



June 26, 2025

Mr. Kyle McConnell
The State of Nebraska, Department of Labor
550 South 16th Street
Lincoln, NE 68508

Dear Mr. McConnell,

Re: Exemption from Disclosure

In submitting our proposal, Coast Professional, Inc. (Coast) has deemed four (4) required items to be protected records under Nebraska Revised Statute § 84-712.05 that are **confidential and proprietary** in nature, subject to a claim of business confidentiality:

1. Coast's audited financial statements in **Exhibit I: Financial Statements**
2. Banking reference in **Exhibit II: Banking Reference**
3. Coast's similar project references under **Section h. Summary of Bidder's Corporate Experience**
4. Key personnel references under **Section i. Summary of Bidder's Proposed Personnel/Management Approach**

The above information is not considered public knowledge, nor is it available to the public. This information constitutes trade secrets and protects commercial information, and as a result, this item is not required to be open or disclosed under Nebraska Revised Statute § 84-712.05(3).

Our audited financial statements derive economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.

Coast's banking reference, similar project references, and its key personnel references contain sensitive and personal information which is not intended for public disclosure. Additionally, such information may be proprietary to the organization's internal decision-making and should be safeguarded to prevent misuse or unauthorized access.

Coast appreciates the opportunity to provide references in a confidential manner. We understand that the State of Nebraska is subject to Nebraska Revised Statute § 84-602.04 and has sole discretion to determine if the information identified in our request is exempt from disclosure.

Should you have any questions regarding our request for the confidential treatment of the aforementioned material, please reach out to proposals@coastprofessional.com.

Sincerely,


Michael Del Valle
General Counsel/Chief Compliance Officer

4273 Volunteer Road | Geneseo, NY 14454
T: 800.231.0225 | www.coastprofessional.com



Coast Professional, Inc. Response to RFP 121962 03 for

Services Contract

The State of Nebraska, Department of Labor

Submitted to:

Mr. Kyle McConnell
The State of Nebraska, Department of Labor
550 South 16th Street
Lincoln, NE 68508
(402) 471-9944
ndol.procurement@nebraska.gov

Submitted by:

Kimberly Perry
Director of Business Development
Coast Professional, Inc.
4273 Volunteer Road
Geneseo, NY 14454
(585) 991-2133
kperry@coastprofessional.com



Mission Statement:

Coast Professional, Inc. is a top-performing accounts receivable management and customer support center specializing in communications for private, public, and government entities across the United States. Our mission is to perform services with the highest standards of integrity, efficiency, and ethics.

We develop rapport with companies and consumers, create long-term relationships with clients, and improve communities through philanthropic initiatives. We further our corporate culture of compliance, customer service, and teamwork by investing in our most valuable asset: our people. We maintain a professional environment and always do what is right.

Vision Statement:

Coast strengthens relationships between consumers and our partners while empowering employees to excel.

Core Values:

In all decisions, actions, and outcomes, Coast's guiding principle is to do what is right. We believe in:

- **Community:** Volunteer efforts and philanthropic initiatives are essential to the improvement of our communities.
- **Compliance:** Strict compliance with applicable laws and regulations is an absolute requirement in all aspects of our business.
- **Influence:** Our efforts make a positive impact on consumers, clients, employees, and our local communities.
- **Integrity:** Fair, proper, credible, and honest communication is required in every interaction.
- **People:** Hiring competent individuals and providing them with support and advancement opportunities improves our organization.
- **Performance:** Our technology advancements, compliance initiatives, and experience makes us an industry leader.
- **Perseverance:** Our company stability and longevity requires adaptability, agility, grit, and decisiveness.
- **Respect:** People deserve to be treated with respect, professionalism, and responsiveness.
- **Trust:** Preserving the integrity and the reputation of the partners we serve is of the utmost importance.

Coast is proud of our employees. Coast is proud of our accomplishments. Coast is proud of what we do.

Equal Opportunity Employer

Coast Professional, Inc. is an equal opportunity employer and federal contractor or subcontractor. Consequently, the parties agree that, as applicable, they will abide by the requirements of 41 CFR 60-300.5(a) and 41 CFR 60-741.5(a) and that these laws are incorporated herein by reference. These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities. These regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment and otherwise treat qualified individuals without discrimination based on their status as a protected veteran or individual with a disability. The parties also agree that, as applicable, they will abide by the requirements of Executive Order 13496 (29 CFR Part 471, Appendix A to Subpart A), relating to the notice of employee rights under federal labor laws.



June 26, 2025

Mr. Kyle McConnell
The State of Nebraska, Department of Labor
550 South 16th Street
Lincoln, NE 68508

Dear Mr. McConnell:

Coast Professional, Inc. (Coast) is honored to submit our proposal in response to RFP 121962 O3 for Request for Proposal for Services Contract, issued by The State of Nebraska, Department of Labor (the State). We appreciate the opportunity to present our capabilities, and we are confident that Coast is well-positioned to meet and exceed your expectations.

With more than 49 years of experience in business process outsourcing (BPO) and call center operations, Coast has earned a reputation for delivering reliable, high-quality services. Our extensive experience working with both public and private sector clients, including federal agencies such as the Department of Education, Federal Student Aid (FSA) and the Internal Revenue Service (IRS), has provided us with the expertise to consistently deliver dependable, empathetic support.

We understand the importance of providing prompt, accurate, and compassionate service to your claimants. Coast's team, resources, and technology are equipped to deliver seamless service to the State's callers, ensuring a positive experience for every interaction. Additionally, our expertise in managing full-service call center services will ensure that every caller receives the support they need in a timely and professional manner.

We are committed to providing a solution that is not only tailored to meet the State's specific needs but also designed to exceed your service expectations. Coast takes pride in our ability to adapt and deliver results, and we are confident that our partnership will help the State maintain the highest level of caller satisfaction.

If you have any questions or would like further information regarding our proposal, please feel free to reach out to Director of Business Development Kimberly Perry at (585) 991-2133 or via email at kperry@coastprofessional.com.

On behalf of the entire Coast Team, thank you for this opportunity.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jonathan Prince".

Jonathan Prince
Chief Executive Officer

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A. SOLICITATION RESPONSE SUBMISSION

1. CORPORATE OVERVIEW

The Corporate Overview section of the solicitation response should consist of the following subdivisions:

a. BIDDER IDENTIFICATION AND INFORMATION

The bidder should provide the full company or corporate name, address of the company's headquarters, website, entity organization (corporation, partnership, proprietorship), state in which the bidder is incorporated or otherwise organized to do business, year in which the bidder first organized to do business and whether the name and form of organization has changed since first organized.

Full company or corporate name: Coast Professional, Inc.

Address of the company's headquarters:

4273 Volunteer Road
Geneseo, NY 14454

Website: www.coastprofessional.com

Entity organization: S Corporation

State in which the bidder is incorporated or otherwise organized to do business: Nevada

Year in which the bidder first organized to do business: 1976

Whether the name and form of organization has changed since first organized:

Coast was originally formed in 1976 as LA County Professional Services, Inc. The company underwent three (3) subsequent changes, ultimately becoming Coast Professional, Inc. in 2003. We have been in continuous operation under that name since that time. Please see the history of our firm names below:

1976 – 1989	LA County Professional Services, Inc.
1989 – 1998	Coast Professional Services, Inc.
1998 – 2003	St. Clair Financial Services, Inc.
2003 – Present	Coast Professional, Inc.

Coast's form of organization has not changed since the company was first organized.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

b. FINANCIAL STATEMENTS

The bidder should provide financial statements applicable to the firm. If publicly held, the bidder should provide a copy of the corporation's most recent audited financial reports and statements, and the name, address, and telephone number of the fiscally responsible representative of the bidder's financial or banking organization.

If the bidder is not a publicly held corporation, either the reports and statements required of a publicly held corporation, or a description of the organization, including size, longevity, client base, areas of specialization and expertise, and any other pertinent information, should be submitted in such a manner that solicitation evaluators may reasonably formulate a determination about the stability and financial strength of the organization. Additionally, a non-publicly held firm should provide a banking reference.

The bidder must disclose any and all judgments, pending or expected litigation, or other real or potential financial reversals, which might materially affect the viability or stability of the organization, or state that no such condition is known to exist.

The State may elect to use a third party to conduct credit checks as part of the corporate overview evaluation.

Coast is not a publicly held corporation. We have provided the reports and statements required of a publicly held corporation in **Exhibit I: Financial Statements** and a banking reference in **Exhibit II: Banking Reference**. Coast considers both exhibits **Confidential and Proprietary** and requests they be withheld from public disclosure. No known judgments, pending or expected litigation, or other real or potential financial reversals exist that might materially affect the viability or stability of Coast. Coast has read and understands that the State may elect to use a third party to conduct credit checks as part of the corporate overview evaluation, and we agree to comply.

c. CHANGE OF OWNERSHIP

If any change in ownership or control of the company is anticipated during the twelve (12) months following the solicitation response due date, the bidder should describe the circumstances of such change and indicate when the change will likely occur. Any change of ownership to an awarded bidder(s) will require notification to the State.

Coast has read, understands, and agrees to comply. No change in ownership or control of the company is anticipated during the 12 months following the solicitation response due date. If that changes, Coast will notify the State, describe the circumstances of such change, and indicate when the change will likely occur.

d. OFFICE LOCATION

The bidder's office location responsible for performance pursuant to an award of a contract with the State of Nebraska should be identified.

Coast will oversee performance of this contract from its headquarters located in Geneseo, New York. Work will be performed at one of our three (3) office locations, as shown in Figure 1 on the following page. Coast's accounting, data processing, and client service activities will take place in our West Monroe, LA office. Currently, Coast employs approximately 700 employees at three (3) call center locations and six (6) satellite office locations nationwide. Please note, Coast utilizes a network of

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

satellite offices to allow our Directors of Business Development to meet with clients across the United States. These satellite offices are solely utilized for business development purposes. No State accounts will be worked from our satellite offices.

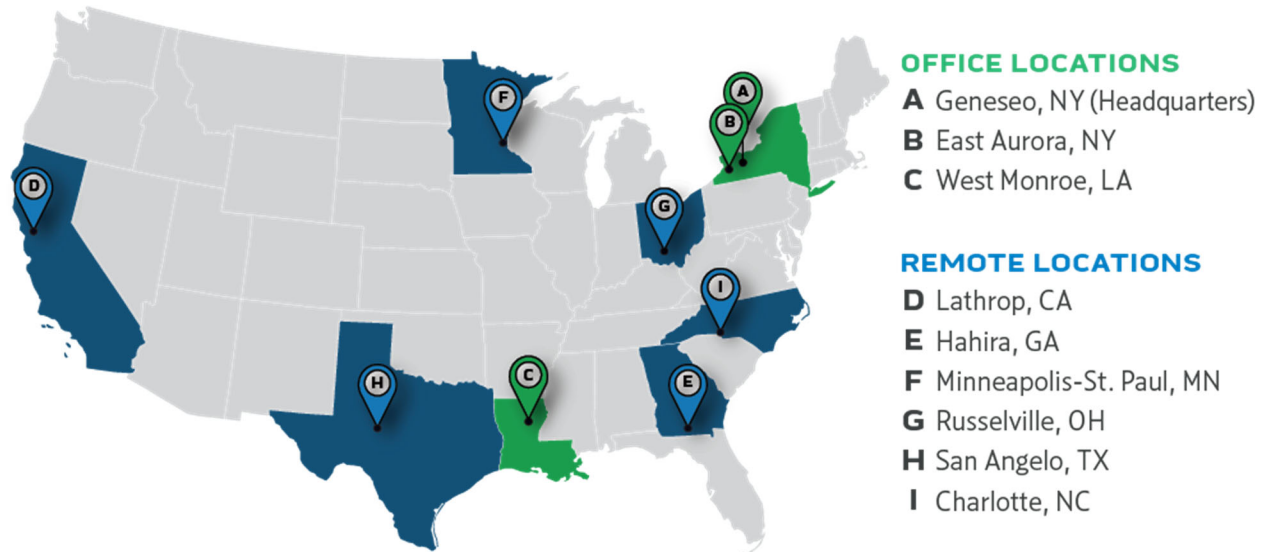


Figure 1

Geneseo, NY Office (Company Headquarters)

4273 Volunteer Road
Geneseo, NY 14454

East Aurora, NY

300 Gleed Avenue
East Aurora, NY 14052

West Monroe, LA

651 Downing Pines Road
West Monroe, LA 71292

e. RELATIONSHIPS WITH THE STATE

The bidder should describe any dealings with the State over the previous (five) (5) years. If the organization, its predecessor, or any Party named in the bidder's solicitation response has contracted with the State, the bidder should identify the contract number(s) and/or any other information available to identify such contract(s). If no such contracts exist, so declare.

Coast was awarded a contract by the University of Nebraska in 2023 under solicitation number 3778-23-8015, purchase order E001045703 to provide call center services for accounts receivable management for the Department of Cashiering/Student Accounts.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

f. BIDDER'S EMPLOYEE RELATIONS TO STATE

If any Party named in the bidder's solicitation response is or was an employee of the State within the past (twelve) (12) months, identify the individual(s) by name, State agency with whom employed, job title or position held with the State, and separation date. If no such relationship exists or has existed, so declare.

If any employee of any agency of the State of Nebraska is employed by the bidder or is a subcontractor to the bidder, as of the due date for solicitation response submission, identify all such persons by name, position held with the bidder, and position held with the State (including job title and agency). Describe the responsibilities of such persons within the proposing organization. If, after review of this information by the State, it is determined that a conflict of interest exists or may exist, the bidder may be disqualified from further consideration in this solicitation. If no such relationship exists, so declare.

Coast has read, understands, and agrees to comply. No party named in Coast's solicitation response is or was an employee of the State within the past 12 months.

g. CONTRACT PERFORMANCE

If the bidder or any proposed subcontractor has had a contract terminated for default during the past (five) (5) years, all such instances must be described as required below. Termination for default is defined as a notice to stop performance delivery due to the bidder's non-performance or poor performance, and the issue was either not litigated due to inaction on the part of the bidder or litigated and such litigation determined the bidder to be in default.

It is mandatory that the bidder submit full details of all termination for default experienced during the past (five) (5) years, including the other Party's name, address, and telephone number. The response to this section must present the bidder's position on the matter. The State will evaluate the facts and will score the bidder's solicitation response accordingly. If no such termination for default has been experienced by the bidder in the past (five) (5) years, so declare.

If at any time during the past (five) (5) years, the bidder has had a contract terminated for convenience, non-performance, non-allocation of funds, or any other reason, describe fully all circumstances surrounding such termination, including the name and address of the other contracting Party.

Coast has not had any contracts terminated for default during the past five (5) years. A contract with the FSA was terminated for convenience when FSA recalled all student loans from all private collection agencies in 2021. Coast demonstrated consistent success on this contract with three (3) first place finishes out of five (5) competitive review quarters which measures compliance (50%) and performance (50%).

United States Department of Education
Federal Student Aid
830 First St. NE – Suite 91F3
Washington, DC 20202

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

h. SUMMARY OF BIDDER'S CORPORATE EXPERIENCE

The bidder should provide a summary matrix listing the bidder's previous projects similar to this Solicitation in size, scope, and complexity including call center services for government agencies, unemployment insurance programs or projects similar thereto. The State will use no more than three (3) narrative project descriptions submitted by the bidder during its evaluation of the solicitation response.

The bidder should provide three (3) references for call center services provided. Include contact name, phone number, email address, length of relationship, and a brief overview of the services provided. Bidder should also describe its company culture and how it aligns with this solicitation. The bidder should address the following:

- i. Provide narrative descriptions to highlight the similarities between the bidder's experience and this Solicitation. These descriptions should include:
 - a) The time period of the project,
 - b) The scheduled and actual completion dates,
 - c) The bidder's responsibilities,
 - d) For reference purposes, a customer name (including the name of a contact person, a current telephone number, a facsimile number, and e-mail address); and
 - e) Each project description should identify whether the work was performed as the prime Vendor or as a subcontractor. If a bidder performed as the prime Vendor, the description should provide the originally scheduled completion date and budget, as well as the actual (or currently planned) completion date and actual (or currently planned) budget.
- ii. Bidder and Subcontractor(s) experience should be listed separately. Narrative descriptions submitted for Subcontractors should be specifically identified as subcontractor projects.
- iii. If the work was performed as a subcontractor, the narrative description should identify the same information as requested for the bidders above. In addition, subcontractors should identify what share of contract costs, project responsibilities, and time period were performed as a subcontractor.

Similar Projects and References

Coast has included a summary matrix with similar projects and references in **Exhibit III: Similar Project References**. We consider this information to be **Confidential and Proprietary** and request it be withheld from public disclosure. Narrative descriptions are below, and they include brief overviews. Coast is a prime vendor for each contract and none of them list a budgeted amount on their purchase orders.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

State of Oregon Department of Administrative Services Narrative Description

Service Overview: Call center-based collection services for state debts

Coast has been contracted by Oregon Department of Administrative Services for the collection of delinquent debts from in-state and out-of-state taxpayers whose debts include, but are not limited to, Oregon state taxes, penalties, and interest. This business relationship began as an RFP in 2019 whereby collection agencies competed to get on an approved list for the State of Oregon. From a field of 23 competing agencies, Coast was awarded one (1) of six (6) spots on the statewide contract list. While the endorsement placed the agencies onto this coveted short list, the award itself was not a guarantee of placements. This was followed by nearly two (2) years of relationship building, after which Coast was rewarded for its diligence with not one, but two (2) contract awards. As a result, Coast is responsible for accounts receivable management (ARM) and debt collections of delinquent debts owed to both:

- Oregon Department of Revenue – Outside Agency Accounts (OAA)
- Oregon Department of Revenue – Tax Accounts

Terrebonne Parish Consolidated Government Narrative Description

Service Overview: After-hours call center answering services

Coast began supporting TPCG in 2023, providing answering services during business hours, after-hours, and 24/7 on weekends and holidays. TPCG is similar in size and scope to the State and experiences surges in call volume during hurricanes, flash floods, and other local events impacting the community. We developed a customized approach to address these challenges, improve resource allocation, and enhance after-hours response capabilities. Our skilled agents quickly evaluate calls during non-business hours and activate timely emergency responses, when necessary, efficiently prioritizing calls to identify true emergencies. Urgent matters are escalated to the appropriate authorities through a coordinated network of voice, email, and text messaging, reducing caller wait times for TPCG. Non-emergency calls are logged and attended to during regular hours, optimizing the focus of first responders. A TPCG manager shared *"Coast's proactive approach has significantly enhanced our emergency response system, allowing us to better protect and serve our community."*

UCPath Narrative Description

Service Overview: Call center for employee payroll overpayments

UCPath stands as the University of California's (UC) transformative initiative to consolidate and modernize its payroll, benefits, human resources, and academic personnel systems across all UC. This program went live in 2019 with a goal of creating a more sustainable and efficient integrated environment for the university system. As part of its comprehensive services, Coast is entrusted with managing both inbound and outbound communications to address and resolve issues related to payroll overpayments. This includes clarifying discrepancies, providing detailed explanations, and collaborating with employees to develop and implement effective repayment plans. Through these efforts, Coast plays a pivotal role in maintaining the financial integrity of the UCPath system and ensuring that employees are accurately compensated for their contributions.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Company Culture

Coast's company culture aligns well with this solicitation because our character, integrity, reputation, judgment, experience, and efficiency uniquely position us as the ideal partner for the State. At Coast, the greatest asset is our people. The company fosters a culture of respect, collaboration, and continuous improvement, ensuring every team member is empowered to thrive both personally and professionally. The team environment celebrates individual contributions, promotes inclusivity, and personal growth through team-building events and professional development opportunities.

Work-Life Balance: Coast's employee retention program prioritizes a healthy work-life balance through flexible scheduling, allowing employees to balance their professional and personal commitments. Regular employee appreciation events and tenure awards celebrate staff contributions and long-term dedication, promoting a positive and inclusive workplace culture. These initiatives are designed to enhance job satisfaction and foster a stable, motivated workforce.

Training and Career Development: Coast emphasizes the importance of training and career development as key elements of its employee retention strategy. The company offers training programs to enhance skills and knowledge, while also providing career advancement opportunities. This focus on professional growth and progression supports a dynamic work environment and helps retain top talent, contributing to the company's overall success.

Succession Planning: The company's succession planning strategy supports career growth and provides clear advancement pathways within the organization. By identifying and nurturing employees who align with Coast's core values, the program ensures that key positions are filled with capable and committed individuals. This proactive approach enhances employee satisfaction and loyalty while strengthening the company's leadership pipeline for long-term success.

Leveraging Rural Areas: Coast strategically utilizes rural locations for its offices, offering high-paying jobs and career opportunities in smaller communities. This approach supports local economic growth and fosters a loyal and stable workforce. By operating in areas with lower overhead and living costs, Coast can expand rapidly while minimizing expenses, thus enhancing its competitive advantage and employee retention.

Benefits: Coast prioritizes the well-being of employees with a benefits package that includes competitive healthcare plans, dental and vision coverage, and a 401(k)-retirement savings plan. The company is dedicated to providing resources that support a healthy and fulfilling lifestyle.

Anniversary Program: Coast's Anniversary Program honors employee dedication by recognizing significant milestones with meaningful rewards. Employees celebrating milestones such as five, 10, 15, and 20 years with the company receive rewards in partnership with prestigious retailers including Tiffany & Co. and Tourneau, as well as travel vouchers. This program highlights the company's appreciation for long-term contributions and celebrates the integral role employees play in our success.

Paid Time Off: Coast recognizes the importance of work-life balance and offers generous paid time off for employees to recharge, spend time with loved ones, and pursue personal interests. Coast will also align with contract requirements to ensure full compliance with any specific paid time off (PTO) policies, ensuring the team remains well rested and motivated.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Opportunities for Advancement: The company is committed to helping employees reach their full potential by providing ongoing training and development opportunities. With a clear career path and a supportive environment, Coast empowers team members to advance and achieve their professional goals.

Charitable Endeavors

Philanthropy is always in the forefront of Coast's culture. We run a program where employees are able to contribute to local charities they vote on directly from their own wages. To help keep staff interested in making a difference, we randomly pick a winner of eight (8) hours of paid time off out of the team members who are enrolled.

During the last two (2) years, Coast has donated to:

- American Cancer Society
- Louisiana Baptist Children's Home
- Geneseo Fire Department (New York)
- Northeastern Louisiana "Wish I Could" Foundation
- March of Dimes
- Humane Society Adoption Center
- Susan G. Komen Race for the Cure
- Family Promise
 - *Assists children and their families experiencing homelessness by providing shelter, meals, and support services*
- MedCamps
 - *A summer camp for severely disabled and ill children*
- Ronald McDonald House
- Buddy's Second Chance Rescue

Coast recently presented a check, raised through employee donations, to Operation Build Up, a non-profit organization dedicated to assisting and improving the lives of veterans across New York State. This contribution, made in July of 2024, at Coast's Geneseo, NY headquarters, continues Coast's longstanding tradition of supporting local charities and non-profit organizations. Coast's donation is a result of its employees' strong sense of philanthropy and community. To make donations like these possible, Coast employees can elect for a portion of their paycheck to benefit a selected local charity or organization.

Coast upholds an annual tradition of providing complimentary hams and turkeys to employees during three (3) holiday occasions. Any surplus items are donated to local food banks. This past year, additional hams and turkeys were distributed to food banks in Geneseo, NY; East Aurora, NY; and West Monroe, LA.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Coast Cares Education Open

In 2019, Coast established Coast Cares, an employee-driven initiative dedicated to supporting local communities. That same year, Coast launched the inaugural Coast Cares Education Open, a charity golf tournament benefiting underprivileged children in school districts where many of our employees' families are based.

On August 23, 2024, the second Coast Cares Education Open raised money to support school districts in counties where employees reside, providing resources for educational programs, extracurricular activities, and classroom supplies. Coast remains committed to giving back to the community and supporting families in need through initiatives such as this.



GLOW 5K Corporate Cup

Coast is deeply committed to enhancing employee well-being and supporting local community initiatives. This dedication was recently showcased through the company's enthusiastic participation in the 11th GLOW Corporate Cup, a team 5K race supporting the Genesee, Livingston, Orleans, and Wyoming (GLOW) YMCA programs. The company sponsored employees, covering all associated costs, including water and snacks, which demonstrates dedication to fostering community engagement and promoting employee well-being. In addition to this event, Coast has implemented other health initiatives, such as an internal company step challenge, including wellness articles in the company newsletter, and posting health tips on social media pages. Looking ahead, Coast plans to continue this tradition, reinforcing its commitment to supporting local initiatives and enhancing employee health and camaraderie.

Corporate Social Responsibility and Charitable Initiatives

Coast is committed to making a positive impact in the communities where its employees live and work. Through innovative programs and employee-driven initiatives, Coast encourages and supports its workforce in giving back to organizations in need.

Volunteer Engagement

Coast staff and management actively participate in volunteer services, dedicating time and resources to the following organizations:

- Boys & Girls Club
- Regional Food Banks
- Fellowship of Christian Students (FCS Coaching)
- Refuge Temple Ministry
- Children and Youth Sports (as coaches and sponsors)

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Recognizing the importance of time for community organizations, Coast introduced its Charitable Time Off (CTO) Policy to empower employees to contribute meaningfully:

- **Salaried employees** are eligible for 16 hours of paid time off annually to volunteer at non-profit organizations.
- **Hourly employees** may utilize 4 hours of paid time off annually for volunteer activities.

This initiative underscores Coast's dedication to fostering a culture of giving and community support.

Dress Down for Charity Program

To further its charitable efforts, Coast implemented the Dress Down for Charity Program as part of its Business Casual dress code. This program allows employees to participate in a Relaxed Dress Code in exchange for a small donation per pay period (twice per month).

Program Details:

- Employees may follow the Relaxed Dress Code for the designated month by contributing in advance.
- Donations are directly deducted from participants' paychecks twice a month, ensuring seamless participation.

By combining practical support for charitable organizations with employee-driven initiatives, Coast demonstrates its ongoing commitment to corporate social responsibility. These programs align with Coast's core values of community influence and service excellence. Employee satisfaction is a priority for Coast and it leads to higher call scores and a better customer experience for your claimants.

i. SUMMARY OF BIDDER'S PROPOSED PERSONNEL/MANAGEMENT APPROACH

The bidder should present a detailed description of its proposed approach to the management of the project.

The bidder should identify the specific professionals who will work on the State's project if their company is awarded the contract resulting from this Solicitation. The names and titles of the team proposed for assignment to the State project should be identified in full, with a description of the team leadership, interface, and support functions, and reporting relationships. The primary work assigned to each person should also be identified.

