (e.g., basic information requests, password resets); addressed by the Contractor
- **Tier 2:** Moderately complex service requests (e.g., location-specific information, technical issues); addressed by the Contractor
- **Tier 3:** Highly complex service requests (e.g., unique circumstances); escalated by the Contractor to the HUD Tier 3 Network: a group of federal employees who will act as subject matter experts to field complex inquiries, contribute to the knowledge database, and participate in Contractor-led training

HUDCentral will fall under strong contact center and customer experience governance as established by the new Office of Customer Experience. Under this centralized governance structure, HUDCentral must practice robust data analytics and unify best-in-class contact center tools, technologies, and procedures that ensure interoperability across HUD. By emphasizing flexibility and scalability, HUDCentral will be able to meet changes in HUD's business needs. HUDCentral will also facilitate cost reduction by establishing clear contact escalation processes and shifting contacts toward lower-cost channels (e.g., intelligent IVR).

HUDCentral will be able to provide HUD customers with timely, accurate, and consistent answers to their questions through the channel of their choice, seven days a week. Additionally, HUDCentral will allow for HUD to leverage customer data to proactively address customer needs and identify trends which will create accountability and oversight of the customer experience as a whole.

1.2 Purpose

This initiative will:

1. Enable HUD customers to get timely, accurate, and consistent answers to their questions anytime, anywhere, and on any device through consolidated, integrated communications channels.

2. Improve efficiency by shifting general inquiries and information to lower-cost channels over time.
3. Increase self-service options and enhance accuracy of the information provided to customers.
4. Reduce contact center costs.
5. Establish consistent customer experience across the agency through the implementation of standardized operating procedures and Key Performance Indicators (KPIs).
6. Enable HUD to measure customer satisfaction levels to facilitate continuous improvement.

1.3 Scope overview

1.3.1 Overview of procurement objectives

The Contractor must develop an integrated turnkey technical and operational solution that enables all HUD customers to engage and transact with HUD through a single front-door omnichannel-enabled contact center.

This procurement has the following six objectives:

1. **Development of a Robust Knowledge Management Solution:** Provision of expertise and offerings to help HUD establish a consolidated, enterprise-wide knowledge management solution that lays the groundwork for sustainable knowledge preservation, evolution, and appropriate usage
2. **HUD Customer Experience Improvement:** Assurance that HUD's customers receive excellent customer service and appropriate assistance for all inquiries through a "front-door" omni-channel contact center
3. **Application of Robust Data Analytics:** Establishment of reporting capabilities and standards for customer interaction data tracking, sharing, and analytics to inform strategies for continuous optimization of HUD's contact center and programs
4. **Contact Center Operations Optimization:** Standardization of enterprise-wide operations and performance standards, application of private sector contact center best practices to improve operational efficiency and better manage day-to-day contact center performance, and creation of an environment that

can efficiently and effectively integrate new capabilities and features to achieve operational flexibility

5. **Implementation of Best-in-class Technologies and Tools:** Adoption of emerging technologies such as Artificial Intelligence and machine learning and institutionalization of innovation and continuous improvement through prototypes and pilot programs
6. **Project and Change Management:** Oversight of standup activities and day-to-day operations, as well as communications and stakeholder engagement to promote buy-in and alleviate challenges

1.3.2 Overview of tasks

At a high-level, the Contractor will be expected to execute the following tasks:

1. Resolve all Tier 1 and Tier 2 customer inquiries through various customer inquiry channels (e.g., phone, email, automated systems)
2. Collaborate with various HUD programs to resolve Tier 3 inquiries
3. Provide all necessary personnel, training, supervision, quality control, and workforce management
4. Perform all necessary tasks related to the setup, configuration, and maintenance of a supporting technology and application stack that meets HUD's needs, leverages emerging technologies, and complies with federal IT standards
5. Perform all necessary tasks related to the setup, configuration, migration, population, and maintenance of a comprehensive knowledge management solution
6. Perform all necessary tasks related to the setup, configuration, and maintenance of Web-to-Case management
7. Analyze contact center data and trends and publish reports as stipulated by HUD
8. Manage all facilities and/or work from home infrastructure, supplies, and equipment
9. Offer a continuous improvement program to continuously modernize and optimize operations
10. Collaborate with other CoE teams to leverage synergies, particularly the Data Analytics and Customer Experience CoEs

- 11. Create and execute Standard Operating Procedures (SOPs)
- 12. Develop and execute risk management and change management strategies

1.3.3 Overview of execution phases

The long-term for HUDCentral is segmented into the following three execution phases:

1. **Phase I: *Process and Technology Design and Setup (Months 1-6)*** – The Contractor will engage with stakeholders from HUD, GSA, and other CoE teams to identify granular contact center requirements (e.g., reporting needs of each program). The Contractor will configure and test all contact center tools and technologies (e.g., CRM, IVR), develop SOPs, develop a training program that includes quality assurance training, determine a data reporting structure, prepare contact center facilities and equipment, and hire contact center staff. The Contractor will begin developing the KM solution, including configuring the platform, and aggregating and migrating existing knowledge documents. In addition, the Contractor will support the new HUDCentral governance structure and perform ongoing change management activities. This will include working with HUD to perform all necessary activities relating to the selection, training, and management of the HUD Tier 3 Network (a group of federal employees who will act as subject matter experts to field complex inquiries and contribute to the knowledge database)
2. **Phase II: *Contact Center Standup and Migration (Months 7-17)*** – The Contractor will launch the new HUDCentral contact center, publicize the HUDCentral contact information, and perform all contact center operations functions. HUD's legacy contact centers and channels will migrate in a staggered manner, so that by the end of this period all contacts are fully migrated and there is a single point of contact for HUD customer inquiries. By the end of this period, all technology, tools, and contact channels will be fully operational, including the KM solution and AI tools. Throughout this period, SOPs, scripting, tools, workforce planning, training etc. will be adjusted to facilitate best-in-class operations. The Contractor will track Service Level Agreements (SLAs) and Operational Level Agreements (OLAs) and participate in cross-HUD and cross-CoE data sharing. The Contractor will continue to support change management to promote continued buy-in

3. **Phase III: Continuous Improvement (Months 18 onward)** – The Contractor will execute contact center operations in a manner that meets all SLAs and OLAs, monitors and improves upon quality, and tracks and shares data to inform contact center and HUD decision-making. The Contractor will identify continuous improvement opportunities (e.g. shift left to Tier 0 to make self-service easier) and configure and deploy test-&-learn pilots to assess viability of emerging IT tools. The Contractor will continue to support change management to promote continued buy-in

1.3.4 Overview of contractor capabilities

In order to succeed, the Contractor must have demonstrated experience and expertise in the following areas:

1. Tier 1 and Tier 2 contact resolution, including both content-based (e.g., How do I buy a HUD home?) and technical-based (e.g., How can I access my real estate assessor's account?) inquiries
2. Best-in-class contact center operations through all contact channels (see section 1.6.4), including workforce management, training, facilities and equipment oversight, standard operating procedures, quality control, and data analysis and reporting
3. Configuration, development, operations, and maintenance of contact center technologies, including CRM, live chat, SMS, telephony, AI chatbot, Intelligent IVR, consolidated desktop and Computer Telephony Integration (CTI), and automated systems
4. Continuous improvement of operations and technologies, including test-and-learn pilots for appropriate emerging/innovative technology implementations
5. Knowledge base design, configuration, population, implementation, testing, and maintenance
6. Project management and change management through large-scale federal transformations, as well as collaboration with multifunctional government and vendor stakeholders

1.4 Operating constraints

The contractor will be working in an environment with the following operating constraints:

1. Solutions must comply with all federal systems security regulations, including the National Institute of Standards and Technology (NIST), the Federal Information Security Management Act (FISMA), and the Federal Risk and Authorization Management Program (FedRAMP).
2. Solutions must seamlessly integrate with certain HUD legacy systems, including but not limited to those listed at <https://www.hud.gov/systems>.

Additionally, the contractor must collaborate with other teams at HUD in the following ways:

- Cloud Adoption CoE team: Refer and prioritize any forms that may need to be either migrated or created as part of OCX's efforts.
- Customer Experience CoE team: Coordinate the HUDCentral customer experience with the overall HUD customer vision and share data to inform enterprise-wide CX analytics.
- Data Analytics CoE team: Ensure data management, analytics, and reporting practices contribute to the Data Analytics CoE's overall vision for HUD (including following policies and leveraging tools).
- HUD's Program Management Office: Ensure required deliverables are documented for HUD leadership review.

1.5 Period and place of performance

The initial (base) period of performance (POP) for this order is twelve (12) months. There will also be four (4) option periods of twelve (12) months each, for a total period of performance for sixty (60) months. The POP is expected to begin on the date of the official kickoff meeting.

The contractor must provide and maintain all facilities, and remote work infrastructure (if applicable), required to perform work requirements. It is anticipated that discovery

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DRAFT RFQ - HUDCentral Contact Center

and some design processes for the creation of an enterprise-wide KM system will require interviews and meetings with HUD that will be located in HUD facilities, with HUD's headquarters, located at [451 7th St SW, Washington, DC 20410](#), as the primary office.

The contractor is expected to travel to HUD Regional and Field offices across the United States during the base year, with travel and expenses to be paid in accordance with section 5.4 of this solicitation.

The contractor must work with the COR and HUD managers to efficiently schedule interviews and meetings in HUD facilities. Any Contractor-managed sites and all work from home personnel must be located within the United States of America.

1.6 Service requirements and baseline assumptions

The Contractor must provide sufficient capability and capacity to support Tier 1 and Tier 2 contact volumes through all channels (e.g., phone, chat, Email, social media, digital properties) in accordance with SLAs (see section 1.8.4.2). For Tier 3 calls, Customer Service Representatives (CSRs) must warm transfer contacts to the appropriate Tier 3 HUD resource to ensure that the contact center meets first contact resolution requirements. As the KM system matures, the Contractor must steadily be able to address more Tier 3 contacts. The Contractor must provide sufficient expansion capacity to accommodate changes in call patterns, surges (i.e., anticipated and unanticipated).

The acquisition team is not able to provide any further data on baseline assumptions or HUD's historical contact center metrics beyond what is specified in this section.

1.6.1 Contact volumes

HUD currently receives approximately 2.9 Million inbound customer contacts annually across all contact channels. It is anticipated that as the HUDCentral Contact Center is being stood up, existing HUD contact centers will begin to provide volume forecasts and workforce schedules to the Contractor's Workforce Management Team so that they can begin building a consolidated HUD forecasting and scheduling plan.

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DRAFT RFQ - HUDCentral Contact Center

Table 1: 2017-2018 Estimated contact volume by channel	
Channel	Volume
Phone	2.5 million
Email	0.3 million
Other (e.g., mail, literature fulfillment, etc.)	0.1 million

Table 2: 2017-2018 Estimated contact volume by contact center	
Contact center	Volume
Federal Housing Authority (FHA) Resource Center	1 million
Real Estate Assessment Center (REAC) Technical Assistance Center	0.1 million
Other formal contact centers (e.g., Multifamily Housing End User Support Services, Multifamily Housing Clearinghouse, Public and Indian Housing Information Center)	<0.1 million
Field offices and program-specific 1-800 numbers (e.g., Manufactured Housing Information) and direct calls to HUD employees	1.7 million

HUD expects an overall reduction in contact volume as a result of HUDCentral implementation and improvement in first contact resolution. In addition, HUD expects contacts to lower-cost channels over time (e.g., “shift left” from phone to Intelligent IVR). Contractors must include a five-year Continuous Improvement Plan and corresponding volume estimates that account for these factors (see section 1.9).

Throughout years 1-2 of the contract period, HUDCentral will not yet handle HUD’s full contact load, as the new contact center is built and HUD’s legacy contact centers migrate to HUDCentral. The following table outlines proposed migration phases and

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DRAFT RFQ - HUDCentral Contact Center

the anticipated contact volumes. Contractors must also be prepared to modify these assumptions as baselines are established during the base year of the contract.

Table 3: Months 0 - 24: HUDCentral anticipated contact volumes			
Months 0 - 6	Months 7 - 9	Months 10 - 12	Months 13 - 24
Design and setup period	Migration of the FHA Resource Center and Single Family Housing National Servicing Center	Migration of the REAC Technical Assistance Center and Multifamily Housing End User Support Services	Migration of all HUD contact volume
0 contacts per month	84k contacts per month	97k contacts per month	241k contacts per month

1.6.2 Customer service request types

The customer service request types that are likely to be required include, but may not be limited to, the following:

1. **Outbound Communications:** Listserv Emails, which target either all Secure Systems users or user groups that relate to specific HUD program, business, information technology or functional area offices, generally with the objective of providing Service request resolutions prior to customers contacting HUDCentral.
2. **Basic Assistance:** Directory assistance, website navigation, and assistance in completing forms.
3. **Inquiries on HUD Programs:** Policies, procedures, requirements, and obligations (e.g., real estate physical inspection and assessment protocols, grantee reporting guidelines); programs include, but are not limited to, those listed at <https://www.hud.gov/hudprograms>.
4. **Secure System Support:** Access issues (user registration, password reset requests, role assignments, etc.), as well as application user support for Secure Systems, including, but not limited to, those listed at <https://www.hud.gov/systems>.

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DRAFT RFQ - HUDCentral Contact Center

5. **HUD technology Office Collaboration:** Collaboration with Office of the Chief Information Officer and Office of Facilities Management Services and infrastructure/cloud service/application vendors to resolve any technical, connectivity and/or configuration problems or issues to maintain continuity of services.
6. **Case Management:** Customer intake and provision of updates on case progression for complaints such as housing discrimination or housing project incidents.
7. **Mortgage Insurance Certificate (MIC) Case Processing:** Case cancellation, case transfer, case reinstatement, and corrections
8. **Customer Feedback:** Complaints and compliments pertaining to HUD programs and services.

1.6.3 Average Handle Time (AHT)

HUD's estimated AHT for phone-based contacts is currently 7-8 minutes. However, AHT varies widely by service request type. For example, the AHT for one of HUD's contact centers that deals primarily with technical issues is 24 minutes. It is anticipated that as the HUDCentral Contact Center is being stood up, other HUD contact centers will begin to provide more detailed AHT details to the Contractor's Workforce Management Team so that they can begin building a consolidated HUD forecasting and scheduling plan.

1.6.4 Contact channels

HUDCentral will operate in an omnichannel environment where websites and digital channels are integrated with other channels, enabling customers to move seamlessly from one channel to another. The Contractor must develop a channel strategy that moves HUD to an omnichannel environment by the end of Contract Phase III. The Contractor is expected to provide omnichannel service through the following contact channels:

1. Inbound Telephone
2. Outbound Telephone
3. Email
4. Mail

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DRAFT RFQ - HUDCentral Contact Center

5. Literature Fulfillment
6. SMS/MMS
7. Live Chat
8. Automated Services - The Contractor must provide automated services to enable HUD to deliver unattended service 24 hours a day, 7 days a week (i.e., 24 X 7). The Contractor must be responsible for the provision, maintenance, design, implementation, operation, and management of these services to include:
 - a. Intelligent IVR
 - b. Chatbot (AI-enabled)
 - c. Automated Callback (Telephone channel)
 - d. Web Callback (enables customers visiting websites and chat to access the callback service)
 - e. Automated Outbound Dialing
 - f. Automated Email Delivery
9. HUDCentral will conduct test-and-learns to pilot new channels throughout the contract (see section 1.8.6.1).

Detailed Requirements for Contact Channels are provided in section 1.7.3.

