

California SAWS Consortium IV



County Purchase MT-01-2012 Monterey County - Contact Center Technology Deployment



I. Overview:

Pursuant to Section 6.11 of the Amended and Restated Revised System Agreement between the California SAWS Consortium IV Joint Powers Authority (“Consortium”) and Accenture LLP and Proquire, LLC, with an effective date of June 29, 2007 (as amended, the “Agreement”), Monterey County (“Monterey”) would like utilize C-IV Contact Center services. The scope of the Project consists of services, hardware, software and recurring maintenance and production support charges, as further described in this County Purchase order.

The scope of the Service Center Project and this County Purchase consists of the following:

- Costs associated with the Services required to deploy the C-IV Contact Center technology within Monterey County’s Service Center for fifty-three (53) workers, including the following:
 - IVR Menuing - Configuration and deployment of county specific menuing to triage customer intent and provide the appropriate transfer logic to agents (this will not include any additional self-service functionality).
 - Call Routing - Configuration and deployment of Routing logic and agent skill group definitions for up to 12 call types with appropriate queuing and messaging treatments.
 - Web Interaction Routing - Configuration and deployment of Web chat routing to agents supporting C4Yourself®.
 - Computer Telephony Integration (CTI) - Deployment of CTI softphone and transfer logic to agent desktops to support telephony.
 - Reporting - Deployment of reporting platform for the County to create reports to manage the Service Center.
 - Quality Monitoring - Configuration and deployment of Call and Screen recording, search and retrieval, and performance management software.
 - Workforce Management - Configuration and deployment of agent scheduling and staffing application.
 - Telephony - Configuration and deployment of telephony and voice messaging.
- Cost associated with Equipment and Software for enabling the above capabilities.
- Production Operations charges (WAN Administration and central support).

Migrating to the Service Center model requires both business process and technology transformation efforts. The business process transformation is not in the scope of this County Purchase as the County will own the effort around definition of the new business model, definition of roles and responsibilities, definition of new processes, job training, call script development, change management, and communication. As part of aligning the technology capability to the business processes, assistance will be provided to the county for the following:

- Facilitation of the creation the inventory of customer interactions.
- Providing templates for defining and documenting the processes and call scripts for those interactions.
- Assistance defining test plans for the business processes and the technology for call scripts and interactions.
- Assistance with management and documentation of outcomes of the model office testing.

Approach:

The approach to delivering the capabilities described above includes Planning, Analysis, Design, Build, Test and Deployment of the contact center technology components. The specific timeframes, activities and responsible parties are listed in Table 1.0 below:

Table 1.0 - Project Schedule

Activity	Start	Finish
Signed County Purchase and approved APD	12/31/2012	12/31/2012
Contact Center Technology Deployment	4/29/2013	8/8/2013
Plan	4/29/2013	5/24/2013
Design	5/27/2013	6/28/2013
Build	7/1/2013	7/12/2013
Local Infrastructure Deployment	7/1/2013	7/19/2013
System Test	7/15/2013	7/26/2013
Scheduling Support	7/22/2013	8/23/2013
Model Office	7/29/2013	8/8/2013
Support	8/9/2013	8/23/2013

The County will be responsible for several milestones to enable the above project schedule.

Table 2.0 - County Milestones

#	Milestones for Which County is Responsible	Date
1	MPOE/MDF Ready for Circuit Installation	4/29/2013
2	Finalize Call Types	5/24/2013
3	Finalize IVR Call Flow	6/10/2013
4	Server Room Ready for Equipment	5/27/2013
5	Facility ready for Workstation and Phone Deployment	6/28/2013
6	Receive any County-procured Equipment	6/28/2013
7	Finalize Agent Processes	7/26/2013
8	Complete Model Office Script Development	7/26/2013
9	Hire Workers and Group into Teams	7/26/2013
10	Train Workers on Processes	8/8/2013
11	Go-Live	8/9/2013

Assumptions:

#	Assumption
Timeframe Assumptions:	
1	Monterey County must approve this County Purchase and provide the corresponding approved Advance Planning Document (APD) by December 31, 2012. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.
Technology Assumptions:	
2	Estimates for deploying the Contact Center Technology within Monterey's Service Center are based on 53 workers.
3	Call recording / quality monitoring solution will record 20% of all transactions for training and quality purposes. Recordings will be kept online for 30 days.
4	Network configuration consists of two (2) DS-3 lines for data connectivity for CTI, access to C-IV and routing calls to the IVR. One (1) T-1 line will be added for connectivity to the NAIT as well as one (1) DSL line for backup network service.
5	A total of five (5) T-1 PRI lines will be provided - four (4) T-1 PRI lines will provide (92) lines for the (53) workers and IVR usage, and the remaining one will provide (23) lines that will be dedicated to outbound calling. Contractor will re-examine this after go-live and discuss the addition of more lines with Monterey County if necessary.
6	Toll Free rate is \$.03/min. The total volume of toll free minutes used by the contact center each month is assumed at 201,599.
7	Long Distance rate is \$.02/min. The total volume of long distance minutes used by the contact center per month is assumed at 10,080.
8	Although other sites in Monterey County follow the Point of Presence (PoP) network model, the Service Center will be deployed with the managed network model. In order for PoP county sites to access the C-IV Service Center network, the County will need to complete a number of activities prior to deployment of the Service Center. Volume VIII - Monterey County of the System Operations and Support Plan (SOSP) will be updated to reflect the change.
Design, Test and Deployment Assumptions:	
9	The County is responsible for setup of the contact center facility including, but not limited to: furniture, electricity, HVAC, and data/electrical cabling. Contractor is responsible only for infrastructure required for the IVR System, Call Routing and Operations, PCs and phone deployment. See County Milestones #1, #4 and #5 in Table 2.0, Section 1 of the County Purchase for due dates.
10	The County is responsible for the purchase and installation of LCD screens for the Agent Statistics wall displays. The County is also responsible for purchasing and installing video cables/MUX that run from the Agent Statistics workstation to the LCD screens. All County-procured equipment must be setup and installed for County Milestone #6 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).

#	Assumption
11	Total devices to be deployed includes up to (54) workstations, (53) phones and (4) printers. The estimate provided assumes that the deployment will be done simultaneously (i.e. desk and phone at the same time). If the installation is to be conducted separately, additional charges will be incurred. Contractor will not be responsible for deploying any scanners.
12	Self-service capabilities will be limited to existing and project-planned Inbound and Outbound IVR capabilities for Monterey County. Capabilities are detailed in the IVR Plan Document (Deliverable IVR001 – IVR Plan). Any additional self-service needs will be a separate SCR and/or County Purchase. Menu structure, options and initial triage and transfer-out capabilities will be provided as part of the county specific business logic.
13	No changes to Computer Telephony Integration (CTI) will be made.
14	The County will be responsible for determining the call types and IVR call flow for the Contact Center. Call types and IVR call flow must be finalized for County Milestones #2 and #3, respectively (see Table 2.0 - County Milestones, Section I of the County Purchase for due dates).
15	Technology training will be conducted at the Service Center facility based on training queues on the production call routing instances. Facilities and space will be provided by the County. This will be a one-time effort and recurring technology training will be the responsibility of the County; trainers should attend the one-time training.
16	Development and testing estimates do not include User Acceptance Testing or Independent Test.
17	Any requested changes to the deployment schedule may result in additional Services charges and will require the execution of a new County Purchase. The daily rate for delaying deployment is \$6,456 during SFY 13/14.
18	County will complete County Milestones referenced in Table 2.0 - County Milestones in Section I of the County Purchase.
Model Office Assumptions:	
19	Contractor will provide the County a maximum of 680 hours of assistance for the County's development of Business Processes, Operating Procedures and Performance Management Metrics. Although Contractor assistance will be provided, the responsibility of aligning the Contact Center technology capability to the County's business processes will fully reside with Monterey County.
20	Model Office scope will provide supplemental staffing for Contractor resources to assist Monterey County with development of the following: <ul style="list-style-type: none"> - Development of Customer Interaction Inventory - Development of up to 12 Call Handling Processes and Scripts - Development of up to 12 Operational Monitoring and Supervisory Processes and Scripts - Up to 12 Interaction Scenarios and Test Plans - Test Environment Preparation for Testing Model Office Interaction Scenarios - Assistance with Execution of up to 12 Model Office Test Scenarios
21	Model Office script development will be the responsibility of Monterey County and will be available for County Milestone #8 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
22	Model Office testing will leverage the production instance of the Cisco Telephony, Call Routing, Quality Monitoring, Workforce Management and Reporting environments with application integration (CTI) screen pops integrated to the C-IV PRT application environment. Data preparation and maintenance will not be required within the C-IV PRT Environment to support Model Office Test efforts.