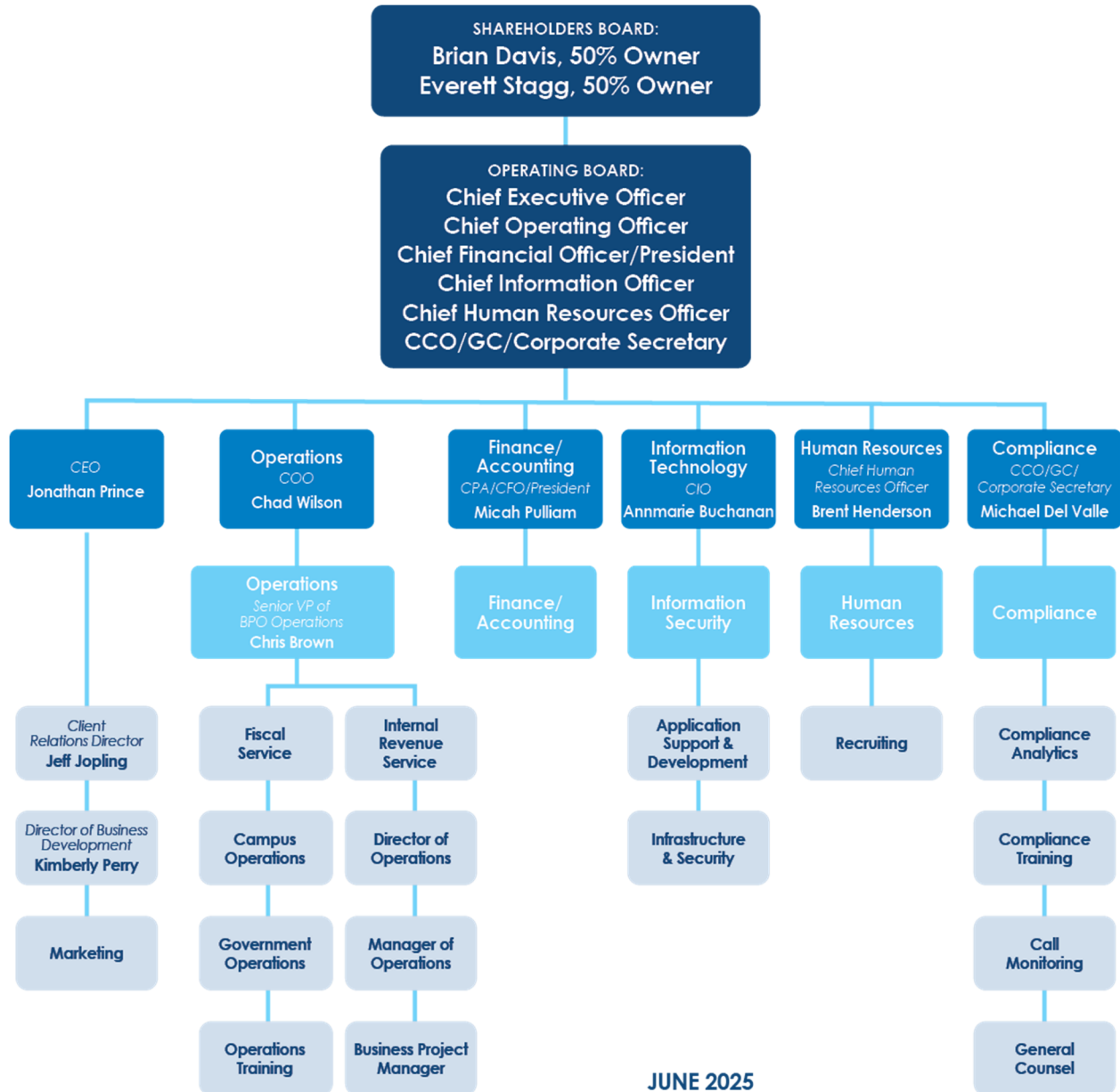
The bidder should provide resumes for all personnel proposed by the bidder to work on the project. The State will consider the resumes as a key indicator of the bidder's understanding of the skill mixes required to carry out the requirements of the Solicitation in addition to assessing the experience of specific individuals.

Resumes should not be longer than three (3) pages. Resumes should include, at a minimum, academic background and degrees, professional certifications, understanding of the process, and at least three (3) references (name, address, and telephone number) who can attest to the competence and skill level of the individual. Any changes in proposed personnel shall only be implemented after written approval from the State.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Company-Wide Organizational Chart

Coast has provided a copy of its company-wide organizational chart below as Figure 2 to illustrate company structure which ensures performance, compliance, and communication across all departments.



JUNE 2025

Figure 2

Proposed Project Management Approach

Coast utilizes a democratic management approach: a leadership style in which group members take a more participative role in the decision-making process. This approach is designed to mitigate the risk of unsuccessful performance by fostering a culture of collaboration, transparency, and inclusivity. This

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approach encourages collective problem-solving, enhances decision-making, promotes continuous improvement, and builds a sense of ownership and responsibility among employees. By valuing the input of all team members, Coast ensures a diverse range of perspectives are considered, leading to more effective and innovative solutions to challenges. This approach positions the organization for long-term success. The assignments and responsibilities of the personnel who will execute this contract are below in Table 1.

Group	Assignment	Responsibilities
Executive leadership; Coast's Operating Board members	<ul style="list-style-type: none"> Daily Operations of Coast Project Implementation Team 	Strategic decisions on project funding, operations, staffing structure and assignment, and act as Authorized Representatives for the company
Vice President of Operations	<ul style="list-style-type: none"> Project Implementation Team Operational Strategy Implementation 	Implement operational strategies, hire staff, provide performance reviews, and make recommendations
Director of Operations	<ul style="list-style-type: none"> Project Implementation Team Daily Operational Team 	Provide daily operational management, oversee team assigned to the State, provide monthly performance to Operating Board, and implement strategic initiatives
Supervisor	Daily Operational Team	Oversee a team of agents, provide support, and handle call escalations
Agents	Daily Operational Team	Communicate with claimants in a compliant manner to provide the State with high-quality services and strong returns
Business Development Team (Director of Business Development, Kimberly Perry)	<ul style="list-style-type: none"> Project Implementation Team Ongoing Point of Contact 	Manage the relationship between the State and Coast, provide problem resolution, and act as liaison between Coast and the State
Operations and Client Services (Senior Vice President of BPO Operations Chris Brown and Client	<ul style="list-style-type: none"> Project Implementation Team Daily Client Contact 	Provide daily client support to the State, manage reporting requirements, provide issue

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Group	Assignment	Responsibilities
Relations Director, Jeff Jopling)		resolution, and field client inquiries

Table 1

Supervisory Capability

Coast's management structure is designed to ensure that our agents are fully supported in their inbound and outbound outreach efforts. This is accomplished by enacting the following:

- Strategic supervisor-to-agent ratio
- Detailed training process including new hire and ongoing training
- Workflow process to ensure that supervisors are available to take over or assist with calls as necessary
- Documented policies and procedures regarding standards of conduct and workflow
- Specific management training designed to enhance leadership and management skills including Dale Carnegie seminars
- Hiring practices that provide opportunities for advancement to high-performing employees
- Review of performance and agent activity to make adjustments to procedures as necessary

Supervisor Training

In addition to annual training required for all Coast staff, supervisors undergo additional training in security awareness, sexual harassment, and annual sessions with agents. They also receive etiquette training for interacting with clients and consumers.

Supervisors are equipped with skills for tracking accounts, conducting audits, processing payments, and achieving goals. A key focus of their training is managing disputes and complaints, as they handle escalated issues. For example, they participate in role-playing exercises with senior management to refine their ability to manage complaints and remain composed during challenging interactions.

Many supervisors also benefit from Dale Carnegie training, which emphasizes leadership, communication strategies, and relationship building. Coast maintains an average management-to-agent ratio of 1:12.5 and a director-to-supervisor ratio of 1:4 to ensure effective and compliant operations.

Proposed Personnel

Coast provides dedicated client managers and staff to assist its clients with processing, technical, and operational issues. The experience and background of the individuals who will be directly responsible for providing services to the State are as follows. Each of these individuals possesses years of experience and deep understanding of BPO and the call center industry, having been directly involved with the majority of our most successful call center programs. The following are the specific professionals who will work on the State's project if Coast is awarded the contract resulting from this solicitation.

Background information for each individual can be found in Figures 3, 4, and 5 on the following pages.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Chris Brown • Senior Vice President of BPO Operations

Mr. Brown joined Coast in 2010 and has 15 years of BPO experience. He oversees the operations of our West Monroe, LA office, with a particular emphasis on call center clients. Mr. Brown provides leadership and guidance to our call center dedicated representatives, ensuring they follow all client guidelines, laws, and regulations. He collaborates closely with training directors to successfully integrate accurate training procedures and requirements, implements company policies and procedures within contracts, and delivers comprehensive contract progress reports. Mr. Brown earned bachelor's degrees in accounting and marketing from the University of Louisiana at Monroe. He is a recipient of the Northeast Louisiana Young Professionals Top 20 Under 40 Award.



Figure 3

Senior Vice President (SVP) of BPO Operations Responsibilities

The SVP serves a key role on the Operations Leadership Team while delivering on the organizational strategic plans. The SVP is responsible for delivering best in class service while delivering on financial commitments within a culture that is consistent with the values of Coast. The position provides direction, leadership, and management to the Operations team.

Kimberly Perry • Director of Business Development

Ms. Perry leads strategic initiatives in Commercial BPO, with a focus on the insurance market. With 29 years of experience in contact center leadership, sales, and client relationship management, she plays a key role in driving growth, ensuring seamless contract implementation, and strengthening client partnerships. Based in North Carolina, Ms. Perry collaborates across departments to deliver tailored solutions and prompt client support. She holds an Associate's Degree from Vincennes University and Life Office Management Association (LOMA) designations including Associate, Customer Service (ASC), Associate, Life Management Institute (ALMI), and Fellow, Life Management Institute (FLMI) Level 1. An active member of the professional community, she serves on the SOCAP Southeast Region Board and is a member of the NICE User Group (NUG).



Figure 4

Director of Business Development Responsibilities

The Director of Business Development is responsible for driving sales by developing relationships with existing and new clients in their assigned market. The Director of Business Development travels to locations in their prescribed territory and communicates with clients/prospects via phone and email. Director of Business Development will also attend trade shows at which they will maximize opportunities to meet with clients/prospects with the intent of growing and nurturing those relationships. This position will partner with the Vice President of Business Development to ensure the highest level of sales performance and service. Ms. Perry will serve as the State's primary point of contact and remain involved throughout project implementation to ensure that your expectations are not only met, but exceeded.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Jeff Jopling • Client Relations Director

Mr. Jopling joined Coast in 2009 and has contributed across multiple areas of the organization, including Operations, Client Service, and program implementation. With more than 15 years of experience in operations management and client relations, he brings a deep understanding of contact center operations and service delivery across a range of programs. As Client Relations Director, Mr. Jopling is focused on ensuring exceptional client satisfaction while meeting and exceeding all contractual obligations. He holds a Bachelor's Degree in Communications from the University of Louisiana at Monroe.



Figure 5

Director of Client Relations Responsibilities

The Client Service team is led by our Director of Client Relations, Jeff Jopling. His primary role is to work closely with clients, develop positive relationships, and ensure complete satisfaction. He accomplishes this by:

- Facilitating the distribution and processing of client reports
- Identifying client issues and provides prompt resolution
- Providing support to the Business Development team
- Ensuring effective and efficient communication between Coast and our clients
- Providing web-based and onsite training to clients
- Coordinating quarterly training webinars

Proposed Personnel Resumes

For full job function details, experience, and qualifications, see proposed personnel full resumes included as **Exhibit V: Proposed Personnel Resumes**.

Key Personnel References

Key personnel references have been provided in **Exhibit IV: Key Personnel References**. Coast considers this information to be **Confidential and Proprietary** and requests it be withheld from public disclosure.

j. SUBCONTRACTORS

If the bidder intends to subcontract any part of its performance hereunder, the bidder should provide:

- i. name, address, and telephone number of the subcontractor(s),
- ii. specific tasks for each subcontractor(s),
- iii. percentage of performance hours intended for each subcontract; and
- iv. total percentage of subcontractor(s) performance hours.

Coast does not intend to subcontract any part of its performance hereunder.

II. TERMS AND CONDITIONS


Coast has no exceptions to note for **Section II. Terms and Conditions** and accepts all terms and conditions within the section as written.

II. TERMS AND CONDITIONS

Bidder should read the Terms and Conditions within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Terms and Conditions Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Terms and Conditions Within Section as Written (Initial)	Exceptions Taken to Terms and Conditions Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
		

The bidders should submit with their solicitation response any license, user agreement, service level agreement, or similar documents that the bidder wants incorporated in the Contract. The State will not consider incorporation of any document not submitted with the solicitation response as the document will not have been included in the evaluation process. These documents shall be subject to negotiation and will be incorporated as addendums if agreed to by the Parties.

If a conflict or ambiguity arises after the Addendum to Contract Award has been negotiated and agreed to, the Addendum to Contract Award shall be interpreted as follows:

1. If only one (1) Party has a particular clause, then that clause shall control,
2. If both Parties have a similar clause, but the clauses do not conflict, the clauses shall be read together,
3. If both Parties have a similar clause, but the clauses conflict, the State's clause shall control.

A. GENERAL

1. The contract resulting from this Solicitation shall incorporate the following documents:
 - a. Solicitation, including any attachments and addenda;
 - b. Questions and Answers;
 - c. Bidder's properly submitted solicitation response, including any terms and conditions or agreements submitted by the bidder;
 - d. Addendum to Contract Award (if applicable); and
 - e. Amendments to the Contract. (if applicable)

These documents constitute the entirety of the contract.

Unless otherwise specifically stated in a future contract amendment, in case of any conflict between the incorporated documents, the documents shall govern in the following order of preference with number one (1) receiving preference over all other documents and with each lower numbered document having preference over any higher numbered document: 1) Amendment to the executed Contract with the most recent dated amendment having the highest priority, 2) Executed Contract and any attached Addenda 3) Addendums to the solicitation and any Questions and Answers, 4) the original solicitation document and any Addenda or attachments, and 5) the Vendor's submitted solicitation response, including any terms and conditions or agreements that are accepted by the State.

Unless otherwise specifically agreed to in writing by the State, the State's standard terms and conditions, as executed by the State, shall always control over any terms and conditions or agreements submitted or included by the Vendor.

Any ambiguity or conflict in the contract discovered after its execution, not otherwise addressed herein, shall be resolved in accordance with the rules of contract interpretation as established in the State of Nebraska.

B. NOTIFICATION

Bidder and State shall identify the contract manager who shall serve as the point of contact for the executed contract.

Communications regarding the executed contract shall be in writing and shall be deemed to have been given if delivered personally; electronically, return receipt requested; or mailed, return receipt requested. All notices, requests, or communications shall be deemed effective upon receipt.

Either party may change its address for notification purposes by giving notice of the change and setting forth the new address and an effective date.

C. BUYER'S REPRESENTATIVE

The State reserves the right to appoint a Buyer's Representative to manage or assist the Buyer in managing the contract on behalf of the State. The Buyer's Representative will be appointed in writing, and the appointment document will specify the extent of the Buyer's Representative authority and responsibilities. If a Buyer's Representative is appointed, the bidder will be provided a copy of the appointment document and is expected to cooperate accordingly with the Buyer's Representative. The Buyer's Representative has no authority to bind the State to a contract, amendment, addendum, or other change or addition to the contract.

D. GOVERNING LAW (Nonnegotiable)

Notwithstanding any other provision of this contract, or any amendment or addendum(s) entered into contemporaneously or at a later time, the parties understand and agree that, (1) the State of Nebraska is a sovereign state and its authority to contract is therefore subject to limitation by the State's Constitution, statutes, common law, and regulation; (2) this contract will be interpreted and enforced under the laws of the State of Nebraska; (3) any action to enforce the provisions of this agreement must be brought in the State of Nebraska per state law; (4) the person signing this contract on behalf of the State of Nebraska does not have the authority to waive the State's sovereign immunity, statutes, common law, or regulations; (5) the indemnity, limitation of liability, remedy, and other similar provisions of the final contract, if any, are entered into subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity; and, (6) all terms and conditions of the final contract, including but not limited to the clauses concerning third party use, licenses, warranties, limitations of liability, governing law and venue, usage verification, indemnity, liability, remedy or other similar provisions of the final contract are entered into specifically subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity.

The Parties must comply with all applicable local, state, and federal laws, ordinances, rules, orders, and regulations.

E. BEGINNING OF WORK & SUSPENSION OF SERVICES

The bidder shall not commence any billable work until a valid contract has been fully executed by the State and the successful Vendor. The Vendor will be notified in writing when work may begin.

The State may, at any time and without advance notice, require the Vendor to suspend any or all performance or deliverables provided under this Contract. In the event of such suspension, the Contract Manager or POC, or their designee, will issue a written order to stop work. The written order will specify which activities are to be immediately suspended and the reason(s) for the suspension. Upon receipt of such order, the Vendor shall immediately comply with its terms and take all necessary steps to mitigate and eliminate the incurrence of costs allocable to the work affected by the order during the period of suspension. The suspended performance or deliverables may only resume when the State provides the Vendor with written notice that such performance or deliverables may resume, in whole or in part.

F. AMENDMENT

This Contract may be amended in writing, within scope, upon the agreement of both parties.

G. CHANGE ORDERS OR SUBSTITUTIONS

The State and the Vendor, upon the written agreement, may make changes to the contract within the general scope of the solicitation. Changes may involve specifications, the quantity of work, or such other items as the State may find necessary or desirable. Corrections of any deliverable, service, or work required pursuant to the contract shall not be deemed a change. The Vendor may not claim forfeiture of the contract by reasons of such changes.

The Vendor shall prepare a written description of the work required due to the change and an itemized cost sheet for the change. Changes in work and the amount of compensation to be paid to the Vendor shall be determined in accordance with applicable unit prices if any, a pro-rated value, or through negotiations. The State shall not incur a price increase for changes that should have been included in the Vendor's solicitation response, were foreseeable, or result from difficulties with or failure of the Vendor's solicitation response or performance.

No change shall be implemented by the Vendor until approved by the State, and the Contract is amended to reflect the change and associated costs, if any. If there is a dispute regarding the cost, but both parties agree that immediate implementation is necessary, the change may be implemented, and cost negotiations may continue with both Parties retaining all remedies under the contract and law.

In the event any good or service is discontinued or replaced upon mutual consent during the contract period or prior to delivery, the State reserves the right to amend the contract to include the alternate product at the same price.

*****Vendor will not substitute any item that has been awarded without prior written approval of NDOL*****

H. RECORD OF VENDOR PERFORMANCE

The State may document the vendor's performance, which may include, but is not limited to, the customer service provided by the vendor, the ability of the vendor, the skill of the vendor, and any instance(s) of products or services delivered or performed which fail to meet the terms of the purchase order, contract, and/or specifications. In addition to other remedies and options available to the State, the State may issue one or more notices to the vendor outlining any issues the State has regarding the vendor's performance for a specific contract ("Contract Compliance Request"). The State may also document the Vendor's performance in a report, which may or may not be provided to the vendor ("Contract Non-Compliance Notice"). The Vendor shall respond to any Contract Compliance Request or Contract Non-Compliance Notice in accordance with such notice or request. At the sole discretion of the State, such Contract Compliance Requests and Contract Non-Compliance Notices may be placed in the State's records regarding the vendor and may be considered by the State and held against the vendor in any future contract or award opportunity. The record of vendor performance will be considered in any suspension or debarment action.

I. NOTICE OF POTENTIAL VENDOR BREACH

If Vendor breaches the contract or anticipates breaching the contract, the Vendor shall immediately give written notice to the State. The notice shall explain the breach or potential breach, a proposed cure, and may include a request for a waiver of the breach if so desired. The State may, in its discretion, temporarily or permanently waive the breach. By granting a waiver, the State does not forfeit any rights or remedies to which the State is entitled by law or equity, or pursuant to the provisions of the contract. Failure to give immediate notice, however, may be grounds for denial of any request for a waiver of a breach.

J. BREACH

Either Party may terminate the contract, in whole or in part, if the other Party breaches its duty to perform its obligations under the contract in a timely and proper manner. Termination requires written notice of default and a thirty (30) calendar day (or longer at the non-breaching Party's discretion considering the gravity and nature of the default) cure period. Said notice shall be delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery. Allowing time to cure a failure or breach of contract does not waive the right to immediately terminate the contract for the same or different contract breach which may occur at a different time.

The State's failure to make payment shall not be a breach, and the Vendor shall retain all available statutory remedies.

K. NON-WAIVER OF BREACH

The acceptance of late performance with or without objection or reservation by a Party shall not waive any rights of the Party nor constitute a waiver of the requirement of timely performance of any obligations remaining to be performed.

L. SEVERABILITY

If any term or condition of the contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and conditions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the provision held to be invalid or illegal.

M. INDEMNIFICATION

1. GENERAL

The Vendor agrees to defend, indemnify, and hold harmless the State and its employees, volunteers, agents, and its elected and appointed officials ("the indemnified parties") from and against any and all third party claims, liens, demands, damages, liability, actions, causes of action, losses, judgments, costs, and expenses

of every nature, including investigation costs and expenses, settlement costs, and attorney fees and expenses ("the claims"), sustained or asserted against the State for personal injury, death, or property loss or damage, arising out of, resulting from, or attributable to the willful misconduct, negligence, error, or omission of the Vendor, its employees, Subcontractors, consultants, representatives, and agents, resulting from this contract, except to the extent such Vendor liability is attenuated by any action of the State which directly and proximately contributed to the claims.

2. INTELLECTUAL PROPERTY

The Vendor agrees it will, at its sole cost and expense, defend, indemnify, and hold harmless the indemnified parties from and against any and all claims, to the extent such claims arise out of, result from, or are attributable to, the actual or alleged infringement or misappropriation of any patent, copyright, trade secret, trademark, or confidential information of any third party by the Vendor or its employees, Subcontractors, consultants, representatives, and agents; provided, however, the State gives the Vendor prompt notice in writing of the claim. The Vendor may not settle any infringement claim that will affect the State's use of the Licensed Software without the State's prior written consent, which consent may be withheld for any reason.

If a judgment or settlement is obtained or reasonably anticipated against the State's use of any intellectual property for which the Vendor has indemnified the State, the Vendor shall, at the Vendor's sole cost and expense, promptly modify the item or items which were determined to be infringing, acquire a license or licenses on the State's behalf to provide the necessary rights to the State to eliminate the infringement, or provide the State with a non-infringing substitute that provides the State the same functionality. At the State's election, the actual or anticipated judgment may be treated as a breach of warranty by the Vendor, and the State may receive the remedies provided under this Solicitation.

3. PERSONNEL

The Vendor shall, at its expense, indemnify and hold harmless the indemnified parties from and against any claim with respect to withholding taxes, worker's compensation, employee benefits, or any other claim, demand, liability, damage, or loss of any nature relating to any of the personnel, including subcontractor's and their employees, provided by the Vendor.

4. SELF-INSURANCE

The State of Nebraska is self-insured for any loss and purchases excess insurance coverage pursuant to Neb. Rev. Stat. § 81-8,239.01. If there is a presumed loss under the provisions of this agreement, Vendor may file a claim with the Office of Risk Management pursuant to Neb. Rev. Stat. §§ 81-8,239.01 to 81-8,306 for review by the State Claims Board. The State retains all rights and immunities under the State Miscellaneous (Neb. Rev. Stat. § 81-8,294), Tort (Neb. Rev. Stat. § 81-8,209), and Contract Claim Acts (Neb. Rev. Stat. § 81-8,302), as outlined in state law and accepts liability under this agreement only to the extent provided by law.

- 5.** The Parties acknowledge that Attorney General for the State of Nebraska is required by statute to represent the legal interests of the State, and that any provision of this indemnity clause is subject to the statutory authority of the Attorney General.

N. ATTORNEY'S FEES

In the event of any litigation, appeal, or other legal action to enforce any provision of the contract, the Parties agree to pay all expenses of such action, as permitted by law and if ordered by the court, including attorney's fees and costs, if the other Party prevails.

O. ASSIGNMENT, SALE, OR MERGER

Either Party may assign the contract upon mutual written agreement of the other Party. Such agreement shall not be unreasonably withheld.

The Vendor retains the right to enter into a sale, merger, acquisition, internal reorganization, or similar transaction involving Vendor's business. Vendor agrees to cooperate with the State in executing amendments to the contract to allow for the transaction. If a third party or entity is involved in the transaction, the Vendor will remain responsible for performance of the contract until such time as the person or entity involved in the transaction agrees in writing to be contractually bound by this contract and perform all obligations of the contract.

P. CONTRACTING WITH OTHER NEBRASKA POLITICAL SUBDIVISIONS OF THE STATE OR ANOTHER STATE

The Vendor may, but shall not be required to, allow agencies, as defined in Neb. Rev. Stat. § 81-145(2), to use this contract. The terms and conditions, including price, of the contract may not be amended. The State shall not be contractually obligated or liable for any contract entered into pursuant to this clause. A listing of Nebraska political subdivisions may be found at the website of the Nebraska Auditor of Public Accounts.

The Vendor may, but shall not be required to, allow other states, agencies or divisions of other states, or political subdivisions of other states to use this contract. The terms and conditions, including price, of this contract shall apply to any such contract, but may be amended upon mutual consent of the Parties. The State of Nebraska shall not be contractually or otherwise obligated or liable under any contract entered into pursuant to this clause. The State shall be notified if a contract is executed based upon this contract.

Q. FORCE MAJEURE

Neither Party shall be liable for any costs or damages, or for default resulting from its inability to perform any of its obligations under the contract due to a natural or manmade event outside the control and not the fault of the affected Party ("Force Majeure Event") that was not foreseeable at the time the Contract was executed. The Party so affected shall immediately make a written request for relief to the other Party and shall have the burden of proof to justify the request. The other Party may grant the relief requested; relief may not be unreasonably withheld. Labor disputes with the impacted Party's own employees will not be considered a Force Majeure Event.

R. CONFIDENTIALITY

All materials and information provided by the Parties or acquired by a Party on behalf of the other Party shall be regarded as confidential information. All materials and information provided or acquired shall be handled in accordance with federal and state law, and ethical standards. Should said confidentiality be breached by a Party, the Party shall notify the other Party immediately of said breach and take immediate corrective action.

It is incumbent upon the Parties to inform their officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a. Specifically, 5 U.S.C. 552a (i)(1), which is made applicable by 5 U.S.C. 552a (m)(1), provides that any officer or employee, who by virtue of his/her employment or official position has possession of or access to agency records which contain individually identifiable information, the disclosure of which is prohibited by the Privacy Act or regulations established thereunder, and who knowing that disclosure of the specific material is prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

S. EARLY TERMINATION

The contract may be terminated as follows:

1. The State and the Vendor, by mutual written agreement, may terminate the contract, in whole or in part, at any time.
2. The State, in its sole discretion, may terminate the contract, in whole or in part, for any reason upon thirty (30) calendar day's written notice shall be delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery to the Vendor. Such termination shall not relieve the Vendor of warranty or other service obligations incurred under the terms of the contract. In the event of termination, the Vendor shall be entitled to payment, determined on a pro rata basis, for products or services satisfactorily performed or provided.
3. The State may terminate the contract, in whole or in part, immediately for the following reasons:
 - a. if directed to do so by statute,
 - b. Vendor has made an assignment for the benefit of creditors, has admitted in writing its inability to pay debts as they mature, or has ceased operating in the normal course of business,
 - c. a trustee or receiver of the Vendor or of any substantial part of the Vendor's assets has been appointed by a court,
 - d. fraud, misappropriation, embezzlement, malfeasance, misfeasance, or illegal conduct pertaining to performance under the contract by its Vendor, its employees, officers, directors, or shareholders,
 - e. an involuntary proceeding has been commenced by any Party against the Vendor under any one of the chapters of Title 11 of the United States Code and (i) the proceeding has been pending for at least sixty (60) calendar days; or (ii) the Vendor has consented, either expressly or by operation of law, to the entry of an order for relief; or (iii) the Vendor has been decreed or adjudged a debtor,
 - f. a voluntary petition has been filed by the Vendor under any of the chapters of Title 11 of the United States Code,
 - g. Vendor intentionally discloses confidential information,
 - h. Vendor has or announces it will discontinue support of the deliverable; and,
 - i. In the event funding is no longer available.

T. CONTRACT CLOSEOUT

Upon termination of the contract for any reason the Vendor shall within thirty (30) days, unless stated otherwise herein:

1. Transfer all completed or partially completed deliverables to the State,

III. VENDOR DUTIES

Coast has no exceptions to note for **Section III. Vendor Duties** and accepts all terms and conditions within the section as written.

2. Transfer ownership and title to all completed or partially completed deliverables to the State,
3. Return to the State all information and data unless the Vendor is permitted to keep the information or data by contract or rule of law. Vendor may retain one copy of any information or data as required to comply with applicable work product documentation standards or as are automatically retained in the course of Vendor's routine back up procedures,
4. Cooperate with any successor Contactor, person, or entity in the assumption of any or all of the obligations of this contract,
5. Cooperate with any successor Contactor, person, or entity with the transfer of information or data related to this contract,
6. Return or vacate any state owned real or personal property; and,
7. Return all data in a mutually acceptable format and manner.