1.6.5 Languages

The Contractor must be able to provide live support to customers in both English and Spanish. The primary language spoken to service the American public at HUDCentral is English. To ensure seamless service to our Spanish speaking populations, at a minimum, the Contractor must have the capability to supply at least 12% of the CSRs who are proficient in English and Spanish. HUD reserves the right to modify the bilingual staff requirement because of the increase or decrease in Spanish contact transactions. The Contractor also must provide Spanish translations for call scripts, IVR scripts, Email templates, chat templates, SMS templates, and other content specified by HUD. The Contractor must also provide HUD knowledge articles in Spanish if requested by HUD. The Contractor must support customer inquiries in languages other than English and Spanish through the HUD Wide Telephonic Oral Interpretation Service.

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DRAFT RFQ - HUDCentral Contact Center

1.6.6 HUDCentral operating hours

HUDCentral will be operational five days a week (Monday to Friday), from 7:00 am EST to 10:00 pm EST. The Contractor is expected to provide service during these hours 250 days a year, which excludes 10 federal holidays. Automated services (e.g., IVR, AI chatbot) must be used to provide unattended service 24 hours a day, seven days a week, 365 days a year. HUD will reassess these operating hours before the execution of each option year, and may decide to adjust operating hours. The Contractor must have the capability to support weekend hours in order to allow for this possibility. HUD will provide requirements and request pricing as a modification to this contract if and when such services are needed.

1.6.7 Sample workflow - Inbound phone service requests

The below sample work flow is intended to be illustrative. The Contractor is encouraged to develop and implement work flows that they believe will serve HUD customers in a high-quality and efficient manner.

All inbound phone requests are routed through the HUDCentral IVR. The IVR provides answers to frequently asked questions and directs customers to HUD Partner (e.g., Local Public Housing Authority) resources where appropriate. If the caller is unable to satisfy their Service request via the self-service options offered by the automated service, or prefers to talk to a live CSR, the caller can, during the hours of 7:00 am – 10:00 pm EST during business hours, select the option to speak to a live CSR for assistance. If the call is received after normal business hours, the caller is informed of the business hours and is given the option to submit a callback request. If the call is of an emergency nature, the caller may be provided with directions to call a designated Government telephone number for assistance.

Each contact (inbound Service request) not handled through a self-serve option will be routed to an appropriate CSR through the IVR based on the stated nature of the call. If the appropriate response is documented within the Knowledge Base, The CSR will identify and address the nature and substance of the Service request by qualifying questions and dialog and provide assistance in a professional, courteous and responsive manner that satisfies the customer's immediate request and probes unrecognized needs. The CSR will assess and document the amount and extent of

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DRAFT RFQ - HUDCentral Contact Center

information required to respond to each Service request type in the shortest amount of time while simultaneously meeting any and all appropriate program, regulatory and/or legal record documentation requirements relating to the nature of the Service request. The CSR will also capture and track information including but not limited to date and time of receipt, nature of Service request, source of Service request, telephone numbers contacts, customer identity when appropriate, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the CRM.

If the Service request is not contained in the knowledge base, the CSR will document the contact and customer information in the CRM. The CSR will then consult escalation protocols to determine the appropriate HUD Tier 3 Subject Matter Expert, and will warm transfer the customer to this HUD employee. The CSR will assume ownership and responsibility for the effective management, disposition, and accurate, detailed recording/logging of all Tier 1 and Tier 2 Service requests from any source from initial contact through resolution. HUD Tier 3 Subject Matter Experts will assume ownership and responsibility for the effective management, disposition, and accurate, detailed recording/logging of Tier 3 Service requests from the time of warm transfer through resolution. The Contractor will work with the HUDCentral federally employed knowledge base owner to review escalations and determine eligibility for knowledge article development.

When necessary, the customer's Service request may require the assistance from another party or resource outside of HUD. Following the HUDCentral Standard Operating Procedures, the CSR will provide the customer with the appropriate referral name and phone number and provide a customer callback option to verify the customer's need was met by the external referral.

When necessary, the CSR will utilize the HUD Wide Telephonic Oral Interpretation Service to ensure that Limited English Proficiency (LEP) individuals have access to information in languages other than English on HUD programs, services and activities.

1.7 Operational requirements

1.7.1 General technical infrastructure requirements

The Contractor must provide and maintain all technology, technical applications tools and support services necessary to meet all requirements specified in this SOW.

The integrated technology and application stack must be:

1. Cloud-based
2. [508 compliant](#)
3. [FedRAMP compliant](#)
4. Omnichannel capable
5. Flexible enough to scale up or down to meet the needs of HUD (i.e., HUD will pay only for volume that it receives each month, the contractor must provide sufficient technical capability and capacity to support potential growth in Tier 1 and eventually Tier 2 contact volumes)
6. Current (i.e., at least the $n-1$ version throughout the POP)
7. Commercial-off-the-shelf (COTS) based

The Contractor must ensure that technical systems are usable by both Contractor personnel and authorized federal staff, where appropriate. The service must provide both remote and onsite access. All technology must allow for all data to be transitioned to a different COTS technology platform within a three-month period if required in a future contract transition out process.

HUD reserves the right to request additional services required to meet its needs at any time during the contract. The Contractor may be required to configure technical integrations with HUD systems, including but not limited to those listed at <https://www.hud.gov/systems>. Any additions will be subject to written mutual agreements between HUD and the Contractor. Contractors may propose additional functionality if they believe that it provides value to HUD.

1.7.1.1 System security management

The Contractor must ensure technical configuration activities delivered are effective and scalable to meet National Institute of Standards and Technology (NIST), Federal Information Security Management Act (FISMA), and FedRAMP security requirements at the moderate level; maintain up-to-date software versioning control; ensure no software or hardware that supports the HUDCentral reaches End of Life (EOL) during the period of performance; and adhere to business processes that conform to industry best practices. Additionally, the Contractor must perform annual testing of security controls and provide evidence of successful testing to HUD. HUD reserves the right to add additional security requirements to meet the evolving needs of the American public, agency programs, and security compliance at any time during the life of the contract. Any additions must be subject to written mutual bi-lateral agreements between HUD and the Contractor.

1.7.1.1.1 Certification & Accreditation (C&A) and Authority to Operate (ATO)

The Contractor must coordinate the submission of C&A documents with HUD and correct any deficiencies identified in the [C&A process](#) until full accreditation and ATO from HUD is obtained. The Contractor must obtain ATO within 75 days of contract award. The documents must include the following:

1. Privacy Impact Assessment (PIA).
2. Risk Assessment (RA).
3. System Security Plan (SSP).
4. Security Training Plan.
5. Contingency Plan (CP).
6. Security Self-Assessment (SSA). Any unmitigated weaknesses identified must be included in a Security Plan of Actions and Milestones (POA&M).
7. System Test and Evaluation Plan (ST&E).
8. Certification & Accreditation (C&A) – HUD requires agencies to adopt a minimum set of security controls to protect their information and information systems. The Federal Information Processing Standards (FIPS) 200, Minimum Security Requirements for Federal Information and Information Systems, specifies the minimum-security requirements for federal information and information systems. HUD is responsible for ensuring that all HUD information systems meet the

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DRAFT RFQ - HUDCentral Contact Center

minimum-security requirements defined in FIPS 200 through the use of the security controls provided in the NIST SP 800-53, Security and Privacy Controls for Federal Information Systems and Organizations.

1.7.1.1.2 NIST SP 800-53 Revision 4

HUD requires the Contractor to test certain control families as per NIST SP 800-53 Revision 4. The key controls required by HUD are the Recommended Security Controls for Federal Information Systems contained in CA-6 Security Accreditation. The Contractor must authorize the information system for processing before operations and update the authorization at a HUD-defined frequency (at least every three years).

Applicable Federal Regulations, Executive Orders, and Directives include the following:

1. [FISMA](#), December 2014.
2. [FIPS 199](#), Standards for Security Categorization of Federal Information and Information Systems, February 2004.
3. [FIPS 200](#), Minimum Security Requirements for Federal Information and Information Systems, March 2006.
4. [NIST SP 800-37](#), Guide for Applying the Risk Management Framework to Federal Information Systems, December 2018.
5. [NIST SP 800-53](#), Assessing Security and Privacy Controls in Federal Information Systems and Organizations, December 2014.
6. [Office of Management and Budget \(OMB\) Circular A-130](#), Management of Federal Information Resources, Appendix III, Security of Federal Information Resources, July 2016.
7. [United States General Accounting Office](#), Federal Information System Controls Audit Manual (FISCAM), February 2009.

1.7.1.1.3 Information and telecommunications system security

HUD requires that all Contractor-provided information and telecommunications systems are secure from unauthorized access and use. Access to the required systems must be limited to only those personnel authorized to support a given task. The Contractor must maintain a listing of those employees with authorized access. When

designing system security, the Contractor must address factors including but not limited to:

1. **Information systems:** Assurance that all information handled by computer systems are protected against unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate compromise
2. **Toll-free access:** Dedicated toll-free access to each facility through either multiple Primary Rate Interface (PRI) circuits and/or Ethernet WAN SIP service. The Contractor must be carrier neutral and permit the use of access services to the proposed location by any telecommunications carrier
3. **Telecommunications systems:** Provision of telecommunications security is sufficient to protect all incoming and outgoing calls and electronic inquiries/responses, and all data collected from these activities from unauthorized access or loss
4. **Software applications and databases:** Access to software applications and databases is limited to only those personnel authorized to support a given task. Such restriction is accomplished with customized menus, user log-on identification codes, operator-defined password protection, and or automatic timeout values. The Contractor must use expiration dating as a method of password security maintenance
5. **Internet and Email usage policy:** Guidelines for appropriate Internet access and usage is implemented and enforced. Policies addressing access to and disclosure of Email messages sent or received by employees using the Contractor's corporate Email system must be implemented and enforced. Such guidelines will inform employees that their privacy does not extend to their use of Contractor-provided equipment or supplies
6. **Security Training:** Certification that all Contractor personnel involved in the management, use, and operation of any HUD systems, have received security awareness training appropriate to their assignment as defined in NISTSP 800-50, "Building an Information Technology Security Awareness and Training Program". In addition to the initial security awareness training, the Contractor is also required to certify that all Contractor personnel involved in the management, use and operation of HUD system, take additional security

awareness training yearly at minimum. CSRs may be requested to complete this training on site for each contact center location

7. **System testing:** System testing performed on a regular basis to monitor adherence to, and compliance with, stated security measures
8. **Audits:** Availability to periodic system audits in the same manner and fashion as those conducted by HUD. Such audits must relate to both Contractor-provided systems and the Contractor's use of Government data under this contract. Examples of such audits include generation of active employee listings to verify user identification maintenance practices, retrieval of user activity reports, archived security information, and demonstration of the Contractor's ability to monitor, collect, store, and control access to usage data

1.7.1.1.4 Reporting of security compromises

Confirmed security compromises to HUDCentral must be reported to HUD within 60 minutes of discovery by the Contractor. The Contractor will work with HUD to remediate security incidents within an agreed upon timeframe (specified in the Contractor's Security Plan deliverable, see section 1.9).

1.7.2 IT system and platform requirements

1.7.2.1 Customer Relationship Management (CRM)

The Contractor will provide Salesforce Service Cloud licenses to all Contractor staff. In addition, the Contractor must work with HUD to ensure relevant HUD employees, including the HUDCentral management and Tier 3 Network, have Salesforce Service Cloud licenses. The Contractor must also provide adequate licenses to facilitate training classes, including licenses for trainers and students.

The Contractor must provide staff to perform all necessary tasks relating to setup, configuration, integration, and maintenance of the Salesforce system to accommodate the Government's minimum requirements. This will include incorporating relevant HUD data into the CRM, including contact records for all HUD employees. The Contractor must maintain Salesforce to ensure consistency in information capture, tracking, assignment, and management of all inquiries from initial contact through resolution, regardless of the access channel.

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DRAFT RFQ - HUDCentral Contact Center

At a minimum, the Contractor must maintain Salesforce to track and report the information identified below. The customer information must be captured manually by the CSR and automatically by supporting systems such as an IVR. The Contractor must work with HUD to identify the appropriate information to track for each supported activity to meet program management objectives. These may include, but are not limited to the following:

1. Inquirer's first and last name
2. Inquirer's mailing address (if necessary)
3. Inquirer's telephone number
4. Inquirer's Zip Code
5. Inquirer's email address
6. Type of inquiry (e.g. phone, email, fax, TTY, chat, postal mail, social media)
7. Unique Identifier Inquiry tracking number
8. Date inquiry received
9. Time inquiry received
10. Date and time of auto response
11. Inquiry status of resolution at all internal and external levels capable in the system
12. Date and time inquiry forwarded to another agency
13. Delivery status of inquiry forwarded to another agency
14. Date and time inquiry responses processed and closed by the Contractor
15. Subject of inquiry (entered by CSR or customer or both)
16. Information embedded in mail messages generated via a web form or email form
17. All action(s) taken to by the Contractor to resolve inquiry
18. Name(s) of program the inquiry/request is forwarded to
19. Response identifier code, if preformatted response(s) are used

All or part of the aforementioned data fields may be required to fulfill publication requests, escalations, or general transactions not resolved by first contact resolution in or outside of HUD POC contacts. The system must be expandable to add additional fields and/or entries as required by HUD.

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DRAFT RFQ - HUDCentral Contact Center

The Contractor must provide all technical services to meet all necessary configurations of the Salesforce requirements, including, but not limited to the following:

1. Inclusion of problem-tracking functionality capable of recording and generating records of problems reported via any channel, tracking the problem through to resolution, and maintaining historical data on problems by tracking identification number, problem categories, and frequency
2. System availability for inquiry and real-time update as appropriate
3. Capability to automatically extract the relevant information from electronic inquiries and populate the corresponding database fields
4. Inquiry tracking and contact management system that tracks a wide range of data and activities, including customer demographics, contact logging and interaction, nature of inquiry, disposition, and inquiry tracking information identified with a unique identifier that is not the customer's social security number
5. Provision of qualified technical and program staff to complete Salesforce configurations and data migration, including historical data migration (the contractor will determine program-specific data migration requirements in collaboration with HUD)
6. Configuration and structuring of a reoccurring records management schedule to maintain call recordings and navigation screen captures for a rolling 30 days
7. Provision of enough storage to maintain HUD content and transaction history, including but not limited to referrals, escalations, customer contact information, case management activities, call recordings and management reports
8. Assurance that all systems do not reach End of Life (EOL)
9. Assurance that all sandbox systems stay up-to-date and current with Production. This includes the Training, Test and Development sites
10. Salesforce database design that conforms to industry standards and conventions. Any such databases must be capable of sustaining a heavy query transaction load without creating a negative impact on required system response KPIs. Databases must be designed, configured and implemented on platforms that provide continuous read/write access during required availability times. Maintenance cycles may restrict access if they are of short duration,

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DRAFT RFQ - HUDCentral Contact Center

scheduled outside of normal business hours, low volumes times and/or coordinated and approved by HUD

11. Salesforce developers that work on the HUD Salesforce platform must be Salesforce certified

The Contractor must provide all project management services to meet HUD's CRM requirements, including, but not limited to:

1. Maintenance of a process to track the status of all inquiries and create and/or update HUD Subject Matter Expert (SME) and Points of Contact (POC) distributions lists that are directed to other agencies for response, including updates on final disposition of inquiries
2. Provision of a dedicated IT service desk/help desk support for the Salesforce with a trouble-shooting ticketing system that can generate immediate on demand, weekly, monthly, quarterly and annual reports as requested by HUD
3. Provision of ongoing technical and management support/maintenance for the CRM
4. Provision of NIST, FISMA, and FedRAMP moderate level compliance documentation to meet capital planning compliance schedules
5. Facilitation of Salesforce Certification and Accreditation and Authority to Operate, including documentation
6. Salesforce curriculum development, training, and corresponding materials for contractor CSRs and other staff, HUD CRM users (e.g., Tier 3 Network), and third-party contractor users
7. Responsibility for being the primary Salesforce POC for the contract
8. Development and implementation of a quality control plan
9. Provision of security requirements overview for the Salesforce system, description of existing or planned controls (management, operational, and technical), delineation responsibilities, and expected behavior of individuals who access the systems. The plan ensures the confidentiality, integrity and availability of information systems for the duration of this contract. The security plan must contain, at a minimum, the information/documents outlined in NIST Special Publication (SP) 800-18, Guide for Developing Security Plans for Federal Information Systems

- 10. Management and maintenance of Salesforce licensing
- 11. Management of accounting and invoicing preparation and delivery

HUD is moving to an enterprise-wide adoption of Salesforce as the system of record for all constituent interactions and engagement applications. HUD may wish to engage the Contractor to integrate with and/or assist in the development of future Salesforce applications. HUD will provide requirements and request pricing as a modification to this contract to be funded through an optional future development CLIN if and when such services are needed.

