



# Proposal for

## State of Nebraska Department of Labor (NDOL) Call Center Support for Unemployment Insurance Services RFP No. 121962 O3

Response Due: 6/27/2025  
Respondent: Direct Interactions, Inc.

### Contact:

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## 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.

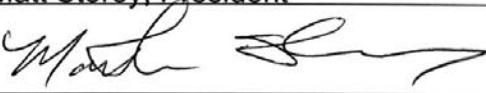
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

N/A 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).

N/A 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.

N/A 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:	Direct Interactions, Inc.
ADDRESS:	701 5th Ave Suite 4200, Seattle, WA 98104
PHONE:	833.972.4162
EMAIL:	RFPteam@directinteractions.com
BIDDER NAME & TITLE:	Matt Storey, President
SIGNATURE:	
DATE:	June 23, 2025

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

NAME:	
TITLE:	
PHONE:	
EMAIL:	

### VI.A.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 have changed since first organized.*

*Direct Interactions Mission Statement below (Fig. 1):*



**Corporate Information below (Fig. 2)**

<b>Company Name:</b>	<b>Direct Interactions, Inc.</b>
<b>Headquarters Address:</b>	701 5th Avenue, Suite 4200, Seattle, WA 98104
<b>Website:</b>	www.directinteractions.com
<b>Entity Type:</b>	S Corporation / Business Process Outsourcing (BPO)
<b>Owners:</b>	Matt Storey & Jonas Nicholson
<b>State of Incorporation:</b>	Washington



<b>Date of Incorporation:</b>	July 6, 2007
<b>Organizational History:</b>	No change in the company's name or form of organization

**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, along with the name, address, and telephone number of the fiscally responsible representative of the bidder's financial or banking organization. For non-publicly held corporations, either the public 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 so that solicitation evaluators can reasonably assess the stability and financial strength of the organization. Additionally, a non-publicly held firm should provide a banking reference. The bidder must disclose any 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 exists. The State may elect to use a third party to conduct credit checks as part of the corporate overview evaluation.*

## Direct Interactions Financial Statements - Proprietary Information

[illegible]

### **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 it will likely occur. Any change of ownership for an awarded bidder(s) will require notification to the State.*

Direct Interactions, Inc. affirms that no changes in ownership or control of the company are anticipated within the twelve (12) months following the submission of this proposal. The company remains under the ownership and leadership of its original founders, Matt Storey and Jonas Nicholson, and there are no planned transactions or restructuring activities that would alter this status. Should any changes occur in the future, Direct Interactions, Inc. will promptly notify the appropriate parties in accordance with contractual and regulatory requirements.

#### **d. OFFICE LOCATION**

*Identify the bidder's office location responsible for performance pursuant to an award of a contract with the State of Nebraska.*

*(Section V.B.1.a.-c.- Contractor Location and Eligibility)* Direct Interactions will establish a dedicated physical office location within a 100-mile area near the Department of Labor office in Nebraska (Hub site), which will serve as the central hub for call center service operations. This location will anchor our commitment to delivering high-quality, locally supported services while integrating seamlessly into our broader national infrastructure.

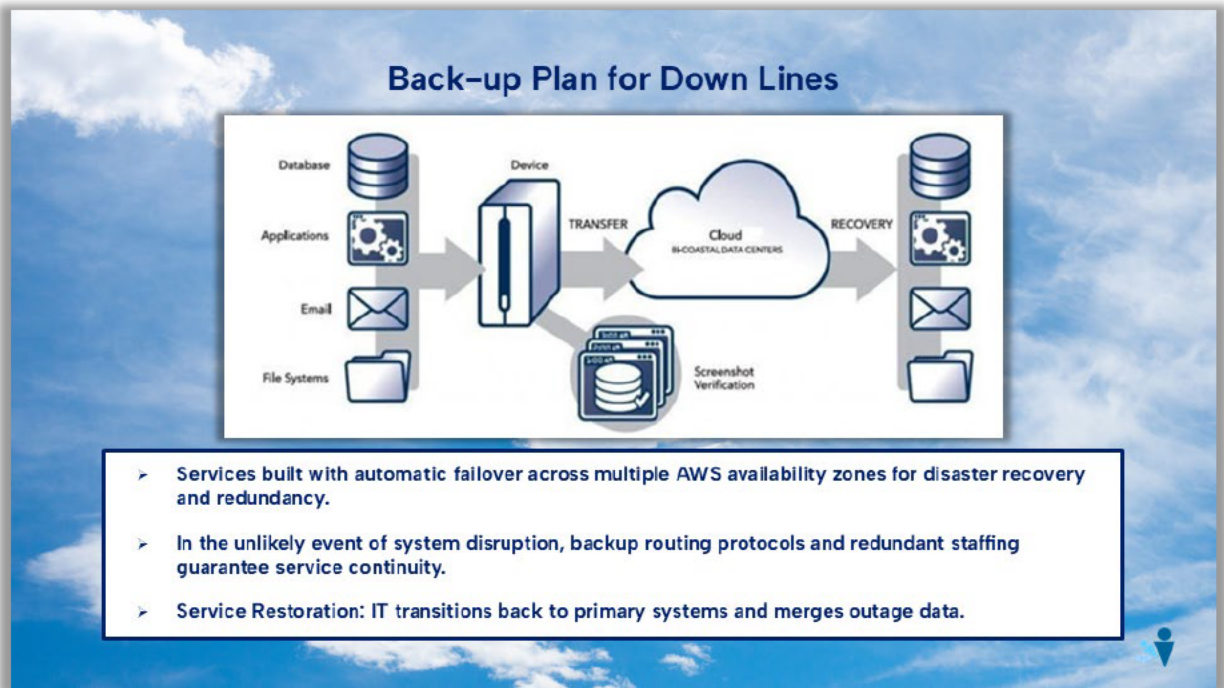
*(V.B.7.a - Disruption in Service)* As part of our distributed workforce strategy, Direct Interactions will also maintain multiple dedicated office locations across the United States. This approach is a cornerstone of our business continuity and disaster response risk mitigation plan, ensuring uninterrupted service delivery regardless of regional disruptions.

Our operational model is built on a seamless, unified service delivery framework. All agents and supervisors, whether at the Hub site or at other sites, will connect through a secure, virtualized environment powered by Amazon Web Services (AWS) and Amazon Connect. This cloud-based infrastructure enables real-time collaboration, centralized quality assurance, and consistent service standards across all locations.

Each site, including the Hub site location, will be staffed with a dedicated team of agents with supervisor support. This structure ensures both localized responsiveness and enterprise-wide coordination. Our operations are further supported by Direct Interactions' national workforce of experienced support personnel. This team includes specialists in customer service, quality assurance, training, and IT, all working together to uphold our high standards of performance and client satisfaction. Should a service interruption occur, Direct Interactions will promptly alert the designated NDOL contact and outline an estimated timeframe for resolution.

**The remainder of this page was intentionally left blank**

*Direct Interactions Back-up Plan for Down Lines below (Fig. 3):*



#### **e. RELATIONSHIPS WITH THE STATE**

*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, identify the contract number(s) and/or any relevant information available to identify such contract(s). If no such contracts exist, declare so.*

Direct Interactions has not previously contracted with the State of Nebraska. While we have had the privilege of serving numerous state and local government agencies across the country, we have not yet had the opportunity to partner with the great State of Nebraska.

We are enthusiastic about the possibility of establishing a strong and productive relationship through this solicitation and stand fully prepared to deliver exceptional service and support to the State and its constituents.

#### **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 which employed, job title or position held with the State, and separation date. If no such relationship exists or has existed, declare so. 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, upon review, the State determines 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, declare so.*

Direct Interactions affirms that no individuals named in this proposal are current or former employees of the State of Nebraska within the past twelve (12) months. Furthermore, no current employees of Direct Interactions are known to be employed by any agency of the State of Nebraska as of the date of this submission. Direct Interactions does not intend to utilize subcontractors for contracted work with the State of Nebraska.

*(Section V.B.2.a - Legal Compliance)* Direct Interactions will operate in full compliance with all applicable federal and state laws and regulations throughout the duration of the contract with the Nebraska Department of Labor (NDOL). We are committed to maintaining the highest standards of legal and regulatory adherence in every aspect of our operations, including employment practices, data security, accessibility, and service delivery. Our compliance team continuously monitors changes in relevant legislation to ensure our policies, procedures, and systems remain up to date and aligned with all legal requirements. This proactive approach ensures that NDOL can rely on Direct Interactions as a responsible and trustworthy partner throughout the contract term.

Direct Interactions is committed to maintaining the highest standards of integrity and compliance. Should we be awarded a contract, we will take all reasonable and proactive measures to ensure that any personnel assigned to the project are thoroughly vetted to prevent any actual or perceived conflicts of interest in accordance with State guidelines which includes partnership, as authorized by the State, with the Nebraska Vocational Rehabilitation program.