Nothing in this section should be construed to require the Vendor to surrender intellectual property, real or personal property, or information or data owned by the Vendor for which the State has no legal claim.

U. **PROHIBITED PRODUCTS**

The State will not accept Gray Market Products for this solicitation. Gray Market is defined as the trade of a commodity through distribution channels which, while legal, are unofficial, unauthorized, or unintended by the original manufacturer. Gray Market items are not designed to be sold in a particular market and cannot be supported by the authorized importer because of various reasons.

The State will not accept any products made by a company owned by the Chinese Communist Party. Furthermore, pursuant to Executive Order No. 23-05, the State will not accept any communications equipment or services developed by organizations on the Federal Communications Commission's Covered List.

The State will not accept goods from countries or persons identified on the Office of Foreign Assets Control Sanctions List.

V. **AMERICANS WITH DISABILITIES ACT**

Vendor shall comply with all applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12131–12134), as amended by the ADA Amendments Act of 2008 (ADA Amendments Act) (Pub.L. 110–325, 122 Stat. 3553 (2008)), which prohibits discrimination on the basis of disability by public entities.


III. **VENDOR DUTIES**

Bidder should read the Vendor Duties within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Vendor Duties Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Vendor Duties Within Section as Written (Initial)	Exceptions Taken to Vendor Duties Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
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A. INDEPENDENT VENDOR / OBLIGATIONS

It is agreed that the Vendor is an independent Vendor and that nothing contained herein is intended or should be construed as creating or establishing a relationship of employment, agency, or a partnership.

The Vendor is solely responsible for fulfilling the contract. The Vendor or the Vendor's representative shall be the sole point of contact regarding all contractual matters.

The Vendor shall secure, at its own expense, all personnel required to perform the services under the contract. The personnel the Vendor uses to fulfill the contract shall have no contractual or other legal relationship with the State; they shall not be considered employees of the State and shall not be entitled to any compensation, rights or benefits from the State, including but not limited to, tenure rights, medical and hospital care, sick and vacation leave, severance pay, or retirement benefits.

By-name personnel commitments made in the bidder's solicitation response shall not be changed without the prior written approval of the State. Replacement of these personnel, if approved by the State, shall be with personnel of equal or greater ability and qualifications.

All personnel assigned by the Vendor to the contract shall be employees of the Vendor or a subcontractor and shall be fully qualified to perform the work required herein. Personnel employed by the Vendor or a subcontractor to fulfill the terms of the contract shall remain under the sole direction and control of the Vendor or the subcontractor respectively.

With respect to its employees, the Vendor agrees to be solely responsible for the following:

1. Any and all pay, benefits, and employment taxes and/or other payroll withholding,
2. Any and all vehicles used by the Vendor's employees, including all insurance required by state law,
3. Damages incurred by Vendor's employees within the scope of their duties under the contract,
4. Maintaining Workers' Compensation and health insurance that complies with state and federal law and submitting any reports on such insurance to the extent required by governing law,
5. Determining the hours to be worked and the duties to be performed by the Vendor's employees; and,
6. All claims on behalf of any person arising out of employment or alleged employment (including without limit claims of discrimination alleged against the Vendor, its officers, agents, or subcontractors or subcontractor's employees).

If the Vendor intends to utilize any subcontractor, the subcontractor's level of effort, tasks, and time allocation should be clearly defined in the solicitation response. The Vendor shall agree that it will not utilize any subcontractors not specifically included in its solicitation response in the performance of the contract without the prior written authorization of the State. If the Vendor subcontracts any of the work, the Vendor agrees to pay any and all subcontractors in accordance with the Vendor's agreement with the respective subcontractor(s).

The State reserves the right to require the Vendor to reassign or remove from the project any Vendor or subcontractor employee.

Vendor shall insure that the terms and conditions contained in any contract with a subcontractor does not conflict with the terms and conditions of this contract.

The Vendor shall include a similar provision, for the protection of the State, in the contract with any Subcontractor engaged to perform work on this contract.

B. FOREIGN ADVERSARY CONTRACTING PROHIBITION ACT CERTIFICATION (Nonnegotiable)

The Vendor certifies that it is not a scrutinized company as defined under the Foreign Adversary Contracting Prohibition Act, Neb. Rev. Stat. Sec. § 73-903 (5); that it will not subcontract with any scrutinized company for any aspect of performance of the contemplated contract; and that any products or services to be provided do not originate with a scrutinized company.

C. EMPLOYEE WORK ELIGIBILITY STATUS

The Vendor is required and hereby agrees to use a federal immigration verification system to determine the work eligibility status of employees physically performing services within the State of Nebraska. A federal immigration verification system means the electronic verification of the work authorization program authorized by the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of an employee.

If the Vendor is an individual or sole proprietorship, the following applies:

1. The Vendor must complete the United States Citizenship Attestation Form, available on the Department of Administrative Services website at <https://das.nebraska.gov/materiel/docs/pdf/Individual%20or%20Sole%20Proprietor%20United%20States%20Attestation%20Form%20English%20and%20Spanish.pdf>
2. The completed United States Attestation Form should be submitted with the Solicitation response.
3. If the Vendor indicates on such attestation form that he or she is a qualified alien, the Vendor agrees to provide the US Citizenship and Immigration Services documentation required to verify the Vendor's lawful presence in the United States using the Systematic Alien Verification for Entitlements (SAVE) Program.
4. The Vendor understands and agrees that lawful presence in the United States is required, and the Vendor may be disqualified or the contract terminated if such lawful presence cannot be verified as required by Neb. Rev. Stat. § 4-108.

D. COMPLIANCE WITH CIVIL RIGHTS LAWS AND EQUAL OPPORTUNITY EMPLOYMENT / NONDISCRIMINATION (Nonnegotiable)

The Vendor shall comply with all applicable local, state, and federal statutes and regulations regarding civil rights laws and equal opportunity employment. The Nebraska Fair Employment Practice Act prohibits Vendors of the State of Nebraska, and their Subcontractors, from discriminating against any employee or applicant for employment, with respect to hire, tenure, terms, conditions, compensation, or privileges of employment because of race, color, religion, sex, disability, marital status, or national origin (Neb. Rev. Stat. §§ 48-1101 to 48-1125). The Vendor guarantees compliance with the Nebraska Fair Employment Practice Act, and breach of this provision shall be regarded as a material breach of contract. The Vendor shall insert a similar provision in all Subcontracts for goods and services to be covered by any contract resulting from this Solicitation.

E. COOPERATION WITH OTHER VENDORS

Vendor may be required to work with or in close proximity to other Vendors or individuals that may be working on same or different projects. The Vendor shall agree to cooperate with such other Vendors or individuals and shall not commit or permit any act which may interfere with the performance of work by any other Vendor or individual. Vendor is not required to compromise Vendor's intellectual property or proprietary information unless expressly required to do so by this contract.

F. DISCOUNTS

Prices quoted shall be inclusive of ALL trade discounts. Cash discount terms of less than thirty (30) days will not be considered as part of the solicitation response. Cash discount periods will be computed from the date of receipt of a properly executed claim voucher or the date of completion of delivery of all items in a satisfactory condition, whichever is later.

G. PRICES

Prices quoted shall be net, including transportation and delivery charges fully prepaid by the bidder, F.O.B. destination named in the Solicitation. No additional charges will be allowed for packing, packages, or partial delivery costs. When an arithmetic error has been made in the extended total, the unit price will govern.

All prices, costs, and terms and conditions submitted in the solicitation response shall remain fixed and valid commencing on the opening date of the solicitation until the contract terminates or expires.

The State reserves the right to deny any requested price increase. No price increases are to be billed to any State Agencies prior to written amendment of the contract by the parties.

The State will be given full proportionate benefit of any decreases for the term of the contract.

H. PERMITS, REGULATIONS, LAWS

The contract price shall include the cost of all royalties, licenses, permits, and approvals, whether arising from patents, trademarks, copyrights or otherwise, that are in any way involved in the contract. The Vendor shall obtain and pay for

all royalties, licenses, and permits, and approvals necessary for the execution of the contract. The Vendor must guarantee that it has the full legal right to the materials, supplies, equipment, software, and other items used to execute this contract.

I. OWNERSHIP OF INFORMATION AND DATA / DELIVERABLES

The State shall have the unlimited right to publish, duplicate, use, and disclose all information and data developed or obtained by the Vendor on behalf of the State pursuant to this contract.

The State shall own and hold exclusive title to any deliverable developed as a result of this contract. Vendor shall have no ownership interest or title, and shall not patent, license, or copyright, duplicate, transfer, sell, or exchange, the design, specifications, concept, or deliverable.

J. INSURANCE REQUIREMENTS

The Vendor shall throughout the term of the contract maintain insurance as specified herein and provide the State a current Certificate of Insurance/Acord Form (COI) verifying the coverage. The Vendor shall not commence work on the contract until the insurance is in place. If Vendor subcontracts any portion of the Contract the Vendor must, throughout the term of the contract, either:

1. Provide equivalent insurance for each subcontractor and provide a COI verifying the coverage for the subcontractor,
2. Require each subcontractor to have equivalent insurance and provide written notice to the State that the Vendor has verified that each subcontractor has the required coverage; or,
3. Provide the State with copies of each subcontractor's Certificate of Insurance evidencing the required coverage.

The Vendor shall not allow any Subcontractor to commence work until the Subcontractor has equivalent insurance. The failure of the State to require a COI, or the failure of the Vendor to provide a COI or require subcontractor insurance shall not limit, relieve, or decrease the liability of the Vendor hereunder.

In the event that any policy written on a claims-made basis terminates or is canceled during the term of the contract or within two (2) years of termination or expiration of the contract, the Vendor shall obtain an extended discovery or reporting period, or a new insurance policy, providing coverage required by this contract for the term of the contract and two (2) years following termination or expiration of the contract.

If by the terms of any insurance a mandatory deductible is required, or if the Vendor elects to increase the mandatory deductible amount, the Vendor shall be responsible for payment of the amount of the deductible in the event of a paid claim.

Notwithstanding any other clause in this Contract, the State may recover up to the liability limits of the insurance policies required herein.

1. WORKERS' COMPENSATION INSURANCE

The Vendor shall take out and maintain during the life of this contract the statutory Workers' Compensation and Employer's Liability Insurance for all of the contactors' employees to be engaged in work on the project under this contract and, in case any such work is sublet, the Vendor shall require the Subcontractor similarly to provide Worker's Compensation and Employer's Liability Insurance for all of the Subcontractor's employees to be engaged in such work. This policy shall be written to meet the statutory requirements for the state in which the work is to be performed, including Occupational Disease. **The policy shall include a waiver of subrogation in favor of the State. The COI shall contain the mandatory COI subrogation waiver language found hereinafter.** The amounts of such insurance shall not be less than the limits stated hereinafter. For employees working in the State of Nebraska, the policy must be written by an entity authorized by the State of Nebraska Department of Insurance to write Workers' Compensation and Employer's Liability Insurance for Nebraska employees.

2. COMMERCIAL GENERAL LIABILITY INSURANCE AND COMMERCIAL AUTOMOBILE LIABILITY INSURANCE

The Vendor shall take out and maintain during the life of this contract such Commercial General Liability Insurance and Commercial Automobile Liability Insurance as shall protect Vendor and any Subcontractor performing work covered by this contract from claims for damages for bodily injury, including death, as well as from claims for property damage, which may arise from operations under this contract, whether such operation be by the Vendor or by any Subcontractor or by anyone directly or indirectly employed by either of them, and the amounts of such insurance shall not be less than limits stated hereinafter.

The Commercial General Liability Insurance shall be written on an **occurrence basis**, and provide Premises/Operations, Products/Completed Operations, Independent Vendors, Personal Injury, and Contractual Liability coverage. **The policy shall include the State, and others as required by the contract documents, as Additional Insured(s).** This policy shall be primary, and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory. **The COI shall contain the mandatory COI liability waiver language found hereinafter.** The Commercial Automobile Liability Insurance shall be written to cover all Owned, Non-owned, and Hired vehicles.

REQUIRED INSURANCE COVERAGE	
COMMERCIAL GENERAL LIABILITY	
General Aggregate	\$2,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal/Advertising Injury	\$1,000,000 per occurrence
Bodily Injury/Property Damage	\$1,000,000 per occurrence
Medical Payments	\$10,000 any one person
Damage to Rented Premises (Fire)	\$300,000 each occurrence
Contractual	Included
XCU Liability (Explosion, Collapse, and Underground Damage)	Included
Independent Vendors	Included
Abuse & Molestation	Included
<i>If higher limits are required, the Umbrella/Excess Liability limits are allowed to satisfy the higher limit.</i>	
WORKER'S COMPENSATION	
Employers Liability Limits	\$500K/\$500K/\$500K
Statutory Limits- All States	Statutory - State of Nebraska
Voluntary Compensation	Statutory
COMMERCIAL AUTOMOBILE LIABILITY	
Bodily Injury/Property Damage	\$1,000,000 combined single limit
Include All Owned, Hired & Non-Owned Automobile liability	Included
Motor Carrier Act Endorsement	Where Applicable
UMBRELLA/EXCESS LIABILITY	
Over Primary Insurance	\$5,000,000 per occurrence
PROFESSIONAL LIABILITY	
All Other Professional Liability (Errors & Omissions)	\$1,000,000 Per Claim / Aggregate
COMMERCIAL CRIME	
Crime/Employee Dishonesty Including 3rd Party Fidelity	\$3,000,000
CYBER LIABILITY	
Breach of Privacy, Security Breach, Denial of Service, Remediation, Fines and Penalties	\$5,000,000
MANDATORY COI SUBROGATION WAIVER LANGUAGE	
"Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska."	
MANDATORY COI LIABILITY WAIVER LANGUAGE	
"Commercial General Liability & Commercial Automobile Liability policies shall name the State of Nebraska as an Additional Insured and the policies shall be primary and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory as additionally insured."	

3. EVIDENCE OF COVERAGE

The Vendor shall furnish the Contract Manager, via email, with a certificate of insurance coverage complying with the above requirements prior to beginning work at:

121962 O3

Nebraska Department of Labor
Attn: Procurement
550 S 16th Street
Lincoln, NE 68508
NDOL.Procurement@nebraska.gov

These certificates or the cover sheet shall reference the solicitation number, and the certificates shall include the name of the company, policy numbers, effective dates, dates of expiration, and amounts and types of coverage afforded. If the State is damaged by the failure of the Vendor to maintain such insurance, then the Vendor shall be responsible for all reasonable costs properly attributable thereto.

Reasonable notice of cancellation of any required insurance policy must be submitted to the contract manager as listed above when issued and a new coverage binder shall be submitted immediately to ensure no break in coverage.

4. DEVIATIONS

The insurance requirements are subject to limited negotiation. Negotiation typically includes, but is not necessarily limited to, the correct type of coverage, necessity for Workers' Compensation, and the type of automobile coverage carried by the Vendor.

K. ANTITRUST

The Vendor hereby assigns to the State any and all claims for overcharges as to goods and/or services provided in connection with this contract resulting from antitrust violations which arise under antitrust laws of the United States and the antitrust laws of the State.

L. CONFLICT OF INTEREST

By submitting a solicitation response, vendor certifies that no relationship exists between the vendor and any person or entity which either is, or gives the appearance of, a conflict of interest related to this solicitation or project.

Vendor further certifies that vendor will not employ any individual known by vendor to have a conflict of interest nor shall vendor take any action or acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its contractual obligations hereunder or which creates an actual or appearance of conflict of interest.

If there is an actual or perceived conflict of interest, vendor shall provide with its solicitation response a full disclosure of the facts describing such actual or perceived conflict of interest and a proposed mitigation plan for consideration. The State will then consider such disclosure and proposed mitigation plan and either approve or reject as part of the overall solicitation response evaluation.

M. ADVERTISING

The Vendor agrees not to refer to the contract award in advertising in such a manner as to state or imply that the company or its goods or services are endorsed or preferred by the State. Any publicity releases pertaining to the project shall not be issued without prior written approval from the State.

N. NEBRASKA TECHNOLOGY ACCESS STANDARDS (Nonnegotiable)

1. The State of Nebraska is committed to ensuring that all information and communication technology (ICT), developed, leased, or owned by the State of Nebraska, affords equivalent access to employees, program participants and members of the public with disabilities, as it affords to employees, program participants and members of the public who are not persons with disabilities.
2. By entering into this Contract, Vendor understands and agrees that if the Vendor is providing a product or service that contains ICT, as defined in subsection 3 below and such ICT is intended to be directly interacted with by the user or is public facing, such ICT must provide equivalent access, or be modified during implementation to afford equivalent access, to employees, program participants, and members of the public who have and who do not have disabilities. The Vendor may comply with this section by complying with Section 508 of the Rehabilitation Act of 1973, as amended, and its implementing standards adopted and promulgated by the U.S. Access Board.

3. ICT means information technology and other equipment, systems, technologies, or processes, for which the principal function is the creation, manipulation, storage, display, receipt, or transmission of electronic data and information, as well as any associated content. Vendor hereby agrees ICT includes computers and peripheral equipment, information kiosks and transaction machines, telecommunications equipment, customer premises equipment, multifunction office machines, software, applications, web sites, videos, and electronic documents. For the purposes of these assurances, ICT does not include ICT that is used exclusively by a Vendor.

O. DISASTER RECOVERY/BACK UP PLAN

The Vendor shall have a disaster recovery and back-up plan, of which a copy should be provided upon request to the State, which includes, but is not limited to equipment, personnel, facilities, and transportation, in order to continue delivery of goods and services as specified under the specifications in the contract in the event of a disaster.

P. DRUG POLICY

Vendor certifies it maintains a drug free workplace environment to ensure worker safety and workplace integrity. Vendor agrees to provide a copy of its drug free workplace policy at any time upon request by the State.

Q. WARRANTY

Despite any clause to the contrary, the Vendor represents and warrants that its services hereunder shall be performed by competent personnel and shall be of professional quality consistent with generally accepted industry standards for the performance of such services and shall comply in all respects with the requirements of this Agreement. For any breach of this warranty, the Vendor shall, for a period of ninety (90) days from performance of the service, perform the services again, at no cost to the State, or if Vendor is unable to perform the services as warranted, Vendor shall reimburse the State all fees paid to Vendor for the unsatisfactory services. The rights and remedies of the parties under this warranty are in addition to any other rights and remedies of the parties provided by law or equity, including, without limitation actual damages, and, as applicable and awarded under the law, to a prevailing party, reasonable attorneys' fees and costs.

R. TIME IS OF THE ESSENCE

Time is of the essence with respect to Vendor's performance and deliverables pursuant to this Contract.

IV. PAYMENT

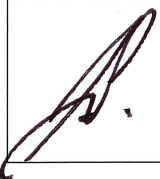
Coast has no exceptions to note for **Section IV. Payment** and accepts all terms and conditions within the section as written.

IV. PAYMENT

Bidder should read the Payment clauses within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Payment clauses Within Section as Written" in the table below. If exception is not taken to a provision, it is deemed accepted as stated. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken;
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Payment Clauses Within Section as Written (Initial)	Exceptions Taken to Payment Clauses Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
		

A. PROHIBITION AGAINST ADVANCE PAYMENT (Nonnegotiable)

Pursuant to Neb. Rev. Stat. § 81-2403, "[n]o goods or services shall be deemed to be received by an agency until all such goods or services are completely delivered and finally accepted by the agency."

B. TAXES (Nonnegotiable)

The State is not required to pay taxes and assumes no such liability as a result of this Solicitation. The Vendor may request a copy of the Nebraska Department of Revenue, Nebraska Resale or Exempt Sale Certificate for Sales Tax Exemption, Form 13 for their records. Any property tax payable on the Vendor's equipment which may be installed in a state-owned facility is the responsibility of the Vendor.

C. INVOICES

Invoices for payments must be submitted by the Vendor to the agency requesting the services with sufficient detail to support payment. Contractor will submit a bi-weekly invoice to NDOL.Procurement@nebraska.gov. Invoices must include supporting documentation as deemed acceptable by NDOL.

The terms and conditions included in the Vendor's invoice shall be deemed to be solely for the convenience of the parties. No terms or conditions of any such invoice shall be binding upon the State, and no action by the State, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping the State with respect to any such term or condition, unless the invoice term or condition has been previously agreed to by the State as an amendment to the contract. **The State shall have forty-five (45) calendar days to pay after a valid and accurate invoice is received by the State.**

D. INSPECTION AND APPROVAL

Final inspection and approval of all work required under the contract shall be performed by the designated State officials.

The State and/or its authorized representatives shall have the right to enter any premises where the Vendor or Subcontractor duties under the contract are being performed, and to inspect, monitor or otherwise evaluate the work being performed. All inspections and evaluations shall be at reasonable times and in a manner that will not unreasonably delay work.

E. PAYMENT (Nonnegotiable)

Payment will be made by the responsible agency in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. § 81-2403). The State may require the Vendor to accept payment by electronic means such as ACH deposit. In no event shall the State be responsible or liable to pay for any goods and services provided by the Vendor prior to the Effective Date of the contract, and the Vendor hereby waives any claim or cause of action for any such goods or services.

F. LATE PAYMENT (Nonnegotiable)

The Vendor may charge the responsible agency interest for late payment in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §§ 81-2401 through 81-2408).

G. SUBJECT TO FUNDING / FUNDING OUT CLAUSE FOR LOSS OF APPROPRIATIONS (Nonnegotiable)

The State's obligation to pay amounts due on the Contract for fiscal years following the current fiscal year is contingent upon legislative appropriation of funds. Should said funds not be appropriated, the State may terminate the contract with respect to those payments for the fiscal year(s) for which such funds are not appropriated. The State will give the Vendor written notice thirty (30) calendar days prior to the effective date of termination. All obligations of the State to make payments after the termination date will cease. The Vendor shall be entitled to receive just and equitable compensation for any authorized work which has been satisfactorily completed as of the termination date. In no event shall the Vendor be paid for a loss of anticipated profit.

H. RIGHT TO AUDIT (First Paragraph is Nonnegotiable)

The State shall have the right to audit the Vendor's performance of this contract upon a thirty (30) days' written notice. Vendor shall utilize generally accepted accounting principles, and shall maintain the accounting records, and other records and information relevant to the contract (Information) to enable the State to audit the contract. (Neb. Rev. Stat. § 84-304 et seq.) The State may audit, and the Vendor shall maintain, the Information during the term of the contract and for a period of five (5) years after the completion of this contract or until all issues or litigation are resolved, whichever is later. The Vendor shall make the Information available to the State at Vendor's place of business or a location acceptable to both Parties during normal business hours. If this is not practical or the Vendor so elects, the Vendor may provide electronic or paper copies of the Information. The State reserves the right to examine, make copies of, and take notes on any Information relevant to this contract, regardless of the form or the Information, how it is stored, or who possesses the Information. Under no circumstance will the Vendor be required to create or maintain documents not kept in the ordinary course of Vendor's business operations, nor will Vendor be required to disclose any information, including but not limited to product cost data, which is confidential or proprietary to Vendor.

The Parties shall pay their own costs of the audit unless the audit finds a previously undisclosed overpayment by the State. If a previously undisclosed overpayment exceeds one-half of one percent (.5%) of the total contract billings, or if fraud, material misrepresentations, or non-performance is discovered on the part of the Vendor, the Vendor shall reimburse the State for the total costs of the audit. Overpayments and audit costs owed to the State shall be paid within ninety (90) days of written notice of the claim. The Vendor agrees to correct any material weaknesses or condition found as a result of the audit.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

2. TECHNICAL RESPONSE

The Technical Response section of the solicitation response should consist of the following subsections:

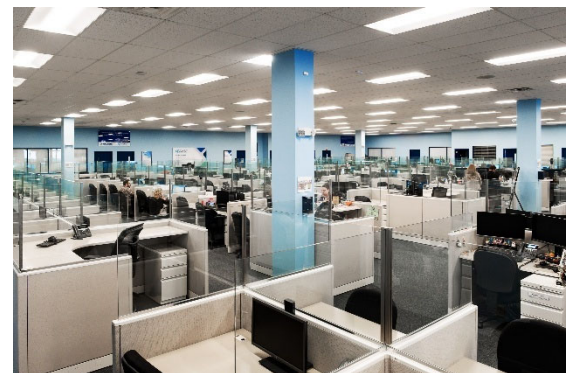
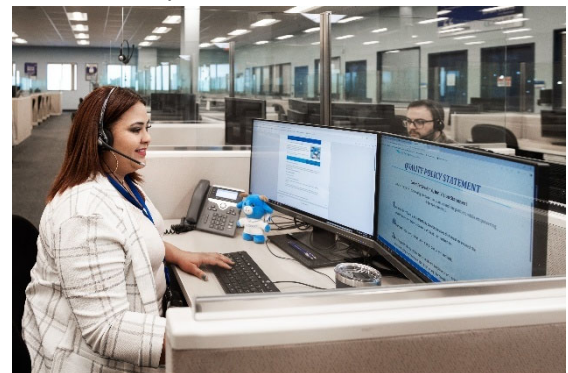
a. Understanding of the business requirements;

Coast operates exclusively within the United States and maintains secured, onsite facilities that meet all applicable federal and state laws. All company personnel work from controlled environments with dedicated workstations to ensure compliance with data protection and privacy regulations. Remote or telework setups will not be used in the delivery of this contract.

The proposed solution is a fully turnkey operation, built on the reliability of Amazon Web Services (AWS) and the flexibility of Salesforce® Service Cloud. Facilities are equipped with modern office space, enterprise-grade computing devices, telephony hardware, and secure network infrastructure. Salesforce® serves as the central customer relationship management (CRM) platform, enabling real-time case management, caller interaction tracking, and streamlined workflows. AWS powers the underlying cloud infrastructure, supporting secure voice, data, and application services, while providing full compliance with FedRAMP and other relevant security frameworks.

Telephony services are delivered through AWS Connect, which integrates with the State's existing systems and supports both a toll-free (800) number and routing through any current number provided by the State. All connectivity, including installation and maintenance of voice and data lines, is handled internally. No equipment or technical resources are required from the State.

Coast's hours of operation mirror those of our clients. There are no concerns with operating Monday through Friday, from 8:00 AM to 5:00 PM CT, excluding the State's recognized holidays. We manage all aspects of staffing and operations, including recruiting, hiring, onboarding, scheduling, payroll,



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performance tracking, and, if necessary, disciplinary actions. Staffing decisions are informed by forecasted call volumes and performance metrics available through Salesforce® dashboards.

Coast recognizes that embracing and supporting the rich diversity of our employees, clients, and their callers is essential to our success. To ensure effective communication, we will either retain bilingual staff or arrange for interpreter services throughout the term of any pricing agreement if bilingual personnel are unavailable. When needed, Coast may partner with an external interpretation provider that offers services in hundreds of languages. Details for the third-party provider are listed below:

Language Line*

Client Services

1 Lower Ragsdale Drive, Building 2

Monterrey, CA 93940

(800) 752-6096

**Anticipated vendor pending award*

Coast's expert agents will field inbound calls from UI claimants to address claim inquiries, schedule callbacks, and escalate complex cases when necessary. All interactions will be logged in Salesforce®, using customized case objects and automation rules to standardize data collection. Integration with NEworks ensures dual-entry of key data fields, including name, address, claim number, phone number, and mother's maiden name.

Coast's Interactive Voice Response (IVR) system, built with AWS Connect and managed through Salesforce®, is configured to deliver calls using State-approved scripts. It offers multi-language support, dynamic routing based on caller input, and continuous performance monitoring. Detailed reporting, including call metrics, abandonment rates, and resolution times, is available through Salesforce® and provided to the State monthly or on demand.

Service quality is to be maintained through monthly reviews with State representatives. Real-time dashboards in Salesforce® allow for proactive identification of bottlenecks or staffing imbalances, with quick internal reallocation of resources as needed to meet performance targets. Any missed service levels are addressed immediately through corrective measures.