1.7.2.2 Knowledge Management Tool (KM Tool)

The contractor must maintain a KM Tool on Salesforce to support HUD's enterprise-wide KM solution requirements (outlined in section 1.7.4). The KM tool must satisfy the following requirements.

1.7.2.2.1 User requirements

- 1. User-configured home page.
- 2. Role-based login capabilities that provide encryption and lost password recovery.
- 3. Single sign on to all parts of the KM Tool.
- 4. Ability for authorized users to create, edit, and delete email or in-system alerts that are automatically triggered by an event or date.
- 5. System actions viewing restricted to authorized users.
- 6. Inclusion of a user tutorial.
- 7. Standard navigation aids with the ability for users to skip through repetitive navigation.
- 8. Interactive self-help that tells the user how to use the program including access to on-line user manuals.
- 9. Allowance of collaboration with external users.

1.7.2.2.2 Platform requirements

- 1. Software-as-a-Service-hosted delivery model that is interoperable with other modules/applications.
- 2. Integration with HUD CRM tool.

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DRAFT RFQ - HUDCentral Contact Center

3. Web-based system that conforms to [HUD's IT Enterprise Architecture Vision](#) and uses HUD's standards for the shared databases and web servers.
4. Compliance with HUD Business Continuity Policies.
5. Ability to integrate with different functional applications such as document management, correspondence tracking, reporting tools, documenting imaging, IVR systems, executive dashboards, web publishing platform, and electronic forms.
6. E-authentication/e-signature technology in line with Federal security regulations.
7. Automated notifications regarding unavailability and availability
8. Ability to be easily upgraded.
9. Flexibility to scale up to support usage across HUD (additional licenses throughout the course of the contract may be authorized and funded by HUD through contract modification).
10. Correspondence tracking system that includes logging, tracking, timestamping, notification, reporting, close-out, and routing based on business rules, workflow, and prioritization.
11. Secure answering request system that provides tracking, e-authorization/e-signature, and workflow management.
12. Help desk support.
13. Direct integration with Human Resource Information System (HRIS) / Enterprise Resource Planning (ERP) systems.
14. Modular system with ability to deploy, activate, and deactivate individual functions.
15. Plug-In Installation Center.
16. Fully integrated live webcasting, live chat, and virtual meeting capabilities along with WebEx events.
17. System action records that are date/time stamped and tracked, can be stored in a secure database, are searchable, can trigger alerts, and cannot be deleted.
18. Ability to use look-up lists to streamline routine operations where appropriate.
19. Dashboard reporting and analytics.
20. Automated reminder system by Email.
21. Ability to prioritize requests, projects, documents, and electronic communications.
22. Ability to deliver alerts and documents through Email

1.7.2.2.3 Customer Experience Portal requirements

1. Integrated portal that can be fully branded using standard based languages and technologies (PHP, HTML5, CSS3, Java, etc.).
2. Portal environment that leverages responsive web design technology and renders pages based on type of device (PC, phone, tablet).
3. Inclusion of functionality of the current [FHA FAQ website](#)
4. Ability to natively expose (programmatically not iFrame) information from the CRM (e.g., popular answers, alerts/notices) on web pages that reside outside the solution
5. Fully-moderated community area on the portal where customers can ask/answer questions
6. Domain security and field-level masking of sensitive data when using co-browse channel
7. Integration with chatbot technology that can determine intent and provide answers directly from the knowledge base, can engage in deterministic dialogs, and can lookup information about specific questions/incidents in the CRM and provide status
8. Ability for customers to filter search results based on program area, answer type, document, type, etc.
9. Search results page that displays excerpts of knowledge articles that highlight search terms
10. Ability for users to rate knowledge articles so that the Agency may determine answer efficiency and knowledge gaps
11. Telephony integration directly within the CRM that enables screen-pops, skills-based routing to match inquiry with best CSR, and interactive dialogs (i.e., CTI)
12. Ability to send proactive communications to large groups of registered users based on segmentation data such as program area, geographic region, customer/business type, etc.
13. Graphical workflow tool (similar to MS Visio) that enables the Agency to quickly automate incidents/service routing
14. Capability for customers to complete online dynamic interviews that show only the relevant data fields

15. Capability to analyze the responses in dynamic interviews with natural-language rules contained in simple tools like MS Word and Excel to make complex determinations like eligibility, program requirements, and required supplemental documentation
16. Capability to conduct what-if analysis on dynamic interviews when rule criteria changes

1.7.2.2.4 Search Capability requirements

1. Ability for searches to be saved, modified, deleted, shared, or cancelled at any time
2. Ability to search within a search
3. Search conduction through full-text, keyword, and metatag
4. Ability to search different file types (doc, xls, pdf, etc.), scanned files (PDFs), and text within graphics
5. Ability to search by index, Boolean (simple and multiple), wild card, near spell, proximity, synonyms, exact phrase, and exclusion of terms
6. Results that highlight search terms in the document or web page
7. Ability for search results to provide a list of hits along document object histories, progress through workflow routes, summaries of documents, or profile data of documents
8. Searches can be limited by time frame
9. Results that display a list of the most often requested results for a specified search term
10. Searches that can be exported into common document formats (doc, xls, pdf, etc.)

1.7.2.2.5 Administrative requirements

1. Built-in Administrative Task Wizards
2. Ability to manage look-and-feel and branding of entire site, and to automate aesthetics management through business rules
3. Ability for User Administrator to create new user(s), configure permissions/roles, edit profiles, enroll users in courses, create user groups/domains, and search for users

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DRAFT RFQ - HUDCentral Contact Center

4. Real-time reports on-demand that appear in application and can be printed without having to be exported
5. Standard reports and wizard-driven ability to create custom reports that can be exported to doc, xls, pdf, etc.
6. Report is filterable by domain and user groups with the ability to drill down
7. Ability for new reports to be created, saved, and shared
8. Administrator permission to mass-distribute notifications, edit content of notifications, notify specific users, manage notification events, and determine who receives what notifications
9. Ability for alerts to be customized by user or group level and sent to multiple users
10. Variety of alert messages depending on urgency
11. Ability for alerts to be saved for re-use and stratified or sent as digests to avoid Email box clutter
12. Ability for alerts to be protected from user modification
13. Error messages customizable by administrator

1.7.2.2.6 Document Management requirements

1. Document management available for different file formats and scanned documents
2. Library of standard documents and templates, version control, document storage, and ability to create customized documents or sort documents based on a Freedom of Information Act (FOIA) request
3. System uses Agency naming conventions, have the ability to link documents, support meta-tagging/profiling of documents, annotation of documents, package documents of different file-types together, and offer previewing of files in HTML format
4. System allows protection of documents as “permanent” and allows for auto-population of document/profile fields from correspondence system
5. Audit trail system equipped with alerts and notifications when document actions are taken
6. Ability to capture documents in various sizes and thicknesses and convert these captured documents to PDFs, while also allowing for Optical Character Recognition (OCR)

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DRAFT RFQ - HUDCentral Contact Center

7. Ability to modify and redact sections of scanned documents
8. Ability to manage and respond to FOIA requests
9. Ability to freeze destruction automation for Emails and documents relevant to an impending e-Discovery request
10. Electronic forwarding of documents to the National Archives and Records Administration
11. Retention-tracking of documents
12. Ability to route documents through workflow for approvals/electronic signature

1.7.2.3 Consolidated desktop and computer telephony integration

The Contractor must ensure that the desktop system can display caller-relevant information at the desktop workstations (e.g. via screen pop technology). The displayed information may be triggered by Dialed Number Identification Service (DNIS), and/or Automatic Number Identification (ANI) information, and/or through information entered by the caller or CSR, and/or through data gathered by any automated service(s). The desktop must have the ability to deliver prior customer contact data to the CSR desktop, as well as populate data from all channels (e.g., digital, mobile). Desktops must have a single interface that connects CSRs with all applications so that the CSR has access to all information in one place.

1.7.3 Contact channel requirements

1.7.3.1 Telephony

The Contractor must provide and maintain a Voice Over Internet Protocol (VOIP) telephony system that meets the following requirements:

1. Provision, maintenance, design, implementation, operation, and management of inbound telephony services
2. Call routing/distribution of incoming contacts based on the sequence of arrival/origination, inquiry type, CSR's specialty and skills, CSR availability, or other predefined routing instructions
3. Fully automated solution to deliver a pre-recorded message furnished or specified by HUD to individuals/organizations on a listing provided by HUD, with the capability to accommodate a message of up to 90 seconds

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DRAFT RFQ - HUDCentral Contact Center

4. DNIS-enabled (in order to distinguish incoming calls by the called number and route them to the appropriate CSR if applicable) and capable of providing the appropriate call identification information (e.g., via a whisper announcement) at the CSR or SMEs workstation
5. Ability for system to queue incoming calls and provide callers with an estimated wait time in queue, an option to stay in queue or leave a message for callback, and an option to return to the queue without losing their place during or upon completion of a callback message based upon response to prompts
6. Capability to warm transfer contacts to the HUD Tier 3 Network as specified by escalation SOPs, as well as to track the quantity and duration of warm contact transfers (warm call transfers will have the ability to be initiated manually by the CSR and as requested by the customer. For example, if a customer knows that they want to speak with a grant specialist in the Office of Native American Programs, the contact transfer function must accommodate)
7. The contractor will be responsible for all costs related to implementing and operating telephone-based service, including telecommunications service minutes

1.7.3.2 Email

The Contractor must provide and maintain an Email capability, including:

1. Fully automated solution to transmit Email messages (including formatted Email messages) via the Internet to individuals/organizations on a listing provided by the Government
2. Service to allow visitors to HUD websites to access a Contractor-developed and maintained web form for submitting Email inquiries to a designated Email address (web form interface must be designed to accommodate commonly used browsers and mobile platforms)
3. Functionality to develop and deploy mass outbound Email communications (e.g., Listserv)

1.7.3.3 Mail and literature fulfillment

The Contractor must provide the facilities, personnel, and administrative structure necessary to process and respond to inbound mail requests, as well as to provide

literature fulfillment services to HUD customers (e.g., mailing informative booklets). This includes provision of outbound mailing services, including creating and applying labels, inserting documents into envelopes, sorting, logging, and tracking mailings.

1.7.3.4 SMS and MMS

The Contractor's technology solution must include SMS and MMS capabilities, which has not previously been part of HUD's contact center capabilities. The Contractor will work with HUD to identify specific SMS and MMS requirements after contract award. For planning purposes, the Contractor must anticipate the following SMS and MMS minimum requirements as it designs its technical solution for HUDCentral:

1. 100% compatibility and integration with Salesforce
2. Texting Inbox that allows HUD to receive, manage, and respond to incoming SMS messages
3. Two-way 1-to-1 texting that allows HUDCentral agents to receive and respond to SMS messages directly via a virtual two-way text conversation
4. Ability to integrate SMS channel with other HUDCentral channels (i.e., voice, Email, chat, etc.)
5. Landline texting so that constituents can call or text on the general HUDCentral number
6. Automation capability to filter lists and trigger targeted messaging
7. Multi-Media Messaging Service that enables HUD to text applications, forms, brochures, and other artifacts to constituents
8. Ability to integrate with HUD's chatbot (i.e., textbot)

1.7.3.5 Live chat

The Contractor must provide and maintain live chat using Salesforce Service Cloud. The live chat solution should have the capability to be embedded in the HUD.gov website and other HUD digital properties (e.g., SMS and MMS) to provide constituents with access to a real-time and integrated chat channel at HUDCentral.

The chat system must have a user-friendly interface, provide similar look and feel to the HUD digital property in which it is embedded, and be compatible with commonly

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DRAFT RFQ - HUDCentral Contact Center

used browsers and mobile platforms. The system must enable HUDCentral CSRs to provide real-time assistance to multiple users at the same time span.

At a minimum, the Contractor must be able to enable the following capabilities:

1. Ability to route inquiries to a specific queue based on CSR skills
2. Ability to push active web pages to end users
3. Tool for HUDCentral CSRs to guide constituents through a website and/or application/form
4. Access to knowledge base and preformatted responses to facilitate inquiry response
5. Automated greetings and responses
6. Real-time monitoring capability
7. Ability to track response and handle time for each session and exchange
8. Real-time and historical management reports on chat sessions and activities
9. Ability to send a copy of the session transcription via Email to the user and/or HUD
10. Ability to enable users of chat to copy and/or print the content of the entire chat session
11. Ability to integrate with AI chatbot technology

1.7.3.6 Self-service

The Contractor must have the capability to provide Tier 0 (self-service) customer support that will provide constituents access to the Salesforce CRM/KM system independent of CSR assistance. The self-service channels must be integrated with voice, Email, SMS, and chat channels to enable HUD constituents to reach a CSR if needed.

1.7.3.6.1 Web

The contractor must integrate and align all contact channels with Web content, in collaboration with HUD's Public Affairs team.

1.7.3.6.2 Intelligent Interactive Voice Response

The Contractor must provide Intelligent IVR voice recognition service for HUDCentral. The service must provide an intuitive, convenient, customer friendly, and naturally-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently. The contractor will assume responsibility for all costs related to developing, implementing, and operating the IVR, including IVR service minutes.

1.7.3.6.2.1 IVR services

The Contractor must be responsible for providing the following services:

1. Call flow design, development, and maintenance of its Intelligent IVR channel (i.e., voice recognition, and text-to-speech services)
2. Regularly refinement and training of the automated voice response services to adjust to the current informational needs of the callers
3. Analytics on IVR dropout rates and corresponding refinement of services to improve customer experience
4. Collaboration with HUD program staff to create and sign off on Intelligent IVR flows, escalations, on-going testing, and refinements
5. Development and maintenance by qualified personnel of call flow and messages for automated voice response services in keeping with the current informational needs of HUD customers
6. Timely update of all IVR messages in accordance with the turn-around time-frames determined with HUD and documented in SOPs (see section 1.9)

1.7.3.6.2.2 IVR tool functionality

The Intelligent IVR tool must accommodate the following functionality:

1. Automatic adaptation to callers' language, speech patterns, accents, and noise environment to ensure accurate and responsive service
2. Support for VoiceXML (VXML) and other industry standards for voice-driven applications
3. Ability to capture the phone number, local zip code, English or Spanish language, and other customer information and populate the CRM accordingly
4. Natural Language Processing capability

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DRAFT RFQ - HUDCentral Contact Center

5. Ability to introduce seamless interfaces with other channels (i.e., channel orchestration)
6. Machine learning capabilities
7. Text-to-Speech capability
8. Simple-to-use Graphical System Design interface
9. Multiple-telephone-line support both on analog and digital
10. Advanced call screening and call switching options
11. Ability to integrate with any type of database and playback data retrieved from database
12. Ability to transfer calls to other extensions and external lines, optionally announcing the Caller ID and allowing the recipient to accept or decline the call
13. Full logging of callers' details and all the selections made during the call
14. Multi-Language support (English /Spanish)
15. Dialed number identification service (DNIS)
16. Automatic Number Identification (ANI)
17. Ability to provide automatic survey to customers after interaction

1.7.3.6.2.3 Automated callback

The service must provide an automated callback option, including:

1. Prompts for the caller to provide information and to provide an estimated callback time to the caller
2. Automatic callback and connection to an available CSR at the estimated callback time
3. Ability to immediately transcribe voicemail messages into written transcriptions of the voice message regardless of message origination (i.e. voice, text-to-speech and speech-to-text)
4. If the callback encounters a voicemail or answering service, the service must leave a brief message indicating the purpose and time of the call and instructions for calling back
5. If the callback encounters a busy or no-answer condition, the service must repeat the callback for up to 3 additional attempts. For billing purposes, each group of 6 callback attempts encountering a busy signal and/or no answer must be counted as a completed call

1.7.3.6.3 Chatbot

The Contractor must provide a robust chatbot solution that is deployed by month 18 of the contract. The contractor will assume responsibility for all costs related to developing, implementing, and operating the chatbot, including chatbot service minutes.