#### **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, where the issue was either not litigated due to inaction on the part of the bidder or litigated and the 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 must present the bidder's position on the matter. The State will evaluate the facts and 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, declare so. 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.*

Direct Interactions affirms that it has not experienced any contract terminations for default within the past five (5) years. Furthermore, the company has not had any contracts terminated for convenience, non-performance, non-allocation of funds, or any other reason during this period.

Since our founding in 2007, Direct Interactions has maintained a strong track record of performance and client satisfaction. Notably, we have successfully retained every recompetete contract opportunity we have pursued, demonstrating our commitment to excellence, reliability, and long-term partnership with our clients.

## **h. SUMMARY OF BIDDER'S CORPORATE EXPERIENCE**

*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 similar projects. The State will use no more than three (3) narrative project descriptions submitted by the bidder during its evaluation. Provide three (3) references for call center services, including the contact name, phone number, email address, length of relationship, and a brief overview of the services provided. Describe the company's culture and how it aligns with this solicitation. Address the following:*

*i. Provide narrative descriptions to highlight the similarities between the bidder's experience and this Solicitation. Include:*

- *The time period of the project,*
- *The scheduled and actual completion dates,*
- *The bidder's responsibilities,*
- *For reference purposes, a customer name (including the name of a contact person, a current telephone number, facsimile number, and e-mail address);*
- *Indicate whether the work was performed as the prime Vendor or as a subcontractor. If performed as the prime Vendor, 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, provide the same information requested for the bidders above. Additionally, specify what share of contract costs, project responsibilities, and time period were performed as a subcontractor.*

### **Direct Interactions Project Experience & References**

The following section represents Direct Interactions 3 references and relevant experience to the Scope of Work described in this RFP.

1) Ohio Department of Job and Family Services Unemployment Insurance Call Center Matrix below (Fig. 4)

<b>Project Name</b>	Ohio Unemployment Insurance Call Center Support
<b>Client Name</b>	Ohio Department of Job and Family Services (ODJFS)



<b>Reference Contact Info</b>	Chris Duda, Management Analyst 4200 E. 5 <sup>th</sup> Ave., Columbus, OH 43219 Phone: 614.214.6102 Email: Christopher.Duda@jfs.ohio.gov
<b>Time Period</b>	March 2020 – present
<b>Scope of Work</b>	Provided Tier 1 call center support for unemployment insurance claims during and after the COVID-19 pandemic.
<b>Responsibilities</b>	Handled over 4 million calls, processed 700,000 claims, scaled from 150 to 750 agents, provided training, QA, and reporting.
<b>Prime/Subcontractor Role</b>	Prime Contractor
<b>Budget &amp; Timeline (planned vs. actual)</b>	Planned: 3 contracts (3/2020 – 6/2027) Actual: 1) \$19 M p/a, 2) \$20 M p/a, 3) \$30 M (p) TBD in process (a).
<b>Outcomes</b>	Reduced wait times from hours to under 5 minutes; maintained CSAT above 90%; exceeded SLA targets.

### ODJFS Experience Narrative (Alignment with NDOL Scope of Work)

Direct Interactions brings a proven, large-scale track record of delivering first-tier unemployment insurance (UI) call center services that directly align with the Nebraska Department of Labor's Scope of Work. From March 2020 through the present day, we have partnered with the Ohio Department of Job and Family Services (ODJFS) to provide Tier 1 support for its UI Claims Center. During this engagement, we handled over 3.8 million UI-related calls and processed more than 700,000 claims, demonstrating our ability to manage high-volume, high-complexity public service operations with precision, compliance, and care.

### First-Tier Inbound Call Handling & Callback Management

NDOL requires a vendor to manage approximately 71,000 calls annually, including 5,000 non-English calls, and scheduling associated to 9,000 callbacks. In Ohio, Direct Interactions successfully managed more than 3.8 million calls and implemented a structured callback model for complex inquiries. Our agents were trained to triage calls, resolve Tier 1 issues, and schedule follow-ups with internal ODJFS staff for escalated matters mirroring NDOL's expectations for callback scheduling, tracking, and reporting. Direct Interactions will provide the same level of service to meet and exceed NDOL's needs.

We maintained queue efficiency by minimizing hold times and implemented real-time monitoring to ensure prompt service. Our performance consistently exceeded expectations, with average wait times reduced from hours to minutes and first-call resolution rates exceeding 80%.



NDOL requires a turnkey solution with full responsibility for hiring, training, onboarding, payroll, and performance management. Direct Interactions fulfilled these same responsibilities for ODJFS, hiring and training more than 1,000 agents after screening more than 10,000 applicants. We scaled from 150 to 750 agents during peak periods, demonstrating our ability to flexibly meet seasonal demand. Direct Interactions has demonstrated our scalability and ability to manage peak periods and post-holiday surges for NDOL.

*(V.B.5.b.iv - Training Content Requirements)* Our training program included over 50 live instructor-led sessions and 20+ refresher courses. We followed a “Train the Trainer” model, maintained a curated knowledge base, and conducted regular calibration meetings and town halls. Our training covered all the same NDOL-required topics, including sensitivity awareness, conflict resolution, confidentiality, positive interaction approach, and system use. Our team will provide the same level of training for NDOL. Direct Interactions will engage with NDOL claimants confidently and professionally, ensuring clear, accurate communication supported by strong product knowledge. Our agents are trained to uphold strict confidentiality standards and follow all data protection protocols. We are committed to enhancing customer service through continuous performance monitoring, coaching, and feedback, ensuring every interaction is efficient, respectful, and informed.

Direct Interactions will ensure all agents are thoroughly familiar with NDOL-approved scripts, enabling them to deliver consistent, accurate, and empathetic responses during every claimant interaction. Our training program emphasizes not only script mastery but also the ability to adapt tone and pacing to meet the needs of each caller. To enhance customer service, we incorporate continuous feedback loops, real-time coaching, and quality assurance reviews that focus on both compliance and claimant satisfaction. Sensitivity and confidentiality are core components of our training curriculum, equipping agents to handle sensitive information with discretion and empathy. Through structured role-play exercises, agents practice real-world scenarios, reinforcing their understanding of scripts, confidentiality protocols, and compassionate communication. This hands-on approach ensures our team is fully prepared to represent NDOL with professionalism and care.

NDOL requires that at least 10% of agents be fluent in English and Spanish and that interpretation services be available for other languages. Direct Interactions met and exceeded these standards in Ohio, providing bilingual (English/Spanish) support and integrating telephonic interpretation services to ensure equitable access for all claimants. Direct Interactions will provide the same level of service for NDOL.

NDOL’s Scope of Work emphasizes the need for a configurable CRM, customized English & Spanish IVR, and real-time reporting. In Ohio, Direct Interactions effectively utilized our client’s secure, configurable CRM that supported case management, callback scheduling, and detailed reporting. Direct Interactions will provide NDOL with a customized and configurable CRM system with case management, dashboards, activity tracking capabilities, and exportable data formats. Our Ohio CRM experience utilization included:

- End-to-end case tracking
- Real-time dashboards
- Callback assignment and resolution tracking

- Exportable reports in multiple formats
- Custom workflows and activity tracking

Our IT Team worked closely with ODJFS to ensure proper connectivity and utilization of the agency's IVR and telephony systems, using Cisco Finesse and Verint for call routing and workforce management. Our experience with Ohio's IVR included support for multi-language options configurable within 48 hours. Upon contract award, Direct Interactions will provide a configurable IVR with the ability to be updated as required by NDOL within 24 to 48 hours of request.

***(V.B.3.a.i-iv. - Interactive Voice Response (IVR) System)*** Direct Interactions will implement and manage an Interactive Voice Response (IVR) system that fully aligns with NDOL's operational and service expectations. Our IVR will be configured to route and process calls using NDOL-approved scripts, ensuring consistency, accuracy, and a seamless claimant experience. To support Nebraska's diverse population, the system will offer multi-language options, including English and Spanish, with the ability to expand language support as needed. We will continuously monitor IVR system performance to ensure reliability, responsiveness, and minimal downtime. In addition, Direct Interactions will provide NDOL with detailed IVR reporting, including call routing data, usage trends, and system diagnostics, enabling full transparency and performance oversight. This approach ensures that the IVR system remains a reliable, efficient, and accessible entry point for all claimants seeking assistance.

Touting multiple Amazon Web Services (AWS) certifications and Amazon Partner Network membership, Direct Interactions has an efficient staff of skilled professionals, technical expertise, and cutting-edge technology experience to seamlessly integrate with NDOL's systems.