Coast's staffing structure is to include an Account Manager, Call Center Supervisors, Quality Assurance Analysts, and frontline Agents. Coast assigns Mr. Chris Brown to serve as the single point of coordination for all operational matters. Onsite supervision and quality monitoring are maintained throughout business hours to ensure consistent performance and adherence to standards.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Training follows a “Train the Trainer” model. Initial training is provided by the State to Coast’s supervisory staff, who then lead internal training sessions using State-provided materials. Ongoing training is delivered to new hires and existing agents, covering areas such as:

- Customer service expectations and compliance with State procedures
- Use of Salesforce® CRM and IVR workflows
- Call scripting, system navigation, and NEworks integration
- Sensitivity, confidentiality, conflict resolution, and effective communication

Training shall occur onsite or virtually through the State’s pre-approved platforms. All training materials, guides, and attendance records are maintained in Salesforce® and made available to the State for review. Coast’s full-time trainers are based onsite to oversee delivery and quality, and to ensure staff remain current with process changes and policy updates.

In the event of service disruption, real-time monitoring tools in AWS detect anomalies immediately. Notifications are sent to the State point of contact, along with an estimated resolution timeline and impact assessment. Built-in failover protocols and cloud redundancies ensure that downtime is minimized and call center operations resume quickly. Coast brings proven experience in delivering large-scale, secure, and compliant call center operations to public-sector clients. By leveraging the scalability of AWS and the workflow power of Salesforce®, this solution is built to meet the State’s expectations for service quality, transparency, and efficiency.

b. Detailed project work plan

Work Plan

We are a successful service provider that will quickly implement, tailor, and exceed performance expectations for the State. The project timeline consists of the following elements, from project definition through and commencement of contact center services and ongoing support:

Define Project Requirements: The Business Analytics team reviews trends in call volumes and outreach attempts to provide the Operations Department with valuable strategic information. They create customized reports and datasets which provides important metrics on trends in our strategy and allows our management team to make adjustments as necessary.

Execute Staffing Plan: Equipped with an agile staffing model, Coast has a team of knowledgeable, experienced employees who are available and ready to begin work on this contract immediately. Throughout the course of the contract, Coast’s Business Analytics Department will monitor progress to identify if additional staffing is required at any time.

Training Plan Development: Coast trains its employees through an award-winning training program built to prepare individuals for a successful career in a contact center atmosphere. To ensure our clients’ needs are met, all new hires must attend an intensive hands-on training program that includes client-specific information to familiarize them with the contract requirements and expectations.

Establish Compliance Auditing Procedures: As part of Coast’s commitment to the State, our team will provide information and guidance related to any compliance or regulatory concerns. We have an

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

unprecedented record of no findings in our Title IV Compliance audit dating back to 2002. Our Compliance Department monitors calls and reviews outcomes to ensure all contract deliverables are met on or before schedule. We have the ability to monitor and report on agreed-upon service levels and key performance indicators (KPIs) such as response time and abandonment rates.

Develop Progress Reports: Coast is accustomed to providing progress reports and summaries per clients' needs and preferences, from periodically to multiple times a week. These reports are created via our internal daily tracking system which tracks all call related data elements. Coast has the systems, staff, and expertise to meet and exceed the need for comprehensive monthly reports throughout the process, including data collection activities by college (117), with graphs, spreadsheets, and visual indicators regarding erroneous data that needs correction.

Implement and Train Call Scripts: Drawing from 49 years in the delivery of effective, personable, professional, and patient communication, Coast will work with the State to create, implement, and follow the survey scripts with accuracy and consistency as staff make calls and gather information. The State's survey will be configured into our dynamic scripting software which will facilitate a natural workflow to make maximum efficient use of the claimants' time. Coast has the ability to implement an after-call survey that can be emailed to claimants with the results provided to the State.

Establish System Connectivity with The State of Nebraska, Department of Labor: Coast understands the importance of providing comprehensive, real-time, and ad hoc reports and is able and willing to comply with all reporting requirements of the State. As required by the State, Coast will securely store the data until the end of contract at which time Coast will work with the State for secure file transfer of the data. This shall include a data file with outcome (opt-out, wrong number, completed survey) by survey ID by September 3, 2021, and an entire data set that is clean and aligned to predetermined code book by September 24, 2021.

Sign-off; Begin Contact Center Communication: Coast will manage and perform this contract in one of our three (3) office facilities. Coast is committed to providing the highest levels of service and compliance to our clients. We recognize the need for effective communication and will be the State most thorough choice for clear communication throughout the contract.

Ongoing Support: Project leader and Director of Business Development Kimberly Perry has over 29 years' experience in leadership and business development capacities in the service of helping customers solve complex problems and achieving both short-term and long-term strategic goals. Ms. Perry will be available by phone and email at all points of the project timeline to ensure that your expectations are not only met but exceeded. In addition, Coast will assign an experienced frontline team of client service and technical support professionals, all of whom will be available directly by direct email and voice lines.

c. Deliverables and due dates.

Coast has provided a detailed implementation plan in **Exhibit VI: Deliverables and Due Dates**. It represents an estimated expedited implementation plan to begin providing the State with high quality and complaint contact center services. We recognize the time sensitive need of this service and will work diligently to meet the State needs and expectations utilizing elements outlined below as applicable. The items listed will be accomplished between the time of Contract Execution and the State designated contract start date. Following this implementation plan allows Coast ample opportunity not only to meet but exceed the minimum response rate benchmark.

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d. Attachment #1: Required Bidder Responses.

1. Describe your site security and how you will maintain security. Both physical and technological security. Describe your experience handling Personal Protected Information (PPI) and sensitive information. Describe how you will ensure that any data resulting from services provided is properly secured according to the requirements in this RFP and is not used, accessed, or disseminated by any manor for any reason not authorized by NDOL.

Physical Security: Employees

Coast understands the importance of protecting the sensitive information and data entrusted to our care. We limit employee access to information to only those who have a business reason to know such information. Coast requires a signed employee acknowledgment of the requirement to keep protected information private. Existing policies establish a procedure for the prompt reporting of the loss or theft of protected information.



All Coast offices and storage facilities that maintain protected information limit unauthorized access and are appropriately secured. **Coast production, support, and systems facilities are under 24/7/365 monitored alarm, electronically monitored and controlled access card system, 24/7 camera surveillance, and all operations are contained inside physically locked door areas with stringent security password and access policies.** Our database hardware is housed in a locking rack chassis located within a further access-controlled, restricted-entry data center.

Coast facilities have both physical and administrative controls to prevent unauthorized entry. Coast has 100% controlled access and requires all employees to wear a blue lanyard with a photo identification badge (around the neck only) at all times. Employees must utilize their key cards (badges) to enter the building and various doors within the facilities, providing both authorization and accountability. The following physical access controls are in place at each Coast facility:

- All Data Center visitors must sign a data center visitor's log
- All firewalls, switches, servers, and Local Area Network (LAN) are in secured data closets
- Card access system to enter/exit the Data Center (including card logging system)
- Data Center has no external windows
- Data Center is in an unidentified room
- Employees are required to display their photo identification badges while in the facility, as well as utilize their ID badges for authorized entrance to all secured areas.
- Front desk receptionist at the security vestibule entrance to the facility monitors all access by employees and visitors
- No personal cell phones allowed in the building (Company-issued phones are permitted for business purposes only and are issued only to Directors and above.)
- A secure technological infrastructure that meets Federal Information Security Modernization Act (FISMA)/National Institute of Standards and Technology (NIST) 800-53 rev 5 standards

Coast distinguishes itself from competitors by offering a unique combination of security, operational efficiency, training excellence, and a strong, employee-focused culture. These

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differentiators reflect Coast's commitment to delivering superior call center services while ensuring compliance, security, and employee satisfaction. By leveraging a secure infrastructure, a proven training program, and a culture of continuous improvement, Coast consistently exceeds client expectations. Below are the key factors that set Coast apart from others in the industry.

Physical Security: Facility Visitors

Coast has extremely stringent policies regarding visitors at its facilities. Visitors are only allowed if they have a business purpose to be in the facility (interviews, maintenance, vending machine vendors, etc.). Visitors must have an escort at all times and are not permitted to bring cellphones into the building. The following visitor physical access controls are in place at each Coast facility:

- All visitors must always have an escort with them while in the facility
- All visitors require red visitor badges and must sign in at the front desk
- Receptionists maintain logs to record the entry and departure of all visitors

Coast requires all visitors to sign in, present photo identification, and be escorted throughout its facilities at all times. Coast's visitor log captures the following information:

- Name
- Data
- Reason for visit
- Person they are visiting
- Time In/Time out
- The type of photo ID presented (Photo ID required)
- Their signature, signature of person signing them in
- The visitor badge number
- If they have a cellphone or laptop with them (outside electronics are not allowed within our facilities unless expressly approved.)

Coast keeps all visitor logs in a secured storage closet which only specific HR employees have access to. Coast keeps all visitor logs indefinitely.

Environmental Security Controls: Network components are housed in an environmentally controlled data center at the Coast facility. The following environmental controls have been implemented to protect the system resources:

- Air Conditioning (A/C) unit, including redundant A/C
- Emergency Power
- Emergency Shutoff
- Fire extinguishers
- Moisture detectors are installed
- Plumbing lines are located under the raised floor
- Raised floors (where applicable)
- Smoke detectors
- Temperature, Flood, and Humidity sensors
- Uninterruptible Power System (UPS)



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Security Overview

Coast's commitment to security is a cornerstone of its operations. As a trusted call center provider for multiple federal agencies, Coast upholds the highest security standards required for large-scale contracts. With a security-first approach, Coast ensures that all employees undergo extensive background checks and vetting, which includes employment history verification, reference checks, and additional screening procedures. This thorough hiring process guarantees that all staff members meet strict security requirements and are prepared to handle sensitive data. In addition, Coast integrates internal compliance measures, including call monitoring and a dedicated compliance team, to maintain the highest standards of data protection.

To maintain compliance and data security, all employees completed annual Health Insurance Portability and Accountability Act (HIPAA) training, reinforcing strict adherence to regulations regarding Protected Health Information (PHI). Coast's physical and network security measures further safeguarded sensitive data, ensuring compliance across all emergency response contracts.

Security Systems

Coast has developed a robust risk monitoring strategy focusing on the development of company audits, monitoring tools, and federal requirements. We utilize advanced tools to monitor our actions, including, but not limited to:

- Real-time Voice Analytics Module (VAM) for caller communications
- System for account activity, call recordings, notations, and records
- Document management system for caller correspondence
- Network activity Intrusion Detection System (IDS) and Intrusion Protection System (IPS)
- Log Event Monitoring (LEM) system to monitor 24/7/365 system event tracking
- Vulnerability scanning for hardware and software
- Compliance Management System (CMS) for compliance tracking
- Custom business analytic reporting structure for operational performance monitoring
- Learning Management System (LMS) for employee training activities
- Lightweight Directory Access Protocol (LDAP) to connect to our active directory
- Web Security Appliance (WSA) to monitor website traffic
- Identity Services Engine (ISE) port switching and network segmentation capabilities

Coast is proud of its efforts to audit, assess, and control our call center services to high standards of compliance, caller experience, and performance.

Network Security Controls

Coast has developed a robust risk monitoring strategy focused on the investment of monitoring tools, the creation of detailed reports, company audits, and a management oversight process to ensure our network security controls are compliant with caller protections and State requirements. We utilize Identity Services Engine (ISE) port switching and network segmentation capabilities to ensure Coast's information systems are protected from unauthorized access from outside our network.

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Data Encryption

Coast has invested heavily into the policies, procedures, and technologies used to secure the IT environment and data residing within it. **All caller data is encrypted at rest and in transit. This includes encryption within our system software, Secure File Transfer Protocol (SFTP) servers, and file server where this data is sitting at rest.** To access our data, Coast utilizes role-based access methodologies to permit staff access to only necessary data to perform their jobs. While data at rest encryption is important to us, we also work to make sure that all data that is transmitted, is encrypted during that transmission. Coast utilizes a file transfer product which allows Coast to receive data via secure methods such as SSH, SSL, and HTTPS. In addition, all data stored on our SFTP server is encrypted at rest and when in transit with 256-bit AESFIPS 140-2 validated encryption.

Transmit Personal Protected Information (PPI)

Coast will utilize our call center system, AWS, to capture and transmit PPI. This system is customizable through programable elements that allow our application development team to create tailored functionality based on our client's requirements. In addition to PPI security at the system level, Coast provides employees with PPI handling training and processes that ensure human interaction with PPI is compliant. We discourage employees from writing any PPI down and require that any PPI is disposed of securely in one of our many secure shred bins. This hard copy documentation is routinely securely disposed of through our shred vendor who provides an attestation of destruction at every pickup.

Data Security

Our Data Storage and Retention Policy is intended to ensure all sensitive data is retained in full compliance with Coast's business, legal, and regulatory policies. Data storage beyond the retention period specified by this policy and Coast's contract with the client puts both Coast and its clients at unnecessary risk. In general, payment card numbers and associated cardholder data are stored for only six (6) months from the last payment, and all payment card and Social Security numbers are fully encrypted and stored on our databases, but only the last four digits of both are visible. Additionally, payment card information stored in the system is not accessible to staff. This retention period allows for potential charge backs within the six-month period. The quality control coordinator and system administrators are responsible for defining procedures to identify the electronic data that exceeds the retention period and to securely dispose of it. Such procedures must be consistent with the following:

- **On-Line Electronic Data:** Once stored data exceeds the retention period, it will be removed on a quarterly basis via an automated process. If an automated process is not available, the various Department Directors are responsible for conducting quarterly audits to ensure that stored data in excess of the retention period is securely removed.
- **Backup/Removable Media:** Backup or removable media storing cardholder data must be classified so it can be identified as confidential, inventoried and physically secured. System Administrators are responsible for reviewing media inventories on a monthly basis and securely disposing of cardholder data which exceeds the retention period.
- **Paper Records:** Paper reports containing cardholder data must be labeled so they can be identified as confidential and securely disposed of once there is no longer a business reason

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to retain them. Paper reports are physically secured (e.g. stored in a locked file cabinet) when not in use. On a quarterly basis, the Quality Control Coordinators are responsible for auditing files to ensure that there are no reports containing cardholder data in excess of the retention period.

- **Secure Transportation:** If transported, paper and/or electronic media must be sent via a traceable method and the System Administrator or Account Manager must provide written approval prior to transportation.
- **Secure Disposal:** To provide proper assurance that data is irrecoverable, the following disposal methods must be used:
 - **On-Line Electronic Data:** Cardholder data stored in files must be wiped using a program approved by the Director of IT.
 - **Backup/Removable Media:** Cardholder data must be destroyed beyond recovery by using a wipe program to delete files or via degassing or physically destroying the media beyond recovery. Removable media must be stored in a secure location until it has been destroyed.
 - **Paper Records:** Documents containing cardholder data must be cross-cut shred, incinerated, or pulped. Employees are responsible for disposing of sensitive paper records, including those containing cardholder data, in the provided locked shred bins or alternatively flagging the box of documentation for shredding by an approved and licensed outsource provider.

The shredding firm maintains several secure shred bins at Coast. Each week, firm representatives arrive at our facilities to pick up the contents of the shred bins for secure on-site destruction. A Coast employee escorts the representatives to each shred bin to verify the contents are emptied and shredded. After the process is complete, the pickup log is signed by both the Coast employee and the representative. A copy of the log is kept on file.

Communications Security

At the edge of our network, Coast has deployed a redundant set of Cisco Adaptive Security Appliance firewalls with Intrusion Prevention System (IPS) modules to prevent intrusion attempts. All Coast devices, including the firewalls, are centrally logging all security logs for alerts and review based on the severity of the event type. We have dedicated security staff that is responsible for monitoring the firewall, IPS, and system logs. As an additional measure of security, Coast has deployed a Cisco Ironport device to help not only with email spam and virus blocking but also as a Data Leak Prevention (DLP) measure to ensure confidential caller information is not sent through non-secure communication channels, such as email. We have web filtering software in place to detect malicious websites as well as to control the sites that employees are allowed to access. Coast also undergoes annual third-party audits that validate our compliance with HIPAA, FISMA, ISO 27002, and many different state regulations and laws.

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Communication with Employees

Coast utilizes various methods of communication to help ensure that employees understand their individual role, as well as company policies and procedures. Certain communication methods, such as floor meetings and companywide internal emails guarantee that significant events are communicated in a timely manner. Time-sensitive information is communicated verbally and by email to all employees. Company owners and team supervisors hold regular staff meetings as needed. Furthermore, employees receive written job descriptions that clearly define roles, responsibilities, and expectations.

System Access

Coast has implemented many layers of security which starts at the perimeter of the network and has implemented highly available firewalls with IPS/IDS modules that are configured to alert to Coast's centralized Security and Event Log server. On local networks, Coast has implemented identify based network access and all systems are hardened to NIST best practices following strict group policy and hardening procedures. These procedures are completed on each system individually to ensure that specific applications are locked down according to best practices. For traffic leaving the network via email, Coast has implemented data loss prevention technology that prevents the unauthorized sending of emails containing confidential information or that contain information pertinent to HIPAA and other caller information.

Coast uses a centralized security log and file integrity monitoring system. Coast's monitoring system alerts staff of system level file changes, as well as logs any activity happening across all devices in the environment, including firewalls, IPS's, servers, applications and antivirus. Coast utilizes its centralized security logging system to aggregate the logs for all systems and devices so that a real-time view of all activity occurring within the environment can be generated. Coast has a list of alerts that are considered important and that trigger alerts to the IT team for review or investigation. These alerts include user logical access events, administrator activity, account modifications, and the detection of malicious code. In the event of a breach that requires a notification, Coast will follow the appropriate state or federal breach notification laws that pertain to the data in question.

Secure Data Transfer

Our firewall protects internal servers and internal/external access through layers of passwords and encryption at multiple levels of our network. To protect data, accessibility to menu features is allowed only by authorized personnel. Passwords are changed frequently to protect the integrity of the system. Passwords are a combination of alpha/numeric keys and cannot be reused. With assignment of password and PIN access and levels of access granted on a need-for-access basis, anyone who logs in is recorded and tracked by keystroke.

Externally, Coast uses its secure web portal to receive data from the State, and the State may access caller information, reports and other information through that portal. Coast creates a SFTP for uploading and downloading information via the online access. All access is encrypted and secure.

Innovative Technology

We have the knowledge and resources to expand our operations, implement new technologies, interface with existing systems, and maintain detailed information security protocol. This includes

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telephony, network, and server systems; a custom electronic operational environment; and information security resources. Coast will provide its services from its Geneseo, New York location that has a secured perimeter and badged employees. We conduct annual audits on our business practices and annual disaster recovery and incident testing. Additional information security controls include, but are not limited to:

- Network routes and segmentation
- Firepower IDS and IPS
- Data loss protection
- Email gateway
- Encryption on all company cellphones and laptops
- Content filter

Compliance Information Security Standards

Coast employs significant information security standards to ensure protection of our systems and the information entrusted to us by our clients. Coast complies with all federal and state requirements pertaining to data security and management of confidential information. This includes:

- FISMA
- HIPAA
- ISO 27002

Coast has developed a management control process that focuses on the documentation, audit trail, and management control of our operations. This has culminated in a document library containing more than 300 policies, 125 procedures, and 600 work instructions. Policies represent company standards; procedures are high level overviews of our process; and work instructions cover detailed step by step instructions of work processes. These documents demonstrate Coast's thorough development of a compliance system and information security standards.

As part of Coast's data security and compliance requirements, third-party service provider due diligence is conducted on an annual basis. Part of that evaluation is verifying that all service providers comply with the same standards, laws, and regulations with which Coast maintains compliance.

Coast maintains a dedicated Information Security Team as part of our Information Technology department. This team is responsible for the management of company information security audits; the maintenance of information security documentation including the company's disaster recovery/business continuity plans; the response to perceived or actual threat of potential data security issues; and the prevention, mitigation, and controlling of information security concerns.

FISMA Compliant

As a contractor for the Department of Education, Coast was required to follow FISMA, 44 U.S.C. § 3541, et seq, a federal law intended to strengthen information security systems and refine the transmission of

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electronic data. This law extends beyond the systems managed by the federal government to cover any third-party service providers who aid in the management of government data.

FISMA compliance is obtained by an agency submitting to a process in which the company's complete IT structure, equipment and security controls are recorded, assessed, certified and accredited. Once FISMA compliance is achieved, regulations require annual monitoring to maintain compliance. Although our contractual obligations to the Department of Education was the catalyst for Coast to pursue compliance, all business lines benefit from working with a FISMA compliant agency due to the advanced security practices it requires.



This has allowed Coast to invest and focus on compliance. Through this process, we have created complete security protocols to monitor accounts. Additionally, our IT and compliance staff are the most talented, knowledgeable, and experienced professionals in the industry.

IRS and Federal Compliance

As a vendor to federal agencies, including the IRS, we comply with all relevant federal and state regulations governing data protection and compliance. This includes adherence to IRS Publication 1075/4812, which ensures the protection of taxpayer information. We also comply with HIPAA and other applicable regulations to ensure the highest standards of data security and compliance.

Health Insurance Portability and Accountability Act

Coast complies with applicable regulations and requirements of the HIPAA. To protect against the unauthorized access or disclosure of information, Coast has implemented multiple access protocols from an information security standpoint. This includes, but is not limited to:

- Access to information based on a documented business need
- Computers are monitored and controlled by Coast's Information Technology (IT) Team
- Document control process with secure shredding
- Employee termination process to immediately remove access to information (as applicable)
- Established control methodologies and tools to monitor all activity, including attempted activity
- Mandated frequent password changes and strong password policy
- Periodic PPI audits and clean desk policies
- Personal cell phones and other recording equipment are not allowed within Coast offices (except for documented business need)
- Regular audits of authorized access
- Secure locations that provide physical barriers to office space with additional access restriction to server rooms
- Significant firewall and security assets are implemented to ensure appropriate external communication channels

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Separate Computing Environments

In accordance with contract conditions, Coast standards, and regulatory requirements, Coast segments client data appropriately. This can be accomplished through various methods such as logical separation or physical separation. Coast has experience implementing both standards of data segregation and will comply with the State's expectation of data segregation. Coast will not co-mingle information with any other contract or data.

Printing/Shredding of Client Information

Coast only prints client information when necessary, and never in a space that is publicly accessible. We are vigilant about protecting any paper documents. We safely store all paper documents in a format that can easily be retrieved and reviewed. This is achieved by scanning documents and shredding the originals in house. Coast contracts for onsite shredding and destruction of all regular correspondence, documents containing personal information, and other sensitive documents.

Coast's shredding firm maintains several secure shred bins onsite. Each week, firm representatives arrive at our facilities to pick up the contents of the shred bins for secure, on-site destruction. A Coast employee escorts the representatives to each shred bin to verify the contents are emptied and shredded. After the process is complete, the pickup log is signed by both the Coast employee and the representative. A copy of the log is kept on file.

Coast understands the importance of protecting the sensitive information and data entrusted to our care. We limit employee access to information to only those who have a business reason to know such information. Coast requires a signed employee acknowledgment of the requirement to keep protected information private. Existing policies establish a procedure for the prompt reporting of the loss or theft of protected information.

All Coast offices and storage facilities that maintain protected information limit unauthorized access and are appropriately secured. Coast production, support, and systems facilities are under 24/7/365 monitored alarm, electronically monitored and controlled access card system, 24/7 camera surveillance, and all operations are contained inside physically locked door areas with stringent security password and access policies. Our database hardware is housed in a locking rack chassis located within a further access-controlled, restricted-entry data center.

Coast facilities have both physical and administrative controls to prevent unauthorized entry. Coast has 100% controlled access and requires all employees to wear a blue lanyard with a badge displaying photo identification (around the neck only) at all times. Employees must utilize their cardkeys (badges) to enter the building and various doors within the facilities, providing both authorization and accountability. The following physical access controls are in place at each Coast facility:

- All Data Center visitors must sign a data center visitor's log
- All firewalls, switches, servers, and LAN are in secured data closets
- Card access system to enter/exit the Data Center (including card logging system)
- Data Center has no external windows
- Data Center is in an unidentified room
- Employees are required to display their photo identification badges while in the facility, as well as utilize their ID badges for authorized entrance to all secured areas.

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- Front desk receptionist at the entrance to the facility monitors all access by employees and visitors
- No personal cell phones allowed in the building (C-Level Executives and Directors receive a company-issued phones for business purposes only)

Document Handling Procedures

To protect against the unauthorized access or disclosure of information, Coast has implemented multiple access protocols from an information security standpoint. This includes, but is not limited to:

- Access to information based on a documented business need
- Computers are monitored and controlled by Coast's IT Team
- Document control process with secure shredding
- Documented employee termination process to immediately remove access to information (as applicable)
- Established control methodologies and tools to monitor all activity, including attempted activity
- Mandated frequent password changes and strong password policy
- Periodic PPI audits and clean desk policies
- Personal cell phones and other recording equipment are not allowed within Coast offices (except for documented business need)
- Regular audits of authorized access
- Secure locations that provide physical barriers to office space with additional access restriction to server rooms
- Significant firewall and security assets are implemented to ensure appropriate external communication channels

Coast protects client and caller information based on industry standards.

Physically Destroy Storage Devices

Coast has developed a data sanitization process that can properly destroy data contained on physical storage devices in accordance with standards of destruction. Coast will destroy physical media in accordance with Office of Information Technology Services Policy for Sanitization/Secure Disposal in NYS-S13-003.

System Access and Termination Procedures

Coast's Human Resources and Information Technology departments work together through a ticketing system to address the granting, modification, and termination of employee system access.

Security Breach

Coast has never had a data security breach in our 49 years of business. If an event occurred, Coast would immediately inform the State of a successful or unsuccessful breach of security. Because Coast maintains facilities and satellite offices in different regions of the United States, key personnel will be able to immediately notify the State via email (or by the means specified in State 's contract with Coast)

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of any information that may impact their information or our ability to perform under our contract during a period of disaster. Coast's Disaster Recovery, Business Continuity and Cyber Incident Prevention and Reporting plans are designed to identify the strategies, resources, and actions necessary to resume essential business functions for critical operational units (departments) in the event of an unplanned disaster, loss of facility, or breach of data security protocols.

In the event of a breach that requires a notification to claimants, Coast will follow the appropriate state or federal breach notification laws that pertain to the data in question. Coast has a team consisting of our Chief Compliance Officer (CCO) and General Counsel and our Chief Information Officer (CIO) and Chief Information Security Officer (CISO) who would work with the State to determine the appropriate steps to notify claimants, if required.

2. Describe your language capabilities, including the percentage of call center staff who are bilingual in English and Spanish, and any other languages available. Describe how you will ensure that call center staff are able to communicate with individuals in multiple languages.

Coast believes understanding and supporting the vital and vibrant diversity of our employees, our clients, and their callers is vital to our success. We will maintain bilingual staff or establish agreements with an interpreter service during the duration of any price agreement if bilingual agents are not available from Coast's staff. If necessary, Coast may utilize an outside interpreter service who offers interpretation for hundreds of languages. Coast has provided the third-party information below:

Language Line*

Client Services

1 Lower Ragsdale Drive, Building 2

Monterrey, CA 93940

(800) 752-6096

**Anticipated vendor pending award*

Coast is an equal opportunity employer. We prohibit discrimination against qualified individuals based on their status as protected veterans, disability, race, color, religion, sex, sexual orientation, gender identity or national origin. Additionally, our staff is experienced to effectively work with telephonic interpretation services to assist all claimants, including English Language Learners, users of text telephone (TTY) services, and claimants with diverse cultural and ethnic backgrounds. Coast employees are sensitive to the needs of claimants with limited English capabilities and are well-versed in quickly identifying when interpretation services may be necessary. Coast staff is empowered to engage these services as needed to deliver effective and compassionate service to all claimants.

3. Describe in detail your Interactive voice response system. Include the total capabilities and any self-service options.