1.7.3.6.3.1 Functionality requirement

The contractor's Chatbot solution must include, at a minimum:

1. 100% compatibility and integration with Salesforce CRM; multi-channel and platform integration (web, mobile, 2-way SMS and MMS, social media properties such as Twitter and Facebook), and other industry leading customer engagement COTS products the Contractor is proposing for HUDCentral
2. Platform selection based on functionality needed to address the largest number of potential HUD business use cases (e.g., providing directory assistance, responding to constituent questions about programs, walking constituents through forms completion, and checking the status of pending applications)
3. Full real-time escalation to HUDCentral agents and ruled based routing capability
4. Flexible user interface including customizable avatars
5. Multiple language capability
6. Unlimited concurrent chatbot sessions
7. Post chat customer survey capability
8. IP access and integration with databases
9. Robust dashboards and reporting

1.7.3.6.3.2 Support requirement

The contractor will be responsible for the following activities:

1. Collaboration with HUD staff throughout the period of performance to continually assess the opportunity to build additional chatbot business cases based on service requirements, nature of contact, volumes, and channels for deployment

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DRAFT RFQ - HUDCentral Contact Center

2. Creation of all functional and technical design documents and architecture based on platform selection, business use cases, and channel deployment options
3. Establishment and maintenance of an Integrated Development Environment (IDE) and testing environment for chatbots and development of intelligence algorithms and automation scripts
4. Testing of the chatbot including unit testing, integration testing, load testing, system testing and user acceptance testing
5. Deployment on the channels selected, as well as further improvements based on user queries and feedback

1.7.3.7 Text Telephone

The Contractor must ensure the system is equipped Text Telephone (TTY) American Standard Code for Information Interchange (ASCII) terminals to ensure accessibility for customers who are deaf or hard of hearing.

1.7.3.8 Social media

HUD currently maintains social media pages (e.g., Facebook, Twitter), but does not actively monitor customer comments on these pages. The Contractor will work with HUD to modify social media account settings such that customers can no longer post on official HUD pages that are not monitored. Over the course of the contract, HUD may decide to develop a social media customer strategy. The Contractor must have the capability to support an inbound and outbound social media service in order to allow for this possibility. HUD will provide requirements and request pricing as a modification to this contract to be funded through an optional future development CLIN if and when such services are needed.

1.7.4 Knowledge Management Solution Requirements

The Contractor must complete all necessary tasks relating to the discovery, design, implementation, testing, population, and maintenance of a single enterprise-wide KM solution and related tools (e.g., CRM, content management tool, integrated portal) that will enable the distribution of consistent, accurate, and timely information to HUD constituents across all channels (e.g., contact centers, websites).

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DRAFT RFQ - HUDCentral Contact Center

Currently, HUD does not have a centralized KM program. The current KM landscape is siloed, inconsistent and incomplete. Knowledge is fragmented across multiple tools, including mature knowledge databases in Microsoft Dynamics and Salesforce, as well as many ad hoc tools such as resource binders in field offices.

The Contractor must develop an enterprise-wide KM system and content management tool through three phases that are to be completed within a 50- to 55-week period. The Contractor must ensure that a process is established to ensure the ongoing currency of knowledge articles as well as the future migration of Tier 3 knowledge throughout the life contract. The Contractor will be responsible for continuous improvement and management of the KM system after implementation, including the ongoing creation and refinement of knowledge articles in accordance with HUD program and customer requirements.

Table 4: Months 0 - 24: Knowledge Management Solution Development Timeline	
KM Development Phase	Estimated time needed to complete
Phase I: Discovery and Design	9 weeks
Phase II: Build, Integrate, and Test	24 to 26 weeks
Phase III: Implement and Populate	17 to 20 weeks

1.7.4.1 Knowledge Management Development Phase I: Discovery and Design

The Contractor must develop and execute an agile discovery process to assess the information needs of HUD customers and stakeholders; the current state of information articles and FAQs at HUD; how best to collect and create knowledge articles to build a robust, scalable, and flexible KM system; and a recommended sequence of rolling in existing knowledge articles. The Contractor must collaborate with the Customer Experience CoE and HUD Public Affairs to design a KM solution that is adopted by all HUD customer-facing functions (e.g., KM must integrate with web content).

The Contractor must submit its design recommendations to the Office of Customer Experience for review and authorization.

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If required at a future date, the Contractor must provide a document summarizing any changes associated with architecture and design of the KM system.

1.7.4.2 Knowledge Management Development Phase II: Build, Integrate, and Test

The Contractor must build out a centralized platform that leverages current knowledge articles, migrates knowledge in a standardized format, and creates a robust and scalable searching metadata structure using an agile based development process with Capability Maturity Model Integration (CMMI) Level 3 certification. The searching metadata structure will display the most popular relevant articles first. Work products and other deliverables must be delivered in accordance with the Contractor's proposed development methodology unless otherwise directed by HUD.

The Contractor must conduct performance testing of interfacing systems, and resolve any issues identified during performance testing. The Contractor must document defects found during testing in accordance with HUD's test management standards. The Contractor must maintain a log to track and record defects, assign a severity level to defects, and create an action plan to resolve the issue.

The Contractor must develop a configuration management plan for the KM system in accordance with the Contractor's and HUD's system management methodologies. The configuration management plan must define the configuration items, establish and document the configuration management processes and controls, establish release baselines/documentation, establish a verification process, and other areas of configuration management governance. KM software, code, frameworks, related COTS tools, and other layers and components of enabling and supporting technology will evolve as part of standard technology refreshment (i.e., evergreening) and best practices, and at a minimum must be maintained at the version level of *n-1* or better.

1.7.4.3 Knowledge Management Development Phase III: Implement and Populate

The Contractor must propose a recommended approach, solution, and implementation plan for consolidating knowledge across HUD. That plan will contain, but not be limited to the following policies and procedures:

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DRAFT RFQ - HUDCentral Contact Center

1. Template for knowledge articles
2. Process for flagging issues for the knowledge base
3. Standards for writing effective knowledge base articles and content
4. Identification of a KM “owner” within each program area and field office who will (a) be responsible to ensure compliance with all KM requirements, and (b) determine who will write content for the knowledge base (these individuals will also comprise the Tier 3 Network)
5. Efficient and quick turn technical reviews before content is published
6. Process whereby the HUDCentral, Field Offices, and other customer-facing personnel can notify a central contact that an information gap in the KM system has been identified

The knowledge article migration strategy must prioritize the transfer of current and accurate existing information, and then lay out a plan to address identified knowledge gaps. The Contractor will be responsible for generating new content in collaboration with HUD to fill existing and emerging knowledge gaps throughout the course of the contract.

1.7.4.4 Knowledge Management Continuous Improvement

The Contractor must institute a process for determining knowledge article needs and drafting content in collaboration with HUD (particularly the HUD Tier 3 Network). As part of this process, the Contractor must perform the following functions:

1. Review of all Service requests that are escalated to Tier 3 for eligibility for knowledge article creation
2. Labelling of topics selected for knowledge article creation within the KM Tool, as well as to assign ownership for knowledge creation tasks
3. Development of new knowledge articles and related tools (e.g., scripting) in collaboration with HUD staff
4. Creation of a process to review all knowledge articles and update content at a regular cadence
5. Creation of a process to collect emerging and time-sensitive updates from HUD program offices (e.g., Public Affairs, Office of the CIO, Field Policy and Management) and adapt knowledge base content accordingly

6. Creation and administration of a user training program for HUD staff (e.g., Tier 3 Network) that will have responsibility for creating and maintaining knowledge articles and other content related to their program. The scope of the training will be how to use the KM system, a review of all HUD KM standards and standard operating procedures (SOPs), and how to write effective knowledge articles
7. Identification of further opportunities to leverage the KM solution to shift contacts to lower-cost channels and improve customer service

1.7.5 Facilities requirements

The Contractor must provide all services required for the operation of HUDCentral in at least two facilities. These two sites must be in geographically distant locations to provide HUD with redundancy and the ability to enact its Contingency/Disaster Recovery Plan. All sites must be equipped to provide daily contact center services. In addition, any site could be used as a backup facility if required to handle elevated call volumes. The Contractor must provide adequate facilities to support the contact center operations. All contact centers must be located within the Continental United States.

The Contractor must provide facilities that meet all applicable federal, state, and local zoning, environmental, and building laws and regulations. All personnel who enter the facility must be issued a badge or identification card. Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility access is limited to Contractor personnel performing work under contract; authorized HUD personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment; customer personnel visiting the site on official business; and personnel as approved jointly by the Contractor and HUD. The Contractor must obtain HUD approval prior to granting either current or potential customers access to areas where Government work is performed. Terminated employees must have their badges removed and passwords deleted from any system access immediately upon termination. Proof of staff removal must be documented by the facility and must include protection against unauthorized access at all hours, including security personnel, alarms, and notification systems must such protection be breached.

The Contractor must grant HUD access at any time to all facilities and information resources used in support of HUDCentral.

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DRAFT RFQ - HUDCentral Contact Center

The Contractor must be responsible for any expansion activities associated with their successful performance of this contract. The Contractor must seek and obtain approval from HUD prior to relocation of contact center facilities. Relocation expenses are at the expense of the Contractor; however, if significant cost savings are achieved through a change in service delivery, HUD will have claim on a portion of those savings. The Contractor's relocation Proposal must provide a compelling reason for the recommended change.

The Contractor must ensure that there will be no degradation of service during any relocation.

1.7.5.1 Infrastructure management

The Contractor must be responsible for the acquisition, installation, and maintenance of all cable, wiring and support infrastructure required to operate the facility, including, but not limited to: cable distribution systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect and support the contact center systems and operations. After the contract is awarded, HUD must not assume any costs for relocating telecom services to a new Contractor facility location throughout the duration of the contract.

The Contractor must plan, implement, operate, maintain, report and manage the contact center infrastructure, including, but not limited to the following functions:

1. Site operations management, maintenance, accessibility, accommodation, security, and disaster recovery
2. Hardware, software, and telecommunications equipment and services
3. Requirements definition and validation, integration planning, design, configuration, selection, acquisition, installation, programming, and initialization
4. Performance verification and acceptance testing, monitoring, analysis, reporting, administration, management, maintenance, security, and disaster recovery

1.7.5.2 Network management

The Contractor must provide network engineering and management services, including, but not limited to the following functions:

1. Design, systems integration, implementation, management, and quality assurance support for all networks, including the Internet
2. Telecommunications management, including recommending processes, coordinating and monitoring telecommunications orders, and liaising with telecommunications Contractors
3. Consulting support for HUD in areas of telecommunications engineering, including providing advice on hardware, software and service issues that include wiring, voice mail, call accounting, T1 lines, Ethernet connectivity, VOIP, telecom routing and local and long-distance carrier services
4. Traffic and usage data analysis to determine network performance levels and recommend improvements for network designs and call flows in accordance with customer service standards and cost efficiencies
5. Real-time monitoring of call delivery and assurance that no call recordings are lost/erased as a result of real-time call monitoring or Best Service Routing (BSR) call distribution strategies
6. Assurance that 100% of all inbound and outbound calls are recorded, including implementation of a fail-safe and/or redundancy system to secure a possible software failure to ensure no interruption of 100% call recording
7. Resolution of all system issues within 48 hours
8. Reporting support to include data and management information analysis
9. Optimized call routing design based on availability of network-based or systems-based call routing capabilities
10. Optimized automated announcement system design based on availability of network-based and systems-based automated announcement capabilities, including monitoring of network performance and identification of network problems and outages, compilation and maintenance of a log of problems, outages, service interruptions, unauthorized access, and notification to designated HUD personnel within 24 hours of any problems, service disruptions, and unauthorized access

1.7.5.3 Power supply

The Contractor must provide emergency electrical power generation capability, as well as an Uninterruptible Power Supply (UPS) to ensure continuity of contact center operations. The UPS must be capable of protecting systems from voltage lags, over-voltage conditions, line frequency fluctuations, and power blackouts. It must be capable of sustaining operations in the event of loss of normal sources of power until the backup generators can come online. The backup generator must be capable of sustaining full contact center operation for a minimum of 24 hours. The transition from normal to emergency to backup power must occur without loss of power to systems and without the disconnection of calls in process, loss of data, or customer calls queued for service. The contingency/disaster recovery plans must detail redundancy of hardware, software, networking, cabling, etc.

1.7.6 Equipment requirements

The contractor must provide all equipment, furniture, and supplies necessary to support operations of HUDCentral including, but not limited to the following:

1. Telecommunications lines and connectivity
2. Local Area Network from carrier fiber Point of Demarcation (POD) to staff workstations with the following specifications:
 - a. LAN distribution from POD must utilize managed gigabit switch hardware consistent with HUD CIO-mandated standard capable of integration into central HUD service desk for monitoring
 - b. Cabling from switch to workstations must be CAT 6 or greater
 - c. CAT 6 cable lengths between devices must not exceed 100 meters or 328 ft Contractor must provide intermediate switching hardware according to HUD CIO-mandated standard installed in approved data closets if workstations distance from demarcation exceeds 100 meters
 - d. Cabling installed in an organized manner including standardized labels and routed via under-floor cable conduit and/or ceiling suspended trays per HUD CIO-mandated standard. Cabling must not cross walkable floor space, and terminate to standard jacks in cubicles and offices through labeled dual data/VOIP port jacks

- e. Operations and maintenance of all networking equipment in cooperation with the centralized service desk including break-fix service as required
- 3. VOIP soft phones compatible with both Salesforce CRM CTI functionality and telephony switching systems provided by the government
- 4. Two-17" desktop monitors meeting the HUD CIO-mandated workstation standard with memory, processor, and storage capacity per the combined requirements of all required software including but not limited to Salesforce CRM systems, soft phone, as well as the standard HUD CIO-mandated workstation support software within a system latency timeframe that must not exceed 500 milliseconds
- 5. Standard workstation image and corresponding software configuration management system and controls in cooperation with the HUD centralized service desk that meets all HUD CIO-mandated software and performance requirements
- 6. Training space and equipment that facilitates both classroom and virtual training sessions using workstations supplied with the same network connectivity bandwidth and workstation image as those used by contact center agents and staff in order to provide unplanned call surge capacity
- 7. Furniture configuration, lockers, and work space lay out that optimizes productivity and security
- 8. Workstations designed and configured in a manner that limits conversation bleed-over with neighboring workstation and limits ambient noise on the call floor to between 50 and 60 dB

1.7.7 Customer Service Representative staffing requirements

HUDCentral is primarily a Tier 1 and Tier 2 (first contact) customer support program that provides the public with consistent, accurate and understandable information services covering a wide range of HUD programs and 311 services. The Contractor may employ CSRs who work from home full- or part-time, but no more than 15% of total CSR hours may be remote hours during the base year. The contractor can propose changes to this requirement in subsequent option years as a modification of this contract. Due to the diversity of HUD program requirements, the Contractor must provide a mix of CSRs to address the range of service requests handled by HUDCentral (see section 1.6.2 for more information on anticipated service requests.)