NDOL has clearly defined KPIs, including:

- Average Speed to Answer ( $\leq 3$  minutes)
- Average Handle Time ( $\leq 10$  minutes)
- After Call Work ( $\leq 1.5$  minutes)
- Abandoned Call Rate ( $\leq 10\%$ )
- Customer Satisfaction Score ( $\geq 85\%$ )

Direct Interactions met or exceeded these benchmarks in Ohio. We maintained QA scores above 92%, an error rate below 0.25%, and CSAT scores consistently above 80%. Our Power BI dashboards provided real-time visibility into agent performance, call volume, and service level adherence.

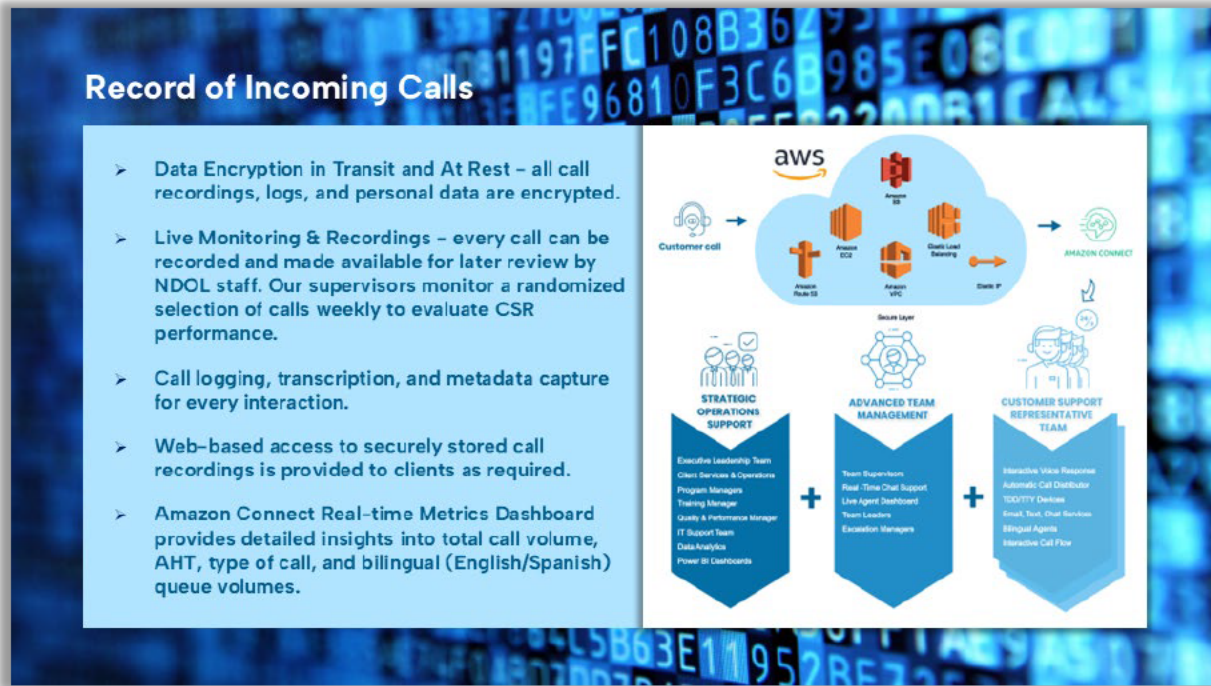
NDOL requires audio recordings of all calls, available within 24 hours, and a robust QA process. In Ohio, we recorded and stored all calls, conducted regular QA reviews, and implemented corrective action plans when needed. Our QA team worked closely with ODJFS to ensure compliance with all state guidelines and service expectations.

***(V.B.6.c - Ad Hoc Reports)*** NDOL expects daily dashboards, interval reports, and ad hoc reporting. Direct Interactions delivered all of these in Ohio, including:

- Real-time call volume and queue status

- Agent performance metrics
- Callback logs and resolution tracking
- Custom reports based on trends and KPIs

*Direct Interactions Monitoring, Recording & Strategic Support Methodology below (Fig. 5):*



We also participated in regular meetings with ODJFS leadership to review performance, address issues, and ensure alignment with service improvements, just as NDOL requires monthly and ad hoc meetings with its vendor. Our Direct Interactions team is prepared to provide the same level of services to NDOL.

While Direct Interactions operated remotely for ODJFS, we fully understand NDOL's requirement for an onshore, secure, dedicated office environment. We are prepared to meet this requirement by establishing a compliant physical call center operation within the United States, ensuring all agents work from secure, dedicated workspaces.

#### Summary of Alignment Chart below (Fig. 6)

NDOL Requirement	Direct Interactions – Ohio Experience
First-tier UI call handling	3.8M+ calls handled, 700K+ claims processed. Current AWS subscription supports up to 70,000 call center representatives simultaneously. Prepared to handle
Callback scheduling & tracking	Structured callback model with detailed reporting for ODJFS. Acknowledge callbacks will be the duty of NDOL per Q&A.

Staffing & training	More than 1,000 agents hired, 50+ training sessions, full HR oversight. *We have ~100 UI trained employees available for deployment.
Spanish & multilingual support	Bilingual (English/Spanish) agents + interpreter services.
CRM & IVR	IT services provided & Agent interaction with client's CRM, IVR, real-time dashboards
Performance standards (ASA, AHT, CSAT)	Exceeded KPIs: ASA < 3 min, CSAT > 80%, QA > 92%
QA & call recording	Performed QA analysis from call recordings, created corrective action plans (CAPs), conducted calibration meetings
Reporting & dashboards	Provided Power BI dashboards, interval reports, ad hoc reporting
Physical call center (non-remote)	ODJFS – fully remote. *Prepared to establish secure, onshore facilities for NDOL Call Center Services

Direct Interactions is confident in our ability to replicate and tailor this success for the Nebraska Department of Labor. Our experience with ODJFS demonstrates our capacity to meet NDOL's operational, technical, and performance requirements while delivering compassionate, efficient, and compliant service to claimants across the state. A detailed description of our plan to provide call center services including live agents, telephony, CRM, WFM, Training, Supervision with real-time support, Quality, Reporting, Data Analytics, and IT services for NDOL is provided in our Work Plan on pg. xx.



Letter of Reference

Oct 2, 2023

To whom it may concern,

I am writing to express my appreciation for the services provided by Direct Interactions to the Ohio Department of Job and Family Services (ODJFS). Our partnership allowed us to be more successful than ever before.

Direct Interactions utilized US-based agents with very flexible hours. Using US-based agents was a requirement for us, and DI delivered better than any of our other vendors. When leadership requested that Direct Interactions start to focus on more Ohio agents for the project, Direct Interactions stepped up on that too. The type of agents Direct Interactions brought on and their flexibility was a key to our success.

During the pandemic, our call volume increased from a couple thousand calls a month to a couple million calls a month at the peak. Direct Interactions' flexibility allowed them to staff up and staff down with surges and lows in call volumes. It allowed them to staff up during our busiest intervals and cut down during our lowest intervals. Our needs, both financially and regarding staffing, changed several times during the pandemic. Direct Interactions rolled with the punches and quickly made any changes requested, both in the contract, with staff management, and staff numbers. We had five different vendors throughout the pandemic. Direct Interactions was our first and was the last one standing as call volumes slowly returned to historic normal.

Direct Interactions' ability to provide secure access to the State's systems while in a work-from-home environment has been commendable. We had several growing pains as we moved to a virtual environment. Direct Interactions adjusted for any changes made to the computer systems and was a huge asset to us as we adjusted our entire operation.

Direct Interactions has a good quality system. They have an amazing dashboard to help them monitor their staff's historical numbers and performance. They implemented our scorecard and our call quality policies, and adjusted as we changed those policies on them throughout the contracts. They routinely exceeded our call quality objectives, both in score and in number of calls scored.

I offer my enthusiastic endorsement of Direct Interactions as a partner for call center services. Their commitment to utilizing US-based agents, their flexibility, their capacity to manage high call volumes, their dedication to data security, and their unwavering focus on accuracy and empathy make them an invaluable asset to any organization seeking exceptional service.

The value, type, duration, and description of services that Direct Interactions provides to ODJFS is delineated in the graphic titled Direct Interactions Business Experience – ODJFS on the following page.

Please feel free to reach out to me directly if you require any further insights or information about our experience working with Direct Interactions. I would be more than happy to provide additional details.