Coast utilizes Amazon Connect, which is a comprehensive cloud-based contact center solution designed to support millions of customer interactions. It includes intelligent automation and self-service features such as natural language chatbots, IVR (Interactive Voice Response), and automated voice authentication for customers.

IVR Use Cases and Key Benefits: IVR systems offer a cost-efficient method for managing high volumes of incoming calls. They can address common inquiries and perform routine tasks without the need for

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human agents. This allows customer service representatives to concentrate on more complex or urgent issues, even during peak call times. Integrating computing capabilities with telephony, AWS IVR enhances customer experience, streamlines support workflows, and minimizes wait times, ultimately boosting satisfaction.

Automatic Call Distribution: The AWS IVR system manages incoming calls automatically. It offers customers options such as queuing, requesting a callback, or selecting a self-service feature. Calls are distributed evenly among available agents, optimizing resource use and improving overall efficiency.

Caller Identification: In industries like finance or healthcare, verifying the caller's identity is a necessary step before addressing their issue. When done manually, this can be time-consuming and may introduce security risks. AWS IVR streamlines this process by collecting caller line identification details such as PINs, passwords, account numbers, or biometric data for secure authentication before routing the call to an agent.

Customized Service: The AWS IVR system can categorize and prioritize claimants to enhance the customer experience. High-priority customers or urgent issues can be pushed to the front of the queue. The system also directs calls to the appropriate department or agent and gathers information in advance to help agents provide faster, more personalized service.

Better Customer Service: IVR offers self-service solutions that allow users to resolve basic issues independently. The system collects relevant details and directs calls accordingly, improving first-call resolution rates. Segmenting and filtering calls also helps minimize wait times, enabling more efficient large-scale service.

Reduced Operational Costs: AWS IVR helps cut expenses by reducing the workload of live agents. It supports 24/7 service availability—including evenings, weekends, and holidays—without increasing labor costs. A single IVR system can serve multiple applications within large organizations. Custom IVR menus tailored to each application support cost-effective scalability.

Increased Security: The IVR system enhances data security by verifying customer identity before granting access to sensitive information. This ensures only authorized users can access confidential data. Agents can also transfer users to the IVR for secure processes like password verification, removing the need to handle such information directly. The system validates credentials like PINs or passwords without human involvement.

Improved Analytics: IVR systems capture detailed call logs for reporting, auditing, and analytics. These insights can be used to optimize future customer interactions, refine IVR menu options, and address service gaps. For example, if many users abandon calls after several menu layers, routing them to a live agent sooner can improve satisfaction.

Telephone Network: The IVR is compatible with standard public switched telephone networks (PSTN), allowing calls to be routed through traditional phone lines. It also works with VoIP networks, enabling call handling over the internet.

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TCP/IP Network: The IVR system connects via corporate networks to the application server or contact center software. Cloud-based IVR options are also available, facilitating communication between the telephone system and the cloud over standard network infrastructure.

IVR Application Server: The AWS IVR application server hosts software for key features like DTMF recognition, speech-to-text, text-to-speech, and voice recognition. It interfaces with core systems to automate tasks. For example, when customers call to check flight status, the IVR system accesses flight data and responds without human assistance. Cloud contact center platforms provide this IVR functionality as a managed service.

Types of IVR Workflows: Administrators can create IVR call flows using the software's interface. While earlier systems relied on XML-style markup, modern IVRs use visual tools with drag-and-drop functionality for easy design. The three main IVR menu styles include:

1. Touch-Tone Replacement
This approach relies solely on DTMF signaling. Pre-recorded prompts instruct users to press numbers corresponding to specific options. For instance, "Press one for English, or two for French." This method is limited to predefined numeric selections and doesn't allow freeform verbal responses.
2. Directed Dialogue
Directed dialogue menus offer users specific verbal prompts, such as "Say 'flight status' or 'flight time'." The system proceeds only if the response matches one of the expected phrases. Otherwise, it asks the user to repeat or restarts the prompt.
3. Natural Language
These advanced IVRs use speech recognition and natural language processing to interpret user input. With a defined grammar and recognition capabilities, the system extracts important information from varied customer responses. Despite requiring more processing, natural language IVRs are more efficient and often resolve issues more quickly than traditional systems.

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4. Describe your capacity of in-house trainers and approach to on-boarding new call center staff to the project.

Coast's commitment to excellence is reflected in its award-winning training program. As a six-time honoree of the Training APEX Awards, Coast consistently demonstrates its dedication to staff development. The training process begins with an intensive four-week onboarding program and is followed by continuous education throughout an employee's career. This ongoing training includes client-specific courses, compliance updates, and certifications, ensuring that employees are always well prepared to meet industry standards and client needs. Supervisors also undergo specialized training to ensure effective leadership, dispute resolution, and compliance management, fostering a well-rounded team capable of delivering exceptional service. Additionally, our training program is customizable to client specifications.



We currently have three (3) full-time Trainers and one (1) full-time Training Lead. Training class size is based on the needs of our different lines of business. There are normally five (5) to 10 trainees per class. Our organization conducts instructor-led and module-based training. Our training differs from ad hoc by allowing our trainers to pinpoint trainees who may need more one-on-one training, and our training is hands-on. This hands-on training allows our trainees to feel more confident in their skills and helps them develop critical thinking and problem-solving skills. Coast validates proficiency throughout training by requiring trainees to complete multiple quizzes after each topic is covered and a final test. We also do in-training gamification. This allows trainers to gauge if trainees need more assistance in certain areas of the training. Quizzes and final tests require a score of 80% to pass, and all federal tests require a score of 100%.

Training Delivery Methods

Coast's training program, both new hire and ongoing, accommodates a full range of learning styles (what is most effective for each person) and embraces current technology advancements. We understand that everyone learns differently, and our Training Team develops conscientious techniques that accommodate all learners. **Training is conducted through one-on-one intensive sessions, videos, in-person role-playing exercises, quizzes, voice recordings, interactive learning games, and a mix of media and methods that includes:**

- Instructor-led classrooms
- Instructor-led virtual classrooms
- Learning Management System (LMS)

New Hire Training

Coast's new hire onboarding program combines Human Resources (HR), Compliance, and Operational training to provide employees with the tools, knowledge, and support to be successful agents for our

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clients. Our new hire training objectives prepare staff for a successful career. We understand our staff is our most important asset, and their continual development is a top priority.

To ensure your needs are fully met, when hired, all Coast agents must attend an intensive four-week hands-on training program. This training encompasses all relevant regulations and their application, state laws and the rights, responsibilities, options of the caller, accessing and operating our system, tactics training, and daily routines. Full understanding and compliance are achieved on an ongoing basis with mentoring and monitoring to ensure employee success.

Compliance Training

Compliance training is provided continuously throughout employment, beginning at the time of hire, then at regular intervals, and, on rare occasions, when corrective action is necessary. **The satisfactory completion of testing is a prerequisite for an agent to advance from new hire training.** Subsequently, all agents must take part in yearly training related to Coast's industry, including the Privacy Act and cybersecurity. In addition to these formal Compliance training requirements, all staff attend weekly floor meetings to discuss any regulatory changes or updates.

Ongoing Training

Coast employees undergo Security Awareness training semi-annually and are required to sign a statement indicating that training has occurred, as well as pass a quiz. **This training is required of each employee**, not just agents, as any employee of an agency could potentially have access to sensitive data in various formats.

Methods for Keeping Staff Up to Date

Coast takes pride in creating effective and professional agents. As industry requirements change, training is provided, and agents are kept in the information environment with access to updated laws, regulations and policies. When Coast adds a client, their assigned teams are briefed on the specifics of that client's program and expectations. They become familiar with its location, culture, portfolio, staff, needs, and goals.

- Changes are discussed in weekly staff meetings.
- Policy changes are disseminated in writing and electronically.
- Online training manual is updated with any changes, as they occur.
- Representatives attend teleseminars and webinars.
- Relevant publications are distributed on a regular basis.

Coast believes in the consistent training of all employees, in part, due to the constant changes in the call center industry. There is always more to learn and skills to hone in striving for excellence. At Coast, we work hard to ensure our agents have the most up-to-date information available, providing ongoing training in-house, access to teleseminars and webinars, exposure to industry related publications, proven mentors, and active participation in simulated scenarios.

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Learning Management System

Coast has implemented processes to ensure employees receive the necessary training to perform their roles effectively. Each department within the company is responsible for managing its own training plan, tailored to the specific needs and requirements of its respective teams. To facilitate standardized training and compliance, Coast utilizes an LMS that is implemented across the organization. The LMS enables the assignment of relevant training courses to employees based on their roles and responsibilities.

Through the LMS, employees can access and complete their assigned courses, and their progress, results, and outstanding training requirements are tracked and monitored. Updates and additional training requirements can be communicated and delivered through the LMS, ensuring employees stay up to date with evolving standards and best practices. Coast's Compliance Team regularly reviews the effectiveness of the training programs, typically monthly, examining issues and the training performed as part of their ongoing compliance efforts. These reviews are also discussed and evaluated during the management review process.

In addition to the assigned training, certain role-based employees are able to undertake additional courses or training to further their education and professional development on their own. The LMS serves as a platform where employees can explore and access a variety of optional training resources.

Background Standards

All staff assigned to the State's contract must receive a favorable Federal Bureau of Investigation (FBI) fingerprint and background check. We are familiar with and utilize the National Background Investigation Services (NBIS) electronic application (eAPP) process for the performance on our FSA and Department of the Treasury, Bureau of the Fiscal Service (Fiscal Service) contracts. We have included an overview of our hiring practices below, including employment verification, reference and background checks, and screening.

Verification of Employment History: Coast's HR Department verifies employment history by making calls to the references provided within a prospective employee's application. If a prospective employee is currently employed and requests that we do not contact their current employer, we abide by their wishes. However, once we extend an offer to the employee and it is accepted, we contact the employer to confirm employment.

Reference Checks: Coast's HR team makes direct calls to references provided during the application process. Utilizing a standard checklist, we verify the dates of employment, position/role at their prior companies, and their reasons for leaving. Human Resources prefers professional, as opposed to personal, references and checks a minimum of one (1) prior employer and a maximum of three (3) employers.

Background Checks: Coast submits prospective employees to Otus HR Services LLC for background checks. All data is submitted using secure method of transmission. Data required for submission includes the employee's name, Social Security number, date of birth, and current address.

Additional Screening: Additional pre-employment screening includes verification of high school diploma or GED (for specific contracts which require validation), validation of age (applicant must be 18 years old

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or older) and authorization to work in the United States. We also request information on whether applicants have defaulted student loans for certain positions.

Minimum Hiring Requirements for Agents

Coast requires that all employees have a high school diploma or GED at minimum, and customer service environment experience is also preferred. The basic requirements are as follows:

- Appropriately track call-related information for auditing and reporting purposes
- Be respectful and courteous
- Contribute positively to a work environment that is flexible, adaptable, and team-based
- Enter information into Windows-based computer database as required, while following instructions and conducting a scripted interview
- Escalate calls to supervisor when necessary
- Handle incoming and outgoing calls with professionalism, patience, tact, and courtesy
- Maintain a positive attitude about workloads and expectations
- Participate in the development and attainment of team and operational goals
- Prioritize workloads to ensure timeliness and quality standards are met
- Provide feedback on call issues related to downtime and/or training issues
- Provide, receive, and seek feedback in a positive manner to encourage team building

Knowledge, Skills, and Abilities

- Ability to comply with rules, regulations, and laws.
- Ability to handle and resolve recurring problems.
- Display excellent communication and customer service skills and exhibit a high level of professionalism in all communications.
- Establish a good working relationship with team members and internal contacts to maintain and continuously strive to improve the level of overall service being provided.
- Knowledge and experience with personal computers in a Microsoft Windows-based environment.
- Knowledge of contact center telephony and technology.
- Must have strong typing and database entry skills.
- Must have the ability to be empathetic and patient while on the phone.
- Read, write, and speak English fluently. Bilingual English/Spanish preferred.
- Work independently in the absence of immediate supervision.

5. Describe your ability to meet the reporting requirements set forth in Section V.C.6. including ad hoc reporting capabilities including online reporting capabilities and client accessibility.

Reporting Capabilities: Amazon Web Services

Coast's AWS solution delivers real-time and historical reporting, and the State will have secure, daily access to dashboards and reports that meet all performance monitoring needs.

Real-Time Dashboard: Dashboards will be accessible via browser, with auto-refreshing visuals of key metrics. State staff can monitor performance live, with role-based access and permissions.

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Call Statistics Reports: Detailed and summary reports will show total calls received, answered, abandoned, and resolved. Data can be grouped by agent, queue, or category, with drill-down and export options.

Interval Reporting: Reports can be filtered by hourly, daily, weekly, or custom intervals. The State's users can select time ranges interactively without technical support.

Real-Time Call Volume: Live dashboards will show current call volume, active queue size, and wait times using Amazon Connect metrics. Visual alerts will highlight abnormal spikes or delays.

Service Level Compliance: Dashboards will display service-level agreement (SLA)-related KPIs such as average speed of answer, abandonment rate, and resolution time.

Agent Performance: Metrics include call handling time, resolution rate, wrap-up time, and customer sentiment. Contact Lens adds real-time transcription, keyword analysis, and satisfaction scoring. Agent scorecards and team views are included.

Call Categories: Calls will be tagged by issue type using IVR flows, metadata, or natural language processing (NLP) via Contact Lens. Dashboards will show category volumes, trends, and customer feedback patterns.

Customizable Trend Reporting: Coast will create and modify trend-based reports on volume, CSAT, and SLA adherence. Reports can be scheduled or exported in multiple formats.

Ad Hoc Reports: AWS has the ability to generate ad hoc reports. Timelines and formats will be defined by mutual agreement. All services will run in FedRAMP-compliant environments, with encryption, access controls, and audit logging to ensure data security and regulatory compliance.

Reports

Coast understands the importance of receiving comprehensive and timely reports and will comply with all State reporting requirements. Our standard suite of reports is available for viewing and downloading. Most reports are generated monthly, but the frequency can be modified to suit the State's needs. Customized reports can be programmed and generated according to the schedule required by the State. Reports for prior periods are maintained within the client's secure web folder and are available online for as long as required.

Customized Reports

We have the capability to develop customized reports based on unique requirements. By leveraging advanced technology and integration with State systems, Coast can generate real-time, data-driven insights tailored to specific business needs. Utilizing SFTP or a site-to-site virtual private network (VPN) connection, we guarantee that all data exchanged between the two (2) parties remains protected. The State will have ongoing access to historical reports through a secure web portal, in line with any required retention periods. Coast will meet regularly with the State to review performance data, discuss any necessary improvements, and ensure all service standards are met consistently.

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Transfer Information Electronically, Receive and Decrypt Files: Through extensive experience working with large government clients, Coast brings the State a knowledgeable team of experts to smoothly transition services into our call center environment. Coast will work with the State to set up the required electronic file transfer process. Whether we are utilizing the SFTP or a site-to-site VPN connection, Coast will ensure the secure electronic transfer of information. Our system will be appropriately configured and ready to accept accounts via the State's utilized file layouts. Coast will utilize a Software Development Life Cycle (SDLC) for setting up the secure system area and conduct proper testing to ensure the continuation of data integrity and security.

Dynamic Data Interfaces: During the implementation process, Coast will work with the State to establish the proper file transfer protocols and file processing procedures to promptly update our system with dynamic information from the State. We will do this by mapping applicable data sets to our system and creating any necessary fields to accommodate the requested information. When we develop custom fields, we also develop system workflows to ensure that our efforts are capturing the required information through system automations or by requiring manual action notation.

Our IT team frequently develops and manages a variety of data interfaces for our large client base. Clients such as the FSA and the Fiscal Service, as well as other state and private clients, have required us to seamlessly accept high volumes of data transfers. We have experience in the development of automatic daily scans of client web portals to capture and update new information. We have the technology, staff, experience, and tools to accommodate the State's request.

Creating and Sending Status Files: Coast will create and send status update files in the desired formats of the State. The required fields in the file will be mapped to our system. If a field does not have predetermined mapping, appropriate mapping will be created and provided in our customizable system. We have the ability to develop custom workflows to capture manual and system generated fields to accommodate requests for specific information. This information will be programed and implemented by Coast's Application Development Team, an internal team of industry experts, during the implementation testing process.

Coast's ability to generate the State's required reports and program them into our system will create accurate, timely, and information-rich reports for the State. This will increase the transparency between Coast and the State and ensure all contract requirements are being met.

6. Describe your quality monitoring process.

The ethical and respectful treatment of claimants is at the forefront of Coast's actions and guides our overall mission. Coast communicates in an empathetic, considerate, and concise manner, driven by our culture of compliance and quality assurance monitoring. We maintain an internal Compliance Department, employ a full-time General Counsel and CCO, utilize voice analytic software, ensure the proper training of staff, and establish appropriate internal audits and call monitoring procedures. Coast has established a robust framework for monitoring both internal employees and agents. Our approach integrates performance management, compliance checks, and continuous training, ensuring that all staff consistently meet or exceed client expectations.

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Agent Performance Monitoring

100% of allowable calls will be recorded and Coast will ensure that at a minimum of one (1) call per agent will be monitored monthly to ensure compliance with the State's expectations, adherence to state and federal guidelines, and Coast policies. Calls are scored on key metrics such as professionalism, adherence to scripts, problem resolution, and overall customer satisfaction. Our Compliance Department conducts monthly call monitoring audits using a customized call scorecard to assess compliance with both operational requirements and state/federal laws (e.g., HIPAA). This process ensures that all agents meet the contractual obligations and legal requirements, as well as operational quality standards.

In addition, our Business Analytics Department generates detailed reports on agent performance, measuring adherence to SLAs and KPIs. This data is analyzed by management to make staffing and training decisions, and it is shared with each agent so they can track and improve their performance.

Employee Engagement in Performance Excellence

To encourage continuous improvement, we tie performance-based bonuses to key metrics, such as customer satisfaction scores, call quality, attendance, and meeting contractual SLAs. This aligns individual goals with company objectives, incentivizing agents to exceed expectations. Supervisors meet with agents weekly to review performance and offer personalized feedback. This ongoing dialogue ensures that any performance gaps are identified early, and corrective actions or additional training are implemented.

Corrective Action & Retraining

When an agent's performance falls below expectations, our corrective action policy is activated. This may include retraining on specific skills or behaviors that require improvement, such as customer interaction techniques or compliance with specific regulations. If performance issues are not resolved after retraining, an escalation policy is triggered, which may involve further disciplinary actions, including suspension or termination if necessary. This policy ensures that the company maintains high performance standards and enforces accountability.

Quality Assurance (QA) Process

Our QA process includes comprehensive call scoring, internal audits, and continuous evaluation of employee performance. The Quality Assurance team audits calls, evaluates compliance with client specifications, and ensures the highest levels of professionalism and quality are consistently maintained. Internal audits, conducted regularly across different business lines, focus on adherence to contract specifications and federal/state regulations. These audits provide real-time data on performance and allow us to take immediate corrective actions when necessary. Additionally, we employ **voice analytic software** to assist in call monitoring and ensure compliance.

Compliance Management System: Our CMS tracks compliance issues, audits, and corrective actions. This system ensures that any issues, whether related to employee conduct or quality standards, are quickly addressed and resolved. The system also helps identify trends and areas where additional training or adjustments to processes are needed.

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IRS and Federal Compliance

As a vendor to federal agencies, including the IRS, we comply with all relevant federal and state regulations governing data protection and compliance. This includes adherence to **IRS Publication 1075/4812**, which ensures the protection of taxpayer information. We also comply with **HIPAA** and other applicable regulations to ensure the highest standards of data security and compliance.

BBB Accreditation

Coast is an accredited business with the Better Business Bureau (BBB) and maintains an A+ rating from the BBB. This reflects our commitment to ethical business practices, customer satisfaction, and operational excellence. Our BBB accreditation underscores our focus on maintaining high standards of service, professionalism, and integrity in all of our business dealings.

Complaint Resolution

Any complaints related to employee performance are handled by our independent Compliance Department, ensuring objectivity and neutrality. The department conducts thorough investigations of complaints, using call recordings, audit logs, and other relevant data to assess the situation. Complaints are assigned to the appropriate team for review, and corrective actions are taken when needed. These actions range from retraining and process adjustments to more serious disciplinary actions if necessary.

Written Complaints: When a written complaint is received, Coast takes immediate and professional action to address the matter. All written complaints are first scanned and forwarded to our Compliance Department for review. The complaint is logged into our internal tracking system, and the caller's account is flagged. Our Compliance Department then begins an independent investigation, which includes reviewing call recordings, audit logs, and other relevant documentation. Once the investigation is complete, a detailed response is prepared in consultation with management and legal teams. This response is reviewed and finalized by the Legal Department before being sent to the complainant, whether the response is directed to the submitting agency, the caller, or the client. All details of the complaint investigation and resolution are documented in our internal system, and the caller's account is updated accordingly. If an employee is found to have acted improperly or if a policy has failed, corrective actions are taken in collaboration with the HR team. This can range from retraining to the initiation of more severe actions, such as policy changes or employee termination. Throughout the process, Coast ensures that all documentation related to the complaint, including the original communication and investigative materials, is retained securely and is only accessible to authorized personnel.

Element 15 Audits

We also conduct Element 15 audits, which include a review of departmental policies, procedures, and work instructions. These audits are performed annually, with remediation required for any non-passing scores. This audit process ensures our policies are continuously refined to meet the highest compliance and operational standards.

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Training and Certification

Agents are required to undergo regular training, including compliance training and skill enhancement sessions. This ensures that all personnel are up to date with legal requirements and client-specific standards. We have established relationships with accredited training organizations to offer certification programs for our team members. This promotes a culture of professional development and ensures that our employees remain proficient in the latest industry standards.

7. Describe the Customer Relationship Management (CRM) system used and whether it was developed in-house or off-the-shelf. If off the shelf, please specify the product and company. Please describe the capabilities of the Customer Relationship Management systems in use.

Omnichannel Technology

Coast has invested in Salesforce® CRM software including Amazon Web Services as a secure, cloud-based omnichannel solution to support integrated consumer interaction across platforms. It was developed off-the-shelf. Claimants experience seamless, high-quality customer service interactions within and between contact channels including voice, chat, and messaging. Agents are assigned tasks based on skills, location, business rules, and work preference. These agents easily pick up the conversation from any channel to resolve complex issues faster, while supervisors monitor behaviors, analytics, and insights in real-time. The combined results include decreased call handle time, increased first-contact resolution, better call retention, and maximum agent productivity. Calls and their transcripts are recorded within Coast's Salesforce® CRM. Tracking can be performed through reports and dashboards that will be customized for the State's needs. (See Figure 6)

Customer-facing Features:

- Live chat
- AI-powered chatbots
- SMS conversations
- SMS-triggered outbound messages for actionable self-service

Performance-boosting Features:

- 360-degree view of the customer
- Real-time call transcriptions
- Consolidated supervisor view
- Real-time agent guidance

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Service Cloud Voice with Amazon Connect









Use Case	Value Drivers	Success Metrics
 Run Your Contact Center from Anywhere	<ul style="list-style-type: none"> • Single Console + 360° view of the customer • Out-of-the-box telephony integration  	<ul style="list-style-type: none"> ↑ Customer Retention ↑ First Contact Resolution ↑ CSAT / NPS
 Boost Agent Productivity on the Phone Call	<ul style="list-style-type: none"> • CRM-integrated voice, chat, and messaging • Real-time call transcriptions  • Built-in automation and AI • Modern, agile IVR  	<ul style="list-style-type: none"> ↑ Cross-sell / Upsell ↑ Call Deflection ↑ Agent Performance
 Supervise and Coach Agents from Anywhere	<ul style="list-style-type: none"> • Conversations in CRM data model • Call center insights and analytics • Consolidated supervisor view • Real-time agent guidance 	<ul style="list-style-type: none"> ↓ Supervisor Admin Time ↓ Average Handle Time ↓ Call Wrap-up Time

Figure 6

Coast agents solve tickets faster with the Salesforce® Customer 360 integrated CRM platform. Customer 360 includes the following features and benefits:

Embedded Knowledge: Agents solve cases faster because relevant articles on the case subject appear in the user interface (UI), immediately preparing them for the next level of conversation with claimants.

In-App SLA Adherence: Client-specific milestones appear within the agent's workspace to keep them aware of client SLAs and current adherence.

Proactive Omnichannel Service: Agents can accept work via synchronous and asynchronous channels within the same UI, which decreases onboarding time and time to first response.

On-Platform Automation: Records are automatically updated based on changes in the system, and corresponding notifications are delivered to agents as needed.

Call Capacity

All Coast operations are conducted utilizing our advanced AWS telephony platform, which is designed to scale dynamically. This cloud-based infrastructure ensures seamless handling of high call volumes without disruption and can efficiently manage a large volume of concurrent calls without any risk of crossline interference or service degradation. There is no fixed upper limit on call capacity, allowing us to expand capacity in real-time to meet demand. As a result, we can maintain optimal performance during peak periods across all locations. Our infrastructure supports both onshore and nearshore models, providing the flexibility to adjust based on specific requirements and ensuring a smooth, uninterrupted service experience.

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Tracking Calls

Calls and their transcripts are recorded within Coast's Salesforce® CRM. Tracking can be performed through reports and dashboards that will be customized for the State's needs.

Capturing, Recording, and Responding to Email Communication

Utilizing the Salesforce® Omnichannel platform, Coast has the ability to receive emails, respond to emails, conduct mass email campaigns, and analyze the effectiveness of email communication using Einstein Copy Insights.

Planned Upgrades

Coast is implementing an upgrade to NICE CXone Telephony (NICE), a cloud-based, omnichannel communication platform. This system will serve as the foundation for enhanced efficiency and transparency across customer communication channels.

Redaction

Salesforce® has the functionality to "Data Mask" any fields within the CRM that need to not be seen.

8. Describe your approach to workforce planning, including the speed, agility, and flexibility necessary to match your workforce to the fluctuating demand of this contract. Include the processes in place to adjust staffing, workflows, or resource allocation in response to sudden changes in call volume or unexpected events. How will you ensure KPIs are met in the performance of this contract?

Adaptability to Evolving Industry Conditions

Coast exemplifies resilience and adaptability in navigating dynamic industry landscapes, as evidenced by our strategic management of high-profile contracts such as the FSA. Initially requiring physical facilities, Coast scaled operations across multiple locations, increasing our capacity tenfold to accommodate escalating account volumes throughout the contract's lifecycle.

During the unprecedented challenges posed by the COVID-19 pandemic from March to July 2020, Coast swiftly pivoted to a virtual work-from-home (WFH) model for the FSA contract. Leveraging our infrastructure, including secure VPN access and Coast-owned computer equipment with two-factor authentication (TFA), we ensured uninterrupted service delivery while adhering to stringent FSA standards. Our adaptable operational workflows seamlessly integrated remote staffing adjustments and optimized call capabilities, utilizing diverse telephonic resources such as landlines and Voice over Internet Protocol (VoIP).

Furthermore, Coast's agility was prominently displayed when we mobilized over 250 personnel to support critical contact tracing initiatives for the OPH during the pandemic. Within a remarkably short timeframe of ten days, Coast implemented comprehensive contract elements, harnessing advanced call center technologies and specialized training programs. This proactive approach not only facilitated effective communication with COVID-19 positive individuals but also enabled prompt identification of their exposed contacts. Selected as one of four agencies by the OPH, Coast's empathetic communication

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strategies and tailored service protocols ensured exceptional contact rates and service delivery excellence.

Ability to Scale Quickly

Year after year, Coast's responsive and scalable staffing model has been put to the test with favorable results. In 2019, Coast hired, onboarded, and trained 764 employees to manage the varying magnitude of inventory of our competitive clients, which was a 123% increase over the prior year.

