



# REQUEST FOR PROPOSAL

Upper Cumberland Electric - UCEMC

## Abstract

Seeking Proposals for a Modern Help and Service Desk Solution for the 21st Century

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## Background

Incorporated in 1938, the Upper Cumberland Electric Membership Corporation (UCEMC) was founded with a desire to deliver power to rural and developing communities in the Upper Cumberland area. Growing from a base of 2,951 members in 1939 to over 50,000 members today, UCEMC is proud to serve its communities with reliable electricity with excellent service.

When Upper Cumberland Electric was formed in 1938, it was done to serve rural communities when power companies refused to provide power to these communities. UCEMC was formed as a cooperative, meaning each member owns it - not stockholders. Because of Upper Cumberland Electric's position as a cooperative, its members demand high-quality, reliable service and management to ensure the homes and businesses under UCEMC's stewardship thrive.

## Objective

Upper Cumberland Electric seeks to implement a service/help desk to improve the member experience. The project seeks to lower the cost of member transactions, improve member and customer satisfaction through lowering time to serve, and create a modern help desk infrastructure to handle current and future needs. Additionally, the help desk project should establish a training protocol for all future employees, and allow UCEMC to eventually move towards a more self-service business model through implementation of automated tools and services.

## Scope of Service

Upper Cumberland Electric is expecting respondents will submit proposals that meet or exceed the use-cases of the following in-scope services:

- Providing transparency of UCEMC information to members and regulators such as outages, power usage and costs, and appointment dates while maintaining or improving upon current security.
- Providing service to members through accessible means such as telephone service, website and/or app communication
- This service should allow members access to services such as on-site appointments, or administrative tasks related to a member's account
- Installation of the service/help desk software
- Briefing and/or training of users and staff
- Assigning tickets to the correct departments and employees
- Creating a persistent queue or several queues of tickets based on the time a service was scheduled, with the ticket order changing based on issue severity
- The software must handle tickets via software using chatbots or other automated services, and hand off the ticket to local UCEMC employee who can resolve the issue if needed.
- The software should track metrics on the tickets such as response time, ticket resolution, and/or any additional metrics for internal and external auditors of UCEMC such as the TVA

## Proposal Requirements

Upper Cumberland Electric expects that respondents provide a proposal that meets or exceeds the following requirements:

- Company name, address and primary contact(name, office phone number, and email address)
- Description of the organization and the team assigned to the project, relevant past projects, and any relevant qualifications
- Description of the proposed solution along with estimated total cost and cost per member
- Estimated project timeline including milestones that UCEMC is needed for communication, collaboration, or implementation
- Potential problems the team is planning for, its proposed solutions and timeline changes should these problems arise
- Total cost of ownership analysis for your solution and the anticipated return on investment
- Provide 2 case studies or examples of similar projects with names and contact information as references

## Evaluation Criteria

UCEMC is expecting respondents to provide a proposal that meets the following criteria to best serve its members:

- Low Cost of Implementation
- Degree of Automation to both reduce cost of new employees and training, and to future-proof UCEMC's infrastructure.
- Accessibility for members on both Web and Mobile platforms
- Knowledge base for common questions or issues
- Dashboard for both members and employees that provides easy access to customer services including but not limited to; bill payment, service cancellation, appointment scheduling, viewing member account details, and connecting with a UCEMC help desk employee or chatbot
- Dashboard for internal users that provides current tickets that need to be resolved and provides specific info for the issue
- Ability to generate reports for internal use by UCEMC or external users like regulators or the TVA that displays metrics for UCEMC's performance for its members, and relevant costs and power usage.

## Hardware Requirements

- Computers with the helpdesk software will have minimum specifications of:
  - CPU: 4GHz Multi-core
  - Memory: 8GB DDR4 RAM
  - Storage: 500GB SSD
  - OS: Windows 10 version 22H2
  - Connection via MAN to Servers in UCEMC's headquarters(computers will not be outside of UCEMC's service range, so a WAN is not needed)
  
- Persistent Storage Solution for Tickets will be handled on-site at a server located at the Cookeville Office, with 2 Redundancy Servers set up in UCEMC's region. These servers will be used to reduce costs for UCEMC's members without having an outflow to cloud-based solutions. These servers currently have specifications of:
  - Processors: 2 2.4GHz CPU's in a dual-socket configuration to handle heavy traffic load
  - Memory: 256 GB DDR4 RAM(~5MB per user for heavy load)
  - Storage: 4TB of SSD storage for storing currently used data and metrics
  - Storage: 20TB of HDD storage for backups and past data and metrics
  - OS: Windows Server 2022(10.0.20348.1787 (June 13, 2023))

## Award of Contract

Upper Cumberland Electric will follow the schedule below for the contracting process:

**July 7<sup>th</sup>, 2023** - RFP Issuance Date

**July 14<sup>th</sup>, 2023** - Q&A Session for Respondents

**July 28<sup>th</sup>, 2023** - Respondent Proposals Due

**August 11<sup>th</sup>, 2023** - Selection of Top 3 Proposals will be Announced, In-Person Presentations will be scheduled.

**Week of August 18<sup>th</sup>, 2023** - Presentations for Respondent Proposals

**August 25<sup>th</sup>, 2023** - Award of Contract to Top Respondent and begin the contracting process

**September 15<sup>th</sup>, 2023** - anticipated start date for project

All questions related to this RFP must be directed to John Smith, Vice President of Procurement by email to: [johnsmith@ucemc.org](mailto:johnsmith@ucemc.org) or by telephone at 505-842-5662