Sincerely,

  
Christopher Duda

Christopher Duda (Oct 2, 2023 13:22 EDT)

Chris Duda, Unemployment Supervisor, WFM Lead  
Ohio Department of Job and Family Services  
Christopher.Duda@jfs.ohio.gov  
614-214-6102  
09/29/2023

## 2) American Red Cross Disaster Relief Hotline Support Matrix below (Fig. 7)

<b>Project Name</b>	Disaster Relief Hotline Support
<b>Client Name</b>	American Red Cross
<b>Reference Contact Info</b>	Gina Surgener 430 17 <sup>th</sup> St. NW, Washington, DC 20006 Phone: 202.669.8193 Email: regina.surgener@redcross.org
<b>Time Period</b>	August 2017 - Present
<b>Scope of Work</b>	Provided emergency call center support during natural disasters across the U.S.
<b>Responsibilities</b>	Staffed 24/7 hotline, trained agents in crisis response, managed call surges, and ensured data security.
<b>Prime/Subcontractor Role</b>	Prime Contractor
<b>Budget &amp; Timeline (planned vs. actual)</b>	Planned: Recompete 3 times from end of first contract starting in 2017 through 2024. Awarded to Direct Interactions 3 times (most recently on 6/2024 w/ contract term through 2027. Actual: Original contract ~250K (p), yearly average contract value ~8 M (a).
<b>Outcomes</b>	Handled over 500,000 calls, maintained 95% call answer rate, and supported FEMA coordination.

**ARC Experience Narrative (Alignment with NDOL Scope of Work)**

Direct Interactions, Inc. brings a proven track record of delivering high-quality, scalable, and mission-critical call center services that align closely with the Nebraska Department of Labor's (NDOL) Scope of Work (SOW) for Unemployment Insurance Call Center Support. Our experience supporting the American National Red Cross (ARC) demonstrates our ability to provide 24/7, first-tier support with rapid scalability, robust training, and real-time performance monitoring.

Direct Interactions provides year-round 24/7 support for the American Red Cross, maintaining a flexible staffing pool that can ramp up within 48 to 72 hours of the client's request. Our team consistently meets and exceeds service levels while delivering disaster support through resource referrals and demographic data collection to identify impacted areas.



Our services include inbound call support for both major incidents and daily situations, recording caller information, and offering appropriate referrals based on pre-defined guidelines. We assist constituents in navigating financial assistance programs and provide up-to-date information on external resources. We also support field workers in documenting assistance cases efficiently. To ensure quality and responsiveness, we deliver daily performance metrics including call volume, service levels, and average handling time. We conduct ongoing training with real-time updates to adapt to evolving client policies. Weekly calibration meetings and performance reviews with ARC leadership ensure alignment and continuous improvement. Our quality assurance program includes real-time monitoring and one-on-one coaching to enhance customer satisfaction and agent performance.

The services our Direct Interactions Team provides to the American Red Cross align closely with the NDOL's requirements for Unemployment Insurance Call Center Support. NDOL requires a vendor capable of handling fluctuating call volumes, providing first-tier support, scheduling callbacks, and delivering real-time reporting and quality assurance. Direct Interactions' ARC engagement demonstrates our ability to meet these expectations through scalable staffing, structured training, and performance-driven operations.

More than that, Direct Interactions demonstrated and assisted in integration and monitoring of a cutting-edge conversation intelligence platform that leverages a proprietary large language model (LLM) with 30 billion parameters and generative AI to analyze 100% of customer interactions across voice, chat, and email channels in real time. In addition, Direct Interactions skillfully utilized a business intelligence platform that empowered our team to make fast, data-driven decisions by transforming complex data into interactive visual insights. This powerful tool enhanced customer service and satisfaction by enabling real-time monitoring, quick identification of emerging trends, and agile responses to shifting customer needs. We understand that continual performance monitoring and quick pivots are crucial to continuous improvement and customer satisfaction. With Direct Interactions, NDOL would have a partner with the skill and expertise required to advance and streamline customer interactions throughout the contract term.

#### Summary of Alignment Chart below (Fig. 8)

NDOL Requirement	Direct Interactions – ARC Experience
Scalable staffing for seasonal surges	24/7 operations with 48-72 hour ramp-up capability
First-tier call handling & callbacks	Disaster response triage and follow-up scheduling
Real-time performance monitoring	Power BI dashboards, QA scorecards, and live call reviews
Continuous training & calibration	Weekly training updates and client-led calibration meetings
Secure, onshore operations	U.S.-based infrastructure with secure data handling
High customer satisfaction	Compassionate, high-stakes support with strong feedback loop

Our experience with ARC also reflects our commitment to secure, compliant, and customer-focused service delivery, key priorities outlined in the NDOL Scope of Work. We are prepared to replicate this success, ensuring high-quality support for the State and Nebraskans who rely on these essential services.

Letter of Reference

To Whom It May Concern,

I am writing to express our appreciation for the quality services provided by Direct Interactions, Inc. Direct Interactions offers 24/7/365 support with an adaptable staffing model that can ramp up within 48 to 72 hours upon request. This flexibility has been critical in responding to the unpredictable call volume that American National Red Cross experiences when responding in a chronic disaster environment. The team at Direct Interactions consistently meets the challenge of quickly ramping up to meet our service level expectations, providing vital disaster support through resource referrals and dispatch services for people affected by disaster.

Their services include offering inbound call support for disaster response, addressing both major incidents and daily situations affecting the general population. They supply information on pre-established external resources and provide callers with the latest updates on accessing these resources. Their support extends to caseworkers requiring support in the field.

Direct Interactions delivers ongoing training with real-time updates, swiftly adapting to changes in our policies and procedures. They conduct weekly calibration meetings to evaluate agent performance and gather feedback on call quality requirements. Additionally, they hold weekly reviews to discuss all metrics and address upcoming needs. Their implementation of Quality Assurance monitoring and one-on-one coaching sessions continuously enhances customer satisfaction and key performance metrics for agents.

The commitment and professionalism of Direct Interactions have been pivotal in our efforts to support those in need. Their ability to provide high-quality service, even in the most challenging circumstances, is truly commendable. We highly recommend Direct Interactions, Inc. to any organization seeking a reliable and efficient partner for call center services. Their expertise, responsiveness, and strong partnership have made a significant positive impact on our operations, and we are grateful for their ongoing support.

Sincerely,

Christina Curtis  
Director, DCS Contact Center  
American Red Cross  
[christina.curtis@redcross.org](mailto:christina.curtis@redcross.org)  
513-391-0688

  
Signature

04-15-25  
Date

## 3) Citizens Property Insurance Call Center Service Matrix below (Fig. 9)

<b>Project Name</b>	Citizens Property Insurance Call Center
<b>Client Name</b>	Citizens Property Insurance
<b>Reference Contact Info</b>	Jason Oliver, Sr., Vendor Relationship Administrator 2101 Maryland Circle, Tallahassee, FL 32303 904-472-8847 jason.oliver@citizensfla.com
<b>Time Period</b>	May 2020 - present
<b>Scope of Work</b>	Call Center Services for catastrophe (CAT) response calls if/when needed upon 72-hour notice.
<b>Responsibilities</b>	Provide 24/7 multilingual support for various call types, meet strict performance metrics, scale rapidly for catastrophe response, ensure business continuity, ensure qualified staffing, and adhere to monthly reporting requirements/timelines.
<b>Prime/Subcontractor Role</b>	Prime
<b>Budget &amp; Timeline (planned vs. actual)</b>	Planned: Awarded 2020 (multi-vendor). Activated in 2022 – 2025 as needed based on CAT events. Recompete earned multiple award categories (CAT & FNOL) on 5/2025 % dictated by call volumes)  Actual: 1) ~1 M/yr. for 3 yrs. (a) <CAT activations not predictable/as needed (p as TBD). 2) ~7 M/yr. for up to 7 years based in part on activation/call volume peaks due to disaster events. (a) with (p as TBD).
<b>Outcomes</b>	Provided 7:00 AM – 7:00 PM 7-days per week during multiple CAT activations, with occasional 24-hour coverage required / ~60 Agents adjusted as needed / ~15% attrition / 90% agents moved into production once training was completed / Monthly call volume (expressed as agent production hours delivered*) September 2022: ~2,540 hours, October 2022: ~13,943 hours, November 2022: ~4,074



hours, July 2023: ~140 hours (readiness exercise), June 2024: ~255 hours (readiness exercise), September 2024: ~7,768 hours, October 2024: ~68,442 hours
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### Citizens Experience Narrative

Direct Interactions brings a proven track record of delivering high-quality, scalable, and secure call center services through its ongoing partnership with Citizens Property Insurance Corporation. Since 2022, our team of experts have supported Citizens during catastrophic events and seasonal call surges, providing multilingual inbound call support, real-time policy updates, and seamless escalation processes. From this experience, we believe our team can fulfill NDOL's needs for a responsive, first-tier call center capable of managing fluctuating volumes, particularly during peak unemployment periods.