The following year, the effectiveness of our rapid deployment strategy proved to be a literal lifesaver; that May, we onboarded more than 250 employees to fulfill the Louisiana Office of Public Health's need for BPO services relating to the COVID-19 pandemic. **Coast implemented the contract elements within 10 days.** At the height of the pandemic, our representatives communicated with more than 208,000 Louisianians to reduce the spread of COVID-19.

We have several case studies such as this, which demonstrate our ability to quickly scale staff to meet an aggressive implementation, that we could share with the State. We pride ourselves on being able to move experienced account representatives to new client opportunities while we ramp up with new hires to meet our clients' staffing needs.

Coast's organizational structure is scalable and unrestricted in terms of growth. Our call center environment, which comprises our security infrastructure and system, can continuously accept and accommodate changes in volume. Coast added a large call center in 2019 and currently maintains three (3) such locations. We currently employ approximately 440 people and have a reserve of qualified applicants ready to deploy at any time. Coast is adept at adjusting our staffing model to account for client volume increases and seasonal demand.

Workforce Management Team

Coast has a dedicated Workforce Management (WFM) team led by a Senior Vice President of Operations and his Directors, who oversee scheduling, forecasting, and resource allocation to ensure operational efficiency. Our WFM team plays a crucial role in optimizing staffing levels to align with client needs, including real-time adjustments to meet fluctuations in call volume and demand.

For State' program, our WFM team will actively monitor performance metrics, adjust schedules as necessary to maintain service levels, and coordinate closely with State to align staffing with program goals. During ramp-up periods, we will implement a structured approach to workforce scaling, leveraging historical data and anticipated call volume trends to ensure a seamless transition and adequate coverage. Coast utilizes workforce management tools as needed, deploying technology solutions to optimize scheduling, call distribution, and performance tracking. Our scheduling approach is data-driven, ensuring the right resources are in place to meet client expectations effectively.

Staffing Plan

Coast's agents and supervisors will provide proper and timely communications with the State's claimants ensuring they receive information in an accurate, prompt, and complete manner. We have a reserve of current staff to immediately assign to this contract while pulling from our internal list of high-quality candidates to supplement additional contact center staff. We will immediately assign

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experienced staff to begin providing services, and then increase staff for this contract as needed to ensure the State's requirements and expectations are continually met.

We routinely develop and implement staffing models based on client specifications including multiple time zones, seven-day work weeks, and substantial volume (call increases). This is completed through a flexible scheduling plan, hiring sufficient number of staff, and continually monitoring call volume fluctuations to ensure we maintain appropriate staff for our clients' hours of operation. Coast is an expert in understanding client requirements, implementing large federal contracts, and developing our operational processes to maintain top performance based on the contract's key performance metrics.

The Right People, Right Now: Coast attracts qualified candidates through competitive employee compensation and bonus plans that encourage staff to perform services with the highest integrity and efficiency. This investment in staff allows us to maintain a turnover rate well below industry averages. As staff rise through the ranks and the Coast client base grows, our organization puts forth every effort to always attract the best and brightest new employees. Ongoing recruiting practices include a multimedia strategy that leverages social media, employment websites, magazines, billboards, local Departments of Labor, job fairs, and community outreach. We also administer an employee referral program, resulting in nearly half of our new hires and demonstrating the positive culture of the organization. As a result, Coast conducts more than 4,000 employee interviews in a typical year, allowing us to be selective when recruiting from this large pool of candidates.

Ready to Work: Where possible, Coast selects agents for a project based on their successful work history on similar contracts within a comparable industry. All agents benefit from a version-controlled script repository that has been developed and refined through multiple levels of approval. Our training process ensures agents use a standardized account notation process for ease of readability and consistency.

Readiness = Results: Year after year, this responsive and scalable staffing model is put to the test with favorable results. In 2019, Coast hired, onboarded, and trained 764 employees to manage the varying magnitude of inventory of our competitive clients, which was a 123% increase over the prior year. The following year, the effectiveness of our rapid deployment strategy proved to be a literal lifesaver; that May, we onboarded more than 250 employees to fulfill Louisiana OPH's need for BPO services relating to the COVID-19 pandemic. Coast implemented the contract elements within 10 days. At the height of the pandemic, our representatives communicated with more than 208,000 Louisianians to reduce the spread of COVID-19.

Quality Assurance: Compliance with rules and regulations is paramount to Coast and our clients. We commit to ensure each employee understands and is prepared to do their job while remaining compliant with all client and legal requirements. We utilize an independent Compliance Department to monitor our contact center operations.

Risk Identification: Coast has in place strict protocols, procedures, and technology which have been designed, developed, implemented and continually refined to protect caller rights in our actions. Our overall risk identification process is to utilize internal monitoring tools combined with a network of outside entities. We have built a significant auditing structure to ensure contract requirements are met, our interactions with claimants are exceptional, and our business processes achieve our standards of work. Established by the Compliance Department and reinforced through documented policies and procedures, our auditing practices are among the best in the industry with extensive audits conducted

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each month. Our auditing standards meet or exceed regulatory body requirements, such as the CFPB and NIST 800-53 rev 4. Management collectively reviews the status of any high risks identified, develops further plans of action and milestones (POA&M), and provides oversight to our organization.

Coast engages outside subject matter experts, industry organizations, legal counsel, consultants, and auditors to obtain feedback regarding our business activity and changes to industry practices impacting our services. The review of case law, changes in regulatory requirements, and updates to industry standards are implemented into our process to ensure the highest levels of compliance for our clients. We utilize third-party auditors to review our stated business practices against our work quality, conduct documented reviews of our system security, and develop yearly audited financial statements. We conduct system vulnerability scans, penetration tests, and yearly audits of our disaster recovery plan. By continuously testing our systems and processes, Coast actively identifies potential areas of risks and develops comprehensive plans to reduce and eliminate those risks.

Additional Volume

If additional volume is required, Coast has the capability to scale operations seamlessly while maintaining high quality standards. This is accomplished through a combination of strategic planning, flexible resource management, and technology enhancements:

- **Scalable Workforce:** Coast has a robust recruitment pipeline that enables us to quickly hire and onboard additional staff as needed. Our training program is designed for efficiency, allowing new hires to be fully trained and productive in a short timeframe. In the event of increased volume, we can adjust staffing levels, including temporary or contract workers, to meet demand without compromising service quality.
- **Cross-Training & Staff Flexibility:** Coast employees are cross-trained across multiple roles to ensure flexibility and efficiency in handling different types of tasks. This allows us to quickly adapt to changes in workload, whether through increased call volume or expanding service requirements.
- **Technology Integration:** Coast leverages advanced technologies, workforce management tools, and automated quality assurance software. These systems optimize operations and allow us to handle increased volume without needing to proportionally increase headcount, maintaining efficiency and consistency.
- **Partnering with Subcontractors:** Should additional capacity be needed, Coast can tap into its network of vetted subcontractors to provide supplementary resources. We ensure that all subcontractors undergo the same stringent onboarding, training, and compliance processes to ensure that they meet our high-quality standards.
- **Process Optimization:** We continuously evaluate and improve our processes to maximize efficiency. In times of higher volume, we deploy process enhancements that improve throughput without sacrificing quality, such as streamlining call handling or reducing response times through improved internal workflows.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

- **Client Collaboration & Reporting:** In anticipation of volume increases, we work closely with our clients to forecast demand and prepare accordingly. This includes providing detailed performance reports to track progress and ensuring transparency in how additional resources are allocated.

Surge Capability

While Coast has successfully onboarded large groups of agents within a short timeframe for existing clients, this process is focused on recruiting, credentialing, and preparing employees for contract-specific training rather than immediate deployment to live operations. For example, a current client utilizing Coast's inbound call center services has required a minimum of 50 agents during peak demand periods. In these instances, Coast has efficiently expanded staffing, ensuring all new hires are properly onboarded and positioned to complete the necessary training before assuming active roles.

Case Study: Scalable Workforce Solutions in Emergency Response

In response to the COVID-19 pandemic and multiple national disasters, Coast rapidly scaled its workforce to support more than a quarter million Americans in need. As a subcontractor for a large federal entity coordinating disaster response, Coast provided essential call center and BPO services, ensuring affected individuals received timely, empathetic, and compliant assistance.

Challenge: The scope of work required Coast to swiftly deploy a large-scale workforce capable of handling high call volumes related to disaster relief and COVID-19 funeral assistance. The challenge was twofold: first, to rapidly recruit and train call center agents while maintaining compliance with stringent regulatory standards, and second, to ensure consistent service quality in emotionally sensitive interactions.

Solution: Coast successfully scaled its workforce by implementing a strategic approach to hiring, training, and compliance. At the height of operations, more than 300 trained agents were deployed across emergency management contracts. To prepare employees for high-volume, high-sensitivity interactions, Coast leveraged an intensive, award-winning training program focused on:

- **Active Listening** – Ensuring claimants feel heard and understood
- **Rapport & Trust-Building** – Establishing credibility and connection with those in distress
- **Respect & Sensitivity** – Handling emotionally charged conversations with professionalism
- **Emotional Intelligence** – Understanding the complexities of grief, loss, and disaster-related trauma

To maintain compliance and data security, all employees completed annual HIPAA training, reinforcing strict adherence to regulations regarding PHI. Coast's physical and network security measures further safeguarded sensitive data, ensuring compliance across all emergency response contracts.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Results: Coast's ability to scale efficiently and meet client demands resulted in:

- Rapid deployment of more than 300 trained agents
- Successful handling 59,569 disaster-related calls in one (1) month
- Seamless adaptation to evolving client needs, expanding from COVID-19 funeral assistance to natural disaster response
- Zero compliance breaches, maintaining full HIPAA compliance throughout the contract

Scalability for Future Needs: Coast's ability to rapidly scale its workforce, implement robust training programs, and maintain strict compliance standards makes it a reliable partner for businesses requiring high-volume call center solutions. With a proven track record of adapting to dynamic customer needs, Coast's processes are fully customizable to support organizations in industries such as insurance, healthcare, financial services, and disaster response. Whether managing surge demands, enhancing customer engagement, or providing empathetic, compliant communication, Coast delivers flexible solutions tailored to evolving business challenges.

Forecasting

Coast's omnichannel routing solution delivers seamless routing and service across communication channels. It supports customers across multiple channels, from digital to voice, on a single platform. Communication is routed to the proper Coast agent based on their skills, workload, and other factors. We utilize a sophisticated real-time call monitoring technology to analyze all aspects of calls including real-time call volumes. In addition, Coast's dedicated Business Analytics team reviews trends in call volumes and frequencies to provide our Operations Department with valuable forecast information. The reports and datasets provided by the Business Analytics Team provide important metrics on trends in our strategy and allow our management team to adjust as necessary. For example, should we identify through review of our Average Speed of Answer (ASA) and answer rate that the answer rate is decreasing, and ASA is increasing, we could respond by deploying more staff hours to the contract (e.g., increasing the availability of overtime, hiring additional staff, creating set schedules during peak call volume time).

Workflow Continuity

If allowed by the State, Coast will propose temporarily transferring the workload, for processes which could be transferred, to one of its US-based locations to ensure continuity in the case of severe weather. Coast's facilities are secure, both physically and electronically, and could easily accommodate the additional temporary workload. Coast has implemented government recommended PIV-I and has the technological, operational, and compliance proficiency to provide professional services from our facilities, should the need arise. Alternatively, Coast will work with State to find a temporary, workspace. Please see below for an overview of Coast's Disaster Recovery Plan.

Disaster Recovery Plan

Coast has a well-developed disaster recovery plan with a documented strategy to ensure continued operations in the event of a disaster. Coast has an emergency toll-free line for employees to retrieve updated information regarding their status. This emergency line notifies the disaster recovery team and key personnel that the disaster recovery plan has been implemented and they are to report to the designated location to continue vital operations for the company.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Because Coast maintains facilities and satellite offices in different regions of the United States, key personnel will be able to promptly notify clients via email or by the means specified in the client's contract with Coast of any information which may impact their information or our ability to perform under our client contracts during a period of disaster.

Coast's Disaster Recovery, Business Continuity, and Cyber Incident Prevention and Reporting plans are designed to identify the strategies, resources, and actions necessary to resume essential business functions for critical operational units (departments) in the event of an unplanned disaster, loss of facility, or breach of data security protocols. The plans below have been developed, documented, and exercised to ensure a full business and system recovery including implementation, a course of action, and contingency planning.

- A secondary recovery location
- Real-time recovery processes and hardware built for critical applications and servers
- A telecommunication strategy devised to switch both voice and data
- Building management conducts semi-annual testing on building evacuations, emergencies, security awareness, and business resumption and system readiness procedures.

Project Management: Coast's Project Management involves comprehensive project management assistance during the initial and subsequent plan maintenance phases of the project. The business unit head(s) are responsible for the signoffs on acknowledged and completed disaster recovery and security plans.

Cyber Incident Prevention and Reporting Program: This plan incorporates thorough prevention warning and response program protocols, coordinated by our Information Systems Manager throughout all business units. These incidents include internal or external successful or unsuccessful access attempts and unauthorized use, virus or Trojan horse, or malicious code infection, or any other intentional or unintentional access, control, or loss of data.

All systems – detected or employee-reported events are intensively investigated, and corrective measures and procedures are initiated immediately to protect data integrity, confidentiality, hardware, software, and overall secure operational readiness. **If an event occurred, Coast will immediately inform all clients of the nature of a successful or unsuccessful breach of security.** All records of such incidents are maintained in Coast's Information Systems (IS) area.

Coast's management team and staff are all committed to maintaining and improving comprehensive Disaster Recovery, Business Continuity Planning and Cyber Incident Prevention and Reporting. The recovery plans are workable documents designed to provide immediate response to and subsequent recovery from any unplanned business interruption or breach. The following list covers the type of unplanned business disruptions:

- Agency only or cyber Incident
- City-wide business
- Building only
- Regional
- Business district

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Coast completes disaster recovery, business continuity, and cyber incident prevention reports testing on a bi-annual basis. Our procedure manuals are stored in two (2) locations. Our test results are maintained by Human Resources and the Information Systems Manager.

Our operating system and database hard drives and backups are layered to best secure our client's information from potential disasters, security breach attempts, and/or hardware or software failures. Redundant Array of Independent Disks (RAID) redundancy coupled with real-time file journaling ensures restoring capabilities to the last activity entered into the system prior to a failure of one or all systems.

Staff Shortage

To ensure coverage if there is staff on leave unexpectedly, Coast intentionally staffs our contracts with more employees than other agencies. This enables Coast to have ample staff when unexpected absences occur. The success of this strategy is evidenced by Coast's maintenance of an ASA rate of less than 11 seconds and an average abandon rate of less than 1%.

Coast successfully combats absenteeism through a multi-faceted approach that begins before an employee is assigned to the State's contract. As an industry-leading contact center company, Coast steadily maintains a diverse pool of potential employees ready to be assigned to the appropriate contract. Using strategically developed questionnaires, work histories, and personality indicators, management staff can match employees to appropriate contracts using a best-fit formula, while maintaining a bullpen of employees whose skillsets are more appropriate for other customer-service functions. Workers motivated by financial reward and with high tolerance for risk are typically assigned to commission-based work, while those scoring highest in areas of reliability are considered for traditional call center work. Selecting high scorers on the reliability index is historically proven to minimize unexpected absenteeism for call center partnerships such as the contract being pursued by the State.

On the job, Coast deploys an agile staffing model to ensure that we have adequate staffing coverage. This is completed by constantly reviewing staffing levels, monitoring leave requests, building contingency into our plan, and having a pool of candidates and employees to move as necessary. We cross-train employees, where allowed, to ensure that we have flexibility in our staffing, to accommodate sharp changes in staffing levels. We enhance this training with developing a base of employees to hire from, as part of our recruiting process.

Outages

For our sites, Coast maintains in-depth and up-to-date Disaster Recovery, Business Continuity, and Cyber Incident Prevention and Reporting plans that are designed to identify the strategies, resources, and actions necessary to resume essential business functions for critical departments in the event of an unplanned power outage, disaster, loss of facility, or breach of data security protocols. In the event of a significant IT power outage (on site), Coast's UPS is deployed, as permissible, to ensure the secured and controlled shutdown of data servers to prevent data corruption. Coast employees are familiar with this process and well prepared to handle unforeseen situations such as a long-term IT outage and fully understand the need for consistent productivity. Coast will request that employees work on processes outside of the standard system, such as hard copy file maintenance, office organization, document

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accuracy checks, and extra training exercises. If an IT outage creates a significant backlog, Coast may also consider offering overtime to ensure work is completed in a timely manner.

Employee Performance

Coast is committed to assigning employees that strive for performance excellence. Coast has developed a performance management process that reviews our agents' stated performance against contract requirements and expectations. We utilize various methods of performance measurement to ensure we are exceeding expectations including:

Performance and Compliance Based Bonuses: Coast has developed compensation plans that encourage our agents to exceed stated contract goals by tying bonuses to positive behaviors. This includes meeting KPIs, quality control call scorecards, and attendance. We refine our compensation bonus plans to ensure that we are exceeding expectations and our staff are successfully providing services.

Tracking and Training for Corrective Action: Coast has a thorough, written corrective action policy and procedures to ensure that our employees have stated goals, and that unsuccessful performance is managed. When an employee is not meeting expectations, we enable our training team to provide retraining. Should it be necessary, Coast has an escalation policy that can be enacted to provide corrective action up-to and including termination.

Removal of Employees

Should the State request specific employees to be removed from the contract, Coast will work with the State to discuss the removal of employees. While we would encourage our employees to receive retraining prior to being removed from the contract, Coast will actively work to provide only qualified and successful agents to this contract.

Complaints

Coast carefully reviews every complaint received and responds to it in a prompt and professional manner. All incoming complaints are forwarded to Coast's Compliance Department, which logs the complaint in our internal tracking system. The affected file is flagged immediately as having filed a complaint, and all call activity to the respondent ceases until a thorough investigation has been conducted. Throughout the entire complaint investigation process, Coast works closely with the State ensuring the State is kept abreast of the latest developments in the investigation.

The compliance representative assigned to the file will research the complaint, pulling references and evidence such as:

- Audit logs from the customer service platform
- Call Recordings
- Documentation from the State

Based on the findings, the compliance representative will develop an initial response to the complaint and consult with the appropriate director to review the response. The response is submitted to the Coast legal team for final review.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

If the investigation reveals that a Coast employee acted improperly, or that a policy has failed, the appropriate director will take steps to correct the issue, whether working with the Compliance Department to implement policy changes or working with Human Resources to initiate corrective action for the employee who was responsible for the complaint. Depending on the severity of the mistake, corrective action can range from a simple verbal warning, up to, and including termination.

All hard copy documentation received relating to complaints, including the original communication from the caller and any supporting information received through the investigation, is retained electronically in a secure folder. The folder is located within the caller's account file and is only accessible to Coast employees. Complaint and resolution information is available upon request from the State or delivered per the specified terms of an individualized agreement between the State and Coast. Legitimate complaints are reported to the State by Coast's Client Service team.

Please note: Coast understands that the State has the final determination in the staff assigned to the contract.

Measuring Performance

In order to measure the performance of agents, Coast utilizes a mixture of business intelligence gathered from our Business Analytics Department and quality control audits conducted by our Compliance Department.

Our Business Analytics team develops monthly reports on agent performance against contract requirements and goals that is then used to develop agent bonus plans. This information is sent to management and the executive team to make staffing or plan adjustments as necessary. We provide our agents with transparent performance metrics so that they are aware of their performance and can correct their performance appropriately.

The Business Analytics Department, in conjunction with our Application Development Team, develop internal and external reports to monitor our performance against contract expectations. These reports are utilized by management and the executive team to ensure we are exceeding expectations.

In addition to the information created by the Business Analytics Team, our Compliance Department conducts call monitoring audits each month and utilizes a customized call scorecard. This is used to ensure that we are compliant with state and federal laws while ensuring that we are meeting the operational requirements of the contract. This scorecard is then used in the bonus plans of employees and is shared with employees so they can see where they have room for improvement. Should an employee receive an unfavorable score on the call monitoring audit, retraining is initiated to quickly correct potential deficiencies.

Coast's agents always maintain strict professionalism. We uphold a company culture that embraces and rewards compliant communication with all audiences we serve. To ensure the accuracy of data collection and entry, hiring the most knowledgeable, self-sufficient, and detail-oriented staff members is vital.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

- Coast ensures the accuracy of data collection and entry through multiple forms of Quality Assurance checks.
- Department managers perform daily account reviews of incoming and outgoing correspondence received and sent by Coast's Administrative team staff members. This includes facsimile, along with inbound email. All mail received at Coast's facilities are time and date stamped.
- Our Compliance Department performs monthly audits on all tasks the Administrative team performs, as well as the correspondence sent and logged by the team to ensure accuracy. If any errors are found, they are corrected immediately.

Client SLAs vary dramatically from contract to contract. However, common SLAs include the following metrics:

- Average handle time
- Average wait time
- Average speed of answer
- First call resolution rate
- Answer rate
- # of calls answered
- Abandonment rate
- Agent availability %
- Quality assurance/compliance scores

Technology to Identify Unacceptable Behaviors

Coast leverages Salesforce® Service Cloud Voice, a secure, cloud-based omnichannel solution, to monitor and enhance agent performance while identifying unacceptable behaviors such as ghost calls, call avoidance, escalated voice tone, poor-quality handling, and negative sentiment.

Real-Time Monitoring and Analytics: Service Cloud Voice seamlessly integrates voice, chat, and messaging channels into a single platform, allowing supervisors to monitor agent activity in real-time. Supervisors can observe KPIs, call handling behaviors, and customer sentiment during live interactions. This real-time oversight enables the rapid identification of concerning patterns, such as excessive hold times, abrupt call terminations, or repeated call transfers.

AI-Powered Insights: The platform includes real-time call transcription and NLP, which assists in identifying escalated voice tones, frustrated language, or negative sentiment. These insights trigger alerts for supervisory intervention and coaching, ensuring that potential issues are addressed promptly.

Behavioral Patterns & Workforce Management: WFM tools within the platform track agent adherence to schedules and task assignments. This functionality detects behaviors indicative of call avoidance, such as frequent idle time or excessive after-call work, prompting further investigation.

Consolidated Supervisor Dashboard: Supervisors have access to a consolidated performance dashboard, providing a 360-degree view of agent activity, customer history, and live conversation data across all channels. This dashboard enables supervisors to quickly assess agent performance trends and intervene when unacceptable behaviors are detected.

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

Outcome-Oriented Results: This integrated approach, combining real-time data analysis, AI-powered voice and text insights, and robust workforce management, empowers Coast to maintain high standards of service quality. The system not only identifies but also helps proactively prevent behaviors that could negatively impact the customer experience.

By investing in Salesforce® Service Cloud Voice, Coast ensures that every customer interaction is monitored for quality, compliance, and efficiency, ultimately driving improved first-contact resolution, reduced call handle times, and increased customer satisfaction.

9. Explain percentage of calls are digitally recorded and how long are these recordings stored?
Client requested recordings must be made available within 24 hours of the request.

Call Recordings

Coast has read, understands, and agrees to comply. We record all telephone calls, where allowed by law, after notifying the caller that we are recording the conversation. This is an excellent tool for reducing liability as all records may be retrieved and reviewed at any time by management or at the request of the client to determine if the call was appropriately handled and adhered to all applicable standards. All recordings and associated data are securely stored for the duration of the contract, adhering to industry best practices for data security and regulatory compliance.

Client Remote Access to Recorded Calls and Data

Coast utilizes AWS as its cloud-based telephony platform to enhance call handling, quality management, and performance analytics. This advanced platform offers a secure and scalable solution, enabling seamless recording, storage, and retrieval of customer interactions. Designed with flexibility and security in mind, it supports both voice and screen capture capabilities, ensuring a comprehensive view of every customer engagement.

Remote Access Capabilities: Authorized clients have the option to access recorded calls and associated data remotely through a secure portal. This remote access is available under a licensed user model, with specific pricing provided upon request. Clients with licensed access can retrieve call recordings independently and in near real-time.

For clients who do not require ongoing remote access, Coast can provide recordings upon demand. Recordings are typically available within three (3) to five (5) minutes following the conclusion of a call. Requested files are securely transferred using approved methods to ensure data integrity and confidentiality.

Recording Formats and Storage: Coast captures and retains customer interactions in multiple formats to meet diverse client needs:

- **Voice Recordings:** Stored in .WAV format, offering high-quality playback and compatibility with industry-standard audio analysis tools.
- **Screen Recordings:** Captured alongside voice recordings, documenting agent desktop activity throughout the call. These screen recordings are provided in widely supported video formats.

All recordings and associated data are securely stored for the duration of the contract, adhering to industry best practices for data security and regulatory compliance. Coast's platform ensures that clients

Coast Professional, Inc. Response to Request for Proposal for Services Contract for The State of Nebraska, Department of Labor

can efficiently access and review interactions to support quality assurance, compliance monitoring, and performance improvement initiatives.

E. ATTACHMENT #2: COST PROPOSAL

Coast's completed Cost Proposal is on the following page and includes all costs of staffing including labor, employee benefits, all statutory employment costs, and all other direct costs of operating the call center as described in Section V of the RFP.

COST PROPOSAL
NDOL Call Center Support for Unemployment Insurance Services
RFP 121962 - o3

Bidder's Name: Coast Professional, Inc.

Bidder to complete the following cost proposal, which shall include all costs of staffing including labor, employee benefits and all statutory employment costs and all other direct costs of operating the call center as described in Section V of the RFP.

Deliverable Section	Summary of Total Project Costs	Annual Cost Year 1	Optional Renewal One Annual Cost	Optional Renewal Two Annual Cost	Optional Renewal Three Annual Cost	Optional Renewal Four Annual Cost
V.B.6.b.i	Interpretation expenses (paid biweekly)	\$47,323.61	\$48,743.32	\$50,205.62	\$51,711.78	\$53,263.14
V.D. a	Project Planning and Management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
V.D. b	Outline and phase management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
V.D. c	Daily First Tier Support and call reporting (paid biweekly)	\$1,245,972.05	\$1,283,351.21	\$1,321,851.75	\$1,361,507.30	\$1,402,352.52
	Total Project Costs	\$1,293,295.66	\$1,332,094.53	\$1,372,057.37	\$1,413,219.09	\$1,455,615.66

CONTRACTUAL AGREEMENT FORM

Coast's completed **Contractual Agreement Form** is on the following page.

CONTRACTUAL AGREEMENT FORM

BIDDER MUST COMPLETE THE FOLLOWING

By signing this Contractual Agreement Form, the bidder guarantees compliance with the provisions stated in this solicitation and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder is not owned by the Chinese Communist Party.

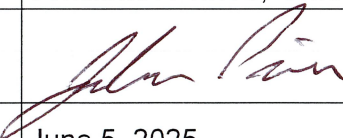
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

____ NEBRASKA VENDOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Vendor. "Nebraska Vendor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this Solicitation. All vendors who are not a Nebraska Vendor are considered Foreign Vendors under Neb. Rev Stat § 73-603 (c).

____ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

____ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. § 71-8611 and wish to have preference considered in the award of this contract.

THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

COMPANY:	Coast Professional, Inc.
ADDRESS:	4273 Volunteer Road, Geneseo, NY 14454
PHONE:	(585) 991-5200
EMAIL:	proposals@coastprofessional.com
BIDDER NAME & TITLE:	Jonathan Prince, Chief Executive Officer
SIGNATURE:	
DATE:	June 5, 2025

VENDOR COMMUNICATION WITH THE STATE CONTACT INFORMATION (IF DIFFERENT FROM ABOVE)

NAME:	Kimberly Perry
TITLE:	Director of Business Development
PHONE:	(585) 991-2133
EMAIL:	kperry@coastprofessional.com

EXHIBIT V. PROPOSED PERSONNEL RESUMES

Proposed Personnel full resumes are included on the next pages.