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DRAFT RFQ - HUDCentral Contact Center

At a minimum, all CSRs must have the following qualifications:

1. High school diploma or General Educational Development (GED) Certificate
2. A minimum of two (2) years of telephone customer service experience (omnichannel experience preferred)
3. English language proficiency
4. Excellent Customer Service Skills
5. Equivalent of a public trust background investigation
6. Keyboarding proficiency of at least 40 words per minute

The Contractor-provided CSR staff must demonstrate the requisite skills and knowledge to perform the following functions, including the following minimum requirements:

1. Oral and written communication skills sufficient to facilitate clear and accurate information exchanges with customers (verified by a writing test)
2. Ability to control the pace and flow of the inquiry, and manage call time effectively
3. Ability to handle inquiries and requests in a courteous and professional manner, including calls received in crises, and/or from abusive callers
4. Ability to listen to, empathize with customers, and acknowledge their concerns
5. Ability to follow protocol and to apply sensitivity and discretion in handling confidential information
6. Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquiry/request effectively
7. Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner
8. Ability to demonstrate call control skills
9. Ability to use the web to search and retrieve information
10. Ability to respond to inquiries from the hearing, speech, and visually impaired, as well as other physically impaired callers using appropriate equipment
11. Ability to take direction within a team setting and complete team-related work

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DRAFT RFQ - HUDCentral Contact Center

Certain Tier 2 inquiries (e.g., FHA mortgage program applications) will require elevated familiarity with the real estate industry and mortgage finance. In order to sufficiently address these inquiries, 70-80 of the CSRs must have the following qualifications in addition to those listed above:

1. 3+ years of real estate or mortgage finance experience
2. 2+ years of college education (e.g., Associate's Degree)

HUD reserves the right to adjust the required percentage of CSRs with the above credentials based on inquiry levels. HUD will provide requirements and request pricing as a modification to this contract if such modifications are required.

1.7.8 Training requirements

The Contractor must develop and implement a comprehensive training delivery program for Contractor staff to ensure that contact center staff provide superior levels of customer service in answering inquiries across all customer access channels.

Training must cover the following topics:

1. Introduction to Contact Centers
2. Technical expertise necessary to leverage contact center systems effectively (e.g., CRM, KM solution)
3. Knowledge of HUD's technical systems sufficient to support technical assistance requests
4. Program-specific knowledge, including HUD policies and privacy guidelines and relevant industry and legal terminology
5. HUDCentral Standard Operating Procedures
6. Customer service skills adequate to offer an outstanding customer experience

Training for Contractor CSRs must meet the following requirements:

1. The Contractor must create and execute a contact center training program to address the training of all personnel and support staff
2. The Contractor training must coordinate with the Contractor's workforce management team to minimize disruptions to operations

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DRAFT RFQ - HUDCentral Contact Center

3. The Contractor must provide experienced instructors to create and deliver training material to supervisors and CSRs
4. The Contractor must use technology where appropriate to provide on-going training updates and other value-added training. The Contractor is expected to stay up-to-date on training methodologies and delivery tools throughout the course of the contract
5. The Contractor must create all training materials needed to successfully complete both hard and soft skill training. Training materials created by the Contractor must be nonproprietary, and HUD will have access to them upon request
6. The Contractor must analyze QA evaluations to identify training needs, and incorporate these topics into trainings accordingly

In addition, the Contractor must develop and deliver a training program and curriculum for the HUD Tier 3 Network. Training for HUD staff must cover the following topics:

1. Technical expertise necessary to leverage contact center systems effectively (e.g., CRM, KM solution)
2. Knowledge article creation
3. HUDCentral Standard Operating Procedures
4. Customer service skills adequate to offer an outstanding customer experience

1.7.9 Other operational requirements

1.7.9.1 Dedicated solution

The Contractor must provide a dedicated contact center solution that uses workspace, equipment, and staffing that are unique to the project. The Contractor may not use workspace, equipment, and staffing which are shared with other federal projects managed by the Contractor or its subcontractors.

1.7.9.2 Operating model changes

These services must evolve over the course of the contract to meet the changing needs of HUD customers and stakeholders. HUD reserves the right to request additional services required at any time during the life of the contract. Any additions will be subject to written mutual agreement between the Government and Contractor.

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DRAFT RFQ - HUDCentral Contact Center

The Contractor must be responsible for any expansion activities associated with their successful performance of this contract.

The Contractor must seek and obtain approval from HUD prior to significant changes in operations model (e.g., moving from a work from home/facilities hybrid delivery model to an exclusively work from home model).

Changes in service delivery is at the expense of the Contractor; however, if significant cost savings are achieved through a change in service delivery, HUD will have claim on a portion of those savings. The Contractor's Change in Service Delivery Proposal must provide a compelling reason for the recommended change.

The Contractor must ensure that there will be no degradation of service during any change of service delivery model.

1.8 Project management and change management requirements

The Contractor must develop and implement the required plans, procedures, methodologies, and tools and perform the planning, oversight, and management functions to ensure that all service delivery performance standards and program deliverables specified in this contract are met.

1.8.1 Cross-CoE and Cross-HUD collaboration

The Contractor must work with HUD stakeholders, GSA CoE leadership, GSA CoE leads from other CoE teams, and other contractors supporting the CoE effort to contribute to the success of the overall CoE mission. The contractor must offer the following:

1. Contribution to CoE-wide deliverables and reporting requirements and participation in CoE-wide meetings as requested
2. Sharing of documentation and findings with other CoEs, as well as collaborative consulting support where synergies exist

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DRAFT RFQ - HUDCentral Contact Center

3. Communication with Contact Center CoE teams at other agencies to share best practices and lessons learned, as well as creation of governmentwide standards and approaches
4. Generation and delivery (electronic and hardcopy) of status reports, executive level briefings, talking points, emails, and other communication materials
5. Contribution to CoE website in coordination with CoE leadership
6. Contribution to and participation in CoE status and project review meetings
7. Management and escalation of project risks to CoE and HUD leadership
8. Collaboration with CoEs to create and implement an effective organizational change management strategy and program to facilitate and drive adoption

The Contact Center CoE will collaborate with other CoEs on overlapping projects to align approaches and messaging and avoid duplicative efforts. In particular, the Contact Center CoE will work with the Customer Experience CoE to coordinate the HUDCentral customer experience with the overall HUD customer experience vision. HUDCentral will fall within the Office of Customer Experience at HUD, an office that is being established with support from the Customer Experience CoE. In addition, the Contact Center CoE will work with the Data Analytics CoE to ensure HUDCentral's data management, analytics, and reporting practices leverage the Data Analytics CoE's resources and contribute to the Data Analytics CoE's overall vision for HUD.

1.8.2 Governance, staffing, and workforce management

The Contractor must create an efficient and effective organizational structure, including clear lines of authority for key personnel. The Contractor must create roles and responsibilities and delegations of authority for all staff to ensure accountability for performance and the achievement of HUD customer service and lean management objectives.

1.8.2.1 Subcontractor management

The Contractor must manage and be responsible for the performance of any subcontractors. The Contractor's lines of authority and roles and responsibilities must include all subcontractors and other teaming partners.

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DRAFT RFQ - HUDCentral Contact Center

1.8.2.2 Staffing approach

The Contractor must provide qualified management, operations, and support personnel in sufficient quantities at the time of award. The Contractor must have the appropriate subject matter expertise to perform HUD requirements successfully based on the technical solution and operations management plan proposed by the Contractor.

The Contractor must implement a recruitment and retention approach that ensures a successful and consistent ability to recruit and retain high quality staff during the performance of this contract. The recruiting program (i.e., including screening and background checks) must be relevant to the scope of work, complexity of tasks to be completed, and the maintenance of appropriate staffing levels including the ability to handle short-term surges. HUD expects the Contractor to have a retention strategy that prevents significant attrition and enhances employee engagement.

1.8.3 Standard Operating Procedures (SOPs)

The Contractor will be responsible for setting SOPs for HUDCentral operations that incentivize best practices and meet all of HUD's program requirements. The Contractor will work with HUD staff to determine appropriate SOPs, and may be required to create different SOPs for service requests relating to different HUD program inquiries. SOPs must address all HUD business rules in detail, including but not limited to, contact processing for each contact channel, scripting, escalation protocol, knowledge article editorial process, departmental customer liaison and reporting, workforce management, training, staffing, and quality control, quality assurance, and continuous improvement. SOPs will be used by both Contractor and HUD staff.

The Contractor also must ensure that all SOPs are maintained and updated at least on a regular interval agreed upon between the Contractor and HUD, and when significant process or program changes occur. All new SOPs and changes must be approved by HUD prior to taking effect. The Contractor must keep a responsibility matrix log of changes to the SOPs and provide an updated version of SOPs as a deliverable not later than fifteen calendar days after the end of each quarter.

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1.8.4. Quality Control (QC)

The Contractor must develop, implement, and manage a Quality Control Program for the HUDCentral contact center to ensure that the performance of the contact center adheres consistently to quality assurance SLAs (see section 1.8.4.2). The Contractor must develop a Quality Control Plan, which at a minimum, addresses access for random remote monitoring across all channels, performance monitoring and evaluation criteria for each channel, calibration policies and procedures with HUD, effectiveness of service delivery, variance analysis among CSR performance, a plan for improving quality, surveys and focus groups for customer satisfaction, and internal quality oversight of all channels.

The Contractor must conduct a quality assurance evaluation for two calls per week for each CSR. The Contractor must record all calls and make those recordings available to HUD for random selection during HUD quality monitoring and calibration sessions. Recordings must be maintained throughout the life of the contract.

HUD would like to participate in weekly calibration sessions with the Contractor during the first six months immediately following the completion of transition activities. As the Contractor gains more experience in responding to inquiries, HUD and the Contractor can discuss the reduction of calibration sessions and/or adjust the monitoring evaluation baselines and thresholds.

HUD expects the Contractor's Quality Control Program and Plan to reflect industry best practices and provide for ongoing quality improvement innovations.

1.8.4.1 Customer feedback

Through the HUDCentral Contact Center, HUD will collect real-time customer feedback via all interaction channels (e.g., phone, email, and chat) in both English and Spanish. The survey must be concise, user friendly, visually pleasing, and written in plain language. The customer survey must integrate with IVR, CRM, Chat, and Chatbot tools to automatically launch after the completion of the customer interaction. Customers must receive the customer survey within 2 hours of the interaction.

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DRAFT RFQ - HUDCentral Contact Center

The Contractor must develop a Contact Center Customer Experience Strategy to detail a plan for managing customer feedback surveys that are statistically significant and representative of the overall customer base (e.g., customer survey feedback must be collected for all service request types).

The contractor must develop the surveys, which must include (but are not limited to) the following core questions, which are required by Section 280 of A-11, Managing Customer Experience and Improving Service. Responses should be rated on the Likert Scale from 1 to 5 (1 being poor and 5 being outstanding).

1. Overall satisfaction: I am satisfied with the service I receive from [enter agency or program name].
2. Overall trust/confidence: This interaction increased my confidence in [HUD] OR I trust [HUD/program name] to fulfill our country's commitment to [relevant population].
3. Overall service quality: I feel that my need was addressed.
4. Process (ease and simplicity): It was easy to complete what I needed to do.
5. Process (efficiency and speed): It took a reasonable amount of time to do what I needed to do.
6. Employee interaction: Employees I interacted with were helpful.

The contractor should also collect the "intent" of the inquiry for future trend analysis and collaborate with the website team to determine changes to the website that could reduce overall inquiry volume. The contractor will work with HUD program areas to determine additional questions that need to be added around specific program areas.

The Contractor must collaborate with HUD, the Customer Experience CoE, and the Data Analytics CoE to determine the ideal data analysis and reporting approach for customer surveys. At a minimum, the contractor must provide a real-time dashboard to HUD's Office of Customer Experience (OCX). In addition, HUDCentral will feed operational and customer satisfaction data into a HUD-wide CX executive dashboard. HUDCentral will provide data on key performance and other selected data for inclusion in this new executive dashboard. The contractor's approach to implementing business

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DRAFT RFQ - HUDCentral Contact Center

process improvements based on customer feedback and results must be documented in the Customer Experience Plan.

HUDCentral will participate in a larger HUD Voice of the Customer and Customer Feedback program. HUD's OCX is working with the Customer Experience Center of Excellence to develop an enterprise-wide Voice of the Customer/Customer Feedback program, and will be procuring tools and services to assist in establishing the program in a separate procurement. The Contractor will work with the OCX to develop and execute operating level agreements (OLAs) to integrate the contact center with the Voice of the Customer program. The Contractor is responsible for collaborating with and maintaining close relations with these offices.

1.8.4.2 Service level agreements

The Contractor must perform all task requirements in accordance with the service levels specified in Table 5. Prior to the month at which each SLA takes effect, the Contractor is strongly encouraged to target the required SLAs. The months correspond to months of the contract, and are intended to provide the Contractor with a grace period as HUDCentral is stood up.

Requirements not appearing on the chart below do not negate the Contractor's obligation to perform all requirements as specified in the contract. Additionally, HUD reserves all rights and remedies under the provisions and clauses of the contract when performance of any contract requirement, whether or not listed below, is unacceptable. The Contractor is encouraged to use innovative approaches to meet or exceed the standards specified herein. The Government reserves the right to adjust or suspend the performance standards individually or in their entirety, and/or add other performance metrics as deemed necessary at any time during the performance period of this contract. Any adjustment, suspension, and/or addition must be in collaboration with the Contractor.

The following are examples of criteria that may indicate the need for an adjustment or suspension of performance standards:

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DRAFT RFQ - HUDCentral Contact Center

1. Start-up event (to allow the Contractor a period of time to “ramp up” to meet the Government’s criteria for performance excellence)
2. Change of events in the government or legislative environment (to allow a period of time for Contractor to adjust to the change)
3. SLA metrics, baselines, and thresholds appear either unattainable or trivially easy

The Contractor must follow the detailed definition/formula of how each SLA must be calculated as displayed in Table 5. The contractor must track the performance of each SLA daily and provide HUD access to daily performance numbers. The contractor also must provide HUD with the monthly average performance for each SLA. If the monthly average for an SLA does not meet the stated benchmark, the Contractor must provide a root cause analysis describing the issue, cause, resolution and the plan to avoid or mitigate a future recurrence. HUD may accept or reject the Contractor’s mitigation plan. If HUD rejects the mitigation plan, the Contractor must modify the mitigation plan to address HUD’s concerns.

The singular importance of achieving the Customer Satisfaction (CSAT) SLA warrants a financial penalty if the Contractor fails to achieve the stated benchmark consistently throughout the period of performance. The Contractor must pay 10% of the monthly invoice amount for any month in which the monthly average CSAT SLA score is lower than 88.5% (more than 1.5% lower than the stated benchmark).