Our approach with Citizens demonstrates the deep understanding and ability of Direct Interactions to meet stringent performance metrics, maintain business continuity, and rapidly scale operations, expectations outlined in this RFP. Direct Interactions' provisioning of secure access to client's web-based resources, daily client communications, and a train-the-trainer model ensures agents are well-prepared and continuously supported. We believe that our experienced team's handling of over 68,000 agent production hours during peak months, while maintaining quality and compliance, positions Direct Interactions as a strong candidate to deliver the same level of excellence for NDOL's Unemployment Insurance call center operations.

### Summary of Alignment Chart below (Fig. 10)

NDOL Requirement	Direct Interactions – Citizens Experience
First-tier inbound call center for UI claimants; includes scheduling callbacks for complex issues. Must adjust staffing for seasonal and daily call volume fluctuations	Deliver first-tier inbound call center support for claim status inquiries 24/7/365, including on-demand CAT response within 72 hours.
8 AM–5 PM CST, Mon–Fri (excluding holidays); must handle peak volumes and post-holiday surges.	Operate around-the-clock FNOL services as needed and rapidly scale operations to meet CAT event surges. Mobilizes resources within 72 hours to handle high-volume CAT events, such as hurricanes.
Bilingual (English/Spanish); 10% of agents must be fluent; support for other languages via interpretation	Support bilingual communication, with at least 5% of calls handled in Spanish, and expands language capacity as needed.
Expected 71,000 calls annually	Manage high-impact CAT events, such as Hurricane Ian, during which the team handled over 125,000 calls in just five weeks.
KPIs: ASA ≤ 3 min, AHT ≤ 10 min, ACW ≤ 1.5 min, CSAT ≥ 85%, Abandonment ≤ 10%	Meet service level agreements by answering 80% of calls within 60 seconds, maintaining an average wait time of 0.5 minutes, and achieving an 8-minute average handle time.

Connectivity to CRM NEworks; Provide real-time dashboards and (English & Spanish) IVR with callback and routing; call recording	Implements robust telephony infrastructure, records 100% of calls, and delivers comprehensive monthly performance reports and connectivity to client's web-based resources.
Onsite supervisors, QA analysts, and trainers; NDOL provides initial training; contractor handles ongoing	Assign dedicated personnel including an Account Manager, Trainer, Workforce Manager, Quality Manager, and IT support, and conduct continuous training to ensure service excellence.
Must notify NDOL of service disruptions and provide resolution timelines	Provide & Support Disaster Recovery/Business Continuity Plan led by IT Manager & Information Security Officer
Deliver real-time dashboard accessible daily to NDOL, showing key KPIs such as call volume, service level compliance, agent performance, and customer satisfaction. Provide customizable and ad hoc reports upon request, maintain detailed call logs and callback records.	Provide real-time dashboards, weekly and ad hoc reporting, detailed call logs, and KPI tracking (e.g., AHT, CSAT, service levels) to ensure transparency, performance monitoring, and compliance with Citizens' service expectations.

Our engagement with Citizens Property Insurance Corporation highlights Direct Interactions' ability to deliver scalable, secure, and high-performing call center services under dynamic and high-pressure conditions. Our proven success in managing multilingual support, rapid staffing adjustments, real-time reporting, and seamless client collaboration directly aligns with NDOL's requirements for responsive, first-tier Unemployment Insurance call center operations, ensuring service continuity, data integrity, and exceptional claimant experience.

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

*Present a detailed description of the proposed approach to the management of the project. Identify the specific professionals who will work on the State's project if awarded the contract resulting from this Solicitation. Provide the names and titles of the proposed team, with a description of team leadership, interface, support functions, and reporting relationships. Identify the primary work assigned to each person. Provide resumes for all personnel proposed to work on the project. Resumes should not be longer than three (3) pages and should include academic background, degrees, professional certifications, understanding of the process, and at least three (3) references who can attest to the competence and skill level of the individual. Any changes in proposed personnel should only be implemented after written approval from the State.*

#### **Direct Interactions Key Personnel and Project Management Strategy**

Our approach is designed to ensure seamless execution, accountability, and responsiveness throughout the contract lifecycle. The project will be led by a dedicated Account Manager who will serve as the primary liaison with NDOL. Our Direct Interactions team is structured to ensure operational excellence, compliance with NDOL standards, and adaptability to changing needs. We will implement a centralized chain of command with clear reporting lines, reinforced by specialized roles in quality assurance, training, technical integration, and frontline service delivery. Assigned stakeholders will utilize this structure to ensure that all aspects of the

contract, from agent performance to CRM configuration, are proactively managed and continuously optimized.

**Key Personnel Overview below (Fig. 11)**

Name:	Title:	Primary Responsibilities:	Reports To:
Matt Storey	Executive Sponsor	Contract oversight, NDOL liaison, strategic leadership	Collaborates with Executive Team and primary stakeholders
Iliana Ulloa	Chief Client Officer	Ensures client satisfaction, strategic alignment, and escalation resolution	Executive Sponsor & collaborates with primary stakeholders
Gioella Bonelli	Account Manager	Contract oversight, NDOL liaison, strategic leadership	Chief Client Officer and Executive Sponsor
Laura Moore	Backup Account Manager	Supports primary account manager; ensures continuity during absences	Account Manager & Chief Client Officer
Roderick Hope SR (Primary) Terry Shuford (Backup)	Call Center Supervisors	Daily operations, staff scheduling, KPI adherence	Account Manager
Veronica Cantu	Quality Assurance Analyst	Call monitoring, performance audits, compliance reporting	Director of Quality & Performance
Shala Lewis	Training Coordinator	Agent onboarding, “Train the Trainer” sessions, curriculum updates	Chief Client Officer
Kameron McClenny	CRM Administrator/ IT/System Integration Specialist	CRM configuration, data integrity, reporting/ System integration, technical troubleshooting, IVR/CRM support	Chief Client Officer
Trischa Vaughn	Manager of Workforce Planning	Oversees the effective scheduling of personnel	Chief Client Officer
TBD (~100 UI trained employees available for deployment)	Call Center Agents	Inbound call handling, first-tier support, callback scheduling	Call Center Supervisor
Terrance Greene	Data Analyst	Analyzes call center and CRM data, identifies trends, supports reporting, and informs decision-making	Chief Client Officer
Jeanie Burgan	Director of Quality & Performance	Oversees service quality, performance metrics, and	Chief Client Officer



		continuous improvement initiatives	
Connie Milton	Director of Recruitment	Leads talent acquisition strategy, hiring, and staffing operations	Chief People Officer
Malcolm Moore	Chief People Officer	Oversees HR strategy, employee relations, compliance, and culture	Executive Sponsor
Kevin Els	Disaster Recovery Lead	Continuity planning, risk mitigation, emergency response	Chief Client Officer & Executive Sponsor

*(Section V.B.5. Oversight and Management of Staff)* Direct Interactions will assume full responsibility for the oversight and management of all personnel assigned to support NDOL. This includes managing the entire employee lifecycle from recruiting and hiring qualified candidates to conducting comprehensive onboarding and training programs that align with NDOL's standards. We will track time sheets, administer payroll, and ensure compliance with all labor regulations. Our performance management process includes regular evaluations, coaching, and corrective action when necessary to maintain high service standards. Should it become necessary, we will also manage the termination process in a professional and compliant manner. Our structured approach to workforce management ensures that NDOL receives consistent, high-quality service from a well-supported and accountable team.

*Direct Interactions Employment Outreach Plan below (Fig. 12):*



Our team of UI call center service experts represented in the chart above consistently demonstrate their skill, efficiency, and professionalism. All key personnel will be fully prepared

to participate in structured interviews with NDOL clearly articulating their understanding of the RFP, project scope, and individual responsibilities. Each team member will confidently convey their management style, experience, and collaborative approach to ensure a cohesive presentation. Resumes for Key Personnel are provided on the following pages.

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

### **Resumes**

#### **Key Personnel References:**

Matt Storey, President  
701 5th Ave Suite 4200  
Seattle, WA 98104  
p: 833.972.4162  
m: 206.683.8607  
matt@directinteractions.com

Iliana Ulloa, Chief Client Officer  
701 5th Ave Suite 4200  
Seattle, WA 98104  
p: 833.972.4162  
iliana.ulloa@directinteractions.com

Malcolm Moore, Chief People Officer  
701 5th Ave Suite 4200  
Seattle, WA 98104  
p: 833.972.4162  
Malcolm.Moore@directinteractions.com

**Resumes of Key Personnel are provided on the following pages.**

## Matt Storey, President (Contract Compliance Liaison)

### Synopsis

Actively seeks to advance work-from-home employment opportunities for people with disabilities as part of Direct Interactions' customer service solutions. Recognized by several municipalities and non-profit organizations for proactive role in hiring people with disabilities. Conducts contract negotiations for all corporate accounts. Maintains hands-on client relationships and remains accessible to all key stakeholders 24/7 as Direct Interactions' emergency contact. Additionally, serves in a Subject Matter Expert or Director role on select high visibility accounts leveraging knowledge of cloud-based telephony technology to best meet client's strategic goals.