Chris Brown

Vice President of Operations

Mr. Brown is responsible for overseeing the operations of our West Monroe, LA office with a particular emphasis on call center contracts. He provides leadership and guidance to our call center representatives, ensuring that Coast is successful in meeting client expectations. Mr. Brown is an expert in call center strategy and has a full understanding of what it takes to lead his team during challenging times. He is an expert in Microsoft Excel and Coast's call center system report generator, allowing him to effectively monitor, track, and provide compliance in all areas of responsibility. Mr. Brown will offer daily support to the State, handle reporting obligations, resolve issues, and respond to client inquiries.

Contact

Phone

318-807-6327

Email

cbrown@coastprofessional.com

Education

Bachelor's Degree in Business Administration, Accounting

University of Louisiana at Monroe

Bachelor's Degree in Business Administration, Marketing

University of Louisiana at Monroe

Accomplishments and Memberships

- Maintained high levels of account representative satisfaction, helping minimize turnover and strengthen teams
- Northeast Louisiana Young Professionals Top 20 Under 40 Award Recipient, 2014
- The Association of Credit and Collection Professionals (ACA International) Credit and Collection Compliance Officer Designation (CCCO)

Years of Experience

17

Experience

Coast Professional, Inc.

2018 - Present

Vice President of Operations

2016 - 2018

Senior Director of Operations

2013 - 2015

Director of Operations

2010 - 2013

Senior Manager

Basic Your Best Buy

2009 - 2010

Merchandising Manager

2008 - 2009

Technology Sales Manager

Graphic Packaging International

2008 - 2009

Financial Analyst

Functional Roles and Responsibilities

- Collaborates with training directors to implement the correct training procedures and requirements
- Implements company policies and procedures across call center contracts
- Manages representatives to ensure they are following client guidelines and all related laws and regulations
- Develops and executes contract progress reports



Kim Perry

Director of Business Development

As Director of Business Development at Coast, Kim Perry partners with the Business Development team, Client Service, Operations, and other departments to drive success in Commercial Business Process Outsourcing (BPO) sales, with a focus on the insurance market. Kim brings a wealth of experience in contact center leadership, sales, and customer relationship management, which is instrumental in advancing Coast's growth in the Commercial BPO sector. Based in North Carolina, Kim has honed her skills in client engagement and strategic development. Her focus is on expanding market opportunities and strengthening client partnerships to support Coast's continued success. Ms. Perry will oversee the partnership between the State and Coast, resolve issues as they arise, and serve as the primary point of contact between Coast and the State.

Contact

Phone

(585) 991-2133

Email

kperry@coastprofessional.com

Education

Associate's Degree
Vincennes University

Accomplishments and Memberships

- SOCAP Southeast Region Board Member | SOCAP International
- NUG (NICE User Group) Member
- LOMA Life Insurance Designations
 - ACS - Associate, Customer Service
 - ALMI - Associate, Life Management Institute
 - FMLI - Level 1, Fellow Life Management Institute

Years of Experience

29

Experience

Coast Professional, Inc.

2024 - Present

Director of Business Development

Gerber Assurance Supervisor

2017 - 2024

Quality Assurance Supervisor

2005 - 2017

Customer Service and Sales Supervisor

General Revenue Corporation - A Navient Company

2001 - 2005

Client Service Manager

1995 - 2001

Progressive Leadership Roles

Functional Roles and Responsibilities

- Ensure the successful implementation of new contracts
- Manage relationships with prospective and current clients
- Work with Coast departments to ensure that our organization meets client needs
- Provide prompt resolution of any client issues or concerns
- Provide Coast with year-over-year growth





Jeff Jopling

Director of Client Relations

Jeff Jopling began his career with Coast in 2009 as a Consumer Care Representative. He advanced through the company by consistently making ethical choices, maintaining a strong commitment to success, and forming authentic connections with colleagues. Mr. Jopling has over 15 years of management and client service experience with a thorough understanding of Coast's call center and collections operations. As Director of Client Relations, his primary role is to deliver complete client satisfaction while ensuring all contractual obligations are met and exceeded. Mr. Jopling earned his bachelor's degree in communications from the University of Louisiana Monroe. He will deliver daily support to the State, oversee reporting tasks, address issues, and manage client questions.

Contact

Phone

318-807-6165

Email

jjopling@coastprofessional.com

Education

Bachelor's in Communications

University of Louisiana Monroe

Accomplishments and Memberships

- Outstanding Performance Award
 - Dale Carnegie training
- Member of Coast's First Responders Day planning committee
- Lifetime member of the University of Louisiana Monroe Alumni Association
- Civic Leadership
 - Volunteer work including Desiard Street Homeless Shelter, Ouachita Parish Animal Shelter, and Shady Grove Elementary School (Title I School)

Years of Experience

16

Experience

Coast Professional, Inc.

2023 - Present

Director of Client Relations

2018 - 2023

Director of Operations

2014 - 2018

Senior Consumer Care Manager

2012 - 2014

Consumer Care Manager

2009 - 2012

Consumer Care Supervisor

2009 - 2009

Consumer Care Representative

Functional Roles and Responsibilities

- Ensures the complete satisfaction of clients
- Facilitates the distribution and processing of client reports
- Identifies client issues and provides prompt resolution
- Provides support to sales team
- Ensures effective and efficient communication between Coast and our clients
- Provides web-based and onsite training to clients
- Coordinates quarterly training webinars
- Ensures all contractual requirements are addressed during implementation process
- Verifies compliance with contract deliverables during implementation process and throughout contract



EXHIBIT VI. DELIVERABLES AND DUE DATES

Coast has provided a detailed implementation plan on the following pages.

ID	Outline Number	Task Name	Duration	Start	Finish	Predecessor	Resource Names	2014	2024	2034	2044
1	1	Coast Professional Inc., Implementation Plan	44 days	Fri 8/1/25	Wed 10/1/25			<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><d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ID	Outline Number	Task Name	Duration	Start	Finish	Predecessors	Resource Names	2014	2024	2034	2044
22	2.2	Training Of All Management, Supervisory & Key Personnel	1 day	Fri 8/1/25	Fri 8/1/25						
23	2.2.1	Contract, Project Scope	0.15 days	Fri 8/1/25	Fri 8/1/25		Project Manager		Project Manager		
24	2.2.2	Business, Financial, Cyber Security, And Technical Requirements	0.15 days	Fri 8/1/25	Fri 8/1/25	23	Cybersecurity Trainers,Technical Policy Writer,Security Analyst		Cybersecurity Trainers,Technical Policy Writer,Security Analyst		
25	2.2.3	Project Implementation Plan Revised And Updated	0.15 days	Fri 8/1/25	Fri 8/1/25	24	Project Manager		Project Manager		
26	2.2.4	Project Priorities and Objectives	0.15 days	Fri 8/1/25	Fri 8/1/25	25	Project Manager		Project Manager		
27	2.2.5	Resources Assigned To Project Priorities	0.15 days	Fri 8/1/25	Fri 8/1/25	26	Project Manager		Project Manager		
28	2.2.6	Dependencies For Each Priority Identified	0.15 days	Fri 8/1/25	Fri 8/1/25	27	Project Manager		Project Manager		
29	2.2.7	Priority Critical Path Identified	0.15 days	Fri 8/1/25	Mon 8/4/25	28	Project Manager		Project Manager		
30	2.3	Review Implementation Plan with Team - NDOL	1 day	Fri 8/1/25	Mon 8/4/25	23,24	Project Manager		Project Manager		
31	3	Project Management Plan Development, Distribution& Implementation	9 days	Fri 8/1/25	Wed 8/13/25		Project Manager				
32	3.1	Project Management Plan	1 day	Mon 8/4/25	Mon 8/4/25						
33	3.1.1	Develop Project Management Plan	0.33 days	Mon 8/4/25	Tue 8/5/25	30	Project Manager & Program Manager		Project Manager & Program Manager		
34	3.1.2	Distribute Project Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	33	Project Manager & Program Manager		Project Manager & Program Manager		
35	3.1.3	Implement Project Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	34	Project Manager & Program Manager		Project Manager & Program Manager		
36	3.2	Schedule	1 day	Mon 8/4/25	Mon 8/4/25						
37	3.2.1	Develop Schedule Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25		Technical Policy Writer 1 & Technical Writer 1		Technical Policy Writer 1 & Technical Writer 1		
38	3.2.2	Distribute Schedule Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25	37	Technical Policy Writer 1 & Technical Writer 1		Technical Policy Writer 1 & Technical Writer 1		
39	3.2.3	Implement Schedule Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25	38	Technical Policy Writer 1 & Technical Writer 1		Technical Policy Writer 1 & Technical Writer 1		
40	3.3	Communication	1 day	Mon 8/4/25	Mon 8/4/25						
41	3.3.1	Develop Communication Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25		Technical Policy Writer 2 & Technical Writer 2		Technical Policy Writer 2 & Technical Writer 2		
42	3.3.2	Distribute Communication Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25	41	Technical Policy Writer 2 & Technical Writer 2		Technical Policy Writer 2 & Technical Writer 2		
43	3.3.3	Implement Resource Management Plan	0.33 days	Mon 8/4/25	Mon 8/4/25	42	Technical Policy Writer 2 & Technical Writer 2		Technical Policy Writer 2 & Technical Writer 2		
44	3.4	Resource	1 day	Tue 8/5/25	Tue 8/5/25						
45	3.4.1	Develop Resource Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	43	Technical Policy Writer 3 & Technical Writer 3		Technical Policy Writer 3 & Technical Writer 3		
Project: Nebraska Department of Transportation Date: Fri 6/27/25		Task	<div></div>	Inactive Task	<div></div>	Manual Summary Rollup	<div></div>	External Milestone	<div></div>		
		Split	<div></div>	Inactive Milestone	<div></div>	Manual Summary	<div></div>	Deadline	<div></div>		
		Milestone	<div></div>	Inactive Summary	<div></div>	Start-only	<div></div>	Progress	<div></div>		
		Summary	<div></div>	Manual Task	<div></div>	Finish-only	<div></div>	Manual Progress	<div></div>		
		Project Summary	<div></div>	Duration-only	<div></div>	External Tasks	<div></div>				
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ID	Outline Number	Task Name	Duration	Start	Finish	Predec	Resource Names	2014	2024	2034	2044
46	3.4.2	Distribute Resource Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	45	Technical Policy Writer 3 & Technical W		Technical Policy Writer		
47	3.4.3	Implement Resource Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	46	Technical Policy Writer 3 & Technical W		Technical Policy Writer		
48	3.5	Quality Assurance	1 day	Tue 8/5/25	Tue 8/5/25						
49	3.5.1	Finalize Quality Management Plan	0.02 days	Tue 8/5/25	Tue 8/5/25		Technical Policy Writer 4 & Technical W		Technical Policy Writer		
50	3.5.2	Distribute Quality Monitoring Plan	0 days	Tue 8/5/25	Tue 8/5/25	49	Technical Policy Writer 4 & Technical W		8/5		
51	3.5.3	Implement Quality Monitoring Plan	0 days	Tue 8/5/25	Tue 8/5/25	50	Technical Policy Writer 4 & Technical W		8/5		
52	3.6	Performance	1 day	Tue 8/5/25	Tue 8/5/25						
53	3.6.1	Develop Performance Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25		Technical Policy Writer 5 & Technical W		Technical Policy Writer		
54	3.6.2	Distribute Performance Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	53	Technical Policy Writer 5 & Technical W		Technical Policy Writer		
55	3.6.3	Implement Performance Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	54	Technical Policy Writer 5 & Technical W		Technical Policy Writer		
56	3.7	Scope	1 day	Tue 8/5/25	Tue 8/5/25						
57	3.7.1	Develop Scope Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25		Technical Policy Writer 6 & Technical W		Technical Policy Writer		
58	3.7.2	Distribute Scope Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	57	Technical Policy Writer 6 & Technical W		Technical Policy Writer		
59	3.7.3	Implement Scope Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	58	Technical Policy Writer 6 & Technical W		Technical Policy Writer		
60	3.8	Risk	1 day	Tue 8/5/25	Tue 8/5/25						
61	3.8.1	Develop Risk Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25		Technical Policy Writer 1 & Technical W		Technical Policy Writer		
62	3.8.2	Distribute Risk Management Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	61	Technical Policy Writer 1 & Technical W		Technical Policy Writer		
63	3.8.3	Implement Risk Program Plan	0.33 days	Tue 8/5/25	Tue 8/5/25	62	Technical Policy Writer 1 & Technical W		Technical Policy Writer		
64	3.9	Training	6 days	Wed 8/6/25	Wed 8/13/25						
65	3.9.1	Develop Training Management Plan	2 days	Wed 8/6/25	Thu 8/7/25		Training Specialist		Training Specialist		
66	3.9.2	Distribute Training Management Plan	2 days	Fri 8/8/25	Mon 8/11/25	65	Director of OPS		Director of OPS		
67	3.9.3	Implement Training Management Plan	2 days	Tue 8/12/25	Wed 8/13/25	66	Director of OPS		Director of OPS		
68	4	Business Operations Implementation	38 days	Mon 8/11/25	Wed 10/1/25						
69	4.1	Receive NDOL Approval To Move Forward	1 day	Wed 8/6/25	Wed 8/6/25		Program Manager		Program Manager		
70	4.2	Business Operations Preparation	25 days	Wed 8/6/25	Tue 9/9/25						

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Date: Fri 6/27/25

Task

Split

Milestone

Summary

Project Summary

Inactive Task

Inactive Milestone

Inactive Summary

Manual Task

Duration-only

Manual Summary Rollup

Manual Summary

Start-only

Finish-only

External Tasks

External Milestone

Deadline

Progress

Manual Progress

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ID	Outline Number	Task Name	Duration	Start	Finish	Predecessors	Resource Names	2014	2024	2034	2044
71	4.2.1	Functional Descriptions& Processes	20 days	Wed 8/6/25	Tue 9/2/25		AppDev				
72	4.2.1.1	Account Migration/Conversion	10 days	Wed 8/6/25	Tue 8/19/25		AppDev				
73	4.2.1.2	Account Validation& Reconciliation	2 days	Wed 8/20/25	Thu 8/21/25	72	Database Administrator				
74	4.2.2	Operational Procedures	25 days	Wed 8/6/25	Tue 9/9/25						
75	4.2.2.1	Activity Procedures	20 days	Wed 8/6/25	Tue 9/2/25						
76	4.2.2.1.1	Account Migration/Conversion	10 days	Wed 8/6/25	Tue 8/19/25		AppDev				
77	4.2.2.1.2	Contact Center	5 days	Wed 8/20/25	Tue 8/26/25	76	Database Administrator				
78	4.2.2.1.3	Call Outsourcing Center	5 days	Wed 8/27/25	Tue 9/2/25	77	Software Developer				
79	4.2.2.1.4	GL/Accounting	5 days	Wed 9/3/25	Tue 9/9/25	78	Software Developer				
80	4.2.2.2	System User Procedures	5 days	Tue 9/9/25	Mon 9/15/25		Software Developer,Controller				
81	4.2.2.2.1	NDOL Navigation Screen	5 days	Tue 9/9/25	Mon 9/15/25		Coast Team,NDOL Team				
82	4.2.2.2.1.1	Migration/Conversion	5 days	Tue 9/9/25	Mon 9/15/25		Coast Team,NDOL Team				
83	4.2.2.2.1.2	Contact Center	5 days	Tue 9/16/25	Mon 9/22/25	82	Coast Team,NDOL Team				
84	4.2.2.2.1.3	Call Outsourcing Center	5 days	Tue 9/23/25	Mon 9/29/25	83	Coast Team,NDOL Team				
85	4.3	User Acceptance Testing	13 days	Mon 9/15/25	Wed 10/1/25		Coast Team,NDOL Team				
86	4.3.1	Environment Creation And Data Load	2 days	Mon 9/15/25	Tue 9/16/25		Director of OPS				
87	4.3.1.1	NDOL Test Region	2 days	Mon 9/15/25	Tue 9/16/25		Director of OPS				
88	4.3.1.1.1	File Development & Data Creation	2 days	Tue 9/16/25	Wed 9/17/25		Director of OPS				
89	4.3.1.1.2	Data File Load, Validation, Reconciliation	2 days	Wed 9/17/25	Thu 9/18/25		Director of OPS				
90	4.3.1.1.2.1	Multiple Data Files	2 days	Thu 9/18/25	Fri 9/19/25	88	Director of OPS				
91	4.3.1.1.2.2	Test Data – Number Of Accounts	2 days	Mon 9/22/25	Tue 9/23/25	90	Director of OPS				
92	4.3.1.1.3	File Load, Validation, Reconciliation	2 days	Tue 9/23/25	Wed 9/24/25		Director of OPS				
93	4.3.1.1.3.1	Multiple Image Files	2 days	Tue 9/23/25	Wed 9/24/25		Director of OPS				
94	4.3.1.1.3.2	Test Data	2 days	Wed 9/24/25	Thu 9/25/25		Director of OPS				
95	4.3.2	User Acceptance Scripting	5 days	Wed 9/24/25	Tue 9/30/25		Director of OPS				

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Task

Inactive Task

Manual Summary Rollup

External Milestone

Split

Inactive Milestone

Manual Summary

Deadline

Milestone

Inactive Summary

Start-only

Progress

Summary

Manual Task

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96	4.3.2.1	NDOL Navigation& Screens	5 days	Wed 9/24/25	Tue 9/30/25		Director of OPS				
97	4.3.2.1.1	Migration/Conversion	4 days	Wed 9/24/25	Mon 9/29/25		Director of OPS				
98	4.3.2.1.2	Contact Center	2 days	Wed 9/24/25	Thu 9/25/25		Director of OPS				
99	4.4	User Acceptance Execution	2 days	Thu 9/25/25	Fri 9/26/25		Director of OPS				
100	4.4.1	Contact Center	2 days	Thu 9/25/25	Fri 9/26/25		Director of OPS				
101	4.4.1.1	Telephony	2 days	Thu 9/25/25	Fri 9/26/25		Director of OPS				
102	4.4.1.2	E-mail	2 days	Mon 9/29/25	Tue 9/30/25	101	Director of OPS				
103	4.4.1.3	Call Outsourcing Center	2 days	Thu 9/25/25	Fri 9/26/25		Director of OPS				
104	4.5	Collections Job Descriptions	7 days	Wed 8/20/25	Thu 8/28/25						
105	4.5.1	Update The Following Job Descriptions Internally	5 days	Wed 8/20/25	Tue 8/26/25		HR Compliance Manager				
106	4.5.1.1	Account Manager	1 day	Wed 8/20/25	Wed 8/20/25		HR Compliance Manager				
107	4.5.1.2	Supervisor	1 day	Wed 8/27/25	Wed 8/27/25	106	HR Compliance Manager				
108	4.5.1.3	Quality Assurance Analyst	1 day	Thu 8/28/25	Thu 8/28/25	107	HR Compliance Manager				
109	4.5.1.4	Call Center Agents	1 day	Thu 8/28/25	Thu 8/28/25		HR Compliance Manager				
110	5	Systems Integration	39 days	Wed 8/6/25	Mon 9/29/25						
111	5.1	Technology Implementation- Computer & Software Com	27 days	Wed 8/6/25	Thu 9/11/25						
112	5.1.1	Coast & NDOL Technology Process & Procedure Consoli	5 days	Wed 8/6/25	Tue 8/12/25		CIO,ISO,NDOL				
113	5.1.1.1	Technology Management Processes	5 days	Wed 8/6/25	Tue 8/12/25						
114	5.1.1.1.1	Inventory	2 days	Wed 8/6/25	Thu 8/7/25		NDOL,Coast Team				
115	5.1.1.1.2	Project Technical Boundary	3 days	Thu 8/7/25	Mon 8/11/25	114	Security Analyst,NDOL,Coast Team				
116	5.1.1.1.3	Production Schedule Management, Structure, Coordi	2 days	Fri 8/8/25	Mon 8/11/25	115	NDOL,Coast Teams				
117	5.1.1.1.4	Communication Hierarchy and Processes	2 days	Tue 8/12/25	Wed 8/13/25	116	Coast,NDOL				
118	5.1.1.1.5	Coast Team IT Procedure Documentation	10 days	Wed 8/13/25	Tue 8/26/25		Coast,NDOL				
119	5.1.1.1.5.1	Software Development Lifecycle Processes& Pro	3 days	Fri 8/1/25	Tue 8/5/25						
120	5.1.1.1.5.1.1	Software Updates And Enhancements	3 days	Thu 8/14/25	Mon 8/18/25	117	Coast,NDOL				

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121	5.1.1.1.5.1.2	Communication Hierarchy And Processes	2 days	Tue 8/19/25	Wed 8/20/25	120	Coast,NDOL		Coast,NDOL		
122	5.1.1.1.6	Project Technical Component Implementation	3 days	Thu 8/21/25	Mon 8/25/25	121					
123	5.1.1.2	Project Network And Data Line Implementation	8 days	Mon 8/25/25	Wed 9/3/25		Coast,NDOL				
124	5.1.1.2.1	Coast - NDOL Implementation	1 day	Tue 8/26/25	Tue 8/26/25	122	Coast,NDOL		Coast,NDOL		
125	5.1.1.2.2	Telephony Implementation	5 days	Wed 8/27/25	Tue 9/2/25	124	Coast,NDOL		Coast,NDOL		
126	5.1.1.2.3	Website Implementation	2 days	Wed 9/3/25	Thu 9/4/25	125	Coast,NDOL		Coast,NDOL		
127	5.1.2	Hardware & Software Implementation	10 days	Fri 8/29/25	Thu 9/11/25						
128	5.1.2.1	Personal Computers - Support Attachmate Version 10.0	1 day	Fri 9/5/25	Fri 9/5/25	126	Coast,NDOL		Coast,NDOL		
129	5.1.2.2	Printer Data Stream/Advanced Function Printing Printer F	2 days	Fri 9/5/25	Mon 9/8/25	128	Coast,NDOL		Coast,NDOL		
130	5.1.2.3	Testing& Training	3 days	Tue 9/9/25	Thu 9/11/25	129	Coast,NDOL		Coast,NDOL		
131	5.1.2.4	Combine IT Security Plans as required	3 days	Mon 9/8/25	Wed 9/10/25		Technical Policy Writer 4				
132	5.1.2.4.1	Cybersecurity Requirements Implementation	3 days	Mon 9/8/25	Wed 9/10/25	130	Security Network Engineers,Security				
133	5.1.2.4.1.1	Coast and NDOL joint evaluation and implemen	3 days	Mon 9/8/25	Wed 9/10/25	130	Coast,NDOL		Coast,NDOL		
134	5.2	Salesforce Implementation	38 days	Mon 8/11/25	Wed 10/1/25						
135	5.2.1	Scope	7 days	Mon 8/11/25	Tue 8/19/25						
136	5.2.1.1	Determine scope	3 days	Mon 8/11/25	Wed 8/13/25		Project Manager		Project Manager		
137	5.2.1.2	Secure project sponsorship	1 day	Thu 8/14/25	Thu 8/14/25	136	Project Manager		Project Manager		
138	5.2.1.3	Define preliminary resources	1 day	Fri 8/15/25	Fri 8/15/25	137	Project Manager		Project Manager		
139	5.2.1.4	Secure core resources	1 day	Mon 8/18/25	Mon 8/18/25	138	Project Manager		Project Manager		
140	5.2.1.5	Scope complete	1 day	Tue 8/19/25	Tue 8/19/25	139	Project Manager		Project Manager		
141	5.2.2	Analysis/Software Requirements	24 days	Mon 8/11/25	Thu 9/11/25						
142	5.2.2.1	Conduct needs analysis	2 days	Wed 8/20/25	Thu 8/21/25	140	Operations,IT Teams		Operations,IT Teams		
143	5.2.2.2	Draft preliminary software specifications for CRM	2 days	Fri 8/22/25	Mon 8/25/25	142	IT Teams		IT Teams		
144	5.2.2.3	Contact Platform Requirements-Omni Channel	1 day	Tue 8/26/25	Tue 8/26/25	143	Salesforce Admin,IT Teams		Salesforce Admin,IT Tea		
145	5.2.2.4	End User Certificate (EUC) requirements (similar to MS RC	1 day	Wed 8/27/25	Wed 8/27/25	144	IT Teams		IT Teams		

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146	5.2.2.5	Reporting -Customer/Coast-needs	1 day	Thu 8/28/25	Thu 8/28/25	145	Operations,IT Teams		Operations,IT Teams		
147	5.2.2.6	Einstein AI Requirements Specifications	3 days	Fri 8/29/25	Tue 9/2/25	146	Salesforce Admin,IT Teams		Salesforce Admin,IT Teams		
148	5.2.2.7	2nd Stage Questions	1 day	Wed 9/3/25	Wed 9/3/25	147	IT Teams		IT Teams		
149	5.2.2.8	Finalize Sourcing Product Ordering	1 day	Thu 9/4/25	Thu 9/4/25	148	IT Teams		IT Teams		
150	5.2.2.9	Review software specifications/budget with team	1 day	Fri 9/5/25	Fri 9/5/25	149	IT Teams		IT Teams		
151	5.2.2.10	Incorporate feedback on software specifications	1 day	Mon 9/8/25	Mon 9/8/25	150	IT Teams		IT Teams		
152	5.2.2.11	Develop delivery timeline	1 day	Tue 9/9/25	Tue 9/9/25	151	Project Manager		Project Manager		
153	5.2.2.12	Obtain approvals to proceed (concept, timeline, budget)	1 day	Wed 9/10/25	Wed 9/10/25	152	Project Manager		Project Manager		
154	5.2.2.13	Secure required resources	1 day	Thu 9/11/25	Thu 9/11/25	153	Project Manager		Project Manager		
155	5.2.2.14	Analysis complete	1 day	Fri 9/12/25	Fri 9/12/25	154	Project Manager		Project Manager		
156	5.2.3	Design	2 days	Mon 9/15/25	Tue 9/16/25						
157	5.2.3.1	Review preliminary software specifications- re-approve, a	1 day	Mon 9/15/25	Mon 9/15/25	155	Operations,Salesforce Admin,Project M		Operations,Salesforce A		
158	5.2.3.2	Develop client specifications	1 day	Tue 9/16/25	Tue 9/16/25	157					
159	5.2.4	Develop prototype based on client specifications	6 days	Mon 9/15/25	Mon 9/22/25						
160	5.2.4.1	Review functional specifications	1 day	Mon 9/15/25	Mon 9/15/25		Operations,Salesforce Admin		Operations,Salesforce A		
161	5.2.4.2	Incorporate feedback into functional specifications	1 day	Tue 9/16/25	Tue 9/16/25	160	Operations,Salesforce Admin		Operations,Salesforce A		
162	5.2.4.3	Obtain approval to proceed	1 day	Wed 9/17/25	Wed 9/17/25	161	Operations,Salesforce Admin		Operations,Salesforce A		
163	5.2.4.4	Design/Specs complete	3 days	Thu 9/18/25	Mon 9/22/25	162	Operations,Salesforce Admin		Operations,Salesforce A		
164	5.2.5	Development	6 days	Mon 9/15/25	Mon 9/22/25						
165	5.2.5.1	Review functional specifications	1 day	Mon 9/15/25	Mon 9/15/25		Operations,Salesforce Admin		Operations,Salesforce A		
166	5.2.5.2	Identify modular/tiered design parameters	1 day	Tue 9/16/25	Tue 9/16/25	165	Operations,Salesforce Admin		Operations,Salesforce A		
167	5.2.5.3	Assign development staff	1 day	Wed 9/17/25	Wed 9/17/25	166	Operations,Salesforce Admin		Operations,Salesforce A		
168	5.2.5.4	Develop code	3 days	Thu 9/18/25	Mon 9/22/25	167	Operations,Salesforce Admin		Operations,Salesforce A		
169	5.2.6	Create Lighting Knowledge Base for Call Center	8 days	Fri 8/15/25	Tue 8/26/25						
170	5.2.6.1	Plan Knowledge Base	1 day	Fri 8/15/25	Fri 8/15/25		Salesforce Admin		Salesforce Admin		