#	Assumption
23	Resources to execute the Model Office Test scenarios and plans will be provided by Monterey County. It is assumed that at least two dedicated representatives will be fully engaged to execute each Model Office scenario. Each Model Office Scenario will be limited to two conducts within the nine business-day scope of Model Office Testing.
24	Business process changes as a result of Model Office testing will not alter the technology deployment schedule. Modifications to business processes post Model Office testing will be reviewed and may require a new County Purchase for Services. Changes would be developed and implemented following the completion of the technology deployment. Any technology defects (where the solution built is in conflict with the design) found during Model Office will be logged/shared in the templates used for the Model Office script testing and addressed using the standard project protocols.
25	The County, with assistance from Contractor, is responsible for development of Business Processes, Operating Procedures, and Performance Management Metrics. Processes and Procedures must be completed for County Milestone #7 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
26	The County will be responsible for development and delivery of Agent, Supervisor and Business Process Training, change management and communication in support of the Service Center deployment. All training must be completed for County Milestone #10 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
27	The reporting, quality monitoring, and workforce management solutions for the contact center are used by county Contact Center management and operations personnel to administer the Contact Center. Contractor will set up accounts for reporting, quality monitoring, and workforce management for county Contact Center management and operations personnel. Contractor will also assist those personnel in their initial setup and use of those tools. This will generally occur during Model Office and post go-live enhanced support periods.
Hardware Installation Assumptions:	
28	Contractor staff will set up and install equipment Monday through Friday, between the hours of 8:00 a.m. and 5:00 p.m., with the exception of County holidays.
29	Contractor staff will transport new equipment to the County for installation.
30	Contractor staff will uninstall existing equipment, package the equipment securely, and transport the equipment to a County-provided location.
31	Contractor staff will un-packaged new equipment and connect all necessary cables and cords.
32	Remote Hardware Maintenance Technicians (RHMTs) will use existing power strips (new power strips will not be provided).
33	Contractor will boot up new workstations and join them to the existing domain with a new workstation ID as defined by the C-IV Network team. County IT staff will be responsible for transferring files from the server.
34	Installation will be verified by having the User log in and access the C-IV Application through Microsoft Internet Explorer, as well as the having the user place an outbound call leveraging the agent headset and phone.
35	If the User is not available at the time of de-installation, the RHMTs will need to return to this cubicle at the end of the day, or on another day at the end of the installs (if not returning to that site the next day).

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#	Assumption
36	Peripheral County equipment (i.e., PDA's, speakers) will not be connected by the RHMTs.
37	The RHMTs will have spare equipment in the event that there is a defective phone, headset, workstation, monitor or mouse.
38	Any defective equipment will be brought back to the Central Depot by the RHMTs, and that team will confirm it gets replaced by the vendor.
Operations Assumptions:	
39	All central Service Center application and infrastructure managed services will be part of Tier 3 services for C-IV Service Level Agreement (SLA) #9 - Online Availability.
40	<p>Monterey County will be responsible for monthly recurring production operations charges for central support and WAN Administration.</p> <ul style="list-style-type: none"> • Production operations charges for central support of agents and remote workstation maintenance will commence August 2013 and run through the end of the Agreement, October 2013. Support charges will apply to the workers as they are actually used in production. • Production operations charges for WAN Administration will commence July 2013 and run through October 2013.
General Assumptions:	
41	<p>The Total Cost is an estimate and is subject to changes at the time of ordering. The final cost will be provided to the Consortium at the time of invoicing.</p> <ul style="list-style-type: none"> • With regard to Hardware, Software, Hardware Support and Software Support ("Hardware and Software"), the prices and part numbers of the items actually purchased may differ from what is provided in the estimate due to, but not limited to, the following: 1) price fluctuations and 2) manufacturers' discontinuance of part numbers and 3) the County will determine the actual facility used for the Service Center after approval of this County Purchase, which may change the selection of required hardware. • The final cost for Hardware and Software will not exceed the estimates for each State Fiscal Year. • The estimate is based on the scope of work outlined in this County Purchase. Any revisions to scope must be mutually agreed upon by the parties and may result in additional Services, Hardware and Software, and Production Operations charges. These additional charges will be executed as a change order to this County Purchase.
42	<p>The County will be responsible for one-time Services charges for technology deployment. All services charges, with the exception of Business Process Support, will be invoiced as payment milestones per the schedule set forth in Section IV of the County Purchase.</p> <ul style="list-style-type: none"> • With regard to Business Process Support, Contractor will work up to a maximum of 680 hours (200 hours during SFY 12/13 and 480 during SFY 13/14). The County will only be invoiced for the actual number of hours worked.
43	Status of the project schedule will be available to the County upon request.
44	New hardware will initially be sent to the warehouse in Rancho Cordova, California by the equipment vendor for asset tagging. Once asset-tagging has been completed, Contractor staff will transport the equipment to the County for installation.
45	Taxes for hardware items were estimated at 8.75% and based on the initial shipping location of Rancho Cordova, California.
46	Ownership of central Equipment such as servers, switches, routers and storage devices will reside with the Consortium.
47	Ownership of all software purchased under this County Purchase will reside with the Consortium.