### Experience

#### 2006 - Present

##### **Direct Interactions, Inc.**

Co-Founder and corporate executive with fiduciary and contractual responsibilities for a call center organization of over 800 employees and hundreds of seasonal/part-time staff. Maintains an active role on strategic client engagements that leverage deep understanding of both cloud-based telephony technology solutions, and utilization of a remote workforce supporting workers and individuals with disabilities. Mentor and coach company's account managers on major accounts while guiding the development of new vertical markets in support of company growth.

- Played key role in landing the Ohio Jobs and Family Services contract in 2020, as well as its successful 2024 recompetes. Serve as principal executive point of contact for client organization processing over 700,000 annual unemployment claims.
- Executive point of contact for company's flagship American Red Cross account running from 2017 to the present. Partnered with Amazon Web Services and built a support team for victims of ongoing hurricanes, wildfires, and other emergencies. Integrated the Amazon Connect IVR with Salesforce.com, driving call deflection and self-service enhancements to improve operations for Red Cross.
- Worked with client, Paylock, to meet and improve parking enforcement call center operations for 20 US cities from 2013-2018. Contract included high visibility NY City account that answered over 600,000 calls per year and integrated with the city's finance department to garner over \$2M in fine payments per day.

## **2002 - 2004**

### **InstantService**

Director of Sales at a national software development firm specializing in chat and chatbot technology in support of call center/service center operations.

- Introduced the company's software solutions to major national-level accounts including Xerox, Lending Tree, and Cendant mortgage, among others.
- Produced a 30% increase in software sales during tenure prior to the company being acquired.
- Participated in the Merger and Acquisition process that resulted in Oracle acquiring the company in 2004.

## **2000 - 2002**

### **Par 3 Communications (now Varoli)**

Inside Sales Representative for a call center company specializing in outbound text alerts to customers, with a concentration on the airline and credit card industries.

- Managed all the corporate accounts and assisted in deep market penetration for fraud alerts for the credit card industry.
- Main corporate contact for all regional sales managers nationwide, offering data-driven insights, standardizing sales processes, and providing support to lead generation and qualification.
- Introduced the company to software developer, HNC, which subsequently spawned a synergistic partnership for developing faster notification capabilities for consumer alert services.

## **Education & Certifications**

### **Whitman College - 1996**

BA, Biology & Chemistry

### **Amazon Web Services - 2010**

Partner, Select Tier Services

### **Amazon Web Services - 2010**

Partner, Public Sector

### **American Association of Suicidology - 2024**

Crisis Specialist Certification

## Iliana Ulloa, Chief Client Officer

### Synopsis

Dynamic and results-oriented professional with over 15 years of experience in client relationship management, operations oversight, and team leadership. Proven ability to cultivate lasting partnerships, drive growth strategies, and ensure operational excellence within fast-paced, compliance-focused environments.

### Experience

#### **2011 - Present**

##### **Direct Interactions, Inc.**

Executive Client Manager and Operations Leader for one of the pioneering companies in the cloud-based customer service center market with over 50% of its workforce comprised of veterans, military spouses, first responders, and their families.

- Managed the recruiting, training, quality assurance, performance, and workforce management departments, ensuring seamless operations and exceptional service levels under demanding service levels agreements.
- Served as primary executive contact for client discussions, monitoring real-time statistics and implementing strategies to enhance customer service.
- Led HIPAA compliance initiatives for company supervisors and nationwide customer service agents.
- Established the company's dedicated bilingual Spanish/English agent team and supervised hiring for these specialized agents while promoting a diverse and compliant workforce.

#### **2006 - 2011**

##### **Arise, Inc.**

Customer Service Representative serving as the senior inbound specialist for national level accounts.

- Managed major clients, including Office Depot, Staples, General Electric, 1800Flowers, AAA Roadside Assistance, and Disney, Inc.
- Developed strong remote communication skills and program metrics for delivering best practices and elite customer support across various industries.



## **2002 – 2005**

### **FedEx Ground**

OSHA Trainer and Administrator for Florida and the Southeast Region ensuring compliance and safety standards while providing multifaceted support to senior management.

- Maintained daily calendar for executive Vice President
- Performed accounts payable, accounts receivable, and payroll management for regional employees using distributed automated systems.
- Compiled and distributed all reports for the Southeast Region operation that served as a management dashboard for several key program metrics.

## **1995 – 2001**

### **TradeStation Technologies**

Sales Administrator for a brokerage firm during its transition from client-server to online services.

- Collaborated with upper management to develop, field, and execute a full-service training program for two separate sales departments.
- Managed a team of 42 expert sales personnel.
- Performed multidisciplinary organizational support including organizing sales events and seminars, providing specialty training, and managing the payroll staff to include commission reporting and disbursement.

## **Education & Certifications**

### **St. Leo University - 2001**

BA, Business Management

### **Western Governor's University - 2022-2023**

Coursework in Organizational Leadership

## Gioella Bonelli, Account Manager/Project Manager

### Synopsis

Motivated Account Manager of Customer Service Representatives in demanding call center environments. Oversees schedule adherence, serves as principal point of contact for client, and collaborates with training team to create initial and refresher training for specialized teams. Skilled in project metrics and continuous improvement. Manages bilingual corporate call center capabilities.

### Experience

#### **2017 - Present**

##### **Direct Interactions, Inc.**

Serve as Senior Account Manager and the principal subject matter expert for advising the development of the company's growing English/Spanish bilingual call center for live agent capability. Manage and address staffing issues including but not limited to adherence, occupancy, retention and attrition. Manage one of the company's flagship long-term accounts supporting a large State jobs and family services call center that processes hundreds of thousands of calls and referrals.

- Monitor live telephony dashboards to ensure agent conformity to required key performance metrics and proper staffing levels.
- Partner with training manager for continued training, special updates, creation and implementation of assessments, and curation of the corporate knowledge management system.
- Responsible for certification tracking and daily HIPAA compliance enforcement.
- Conduct routine client interface to review performance, and conducts quality assurance calibrations, and manages the continuous improvement aspect of service management.

#### **2014 - 2017**

##### **Rapid Auto Loans**

Customer Service Representative for a Florida-based high volume short-term lending company with over 20 locations.

- Voice of the enterprise processing new and existing loans.
- Recognized by management for exceptional productivity and extremely high percentage of first-call resolution rates.
- Provided additional customer support via email communications using case management.

## **2012 - 2013**

### **Orvy LLC**

Customer Service Representative and Team Leader for busy Florida payday loan company.

- Processed and revised payday loans and applications and answered customer inquiries during live calls.
- Performed data entry for loan applications.
- Served as Team Leader for a sales team of six agents, responsible for training, quality control, and performance metrics.

## **2010 – 2011**

### **Elite Marketing Group**

Independent Contractor for an experiential marketing agency creating live brand interactions supported by digital and social media solutions and onsite events.

- Lead sales agent for promoting the Spirit Airlines Mastercard at airport locations, routinely exceeding new subscriber goals.
- Greeted and communicated with passengers before their flight.
- Trained new sales representatives to sell sponsored products.

## **2009 – 2010**

### **P&E Solutions**

Customer Service Representative for a regional debt consolidation company, assisting customers with inbound/outbound calls.

- Performed high volume data entry.
- Served as department leader with eight assigned team members with client interface responsibilities. Conducted training and quality assurance with staff.

## **Education & Certifications**

### **Hollywood Hills High School - Hollywood, FL - 2009**

Diploma, General Studies

## Laura Moore, Account Manager/Project Manager

### Synopsis

Fosters innovation and collaborative dynamics. Profound grasp of client requirements. Optimizes collective capabilities and ensures smooth operations of project parameters and their execution. Continuously evaluates project performance. Implements action plans based on client feedback and key performance indicators.

### Experience

#### **2013 - Present**

##### **Direct Interactions, Inc.**

Senior Account Manager/Project Manager for the company's most demanding and high visibility accounts. Champion of innovation, devising imaginative and industry-best solutions in collaboration with Direct Interactions' executive leadership team.

- Chosen for the management of the company's portfolio in demanding areas such as catastrophic event support and seasonal surge support that requires optimization of resources.
- Key player in organization's employment of qualitative and quantitative data via dashboards and other management and client-oriented viewpoints.
- Implemented project management approaches and tools to maintain demanding delivery timelines.
- Collaborating with internal project support teams to enact policy and process improvements based on client feedback.