Table 5: Service Level Agreements				
Key Metric	Calculation	Measurement Window	Required Service Level	Month at which SLA takes Effect
CSAT	CSAT based on Likert scale 1-5 rating (1 low / 5 high)	CSAT survey after transaction is completed	90% score 4 or 5	21

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DRAFT RFQ - HUDCentral Contact Center

Customer Feedback Survey Response Rate	Customer feedback survey responses / contacts received and answered	CSAT survey after transaction is completed	>3% for base year, recalibrate for option years	8
First Contact Resolution	Contacts resolved during the first contact / contacts received and answered	Daily	80%	24
Speed to Answer (Phone)	Total contacts that are answered within 20 seconds or less / total contacts	Daily	80% in 20 seconds	8
Speed to Respond (Email)	Total contacts that are answered within 1-2 calendar days or less / total contacts	Daily	98% in 1 calendar day, 100% in 2 calendar days	8

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DRAFT RFQ - HUDCentral Contact Center

Speed to Answer (Mail)	Total contacts that are answered within 1-2 calendar days or less / total contacts	Daily	98% postmarked in 1 calendar day, 100% postmarked in 2 calendar days	8
Speed to Answer (Live Chat)	Total contacts that are answered within 30 seconds or less / total contacts	Daily	80% in 30 seconds	8
Abandon Rate	Number of calls disconnected by the customer prior to being answered by a CSR /Total calls * 100	Daily	<3%	8
Forecast Accuracy	(Actual contact volume-forecasted call volume) / forecasted volume	Daily	>80%	24

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DRAFT RFQ - HUDCentral Contact Center

Quality Assurance	Number of QA evaluations using a Vendor Developed QA scale approved by HUD	20 QA evaluations per CSR per month	100%	8
Escalation Rate	Number of contacts escalated to HUD Tier 3 Network / Total contact volume	Daily	<5%	30
Blockage Rate	Number of contacts blocked (customer hears busy signal) / Total Contact Volume	Daily	<1%	8
Recorded Inquiries	Number of recorded inquiries / Total phone volume	Daily	100%	8

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DRAFT RFQ - HUDCentral Contact Center

Logged Inquiries	Number of inquiries logged in CRM / Total contact volume	Daily	100%	8
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1.8.5 Data analysis and reporting

The Contractor must store all data on HUD's Enterprise Data Warehouse (EDW) and meet all HUD EDW standards to facilitate integration with data from other sources. Data must be managed in a manner compliant with HUD's security and data management standards. The Contractor must provide reporting systems that are capable of accessing and combining data from all of their operating systems, including, but not limited to, the ACD, dialer, CTI, CRM, retention, IVR, recording, QA, workforce management, speech analytics, and others, on a real-time and historical basis. Specifically, HUD is expecting the following reporting capabilities from the Contractor:

1. Collection and consolidation of data from all HUDCentral systems
2. Ability to feed HUDCentral data into HUD's Voice of the Customer tool and other HUD data analytics tools (without requiring expensive integration projects)
3. Creation of real-time and historical reports
4. Production of reports and dashboards
5. Single system of record that generates reports in sync with their feeder systems
6. Data reporting in any format required by HUD on a scheduled and Ad Hoc basis
7. Scheduling, production, and distribution of reports and dashboards to appropriate CoE and HUD staff
8. Ability for various user groups, including HUD staff, to see different reports and/or data that are relevant to their specific function
9. Creation of rules to issue alerts when a specific metric falls out of compliance or a "issue" is reported by many customers or flagged in the CRM as urgent
10. Creation of alerts
11. Creation of a permissions-based environment that limits data access as needed

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DRAFT RFQ - HUDCentral Contact Center

12. Collaboration with HUD CIO stakeholders to report on technical issues identified through HUDCentral

Required reports may include, but are not limited to the following:

1. Service Request Traffic and Arrival Patterns (including by program and issue area)
2. Service Request Resolution
3. Knowledge Base Candidates
4. Knowledge Base Utilization (Article Hits)
5. Information Technology Systems Issues
6. Contract Status
7. Service Level Requirements
8. SOP Compliance
9. Compliment / Complaint Management
10. CSR Performance Assessment
11. Notifications and Documentation of Service Outages
12. License Usage
13. Individual CSR Activity and Skillsets
14. Customer Profiles
15. Data and Information Security Issues
16. Training Evaluations
17. Workforce Scheduling
18. Staffing Forecasts
19. Quality Assurance Evaluation
20. Escalations to Tier 3 Network
21. Backlog Aging

Post award, the Contractor must review the reporting deliverables and requirements outlined in this task section and all other task sections in this performance work statement and propose an aggregated or combined reporting format and delivery schedule to the Government (see section 1.9).

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DRAFT RFQ - HUDCentral Contact Center

1.8.6 Continuous improvement

The Contractor must create a continuous improvement plan that enables HUDCentral's business processes, technologies, and KM solution to stay current. The Contractor must incorporate innovations throughout the course of the contract that (1) includes "test-and-learn" projects that evaluate use cases for the potential adoption of technical tools, business process re-engineering initiatives, and operations and staff development enhancements; (2) planned upgrades in technology, (3) operations improvements; and (4) benchmarking with appropriate Federal and commercial organizations.

1.8.6.1 Test-and-learn

Each year, the Contractor must propose one test-and-learn project, to pilot a new innovation within HUDCentral. HUD will have final decision-making authority over whether the proposed test-and-learn is piloted, and whether it is implemented following the pilot. HUD may also propose test-and-learn proposals for the Contractor to execute. Test-and-learns must 1) improve the customer experience, (2) improve the efficiency of operations, and (3) support future phases of the HUDCentral contact center modernization roadmap. For example, the Contractor may consider piloting Direct Video Calling to improve services for the deaf community, or implementing a voicemail service that enables callers to leave callback requests. Bidders must include three ideas for test-and-learn proposals in the initial RFQ response, including expected benefits and challenges.

The timeframe, cost and scope of test-and-learn projects must be reasonable, (i.e., the scope must not be too large or too small to test the use case selected, the length of the pilot must not be too long or too short to gather sufficient data to evaluate the use case, and the cost must sufficiently support the project).

1.8.7 Risk management

The Contractor must develop and implement a Risk Management Plan and procedures to address continuity of operations in the event of a lapse of service for any reason. This plan must include both continuity of support for short term disruptions (i.e., less than 48 hours) that do not require relocation to an alternate site, as well as a more comprehensive disaster recovery plan that require relocation of processing sites. This

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DRAFT RFQ - HUDCentral Contact Center

plan must include a business impact analysis (BIA) to identify the activities, resources, and procedures needed to carry out operations of all deliverables identified within the scope of the contract during specified business hours. The Contractor must ensure that guidance is in place for the recovery of system and operations components during short-term periods of interruption to normal operations.

1.8.8 Change management

The Contractor must build upon the Organizational Change Management (OCM) strategy developed in Phase 1 to drive adoption of the HUDCentral Contact Center.

The Contractor must collaborate with multiple stakeholder groups and organizations within HUD to create effective organizational change management approaches and continual improvement programs to “institutionalize” cultural transformation, obtain staff buy-in, and ensure that both technical and operational improvements are anticipated over the term of the HUDCentral Contact Center contract and beyond. The Contractor must work in close collaboration with CoE leadership in ensuring that the HUDCentral Contact Center’s OCM strategy and program align to the COE’s enterprise OCM strategy and plan.

The Contractor must deliver an OCM Plan that highlights their approach for engaging all stakeholders, from CoE leadership who have overall responsibility for all COE activities during Phase II, the Office of the Chief Information Officer (OCIO) who has responsibility for the technology, to the Public Affairs who has responsibility for websites, and the Office of Customer Experience (OCX) who has responsibility for the customer strategy and improving the overall customer experience. The OCM Plan could include identifying and managing risks; communicating across leadership, managers, and front-line staff; and shifting incentives, expectations, and culture. The Contractor’s OCM Plan must include, but not be limited to the following: Stakeholder Analysis, Change Impact Analysis, Communications Plan, Training Plan, and Reinforcement Strategy.

The Contractor must communicate with all HUD officials that touch external customers to ensure that customers know how to contact HUD, employees know where to get information to assist customers, and all public-facing materials are updated with a new

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DRAFT RFQ - HUDCentral Contact Center

contact number if they need it. As content is identified and migrated to a new knowledge base system, the Contractor must work with stakeholders to ensure the content is easily understood and can be used by public affairs, field offices, and other customer-facing offices.

1.8.9 Transition-in

The Contractor must develop and execute a Transition-In Plan that maps the dependencies among deliverables specified in this SOW, and provides a resource-loaded Work Breakdown Structure (WBS) and timeline for each deliverable and its impacts on the others.

The Transition-In Plan must include the following:

1. Site-specific actions, methodologies, clearly defined processes, detailed schedules with realistic milestones (WBS), and specific actions needed to ensure the completion of transition-in activities as described above
2. Detailed risk analysis and mitigation strategies to minimize complications in the transition-in period
3. Key events and critical milestone dates
4. Recommended parallel operations with existing HUD contact centers as well as any requested involvement or impacts on services being provided
5. Information or data required from HUD
6. Detailed operational readiness checklist to determine transition-in completeness and facilitate sign-off by HUD prior to full operation status

The Contractor must complete the following activities within 180 calendar days or less of the final contract award to transition-in the new contact center:

1. All required management plans as described in section 1.9
2. All Discovery and Design activities of the KM System deliverable including a strategy and timeline for sequencing of knowledge content to be incorporated into the HUDCentral knowledge base
3. All activities required to operationalize the new omnichannel HUDCentral Contact Center. Transition-in completion includes the facility, and/or remote

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DRAFT RFQ - HUDCentral Contact Center

work infrastructure, telecommunication connectivity requirements, technology stack, cleared and trained staff, reporting capabilities, and any other activities required to commence contact center operations. Transition-in completion will require the Contractor to work with HUD to determine what initial level of information support, in addition to directory assistance, the contact center will be requested to provide during the development of the enterprise-wide KM system

4. Changes to all digital properties to ensure that the HUDCentral number is prominently displayed
5. Training program for agency personnel on the transition of Tier 1 information to the new HUDCentral Contact Center and the agency's role after transition-in
6. Identification of the 1-800 (and similar) numbers that will be retired and retirement timeline
7. Communication recommendations to internal staff and external stakeholders and customers about the new KM system, contact center capabilities, and change management program

Based on the Contractor's proposed solution the test-and-learn projects may be launched during transition-in, or later after operations are baselined and the KM system is completed.

The Contractor must coordinate and support regular transition-in, status meetings with HUD senior managers. During such status meetings, the Contractor, at a minimum, will present to HUD their accomplishments, issues, and potential risk areas.

The Contractor must recommend whether the Program Manager or a dedicated transition-in, Manager will be responsible for transition integration and completion. The Manager responsible for transition will be responsible for maintaining continuity of information services and quality of services provided and will be expected to become familiar with HUD policies, processes, technologies, and services.

A summary of the Contractor's transition-in approach must be presented as part of the management section of the Contractor's proposal.

1.8.10 Transition-out

The Contractor must develop and execute a Transition-Out Plan that stipulates how operations, knowledge, and data will be transitioned if HUD chooses to suspend the contract at any point. The Contractor will cooperate with HUD, GSA, and the Contractor's successor to facilitate the smooth and continuing operations of HUDCentral. The Contractor should assume this will include data and records access, training, equipment installation, provision of communications and reports, and any other matters reasonably required to result in a successful transition. In the event of a transition, the Contractor must describe their methodology, processes, and transition-out activities in a transition-out implementation document.

At the conclusion of the contract and during the transition of services, the Contractor must continue the work of this contract at the same level of service. The Contractor must provide to HUD the most current versions of all materials and data owned by the Government, materials created, and data collected during the course of this contract.

All data, records, and reports (e.g., CRM records, knowledge articles) relating to HUDCentral and its customers must be treated by the Contractor and its subcontractors as the exclusive property of HUD. The Contractor must facilitate the transition of all data to a different COTS technology platform within a three-month period if required in a future contract transition-out process. Upon expiration or cessation of the contract, the Contractor may not retain any data, records, or reports related to HUDCentral, and must erase all data in a manner compliant with federal data privacy regulations.

1.9 Deliverables

The contractor must provide the following deliverables in a comprehensive, accurate, easy to understand, and timely manner to the Government HUDCentral management under HUD's OCX. The government reserves the right to request further deliverables as they relate to HUDCentral's formation and operations, and the contractor is encouraged to create and share any further deliverables they deem to be beneficial to the government. Deliverables must be provided in a format readable and editable in Microsoft Office Suite by the government, and must be archived on GSA and HUD

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DRAFT RFQ - HUDCentral Contact Center

Google and SharePoint Drives in an organized manner. Any necessary charts, graphs, or illustrations provided in the document must contain a descriptor of the chart, graph, or illustration.

Deliverable	Objective	Description	Assessment
Weekly status report	Objective 6: Project and Change Management	Overview of metrics, trends, risks, mitigations, and project/change management activities (while SLAs stipulate monthly expectations, these will be reported on a weekly basis).	Due: Weekly. Criteria: HUD acceptance of the first and following reports.
Monthly status report	Objective 6: Project and Change Management	Overview of metrics, trends, risks, mitigations, and project/change management activities in accordance to monthly expectations stipulated by SLAs.	Due: Monthly. Criteria: HUD acceptance of the first and following reports.
Transition-in Plan	Objective 6: Project and Change Management	Activities to be performed to ramp-up on Phase I CoE findings and recommendations, align next steps with HUD and CoE stakeholders, and begin process and technology design	Due: Within 10 calendar days after award. Criteria: HUD acceptance of the first and following drafts.

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DRAFT RFQ - HUDCentral Contact Center

		and setup.	
Configuration Management Plan	Objective 5: Implementation of best-in-class technologies and tools	Strategy for designing and deploying new technical tools for HUDCentral (e.g., CRM, chatbot), including staff resourcing and risk management.	<p>Due: Within 30 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Change Management Plan	Objective 6: Project and Change Management	Approach for engaging all stakeholders to shift incentives, expectations, and culture, building on the Change Management plan established in Phase One.	<p>Due: Within 30 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Communications Plan	Objective 6: Project and Change Management	Strategy that outlines HUDCentral's target internal and external audiences, target messages, and target communications channels to drive information and buy-in.	<p>Due: Within 30 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Enterprise-wide KM Plan	Objective 1: Development of a robust knowledge management solution	Methodologies, processes and procedures for effective KM, including those	<p>Due: Within 45 calendar days after award.</p>

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DRAFT RFQ - HUDCentral Contact Center

		required for developing, operating, and maintaining the required knowledge and case management databases to support contact center operations.	Criteria: HUD acceptance of the first and following drafts.
Contact Center Operations Management Plan	Objective 4: Contact center operations optimization	Plans and procedures for managing staff, facilities, equipment and processes effectively, including automated and attended functions, automated voice response script design and maintenance, call routing design and management, workforce scheduling and management, and service delivery strategies.	Due: Within 60 calendar days after award. Criteria: HUD acceptance of the first and following drafts.
Continuous Improvement Plan	Objective 6: Project and Change Management	Approach for implementing service improvements throughout the life of the contract,	Due: Within 60 calendar days after award. Criteria: HUD acceptance of the

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DRAFT RFQ - HUDCentral Contact Center

		including staffing, training, operations, technology, contract deliverables, performance management, process engineering, service delivery, service improvements, and customer satisfaction.	first and following drafts.
Customer Experience Plan	Objective 2: HUD customer experience improvement	Strategy for aligning HUDCentral's customer experience with HUD and the Customer Experience CoE's overall customer strategy, including details on plans, procedures, and schedules for surveying customers.	<p>Due: Within 60 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
System Security Plan	Objective 5: Implementation of best-in-class technologies and tools	Overview of the security requirements for the information and information technology systems and	<p>Due: Within 60 calendar days after award.</p> <p>Criteria: HUD acceptance of the</p>