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#	Assumption
48	Hardware will be invoiced and paid in full upon receipt of hardware acceptance. All hardware (even those items over \$5,000) can be fully purchased without any leasing/financing required.
49	The outbound IVR system supports English and Spanish languages only.
50	All Equipment, with the exception of HP printers and workstations, is purchased with 4-year maintenance agreements from the date of purchase (unless noted otherwise). Once the hardware support agreements have expired, the County will be responsible for funding any hardware refreshes or hardware support renewals through the execution of a separate County Purchase.
51	All HP printers and workstations are purchased with 3-year maintenance agreements from the date of purchase (unless noted otherwise). Once the hardware support agreements have expired, the County will be responsible for funding any hardware refreshes or hardware support renewals through the execution of a separate County Purchase.
52	All software licenses, with the exception of CA Integrated Threat Manager, are purchased with 4-year maintenance agreements from the date of purchase (unless noted otherwise). Once the software support agreements have expired, the County will be responsible for funding any software refreshes or software support renewals through the execution of a separate County Purchase.
53	All CA Integrated Threat Manager licenses are purchased with 3-year maintenance agreements from the date of purchase (unless noted otherwise). Once the software support agreements have expired, the County will be responsible for funding any software refreshes or software support renewals through the execution of a separate County Purchase.
54	San Bernardino County purchased the central equipment that enabled the C-IV Contact Center technology and also funded the equipment support agreements through the end of the Agreement. If Monterey County still would like to continue utilizing the C-IV Contact Center technology when the support agreements end in SFY 14/15, Monterey County would be responsible for funding its share of renewing the support agreements or the technical refresh if the Consortium does not have the available funding.
55	The image deployed on all contact center workstations will include the Microsoft Windows 7 operating system.
County Data Specific Assumptions:	
56	This estimate assumes that all Contact Center workers will be full-time (rather than part-time). If the County would like these workers to follow a part-time model, then the quantities of certain software and hardware items will need to be increased in order to achieve the requested worker concurrency. Any additional software licenses or equipment items will be procured through the execution of another County Purchase.

II. Schedule:

The charges associated with this County Purchase will be incurred during State Fiscal Years 2012/13 through SFY 2013/14.

III. Total Cost:

The following table outlines the total charges for this County Purchase.

Total County Purchase	SFY 2012/13	SFY 2013/14	Total Cost
Services	\$308,626	\$724,419	\$1,033,045
One Time Service Charges	\$308,626	\$724,419	\$1,033,045
Recurring Service Charges	\$0	\$0	\$0
Hardware and Software Charges	\$985,311	\$0	\$985,311
Hardware Charges	\$384,960	\$0	\$384,960
Hardware Maintenance and Support Charges	\$55,293	\$0	\$55,293
Software Charges	\$344,454	\$0	\$344,454
Software Maintenance and Support Charges	\$200,604	\$0	\$200,604
Production Operations Charges	\$0	\$163,930	\$163,930
One Time Charges	\$0	\$24,886	\$24,886
Recurring Charges	\$0	\$139,044	\$139,044
Facilities	\$0	\$0	\$0
Total Charges	\$1,293,937	\$888,349	\$2,182,286

IV. Milestone Schedule:

The following table outlines the charges and invoicing timelines for Payment Milestones associated with Services.

Milestone Number	Description	Due Date	Price	SFY 2012/13	SFY 2013/14
1	Service Center Technology Deployment - Plan Complete	5/24/2013	\$244,226	\$244,226	
2	Service Center Technology Deployment - Build Complete	7/12/2013	\$244,226		\$244,226
3	Service Center Technology Deployment Complete	8/8/2013	\$325,633		\$325,633
TOTAL			\$814,085	\$244,226	\$569,859

Milestone #1 - Service Center Technology Deployment - Plan Complete consists of the following documentation:

- Project Schedule
- Requirements
- High Level Design Description
- Training Approach
- Testing Approach

Milestone #2 - Service Center Technology Deployment - Build Complete does not consist of any paper deliverables.

Milestone #3 - Service Center Technology Deployment Complete consists of the following:

- IVR Menuing Build & Test Complete
- CTI, Call/Web Routing Build & Test Complete
- Reporting Build & Test Complete
- QM Build & Test Complete
- WFM Build & Test Complete
- System Testing Complete
- Technology Training Delivered



COUNTY PURCHASE APPROVAL

Subject: County Purchase - MT-01-2012

The subject document is accepted as allowing Accenture LLP to proceed with the subject County Purchase.

Monterey County

By: _____
Printed Name: _____
Title: _____
Date: _____

APPROVED AS TO FORM AND LEGALITY
J. Michael Hogan 11/27/12
DEPUTY COUNTY COUNSEL
COUNTY OF MONTEREY

Notice Address:
1000 S. Main Street, Suite 306
Salinas, CA 93901

SAWS CONSORTIUM-IV JOINT POWERS AUTHORITY

By: _____
Printed Name: John Boule
Title: C-IV Project Director
Date: _____

Reviewed as to fiscal provisions
[Signature]
Auditor-Controller
County of Monterey
11-27-12

Notice Address:
SAWS Consortium-IV Joint Powers Authority
Attention: C-IV Project Director
11290 Pyrites Way, Suite 150
Rancho Cordova, CA 95670-4481