#### **2007 - 2013**

##### **PRC**

Customer Service Representative and top sales and marketing asset for growing call center company that was acquired during tenure with company.

- Successfully converted an average of 20 new customers per month, contributing to significant revenue growth.
- Provided effective market penetration into the company's target market of media services and entertainment.
- Introduced and implemented ePective Customer Relationship Management tool that better integrated with the company's existing infrastructure and workflows.

## **2004 - 2006**

### **RJ Reynolds**

Inspector in company administrative and logistics department. Assisted in the automation upgrade program for package and mailing distribution and delivery.

- Implemented automated systems for coded shipments labels and tracking capabilities ensuring total asset visibility.
- Devised and implemented 100% inventory and inspection process for packages supporting quality control and error reduction that achieved 3-sigma (99.7%) levels of accuracy.

## **1999 - 2003**

### **Baptist Hospital**

Medical Records Clerk who developed and documented processes to facilitate inquiries and streamline and improve processes for records archiving and retrieval.

- Managed client files and scheduling and utilized database applications to ensure accuracy and organization.
- Implemented advanced capture and scanning technology for improved efficiencies in records and information management.

## **Education & Certifications**

### **Kaplan University - 2012**

Bachelor of Science, Criminal Justice

### **Indiana University - 1997**

Coursework in Business Administration



## Roderick Hope, Account Manager

### Synopsis

Versatile finance professional making successful career pivot to advanced contact center operations. Applies strong leadership acumen in team building and collaborating with account teams to ensure continuous performance at optimum service levels. Strong leadership and management competencies. Entrusted with the managing some of the company's most high visibility accounts.

### Experience

#### **2020 - Present**

##### **Direct Interactions, Inc.**

Account Manager for leading nationwide call center company providing continuous guidance, training, and mentorship to assigned contact center agents. Awarded numerous Supervisor of the Week awards for leadership and performance in service to key accounts.

- Serve in a dual capacity as a Senior Tier II Agent for problem resolution for escalated issues on enterprise accounts.
- Assists in technical set-up during onboarding processes for new customer service representatives on premier accounts.
- Report team performance metrics to senior management and provide recommendations on streamlining current procedures as well as provide insight on improving attrition rates.
- Meet bi-monthly with select clients to share ideas and communicate updates on policies, procedures, and improving performance based on feedback.
- Create performance improvement plans which are incorporated in standard operating procedures by the human resources office for tracking agents' performance on an individual basis. Mentor other supervisors on structuring and formatting performance plans for their agents.

#### **2017 - 2020**

##### **NEXREP**

Resource Specialist and Team Lead for a major contact center company supporting a virtual agent workforce. Served in quality assurance role by creating standardized checklists and coaching new agents on process improvement program.

- Created resource guides and facilitated training sessions for all newly assigned agents.
- Participated in business review meetings and provided recommendations to increase customer satisfaction while reducing employee attrition, resulting in a 10% improvement in retention rates.

- Assisted with streamlining delivery processes and developing metrics to ensure customers' overall experience and expectations were met.
- Identified reporting errors by alerting management to duplicate delivery cases in Salesforce reports, resulting in remediation of nearly 50 duplicate delivery instances.

## **2012 - 2014**

### **NCR Corporation**

Served as a Financial Analyst providing analysis related to all plant manufacturing activity, to include supportive analysis, management reporting, variance tracking, monthly and annual forecasting, and executing internal controls for costs and inventory movement. Calculated and booked all month-end accounting entries to include intercompany transactions. Conducted monthly and annual plan forecasting, actuals & variance reporting for inventory and financial impact to leadership team.

- Managed capital expenditures for three NCR Columbus, GA manufacturing facilities while performing monthly balance sheet reconciliation of entries recorded in the general ledger and fixed assets register.
- Conducted pre-accounting close analysis of profit and loss and expense statements, resolving all issues in a timely manner.
- Collaborated with inventory teams to analyze and adjust inventories for accurate reporting of financial impact.
- Created improved financial model for forecasting depreciation that moved the corporation over 30% closer to its scheduled target.
- Coordinated with plant operations, procurement, and global reduction teams to emplace controls for the accurate reporting of financials, resulting in the corporation meeting cost reduction initiatives.

## **Education & Certifications**

### **Troy University - Troy, AL - 2000**

Bachelor of Science, Business Management

### **Chattahoochee Valley Community College - Phenix City, AL - 1998**

Associate of Science, Business Administration

## Terry Shuford, Team Lead

### Synopsis

Team Lead with experience with accounts receivable, accounts payable, general ledger, payroll and collections. Strong interpersonal skills with experience in training, vendor relations, interaction with multi-level management / non-management personnel, team supervision of staff. Strong written and verbal communication, conflict resolution, and active listening skills.

### Experience

#### **2020 - Present**

##### **Direct Interactions, Inc.**

Team Lead for a leading nationwide call center company reputed for its large and stable work-at-home staff with a high percentage of disabled, veteran, and military spouse employees. Perform duties in an advisory role for large teams of inbound call agents at all clearance levels from training to top tier peers in following all policies and procedures.

- Utilize various system tools including Microsoft Teams to assist agents in multiple call center chat rooms
- Work in conjunction with other team leads, supervisors, and training team
- Help agents succeed in meeting their metrics goals and in performing all tasks for the client we serve

#### **2022 - Present**

##### **ACD Direct**

Tech Support Specialist assisting a client in the Insurance sector with handling their customer inbound calls related to general portal support, technical issues, billing, and client portal support.

- Provide accurate, satisfactory answers to customer queries and concerns.
- Deescalate situations involving dissatisfied customers, offer assistance and support.
- Guide callers through troubleshooting, navigating the company site or using the products or services.
- Review customer or client accounts, provide updates and information about billing and other account items.
- Collaborate with other support specialists and team leads to improve customer service.

## **2019 - 2020**

### **Work Options Consulting**

Self-employed Certified Servicing Professional for consulting providing in-bound call center support for two major non-profit organizations and a Fortune-500 company.

- Customer service work at home for clients as an independent contractor on the ACD, Arise, and NexRep platforms.
- Certified to service clients' platforms.
- Other independent contracts include roles as an on-going market researcher for BVA Group, a retail merchandiser for DP Recruiting, and a business evaluation consultant in various industries for multiple agencies and clients.

## **Education & Certifications**

### **Western Piedmont Community College - Morganton, NC - 2008**

Certified Nurse Aide Level 1

### **Bangor Christian Schools - Bangor, ME - 1982**

Diploma, General Studies

## Veronica Cantu, Quality Assurance Manager

### Synopsis

Experienced Quality Assurance Manager skilled in monitoring, evaluating, and improving agent performance. Proficient in process accuracy, calibration meetings, and constructive feedback. Committed to enhancing work environments.

### Experience

#### **2020 - Present**

##### **Direct Interactions, Inc.**

- Oversees Direct Interactions agents, ensuring adherence to proper protocols by comparing call actions with claim information.
- Directs QA agent assignments for the ODJFS project, selecting calls for calibration with the ODJFS Quality department.
- Conducts regular meetings with the QM team to discuss calls and review procedural updates.
- Works closely with ODJFS management to ensure alignment and accuracy across teams.
- Leads calibration sessions for Direct Interactions and ODJFS Quality Team and Call Center to harmonize evaluation standards.
- Attends ODJFS monthly Townhall meetings to address updates, changes, and stakeholder inquiries.
- Responds promptly to QM disputes, ensuring timely and effective resolution.
- Monitors and evaluates calls, submitting detailed reports reflecting findings and areas for improvement.
- Organizes and conducts pre-calibration and calibration meetings with the disaster management Quality Assurance team, producing reports on outcomes.
- Provides agents with actionable feedback to enhance customer service skills, documenting any identified errors.
- Meets with disaster management leadership to discuss potential enhancements to call flows and procedures.
- Conducts annual reviews of Quality Assurance evaluation forms, recommending improvements.
- Collaborates with disaster management teams to ensure cohesive and accurate quality practices.
- Analyzes agent trends and areas for improvement in meetings with client managers.



- Assesses calls for compliance with soft skills and procedural standards, documenting findings for quality control.
- Provides practical assistance through Teams channels, supporting agents in real time, and conducts training sessions on procedural updates.
- Evaluates agents with technical or procedural challenges, calculating weekly team performance statistics.
- Participates in trainings to stay updated on procedural changes and addressed questions from supervisors and QA team members.

#### **2018 - 2019**

##### **Children's Clinic of Harlingen**

###### **Medical Biller and Coder**

- Handled daily billing and coding for each encounter.
- Assigned correct ICD 10 CM codes to ensure claim payment.
- Assisted in rebilling by running insurance aging reports and correcting denials.
- Interpreted EOBs and applied electronic and mail checks.
- Experienced in E/M Coding and answering patient queries.
- Assisted at the front desk with receptionist duties.