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DRAFT RFQ - HUDCentral Contact Center

		describes the existing or planned controls (management, operational, and technical) for meeting those requirements. The plan must also describe the systems and delineate responsibilities and expected behavior of individuals who access the systems.	first and following drafts.
Quality Control Plan	Objective 2: HUD customer experience improvement	Procedures for maintaining effective quality assurance and service improvement programs, including monitoring and assessing performance and service activities and managing work from home capabilities to ensure quality services are provided to customers.	<p>Due: Within 90 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>

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DRAFT RFQ - HUDCentral Contact Center

Risk Management Plan	Objective 6: Project and Change Management	Strategy to identify and mitigate potential threats (e.g., service outage, unexpected surge in call volume, Federal government closure), including risk identification, risk quantitative and qualitative assessments, risk monitoring and control and risk review.	<p>Due: Within 90 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Workforce Management Plan	Objective 4: Contact center operations optimization	Plans, procedures, and methodologies for training and staffing contact center employees, including the types and schedule of training to be provided, criteria for selecting instructors and evaluation assessment methods.	<p>Due: Within 90 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Data Analysis and Reporting Plan	Objective 3: Application of robust data analytics	Outline of plan, policies, and procedures to monitor, capture, analyze and report daily, weekly,	<p>Due: Within 90 calendar days after award.</p> <p>Criteria: HUD acceptance of the</p>

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DRAFT RFQ - HUDCentral Contact Center

		monthly, quarterly and annually on HUDCentral in a way that provides value to HUD and aligns with the Data Analytics CoE's strategy.	first and following drafts.
Test-and-learn Proposals (one per year)	Objective 5: Implementation of best-in-class technologies and tools	Proposal to pilot a new innovation within HUDCentral that includes use case, benchmarks, goals, methodology for testing the use case, success measures, timeline, mechanism to track and measure performance, and approach for full implementation if the test- and-learn is successful.	<p>Proposal 1 due: Within 90 calendar days after award.</p> <p>Proposal 2 due: Within 60 calendar days after option period 1, if exercised.</p> <p>Proposal 3 due: Within 60 calendar days after option period 2, if exercised.</p> <p>Proposal 4 due: Within 60 calendar days after option period 3, if exercised.</p> <p>Proposal 5 due: Within 60 calendar days after option period 4, if exercised.</p> <p>Criteria: HUD acceptance of the</p>

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DRAFT RFQ - HUDCentral Contact Center

			first and following drafts; Projected impact and reasonableness of timeframe, cost, and scope.
Transition-out Plan	Objective 6: Project and Change Management	Activities to be performed when a contract ends or is transferred to a new Contractor or back to HUD, including transition of project data, documentation, and knowledge to ensure seamless continuation of day- to-day operations.	<p>Due: Within 120 calendar days after award.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Standard Operating Procedures	Objective 4: Contact center operations optimization	Detailed guides to performing all HUDCentral processes, such as administrative processes, performance management, customer feedback, system usage, and knowledge article creation.	<p>Due: Within 180 calendar days after award, refreshed fifteen calendar days after the end of each quarter.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Live Chat Deployment	Objective 5: Implementation of best-in-class	Online software that facilitates text support via a CSR	<p>Due: Within 180 days after award.</p>

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DRAFT RFQ - HUDCentral Contact Center

	technologies and tools		Criteria: HUD acceptance of functionality over a period of 30 days.
Customer Relationship Management Deployment	Objective 5: Implementation of best-in-class technologies and tools	Platform to process and analyze customer data across HUD, including platform configuration according to HUD's requirements	Due: Within 180 days after award. Criteria: HUD acceptance of functionality over a period of 30 days.
Voice Over Internet Protocol Telephony Deployment	Objective 5: Implementation of best-in-class technologies and tools	Digital telecommunication s infrastructure that transfers voice signals via the internet	Due: Within 180 days after award. Criteria: HUD acceptance of functionality over a period of 30 days.
Short Message Service / Multimedia Messaging Service Deployment	Objective 5: Implementation of best-in-class technologies and tools	Technology to send and receive files over telecommunication s networks	Due: Within 180 days after award. Criteria: HUD acceptance of functionality over a period of 30 days.
Migration of Federal Housing Authority Resource Center to HUDCentral	Objective 4: Contact center operations optimization	Transition of all contacts and knowledge content and retirement of legacy contact channels	Due: Within 270 days months after award. Criteria: HUD acceptance of the transition of all contacts and knowledge content, continuous

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DRAFT RFQ - HUDCentral Contact Center

			functionality of all HUDCentral Contact Center Tools (e.g., CRM, live chat) over a period of 30 days.
Knowledge Management Solution	Objective 1: Development of a robust knowledge management solution	System to organize and share HUD content enterprise-wide, including platform configuration and population (with migrated and new content)	<p>Due: At the end of the base period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Migration of Real Estate Assessment Center Technical Assistance Center to HUDCentral and Multifamily Housing End User Support Services to HUDCentral	Objective 4: Contact center operations optimization	Transition of all contacts and knowledge content and retirement of legacy contact channels	<p>Due: At the end of the base period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of the transition of all contacts and knowledge content, continuous functionality of all HUDCentral Contact Center Tools (e.g., CRM, live chat) over a period of 30 days.</p>
Migration of Public and Indian	Objective 4: Contact center	Transition of all contacts and	Due: Should the option be

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DRAFT RFQ - HUDCentral Contact Center

Housing Information Resource Center and Multifamily Housing Clearinghouse to HUDCentral	operations optimization	knowledge content and retirement of legacy contact channels	<p>exercised, within 60 days after the start of the first option period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of the transition of all contacts and knowledge content, continuous functionality of all HUDCentral Contact Center Tools (e.g., CRM, live chat) over a period of 30 days.</p>
Migration of Field Office Lines and Program-Specific Contact Channels to HUDCentral	Objective 4: Contact center operations optimization	Transition of all contacts and knowledge content and retirement of legacy contact channels	<p>Due: Should the option be exercised, within 150 days after the start of the first option period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of the transition of all contacts and knowledge content, continuous functionality of all HUDCentral Contact Center Tools (e.g., CRM,</p>

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DRAFT RFQ - HUDCentral Contact Center

			live chat) over a period of 30 days.
AI Chatbot Deployment	Objective 5: Implementation of best-in-class technologies and tools	Computer program using artificial intelligence to address service requests via text	<p>Due: Should the option be exercised, within 180 days after the start of the first option period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of continuous functionality over a period of 30 days.</p>
Intelligent Interactive Voice Response Deployment	Objective 5: Implementation of best-in-class technologies and tools	AI-based software used to route customer calls and respond to service requests via a recorded voice	<p>Due: Should the option be exercised, within 180 days after the start of the first option period (see section 1.7.4 for detailed timeline).</p> <p>Criteria: HUD acceptance of continuous functionality over a period of 30 days.</p>

1.10 Order type

The Government intends to issue a {{contract-type}} task order under an existing contract under {{vehicle}}, {{SIN}}: {{SIN-title}}, and all quotes must be submitted on that basis. The Government estimates the cost of services to range from \$XXX to \$XXX for the aggregate cost of the POP.

2.0 Special Instructions

2.1 Questions

All questions concerning this RFQ must be submitted electronically through this **RFQ Questions & Answers Google Form** by the deadline provided on the cover page.

Questions should be written in a way that enables clear understanding of the contractors' issues or concerns. Statements expressing opinions, sentiments, or conjectures are not considered valid inquiries and will not receive a response. Further, contractors are reminded that the Government will not address hypothetical questions aimed at receiving a potential "evaluation" decision.

Answers will be provided via an amendment to the RFQ. Similar questions may be answered by referring to a previous answer for efficiency.

2.2 Quotation requirements

A complete quote must include complete responses, by the dates and times listed on the cover sheet, to the Technical Challenge Question form, the Technical Volume form and the Pricing Volume form.

2.3 Conflicts of Interest

2.3.1 Potential Organizational Conflicts of Interest (OCI) statement

No award will be made until any potential conflict of interest has been neutralized or mitigated to the satisfaction of the CO in accordance with FAR Subpart [9.5 - Organizational and Consultant Conflicts of Interest](#). Acknowledgement of this statement is to be made within the Technical Volume submission.

2.3.2 Conflicts of interest between Phase One and Phase Two at HUD

If a contractor performed work in a specific functional area during discovery and assessment (Phase One) at HUD, they will not be able to receive an award in that same functional area during implementation (Phase Two). However, if a contractor performed

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DRAFT RFQ - HUDCentral Contact Center

work in a specific functional area during discovery and implementation (Phase One) at HUD, they may be able to submit a quote against a different functional area during implementation (Phase Two) at that same agency as long as they submit a mitigation plan and that mitigation plan is accepted by the CO.

2.4 Communications before award

The contractor must direct all communications to the CO.

3.0 Basis of Award

This procurement is being conducted in accordance with FAR Subpart 8.4 - Federal Supply Schedules. This is not a FAR Part 15 - Contracting by Negotiation, procurement. All submissions in response to this RFQ are considered quotations and proposals or offers, even if labeled as such. The contractors will be required to agree to and be bound by all instructions, procedures, and rules of this RFQ. The Government is not obligated to determine a competitive range, conduct discussions, solicit final revised quotations, or use other techniques associated with FAR Part 15. The contracting techniques associated with FAR Subpart 15.3 do not apply.

3.1 Best value trade-off

The Government will evaluate quotes that are technically acceptable on a competitive best value basis using a trade-off between technical and price factors. Technically acceptable submissions will be evaluated based on four (4) evaluation factors. These factors are:

1. Technical Approach
2. Management Approach
3. Similar Experience
4. Price

The three (3) technical, non-price evaluation factors, when combined, are significantly more important than price. The Government may make an award to an Offeror that demonstrates an advantage with respect to technical, non-price factors, even if such

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DRAFT RFQ - HUDCentral Contact Center

an award would result in a higher total price to the Government. The importance of price in the evaluation will increase with the degree of equality between Offerors with respect to the non-price factors, or when the Offeror's price is so significantly high as to diminish the value to the Government of the Offeror's advantage in the non-price factors.

3.2 Evaluation approach

The Government intends to utilize a phased approach for this procurement. To be considered for award, contractors must successfully pass through each phase. The technical evaluation will be made up of the following phases:

1. **First Phase:** Technical Challenge
2. **Second Phase:** Technical Volume, consisting of the Technical Approach, Management Approach, and Similar Experience
3. **Third Phase:** Oral Interview

While pricing will be evaluated separately from the technical volume, it will be evaluated concurrently with the same.

3.3 Evaluation scale

3.3.1 First Phase

A contractor's ability to approach work similar to that envisioned by this solicitation will be evaluated on an **Acceptable/Unacceptable** basis. To be considered "Acceptable", the Contractor must respond to the following:

CHALLENGE QUESTION WILL BE PLACED HERE.

Responses should address a contractor's approach and methodology to establishing the HUDCentral Contact Center.

Contractor quotes failing to achieve an "Acceptable" rating will not be further evaluated.

3.3.2 Second Phase

A contractor's Technical Approach will be evaluated using the following ratings:

- **Exceptional:** Quotations receiving an "Exceptional" rating will explain how specific methods or techniques will be used by the contractor to successfully achieve each performance objective associated with this solicitation. Further, "Exceptional" quotations will specify methods or techniques that will allow the contractor to exceed all performance objectives in a specific way that benefits the Government. Finally, "Exceptional" quotations will explain how the methods or techniques to be used by the contractor are free from issues requiring Government intervention to address.
- **Good:** Quotations receiving a "Good" rating will explain how specific methods or techniques will be used by the contractor to successfully achieve each performance objective associated with the solicitation. Further, "Good" quotations will specify methods or techniques that will allow the contractor to at least meet all performance objectives. Finally, "Good" quotations will explain how the methods or techniques to be used by the contractor either free from issues identified during evaluation, or are associated with issues determined during evaluation to be correctable. A quotation identifying methods or techniques that exceed all performance objectives will receive no better rating than a "Good" rating if that quotation contains correctable issues.
- **Poor:** Quotations receiving a "Poor" rating fail to meet the basic requirements of this solicitation. A quotation that fails to explain how specific methods or techniques will be used by the contractor to successfully achieve any performance objective associated with the solicitation will receive a "Poor" rating. A quotation that specifies methods or techniques that fail to meet all performance objectives, or a quotation that contains uncorrectable issues will receive a "Poor" rating.

A contractor's Management Approach and Similar Experience will be evaluated using the following ratings:

- **Very Likely:** Management approach and similar experience indicate that the contractor is very likely to perform the technical approach as proposed.

Contractor's approach mitigates all identified risks; demonstrates exceptional control over the proposed personnel or team; and, displays substantial experience in the performance of similar requirements.

- **Likely:** Management approach and similar experience indicate that the contractor is likely to perform the technical approach as proposed. Contractor's approach mitigates most identified risks; demonstrates satisfactory control over the proposed personnel or team; and, displays some experience in the performance of similar requirements.
- **Unlikely:** Management approach and similar experience indicate that the contractor is unlikely to perform the technical approach as proposed. Contractor's approach does one of more of the following: mitigates few to none of the identified risks; demonstrates unsatisfactory control over the proposed personnel or team; or, displays little to no experience in the performance of similar requirements.

Contractor quotes failing to achieve at least "Good" and "Likely" ratings in all rated factors will not be further evaluated.

3.3.3 Third Phase

The portions of the oral interviews that are technical in nature, they will be evaluated according to the same scale as the Technical Approach and PWS submissions, outlined in 3.3.2, above. The portions of the oral interviews that are related to the management approach or similar experience, they will be evaluated according to the same scale as the Management Approach and Similar Experience submissions, outlined in 3.3.2, above.

4.0 Submission instructions and processes

4.1 Submission instructions

To satisfy each required factor, the contractor must submit the following:

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DRAFT RFQ - HUDCentral Contact Center

1. **Technical Challenge Question Google Form** - The response must include answers to all the required questions.
2. **Technical Volume Google Form** - The response must include answers to all the required questions in the Technical Approach, Management Approach (which will include Contractor Teaming Arrangement (CTA) / Subcontractor questions), and the Similar Experience sections.
3. **Pricing Volume Google Form** - The response must include an attached Pricing Sheet using the Excel template provided.

Please note: For any questions that indicate a character limitation, Google Forms considers punctuation (e.g., commas, semi-colons, quotation marks, etc.) and spaces as characters.

The contractor must also accept and understand the following:

- If any contractor has made any assumption as part of their quotation, they must identify and explain such assumptions in their Technical Volume submission. If technical assumptions are not noted, it will be expected that the contractors quotation reflects no technical assumptions for award and agrees to comply with all of the terms and conditions set forth in the solicitation. It is not the responsibility of the Government to seek out and identify any assumptions, conditions, or exceptions for each contractor's quotation.
- Contractors taking exception to any terms and conditions of the RFQ will not be considered for award.
- Incomplete quotes will be considered unacceptable and will not be further evaluated.
- Quotations must be submitted pursuant to the deadlines provided on the cover sheet, above.

4.2 Technical Challenge Question submission process

Contractors are required to submit a response to the Technical Challenge Question via a Google Form. **This sentence will be a link to the Google Form and published via an amendment that will be posted no earlier than two business days before the close of the response period.**

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DRAFT RFQ - HUDCentral Contact Center

The Technical Challenge Question response will be submitted as part of the overall quote and will be limited to 3000characters (about 1 page).

4.3 Technical volume submission process

Contractors are required to submit a response to this **Technical Volume Google Form**.

The Technical Volume response will be submitted as part of the overall quote. Various questions have various character limitations, outlined in the description of the relevant questions.

4.3.1 Technical Approach

The contractor must demonstrate their understanding of the Government's requirements by addressing individually and fully their technical understanding of the needs outlined in this solicitation and the technical methodology they will use to address those needs. The contractor's responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation. In particular, the contractor must demonstrate their contact center expertise and experience in 1) systems enablement and support, 2) IT governance and security, 3) operations and management, 4) training support, 5) management and staffing, 6) knowledge management, and 7) transition-in. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful.