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171	5.2.6.2	Provide NDOL Articles Documents for Knowledge Base	1 day	Mon 8/18/25	Mon 8/18/25	170	Salesforce Admin		▶	Salesforce Admin	
172	5.2.6.3	Enable Lighting Knowledge	1 day	Tue 8/19/25	Tue 8/19/25	171	Salesforce Admin		▶	Salesforce Admin	
173	5.2.6.4	Lighting Knowledge User Access	0.5 days	Wed 8/20/25	Wed 8/20/25	172	Salesforce Admin		▶	Salesforce Admin	
174	5.2.6.5	Lighting knowledge Home Record Pages	1 day	Wed 8/20/25	Thu 8/21/25	173	Salesforce Admin		▶	Salesforce Admin	
175	5.2.6.6	Record Type Considerations for Lightning Knowledge	1 day	Thu 8/21/25	Fri 8/22/25	174	Salesforce Admin		▶	Salesforce Admin	
176	5.2.6.7	Page Layout for Lightning Knowledge	1 day	Fri 8/22/25	Mon 8/25/25	175	Salesforce Admin		▶	Salesforce Admin	
177	5.2.6.8	Test Lighting Knowledge Base	0.5 days	Mon 8/25/25	Mon 8/25/25	176	Salesforce Admin		▶	Salesforce Admin	
178	5.2.6.9	Testing Passed - Move Knowledge Base to Production	0.5 days	Tue 8/26/25	Tue 8/26/25	177	Salesforce Admin		▶	Salesforce Admin	
179	5.2.7	Developer testing (primary debugging)	8 days	Mon 9/22/25	Wed 10/1/25						
180	5.2.7.1	Testing	4 days	Mon 9/22/25	Thu 9/25/25						
181	5.2.7.1.1	Develop unit test plans using client specifications	2 days	Tue 9/23/25	Wed 9/24/25	168	Operations		▶	Operations	
182	5.2.7.1.2	Develop integration test plans using client specification	2 days	Thu 9/25/25	Fri 9/26/25	181	Operations		▶	Operations	
183	5.2.7.1.3	Unit Testing	3 days	Mon 9/29/25	Wed 10/1/25						
184	5.2.7.1.3.1	Review modular code	0.5 days	Mon 9/29/25	Mon 9/29/25	182	Salesforce Admin		▶	Salesforce Admin	
185	5.2.7.1.3.2	Test component modules to product specifications	0.5 days	Mon 9/29/25	Mon 9/29/25	184	Operations		▶	Operations	
186	5.2.7.1.3.3	Identify anomalies to product specifications	0.5 days	Tue 9/30/25	Tue 9/30/25	185	Salesforce Admin,Operations		▶	Salesforce Admin,Operations	
187	5.2.7.1.3.4	Modify code	2 days	Tue 9/30/25	Wed 10/1/25		Salesforce Admin				
188	5.2.7.1.3.4.1	Re-test modified code	0.5 days	Tue 9/30/25	Tue 9/30/25	186	Operations		▶	Operations	
189	5.2.7.1.3.4.2	Unit testing complete	1 day	Wed 10/1/25	Wed 10/1/25	188	Salesforce Admin,Operations		▶	Salesforce Admin,Operations	
190	5.2.7.1.3.4.3	Integration Testing	2 days	Tue 9/30/25	Wed 10/1/25						
191	5.2.7.1.3.4.3	Test module integration	0.5 days	Tue 9/30/25	Tue 9/30/25		Operations		▶	Operations	
192	5.2.7.1.3.4.3	Identify anomalies to specifications	0.5 days	Tue 9/30/25	Tue 9/30/25	191	Operations		▶	Operations	
193	5.2.7.1.3.4.3	Modify code	1 day	Wed 10/1/25	Wed 10/1/25	192	Salesforce Admin		▶	Salesforce Admin	
194	5.2.7.1.3.5	Re-test modified code	1 day	Mon 9/29/25	Mon 9/29/25		Operations		▶	Operations	
195	5.2.7.1.3.6	Integration testing complete	1 day	Wed 10/1/25	Wed 10/1/25		Salesforce Admin,Operations		▶	Salesforce Admin,Operations	

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196	5.3	Phone System- AWS Implementation	25 days	Mon 8/11/25	Fri 9/12/25						
197	5.3.1	Coast & AWS Technology Process & Procedure Consolidation	25 days	Mon 8/11/25	Fri 9/12/25						
198	5.3.1.1	Technology Management Processes	17 days	Mon 8/11/25	Tue 9/2/25						
199	5.3.1.1.1	Inventory	2 days	Mon 8/11/25	Tue 8/12/25		Coast Team,Salesforce Admin				
200	5.3.1.1.2	Project Technical Boundary	3 days	Wed 8/13/25	Fri 8/15/25	199	Coast Team,Salesforce Admin				
201	5.3.1.1.3	Production Schedule Management, Structure& Coordination	2 days	Mon 8/18/25	Tue 8/19/25	200	Coast Team,Salesforce Admin				
202	5.3.1.1.4	Communication Hierarchy and Processes	1 day	Wed 8/20/25	Wed 8/20/25	201	Coast Team,Salesforce Admin				
203	5.3.1.1.5	Coast Team IT Procedure Documentation	3 days	Thu 8/21/25	Mon 8/25/25	202	Coast Team,Salesforce Admin				
204	5.3.1.2	Software Development Lifecycle Processes& Procedures	7 days	Mon 8/25/25	Tue 9/2/25						
205	5.3.1.2.1	Software Updates And Enhancements	4 days	Tue 8/26/25	Fri 8/29/25	203	Coast Team,Salesforce Admin				
206	5.3.1.2.2	Communication Hierarchy and Processes	2 days	Tue 9/9/25	Wed 9/10/25	205	Coast Team,Salesforce Admin				
207	5.3.1.2.3	Coast Team- OMI Procedure Documentation	2 days	Thu 9/11/25	Fri 9/12/25	206	Coast Team,Salesforce Admin				
208	5.3.2	Project Technical Component Implementation	8 days	Tue 8/26/25	Thu 9/4/25						
209	5.3.2.1	Project Network and Data Line Implementation	3 days	Tue 8/26/25	Thu 8/28/25						
210	5.3.2.1.1	Coast, NDOL, AWS Implementation	3 days	Thu 8/28/25	Mon 9/1/25		Coast Team,Salesforce Admin,NDOL				
211	5.3.2.2	Telephony Implementation	6 days	Tue 8/26/25	Tue 9/2/25						
212	5.3.2.2.1	Create Skills Based Routing Call Flows	3 days	Tue 8/26/25	Thu 8/28/25		Coast Team,Salesforce Admin				
213	5.3.2.2.2	Implement Skills Based Routing Call Flows	3 days	Fri 8/29/25	Tue 9/2/25	212	Coast Team,Salesforce Admin				
214	5.3.2.2.3	Implement Voice Channel	4 days	Tue 8/26/25	Fri 8/29/25		Coast Team,Salesforce Admin				
215	5.3.2.2.3.1	Implement Spanish Language Line	3 days	Tue 8/26/25	Thu 8/28/25						
216	5.3.2.2.4	Test all Functions	1 day	Fri 8/29/25	Fri 8/29/25	215	Coast Team,Salesforce Admin				
217	5.4	Call Center Service Requirements	16 days	Mon 8/11/25	Mon 9/1/25						
218	5.4.1	Inbound Call Handling	4 days	Mon 8/11/25	Thu 8/14/25						
219	5.4.1.1	Claim Inquiries	1 day	Mon 8/11/25	Mon 8/11/25		Coast Team,Salesforce Admin				
220	5.4.1.2	Scheduling callbacks	1 day	Tue 8/12/25	Tue 8/12/25	219	Coast Team,Salesforce Admin				

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221	5.4.1.3	Create 800 Number For NDOL	1 day	Wed 8/13/25	Wed 8/13/25	220	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
222	5.4.1.4	Integrate Any Existing 800 Numbers From NDOL	1 day	Thu 8/14/25	Thu 8/14/25	221	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
223	5.4.2	Interactive Voice Response (IVR)	8 days	Fri 8/15/25	Tue 8/26/25				▶		
224	5.4.2.1	Process calls per NDOL approved scripts	3 days	Fri 8/15/25	Tue 8/19/25	222	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
225	5.4.2.2	Offer multi-language support	3 days	Wed 8/20/25	Fri 8/22/25	224	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
226	5.4.2.3	Monitor system performance continuously	1 day	Mon 8/25/25	Mon 8/25/25	225	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
227	5.4.2.4	Provide detailed IVR reporting to NDOL	1 day	Tue 8/26/25	Tue 8/26/25	226	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
228	5.4.3	Call Menu Options	5 days	Tue 8/26/25	Mon 9/1/25				▶		
229	5.4.3.1	Create Call Menu Options	1 day	Tue 8/26/25	Tue 8/26/25		Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
230	5.4.3.2	Away	0.25 days	Wed 8/27/25	Wed 8/27/25	229	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
231	5.4.3.3	Office Closed	0.25 days	Wed 8/27/25	Wed 8/27/25	230	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
232	5.4.3.4	Large Call Volume In Queue	0.25 days	Wed 8/27/25	Wed 8/27/25	231	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
233	5.4.3.5	Implement Call Menu Options	0.25 days	Wed 8/27/25	Wed 8/27/25	232	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
234	5.4.4	Implement Real Time Interaction Guidance (Monitoring Live	1 day	Thu 8/28/25	Thu 8/28/25	233	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
235	5.4.5	Implement Recorded Calls Archive& Multi Channel Recording	2 days	Fri 8/29/25	Mon 9/1/25	234	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
236	5.5	Operational Reports	13 days	Fri 8/15/25	Tue 9/2/25				▶		
237	5.5.1	Call Statistics Reports	2 days	Fri 8/15/25	Mon 8/18/25				▶		
238	5.5.1.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
239	5.5.1.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	238	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
240	5.5.1.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	239	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
241	5.5.2	Calls Received	2 days	Fri 8/15/25	Mon 8/18/25				▶		
242	5.5.2.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
243	5.5.2.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	242	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
244	5.5.2.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	243	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
245	5.5.3	Calls Abandoned	2 days	Fri 8/15/25	Mon 8/18/25				▶		

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246	5.5.3.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
247	5.5.3.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	246	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
248	5.5.3.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	247	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
249	5.5.4	Calls Answered	2 days	Fri 8/15/25	Mon 8/18/25						
250	5.5.4.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
251	5.5.4.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	250	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
252	5.5.4.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	251	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
253	5.5.5	Calls Resolved	2 days	Fri 8/15/25	Mon 8/18/25						
254	5.5.5.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
255	5.5.5.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	254	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
256	5.5.5.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	255	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
257	5.5.6	Interval Reports (Hourly, Daily, Weekly)	2 days	Fri 8/15/25	Mon 8/18/25						
258	5.5.6.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
259	5.5.6.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	258	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
260	5.5.6.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	259	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
261	5.5.7	Real Time Call Volume	2 days	Fri 8/15/25	Mon 8/18/25						
262	5.5.7.1	Develop Report	0.5 days	Fri 8/15/25	Fri 8/15/25		Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
263	5.5.7.2	Distribute Report	0.5 days	Fri 8/15/25	Fri 8/15/25	262	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
264	5.5.7.3	Implement Report	0.5 days	Mon 8/18/25	Mon 8/18/25	263	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
265	5.5.8	Service Level Compliance (Monitoring adherence to agreed	3 days	Fri 8/15/25	Tue 8/19/25						
266	5.5.8.1	Develop Report	0.5 days	Mon 8/18/25	Mon 8/18/25	264	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
267	5.5.8.2	Distribute Report	0.5 days	Tue 8/19/25	Tue 8/19/25	266	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
268	5.5.8.3	Implement Report	0.5 days	Tue 8/19/25	Tue 8/19/25	267	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		
269	5.5.9	Agent Performance: Metrics on agent effectiveness, includi	2 days	Wed 8/20/25	Thu 8/21/25						
270	5.5.9.1	Resolution Rates and Customer Satisfaction Scores	0.5 days	Wed 8/20/25	Wed 8/20/25	268	Coast Team,Salesforce Admin		Coast Team,Salesforce Admin		

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271	5.5.9.2	Distribute Report	0.5 days	Wed 8/20/25	Wed 8/20/25	270	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
272	5.5.9.3	Implement Report	0.5 days	Thu 8/21/25	Thu 8/21/25	271	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
273	5.5.10	Call Categories: Detailed breakdowns of call categories, including	2 days	Thu 8/21/25	Fri 8/22/25				▶		
274	5.5.10.1	Develop Report	0.5 days	Thu 8/21/25	Thu 8/21/25	272	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
275	5.5.10.2	Distribute Report	0.5 days	Fri 8/22/25	Fri 8/22/25	274	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
276	5.5.10.3	Implement Report	0.5 days	Fri 8/22/25	Fri 8/22/25	275	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
277	5.5.11	Ad hoc Reporting Capabilities	2 days	Mon 8/25/25	Tue 8/26/25				▶		
278	5.5.11.1	Develop Report	0.5 days	Mon 8/25/25	Mon 8/25/25	276	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
279	5.5.11.2	Distribute Report	0.5 days	Mon 8/25/25	Mon 8/25/25	278	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
280	5.5.11.3	Implement Report	0.5 days	Tue 8/26/25	Tue 8/26/25	279	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
281	5.5.12	Implement Real Time Dashboards	3 days	Tue 8/26/25	Thu 8/28/25				▶		
282	5.5.12.1	Create KPI's For Dashboards Based of All Reports	1 day	Tue 8/26/25	Wed 8/27/25	280	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
283	5.5.12.2	Schedule Reports To Be Automated	1 day	Wed 8/27/25	Thu 8/28/25	282	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
284	5.5.12.3	Database Project Support	4 days	Thu 8/28/25	Tue 9/2/25		Coast Team,Salesforce Admin		▶		
285	5.5.12.3.1	Develop Database Support Plan	1 day	Thu 8/28/25	Fri 8/29/25	283			▶		
286	5.5.12.3.2	Distribute Database Support Plan	1 day	Fri 8/29/25	Mon 9/1/25	285	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
287	5.5.12.3.3	Implement Database Support Plan	1 day	Mon 9/1/25	Tue 9/2/25	286	Coast Team,Salesforce Admin		▶	Coast Team,Salesforce Admin	
288	6	Office Location &Hours of Operation	31 days	Wed 8/6/25	Wed 9/17/25		Coast Team,Salesforce Admin		▶		
289	6.1	Hours of Operation- 8am-5pm Cst.	0.5 days	Wed 8/6/25	Wed 8/6/25		NDOL		▶	NDOL	
290	6.2	Identify Coast Location	1 day	Wed 8/6/25	Thu 8/7/25	289	Operating Board		▶	Operating Board	
291	6.3	Provide State With Proof Of Availability Of Office Location	0.5 days	Thu 8/7/25	Thu 8/7/25	290	Project Manager		▶	Project Manager	
292	6.4	Set Location Up	8 days	Mon 9/8/25	Wed 9/17/25				▶		
293	6.4.1	Set Circuit Up For Connectivity	3 days	Mon 9/8/25	Wed 9/10/25		Security Network Engineers		▶	Security Network Engineers	
294	6.4.2	Telephones	0.5 days	Thu 9/11/25	Thu 9/11/25	293	System Administrator		▶	System Administrator	
295	6.4.3	Headsets	0.5 days	Thu 9/11/25	Thu 9/11/25	294	System Administrator		▶	System Administrator	

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296	6.4.4	Keyboards	0.5 days	Fri 9/12/25	Fri 9/12/25	295	System Administrator		System Administrator		
297	6.4.5	Mouse	0.5 days	Fri 9/12/25	Fri 9/12/25	296	System Administrator		System Administrator		
298	6.4.6	Monitors	0.5 days	Mon 9/15/25	Mon 9/15/25	297	System Administrator		System Administrator		
299	6.4.7	Furniture	0.5 days	Mon 9/15/25	Mon 9/15/25	298	System Administrator		System Administrator		
300	6.4.8	Phone lines	0.5 days	Tue 9/16/25	Tue 9/16/25	299	System Administrator		System Administrator		
301	6.4.9	Personal Computers	0.5 days	Tue 9/16/25	Tue 9/16/25	300	System Administrator		System Administrator		
302	6.4.10	Printers	2 days	Tue 9/16/25	Wed 9/17/25		System Administrator		System Administrator		
303	7	Staffing Plan Activities	30 days	Fri 8/15/25	Thu 9/25/25						
304	7.1	Execute Recruiting Plan	30 days	Fri 8/15/25	Thu 9/25/25		Talent Acq. Team		Talent Acq. Team		
305	7.2	Gather Staffing Plans From Each Department	2 days	Fri 8/15/25	Mon 8/18/25		Talent Acq. Team		Talent Acq. Team		
306	7.3	Identify Recruiting Hiring Order	0.5 days	Wed 8/20/25	Wed 8/20/25	305	Talent Acq. Team		Talent Acq. Team		
307	7.4	Review Job Descriptions For Each Position	0.5 days	Wed 8/20/25	Wed 8/20/25		Talent Acq. Team		Talent Acq. Team		
308	7.5	Approve Job Descriptions For Each Position	0.5 days	Wed 8/20/25	Wed 8/20/25	307	Talent Acq. Team		Talent Acq. Team		
309	7.6	Determine Hourly Rates & Benefit Package For Non-Exempt Po	0.5 days	Fri 8/15/25	Fri 8/15/25		Talent Acq. Team		Talent Acq. Team		
310	7.7	Gather Exempt Position Salaries	0.5 days	Fri 8/15/25	Fri 8/15/25	309	Talent Acq. Team		Talent Acq. Team		
311	7.8	Post Positions Internally & Externally	2 days	Thu 8/21/25	Fri 8/22/25						
312	7.8.1	Post On Indeed	0.5 days	Thu 8/21/25	Thu 8/21/25	308	Talent Acq. Team		Talent Acq. Team		
313	7.8.2	Post Social Media	0.5 days	Fri 8/22/25	Fri 8/22/25	312	Talent Acq. Team		Talent Acq. Team		
314	7.9	Identify Interviewers	30 days	Fri 8/15/25	Thu 9/25/25						
315	7.9.1	Schedule Interviews	30 days	Fri 8/15/25	Thu 9/25/25		Talent Acq. Team		Talent Acq. Team		
316	7.9.2	Conduct Interviews	30 days	Fri 8/15/25	Thu 9/25/25		Operations		Operations		
317	7.10	Initiate Hiring Process	17 days	Fri 8/22/25	Mon 9/15/25						
318	7.10.1	On-Boarding	2 days	Mon 9/15/25	Tue 9/16/25		HR Generalist		HR Generalist		
319	7.10.1.1	Benefits Enrollment Complete	0.5 days	Mon 9/15/25	Mon 9/15/25		HR Generalist		HR Generalist		
320	7.10.1.2	Coast Physical Access	0.5 days	Mon 9/15/25	Mon 9/15/25		System Administrator		System Administrator		

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321	7.10.1.3	Coast Network Access	0.5 days	Mon 9/15/25	Mon 9/15/25	320	Database Administrator		Database Administrator		
322	7.10.1.4	Start Background Process	0.5 days	Mon 9/15/25	Mon 9/15/25		HR Client Manager		HR Client Manager		
323	7.10.1.5	Start i9 Process Started	0.5 days	Mon 9/15/25	Mon 9/15/25	322	HR Client Specialist		HR Client Specialist		
324	7.10.1.6	Confirm New Hires Are Cleared To Start Work	1 day	Mon 9/15/25	Mon 9/15/25		HR Clearance Manager		HR Clearance Manager		
325	7.10.1.7	Schedule New Hires In Training Classes	1 day	Mon 9/15/25	Mon 9/15/25		Training Specialist,Operations		Training Specialist,Operations		
326	7.10.2	All Employees Need To Sign A Confidentiality Agreement	1 day	Mon 9/15/25	Mon 9/15/25						
327	7.10.2.1	Save All Agreements	0.5 days	Mon 9/15/25	Mon 9/15/25		Project Manager		Project Manager		
328	7.10.2.2	Send Agreements if Requested	0.5 days	Mon 9/15/25	Mon 9/15/25	327	Project Manager		Project Manager		
329	7.10.2.3	Security Awareness & Training	1 day	Sat 9/20/25	Sat 9/20/25						
330	7.10.2.3.1	Personnel Given Security Awareness Training At Time C	0.5 days	Sat 9/20/25	Sat 9/20/25		Training Specialist		Training Specialist		
331	7.10.2.3.2	Security Awareness Training Records Are Maintained A	0.5 days	Sat 9/20/25	Sat 9/20/25		Compliance		Compliance		
332	7.10.2.3.3	Role-Based Security Training Is Provided To Personnel V	0.5 days	Sat 9/20/25	Sat 9/20/25		Training Specialist		Training Specialist		
333	7.10.2.3.4	Individuals Are Provided With Timely Information Regai	0.5 days	Sat 9/20/25	Sat 9/20/25		Training Specialist		Training Specialist		
334	8	Training Material	10 days	Mon 9/1/25	Fri 9/12/25						
335	8.1	NDOL	2 days	Mon 9/1/25	Tue 9/2/25						
336	8.1.1	Develop training specifications Based of Train the Trainer wi	1 day	Mon 9/1/25	Mon 9/1/25		Operations,Training Specialist		Operations,Training Specialist		
337	8.1.2	Provide Current Desk Reference Guide Material and Other Ir	1 day	Tue 9/2/25	Tue 9/2/25	336	NDOL		NDOL		
338	8.2	Coast	10 days	Mon 9/1/25	Fri 9/12/25						
339	8.2.1	Develop training specifications based off Train the Trainer	5 days	Tue 9/2/25	Mon 9/8/25	336	Operations,Training Specialist		Operations,Training Specialist		
340	8.2.2	Identify training delivery methodology (computer based trai	1 day	Tue 9/9/25	Tue 9/9/25	339	Operations,Training Specialist		Operations,Training Specialist		
341	8.2.3	Develop scripts & training materials for call center staff	6 days	Tue 9/2/25	Tue 9/9/25		Operations,NDOL,Training Specialist		Operations,NDOL,Training Specialist		
342	8.2.4	Conduct training usability study- (training feedback)	1 day	Tue 9/9/25	Tue 9/9/25		Training Specialist		Training Specialist		
343	8.2.5	Finalize training materials	1 day	Wed 9/10/25	Wed 9/10/25	342	Operations,Training Specialist		Operations,Training Specialist		
344	8.2.6	Load into training delivery mechanism- (TrakStar)	1 day	Thu 9/11/25	Thu 9/11/25	343	Training Specialist		Training Specialist		
345	8.2.7	Training materials complete	0.5 days	Fri 9/12/25	Fri 9/12/25	344	Operations,Training Specialist		Operations,Training Specialist		

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346	8.3	Pilot Testing	1 day	Fri 9/12/25	Fri 9/12/25						
347	8.3.1	Identify test group (testers)	0.5 days	Fri 9/12/25	Fri 9/12/25		Operations		Operations		
348	8.3.2	Develop software delivery mechanism	0.5 days	Fri 9/12/25	Fri 9/12/25	347	Salesforce Admin		Salesforce Admin		
349	8.3.3	Install/deploy software	0.5 days	Fri 9/12/25	Fri 9/12/25		Salesforce Admin		Salesforce Admin		
350	8.3.4	Obtain user feedback	0.5 days	Fri 9/12/25	Fri 9/12/25	349	Operations		Operations		
351	8.3.5	Evaluate testing information	0.5 days	Fri 9/12/25	Fri 9/12/25		Operations,Salesforce Admin		Operations,Salesforce Admin		
352	8.3.6	Pilot complete	1 day	Fri 9/12/25	Fri 9/12/25		Project Manager		Project Manager		
353	9	Training Schedule - Onboarding	13 days	Mon 9/15/25	Wed 10/1/25						
354	9.1	Initial Training by NDOL: Up to Two Weeks for “Train the Trainers”	13 days	Mon 9/15/25	Wed 10/1/25		NDOL		NDOL		
355	9.1.1	Training Support	13 days	Mon 9/15/25	Wed 10/1/25		NDOL		NDOL		
356	9.1.2	Update Any Needed Policies	13 days	Mon 9/15/25	Wed 10/1/25		NDOL		NDOL		
357	9.1.3	Provide Current Desk Reference Guide	13 days	Mon 9/15/25	Wed 10/1/25		NDOL		NDOL		
358	9.2	Coast	6 days	Mon 9/15/25	Mon 9/22/25						
359	9.2.1	New Hire Onboarding	6 days	Mon 9/15/25	Mon 9/22/25						
360	9.2.1.1	Security Access and Restrictions	2 days	Mon 9/15/25	Tue 9/16/25		Training Specialist		Training Specialist		
361	9.2.1.2	Coast/NDOL Servicing System	2 days	Wed 9/17/25	Thu 9/18/25	360	Training Specialist		Training Specialist		
362	9.2.1.3	Telephony	2 days	Fri 9/19/25	Mon 9/22/25	361	Training Specialist		Training Specialist		
363	9.3	New Hire Functional	3 days	Mon 9/29/25	Wed 10/1/25						
364	9.3.1	Migration/Conversion	2 days	Mon 9/29/25	Tue 9/30/25		Training Specialist		Training Specialist		
365	9.3.1.1	Account and Loan Data Load& Reconciliation	0.5 days	Mon 9/29/25	Mon 9/29/25		Training Specialist		Training Specialist		
366	9.3.1.2	Loan Data Detailed Evaluation, Correction,& Reconciliation	0.5 days	Mon 9/29/25	Mon 9/29/25		Project Manager,SCM		Project Manager,SCM		
367	9.3.1.3	Account Release	0.5 days	Mon 9/29/25	Mon 9/29/25		Training Specialist		Training Specialist		
368	9.3.2	Contact Center	8 days	Mon 9/15/25	Wed 9/24/25		Training Specialist		Training Specialist		
369	9.3.2.1	Telephony& Scripts	1 day	Mon 9/15/25	Mon 9/15/25		Training Specialist		Training Specialist		
370	9.3.2.2	Messaging& Scripts	1 day	Mon 9/15/25	Tue 9/16/25	369	Training Specialist		Training Specialist		

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371	9.3.2.3	E-mail& Scripts	1 day	Tue 9/16/25	Tue 9/16/25	370	Training Specialist			Training Specialist	
372	9.3.2.4	Texting& Scripts	1 day	Tue 9/16/25	Wed 9/17/25	371	Training Specialist			Training Specialist	
373	9.3.2.5	Website Navigation Q&A	1 day	Wed 9/17/25	Wed 9/17/25	372	Training Specialist			Training Specialist	
374	9.3.2.6	Basic Customer Service Skills	1 day	Wed 9/17/25	Thu 9/18/25	373	Training Specialist			Training Specialist	
375	10	Go-Live	1 day	Wed 10/1/25	Wed 10/1/25		Operations,IT Teams,NDOL				
376	10.1	Test & Monitor Will Be Continuous	60 days	Wed 10/1/25	Tue 12/23/25						

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COST PROPOSAL
NDOL Call Center Support for Unemployment Insurance Services
RFP 121962 - o3

Bidder's Name: Coast Professional, Inc.

Bidder to complete the following cost proposal, which shall include all costs of staffing including labor, employee benefits and all statutory employment costs and all other direct costs of operating the call center as described in Section V of the RFP.

Deliverable Section	Summary of Total Project Costs	Annual Cost Year 1	Optional Renewal One Annual Cost	Optional Renewal Two Annual Cost	Optional Renewal Three Annual Cost	Optional Renewal Four Annual Cost
V.B.6.b.i	Interpretation expenses (paid biweekly)	\$47,323.61	\$48,743.32	\$50,205.62	\$51,711.78	\$53,263.14
V.D. a	Project Planning and Management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
V.D. b	Outline and phase management	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
V.D. c	Daily First Tier Support and call reporting (paid biweekly)	\$1,245,972.05	\$1,283,351.21	\$1,321,851.75	\$1,361,507.30	\$1,402,352.52
	Total Project Costs	\$1,293,295.66	\$1,332,094.53	\$1,372,057.37	\$1,413,219.09	\$1,455,615.66