4.3.2 Management Approach

The contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill this requirement, and what skill sets, roles, and responsibilities of the individuals involved on their team. If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the objectives outlined within the solicitation, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required

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DRAFT RFQ - HUDCentral Contact Center

and will be confirmed. The contractor should identify all associated risks, and provide their strategy to mitigate each risk.

4.3.3 Similar Experience

This criteria considers the extent of the contractor's experience as a firm in providing like or similar services. The contractor must explain in a detailed narrative how the characteristics of the selected experience are related to this solicitation. The contractor must detail its similar experience in a maximum of three (3) contracts, either public or private experience, that reflects and identifies experience on projects currently being performed or which has been completed within the last three (3) years. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

4.4 Pricing volume submission process

The contractor is required to submit a response to this **Pricing Volume Google Form**.

The Pricing Volume response will be submitted as part of the overall quote. The main requirement is to use this **Pricing Sheet template**, without editing the structure, and submitting it in response to the appropriate question.

Prices submitted should reflect the following:

- Contractors are encouraged to provide discounts on their contract rates without compromising quality.
- Prices submitted should map to a contractor's GSA Price List.
- GSA Price Lists for the last three (3) years should be provided for verification that pricing does not exceed schedule pricing.

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DRAFT RFQ - HUDCentral Contact Center

- If submitting a quote as a CTA, each member must submit their GSA Price Lists for the last three (3) years as well.
- Evaluation of options under FAR [52.217-8](#) will be accomplished by using the prices offered for the last option period to determine the price for a 6-month option period, which will be added to the base and other option years to arrive at the total price. Evaluation of options will not obligate the Government to exercise the option(s).

4.5 Oral interview process

The oral interview associated with this RFQ does not and will not constitute discussions or negotiations as defined in FAR Part 15. The Government will not determine a competitive range, conduct discussions, nor solicit or allow revised quotes. The entire oral interview will be conducted remotely via video conference. Contractors must not bring or present slides, graphs, charts, or any other written or visual presentation materials nor will the Government accept or receive such materials.

Agenda Item	Time Allotted
Team Introductions	5 minutes
Interview	30 minutes
Government Question and Answers	10 minutes

4.5.1 Interview

The interview will consist of the contractor answering the Government's core questions related to the contractor's Technical Volume submission. While the technical factors are identified in the RFQ, the core questions are not. The questions are related to the contractor's technical understanding and methodology, management approach, and similar experience. This part of the interview will not exceed 45 minutes.

4.5.2 Government Question and Answer

During this time, the Government may ask questions on any information that had been presented by the contractor that the Government feels is unclear or needs elaboration.

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DRAFT RFQ - HUDCentral Contact Center

The Government questions may differ among the contractors based on what needs elaboration.

4.5.3 General Information

4.5.3.1 Location

The interview sessions will be conducted by video chat, though audio may be substituted as needed. The Government will coordinate and set up the virtual meeting space accordingly (by providing dial-in or links).

4.5.3.2 Date and Time

The Government will schedule the date and time of the interview with each contractor after the RFQ closing date and receipt for technical understanding and methodology of “Good” or “Exceptional” and “Likely” or “Very Likely” for management approach and similar experience submissions. The Government reserves the right to reschedule any contractor’s interview date at the discretion of the CO.

4.5.3.3 Participants

Contractors may include as many participants as it feels is necessary. Contractors are advised to have technical personnel present since the Government will ask technical questions during the interview. Type and number of participants included is at the contractor’s discretion and is the full responsibility of the contractor. All proposed personnel currently employed by the quoter or its teaming partners must attend the session. The Government is most interested in hearing from staff that will have a direct role in performing on the task. After the oral interview, contractor must provide an email to confirm attendance with names of participants to the meeting organizers to the CO.

5.0 Administration

5.1 Points of Contact (POC)

The Government team consists of the CO, the Contracting Officer’s Representative (COR), the Alternate Contracting Officer’s Representative (ACOR), a CoE Lead, and (if applicable) a Technical POC (TPOC).

The CO for this buy is {{CO-name}}. Questions, comments, issues, or responses must be submitted through the methods outlined in this solicitation. Any other forms of communication will not be considered. After award, the CO will delegate most of the day-to-day tasks to the COR, ACOR, CoE Lead, and (if applicable) TPOC.

A delegation letter for both the COR and ACOR will be provided to the awardee, outlining the contractual roles and responsibilities of the COR and ACOR. The roles and responsibilities of the CoE Lead and TPOC will be provided no later than the kickoff meeting that will follow award. The names and email addresses of the entire team will also be provided no later than the kickoff meeting as well.

5.2 Key Personnel

5.2.1 Roles

The Contractor must designate Key Personnel for this project.

At a minimum, key personnel must have the following qualifications:

1. 5 years' experience supporting government program-focused (as opposed to IT helpdesk-focused) contact centers.
2. Subject matter expertise in contact center operations and familiarity with contact center terminology, best practices, standards, and technologies.
3. Outstanding written and verbal communications skills, including demonstrated experience creating concise, visually-pleasing deliverables and giving presentations for various types of audiences (from CSRs to government executives).
4. Adaptability to changing circumstances, as well as a proactive approach to overcoming potential blockers and mitigating risks.
5. Demonstrated experience developing contact center Standard Operating Procedures (SOPs).
6. Demonstrated experience developing and managing a KM solution for contact centers.

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DRAFT RFQ - HUDCentral Contact Center

5.2.2 Substitutions

Key Personnel substitutions must be approved by the Government in writing, and will only be justified by the Government request, sudden illness, death, change of employment, or termination of employment for cause. Contractor requests for a substitution of Key Personnel must include a detailed explanation of the justifying circumstances, and a complete résumé for the proposed substitute or addition, including skills, experience, education, training, and security level. The Government's failure to approve a proposed substitution will not constitute grounds for non-performance by the Contractor, or form a valid basis for any claim for money or any equitable adjustment.

5.3 Quality management

The method of quality verification that will take place for each deliverable is outlined in the deliverables table in section 1.3.2, above. The method of quality verification for overall Contact Center operations is outlined in section 1.8.4, including SLAs in section 1.8.4.2.

5.4 Travel and Per Diem

Travel is anticipated as part of performance during the base period (year 1). Travel will likely consist of visits to HUD's regional offices by the Contractor PM, who will be accompanying Government HUDCentral leadership.

If authorized as part of performance and as approved by the CO, COR, or ACOR, travel expenses may be reimbursed in an amount no higher than that allowed by [Federal Travel Regulations](#) (FTR) in effect at the time of travel. This contract designates \$10,000.00 to meet these travel obligations. Normal commuting expenses, including but not limited to commuting expenses between GSA's headquarters and HUD's headquarters or the contractor's office, are not allowed per the FTR.

If approved in writing by both the CO and COR or ACOR before incurring such travel expenses, to be reimbursable, expenses must be:

- Allowable under the FTR;

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DRAFT RFQ - HUDCentral Contact Center

- Approved by the CO and COR/ACOR prior to travel expenditure; and,
- Allocable and necessary to the services under this order.

Contractor must submit and receive “request for travel” approval from the CO and COR or ACOR at least two (2) weeks prior to the anticipated time of the travel, and must identify:

- Name of the traveler;
- Destination(s) including itinerary;
- Purpose of the travel; and,
- Cost breakdown.

Invoices for travel expenses must include original or legible copies of receipts as prescribed in the FTR including, but not limited to, the following:

- Actual airfare or other public conveyance expenses;
- Transportation including car rental expenses for each rental day; and,
- Lodging expenses.

Any burden added to the travel cost will be allowed only as defined in the contractor’s standard accounting practice or disclosure statement.

5.5 Badge and Key Control

The contractor must ensure that all keys and/or badges issued to contractor support personnel are accounted for and controlled. At a minimum, the contractor must be responsible for the following:

1. Ensuring keys and badges are only used by the contractor’s employees.
2. Prohibiting the opening of locked areas by the contractor’s employees to permit entrance of persons other than the contractor or appropriate Government employees engaged in the performance of assigned work in those areas.
3. Ensuring keys and badges issued to the contractor by the Government are not duplicated.
4. Ensuring keys and badges issued by the Government are not lost or misplaced.

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DRAFT RFQ - HUDCentral Contact Center

5. Reporting the loss of any key or badge in writing to the COR and ACOR within six (6) hours of occurrence or at the beginning of the next scheduled workday, whichever occurs first.
6. In the event of a conflict between these requirements and those of a specific agency, the specific agency requirements must prevail.

5.6 Hours of Operation

HUDCentral will be operational five days a week (Monday to Friday), from 7:00 am EST to 10:00 pm EST. The Contractor is expected to provide service during these hours 250 days a year, which excludes 10 federal holidays. Automated services (e.g., IVR, AI chatbot) must be used to provide unattended service 24 hours a day, seven days a week, 365 days a year.

Key personnel and other management personnel (e.g., Change Management Specialist, Quality Assurance Manager, Workforce Manager) are at a minimum expected to provide support between the hours of 9 am to 5 pm Monday through Friday, though this may vary depending on circumstances. Personnel must be on duty at these times at the identified place(s) of performance necessary to provide the support services described. However, exceptions to these guidelines may be required as approved by the CO, COR, ACOR, CoE Lead, TPOC, or other individual identified by the CO, COR, or ACOR.

5.7 Transparency Policy

Contractors are advised that the Government reserves the right to publish documents associated with this acquisition on a publicly-available website, including any RFQs or their amendments, as well as question and answer exchanges with contractors without source-identifying information removed. The Government reserves the right to publish any other relevant information that is not confidential or proprietary in nature, but will not publish any source-selection sensitive information that would otherwise implicate procurement integrity concerns.

Upon award, the Government may publish the total price of the selected quotation and certain non-source-identifying data (e.g. the number of bids, the mean price, the

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DRAFT RFQ - HUDCentral Contact Center

median, and the standard deviation of price). During the performance of this order, the Government may similarly publish data related to project management (e.g. user stories, milestones, and performance metrics) and top-line spending data.

5.8 Data Rights and Ownership of Deliverables

It is the CoE's intent that any data or deliverable created as a result of the work performed under this order, be committed to the public domain, if reasonable.

It is the intention of the CoE to consider committing the following items, among other items created during the period of performance, to the public domain: all data, documents, graphics, and code created under this call order including but not limited to, plans, reports, schedules, schemas, metadata, architecture designs, and the like; new open source software created by the contractor and forks or branches of current open source software where the contractor has made a modification; new tooling, scripting configuration management, infrastructure as code, or any other final changes or edits to successfully deploy or operate software.

The contractor must use open source technologies wherever possible. All licenses must be expressly listed in the deliverable. Regardless of license(s) used (e.g., MIT, GPL, Creative Commons 0), the license(s) must be clearly listed in the documentation.

If an open source license provides implementation guidance, the contractor must ensure compliance with that guidance. If implementation guidance is not available, the contractor must attach or include the license within the work itself. Examples of this include code comments at the beginning of a file or contained in a license file within a software repository.

If the contractor needs to use work that does not have an open source license, the contractor is required to request permission from CoE, in writing, before utilizing that work in any way in connection with the order. If approved, all licenses must be clearly set forth in a conspicuous place when work is delivered to CoE and must be owned, without any restrictions, by the Government.

5.9 Non-disclosure of Sensitive and Proprietary Information

The contractor must protect from unauthorized disclosure any materials or information made available by the Government, or that the contractor has access to by virtue of the provisions of this order, that are not intended for public disclosure. This includes disclosure to individuals within the contractor's company who are not specifically assigned to work on this order. To affirm and acknowledge this responsibility, the contractor must sign a "Non-Disclosure Agreement" to cover the entity itself.

All contractor employees assigned to perform under this order must sign a "Non-Disclosure Agreement and Conflict of Interest Statement", affirming and acknowledging that the information, technical data or proprietary software to be made available in the performance of this order are restricted for Government use only. The Non-Disclosure Agreement and Conflict of Interest Statement is a permanent agreement and must survive the employee's employment by the contractor. The Non-Disclosure Agreement and Conflict of Interest Statement must be signed by contractor employees prior to any work commencing on this order.

In the event that this order requires the contractor to gain access to the proprietary or sensitive information of Government agencies or organizations, the contractor must be required to execute written agreements with those entities, to protect the information from unauthorized disclosure and refrain from using it for any purpose other than for which it was furnished. A copy of all executed agreements must be delivered to the CO.

At the conclusion of the order, contractor representatives will conduct a thorough audit of the contractor's facilities/files to ensure that no unauthorized information, technical data, or proprietary software exists in its possession.

5.10 Electronic invoicing process

GSA employs Electronic Commerce in Contracting to the maximum extent practicable. Contractors must use the GSA Assisted Acquisition Service Business System (ASSIST), also known as IT Solutions Shop (ITSS), at <https://portal.fas.gsa.gov> to

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DRAFT RFQ - HUDCentral Contact Center

submit invoices. All invoice information, to include attached documents, must be submitted to ASSIST via the Central Invoice Service (CIS).

For each invoice, the contractor must complete the required fields provided in ASSIST CIS and must attach a copy of the invoice. Assistance in using the GSA ASSIST CIS application and answers to related questions may be obtained via email at aasbs.helpdesk@gsa.gov or by calling (877) 472-4877.

The Invoice Form will include all active Contract Line Item Number(s) (CLIN) on the contract. The contractor must enter the invoice amount in dollars and cents for each CLIN.

Additional instructions may be provided by the CO, COR, or ACOR, immediately following the award of the contract or during contract administration to further enhance the use of Electronic Commerce in Contracting or to ensure compliance with GSA requirements or policies.

6.0 Clauses

FAR 52.252-1 -- SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address(es):

<https://www.acquisition.gov/browsefar>

(End of provision)

52.217-5 Evaluation of Options (July 1990)

This is a Request for Information (RFI) only. This is not a Request for Quote (RFQ), Request for Proposal (RFP), or any other type of request for an offer. This is a market research function and does not represent a commitment by the Government to issue a solicitation or award a contract.

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This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Applicable clauses in the quoter's Schedule contract flow-down into this order.

FAR 52.252-2 -- CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): (<https://www.acquisition.gov/browsefar>)

(End of clause)

FAR 52.203-18 Prohibition on Contracting with Entities that Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

FAR 52.203-19 Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (JAN 2017)

GSAR 552.212-4 - Contract Terms and Conditions—Commercial Items (Feb 2018)(DEVIATION FAR 52.212-4)

GSAR 552.232-39 Unenforceability of Unauthorized Obligations. (FAR Deviation Feb 2018)

GSAR clause 552.238-82, Special Ordering Procedures for the Acquisition of Order-Level Materials

FAR 52.232-18 Availability of Funds (APR 1984)

Funds are not presently available for this contract. The Government's obligation under this contract is contingent upon the availability of appropriated funds from which payment for contract purposes can be made. No legal liability on the part of the Government for any payment may arise until funds are made available to the Contracting Officer for this contract and until the Contractor receives notice of such availability, to be confirmed in writing by the Contracting Officer.

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FAR 52.217-8 - Option to Extend Services (Nov 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within 5 calendar days before the contract expires.

(End of clause)

FAR 52.217-9 - Option to Extend the Term of the Contract (Mar 2000)

- (a) The Government may extend the term of this contract by written notice to the Contractor within 5 days provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 15 days before the contract expires. The preliminary notice does not commit the Government to an extension.
- (b) If the Government exercises this option, the extended contract shall be considered to include this option clause.
- (c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 5 years.

(End of clause)

7.0 Appendix

7.1 CC Phase I Artifacts

Please see [the file](#) with the same file name as the heading above in [our acquisition repository](#).

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