#### **2018 – 2019**

##### **Ponce Medical**

###### **Medical Biller and Coder**

- Managed daily billing and coding for the facility.
- Transmitted claims daily and corrected denied claims.
- Communicated with insurances to secure payment.
- Verified eligibility for upcoming appointments.
- Sent patient statements and coded hospital visits.
- Experienced with eClinicalWorks, Medicare, and Medicaid.

## **Education & Certifications**

#### **AAPC - 2017**

##### **Medical Coding**

#### **AAPC Certified - 2017-Present**

##### **CPC**

## Shala Lewis, Training Manager

### Synopsis

Creates training course objectives, impactful content, and virtual materials for client campaigns. Assists with customer service agent onboarding and transitions. Curator of custom corporate knowledge base content promoting accuracy and efficiency for Direct Interactions' agent teams.

### Experience

#### 2020 - Present

##### **Direct Interactions, Inc.**

Training Department Manager of major nationwide call center company overseeing the production and implementation of instructor-led training courses materials including those using the train the trainer approach.

- Creates and assigns training assessments using the company's specialized Learning Management Platform.
- Coordinates and facilitates refresher and ad hoc training for all assigned customer service agents.
- Evaluates training effectiveness by surveying trainees and managers and utilizing various business intelligence tools for tracking efficacy using a continuous improvement model.
- Updates technical documentation, specifications, and methods to integrate IT technology and products into the training program.
- Previously served as a Senior Customer Service Specialist on a high visibility corporate account;
  - Reviewed criteria for different aid programs to determine eligibility for various applicants.
  - Performed careful reviews of applicant data to ascertain compliance with eligibility criteria for economic assistance.
  - Developed effective research and fact-finding processes that were adopted for wide implementation on various corporate accounts.

## **2019 - 2020**

### **Optimum Stages of Learning**

Managed diverse tasks and functions as a Teacher and Administrative Assistant for a unique homeschool service that addressed the needs of families seeking outside resources in a nontraditional school setting. Assisted teachers with lesson preparation and curriculum implementation. Enhanced lessons with smart board technology and computers to address common core goals.

- Used focused instructional strategies in collaboration with other teachers, such as lectures, discussions, supervised role-playing methods, and hands-on activities to present subject matter to students and boost their understanding.
- Assisted in the creative development of the business webpage design, marketing materials, and social media information dissemination that enhanced instructor/ family communication and collaboration.
- Organized student performance and enrichment activities to facilitate learning.
- Performed critical additional duties maintaining records of inventory, employee time and attendance, client enrollment and registration, curriculum development, and scheduling.

## **2009 - 2019**

### **Elliott Family Daycare**

Versatile Facility Director for a Los Angeles area childcare facility stressing play-based educational activities to support milestone development.

- Drafted and revised contracts, ensuring accuracy for effective communication with parents.
- Provided full service administrative and business support managing operations, daily records, payroll, and budgeting.
- Developed and delivered comprehensive lesson plans catering to various youth learning levels.
- Collaborated on new activities, resource allocation, and recruitment while maintaining compliance with state and local protocols and reporting.

## **Education & Certifications**

### **National University - 2023-2025 (est.)**

BA, Business Administration

### **Azusa Pacific University - 2018-2020**

Coursework (60 credits) in Healthcare Management

### **Vista del Lago High School - Moreno Valley, CA - 2006**

Diploma

## Kameron McClenny, AI & Technology Client Solutions Specialist

### Synopsis

Innovative and results-driven AI & Technology Client Solutions Specialist with proven expertise in delivering end-to-end technical solutions across cloud infrastructure, AI-augmented workflows, and client-centered digital applications. Demonstrated success leading public sector, healthcare, and contact center deployments using AWS, Microsoft 365, and React. Strong communicator and strategic builder who thrives on crafting scalable, secure, and visually engaging solutions from concept to delivery.

### Experience

#### 2024 - Present

##### Direct Interactions, Inc.

- Architect end-to-end AI and automation-based solutions for internal tools and public-facing client applications using React, Next.js, TypeScript, and ShadCN UI.
- Develop custom reporting engines using AWS Lambda, Python, SES, and SharePoint Graph API to generate Excel reports on daily and weekly schedules.
- Integrate Microsoft Graph, Power Automate, and Excel automation to replace legacy workflows across multiple government and nonprofit clients.
- Create cinematic, interactive user interfaces embedded into Amazon Connect, including escalation trackers, notification apps, and AI scripting panels.
- Build and deploy role-based dashboards using Amplify, Cognito, and S3, offering real-time file access and data visualizations for government stakeholders.
- Use Terraform, EventBridge, and CloudFront to maintain secure infrastructure and CI/CD flows across multi-client environments.
- Lead cross-departmental collaborations from RFP prototyping to post-deployment support, showcasing strong UI/UX, backend integration, and DevOps expertise.
- Provide high-level technical assistance and troubleshooting across a wide range of client platforms and services.
- Support call center staff and field teams with system diagnostics, password resets, software training, and onboarding processes.
- Maintained clear documentation of ticket resolutions and operational procedures to inform technical strategy and reduce support load.
- Offered proactive technology education to customers, improving digital literacy and reducing repeat contacts.

## Education & Certifications

### **Troy University - Troy, AL**

Continued Education in Software Engineering & Machine Learning

### **Wallace Community College - Dothan, AL**

B.A. in Applied Computer Science

## Specialized Skills

**Languages/Frameworks:** React, Next.js, TypeScript, Python, PowerShell, HTML/CSS

**Cloud & Tools:** AWS (Lambda, S3, SES, EventBridge, CloudFront, Amplify), Terraform, Microsoft Graph API, SharePoint, Power Automate

**AI & Automation:** ChatGPT, MidJourney, Copilot, Microsoft Loop, Excel Automation

**Design:** Figma, Canva, Adobe Photoshop, Premiere Pro, Framer Motion

**Other:** Git, GitHub, API Gateway, Cognito, TailwindCSS, Node.js, Excel (Advanced)



## Trischa Vaughn, Manager of Workforce Planning

### Synopsis

Experienced work force management administrator adept at optimizing staffing resources, enhancing operational efficiency, and implementing strategies to meet organizational goals. Strong competencies with customer relationship management applications and other specialized tools for training and increasing productivity and effectiveness of customer service representatives.

### Experience

#### 2014 - Present

##### **Direct Interactions, Inc.**

Manager of Workforce Planning for major nationwide call center company overseeing the effective scheduling of personnel assets across numerous company accounts. Serviced numerous key accounts while developing critical competencies in mastery of various applications and tools for improvement of workforce management. Remains as key hands-on advisor to the company's flagship accounts.

- Strong competencies in assistive agent monitoring for quality assurance, training, and continuous improvement.
- Created alternatives for tracking agents' time, reviewed team's hours, and cross-leveling resources in real time for workshare optimization on select accounts using flexible workforce.
- Developed methods for accurately forecasting call volume, scheduling and maintaining productive service levels, and optimizing revenue based on utilization.
- Worked with corporate human resources, IT, and other key staff to integrate agent availability with company's flexible scheduling application for best possible personnel utilization.
- Served as service/delivery agent and account manager on key accounts early in tenure with the company.
  - Liaised with client management for performance management and reporting.
  - Hands-on relief agent on as-needed basis.
  - Built and adjusted schedules for multiple clients, audited agents time, prepared invoices for various clients.
  - Reviewed calls and scored agent performance based on contract guidelines/metrics.
  - Assisted with recruiting and conducting interviews with potential employees.
  - Implemented and matured customer relationship management software in support of various contracts.
  - Designed and implemented auto-response scripts for customers frequently asked questions.

## **2011 - 2014**

### **Residential Programs Inc. (RPI)**

Versatile Sales and Verification specialist for a leading not-for-profit fundraising organization providing industry-leading telemarketing, event fundraising, direct mail, text campaigns, business to business contact, and political surveys.

- Developed strong cold-calling sales techniques and capabilities and regularly exceeded productivity goals.
- Conducted detailed pledge verification processes and managed data entry for funding pledges.

## **2007 - 2008 & 2009 - 2010**

### **Epic Star Telemarketing**

Dedicated Telemarketer for sales of identity theft and credit protection services for Discover Card account holders.

- Exceeded sales quotas for new accounts for existing Discover Card patrons.
- Provided training for other sales associates based on results achieved and enhanced communications capabilities.
- Performed quality monitoring of calls, follow-up training, and render continuous improvement reports to management.

## **2009**

### **Global Contract Services**

Telemarketer for sales of credit card protection and additional protective services.

- Met or exceeded sales quotas for new accounts.
- Successfully generated leads for additional company products, to include accidental death and injury insurance plans.

## **2005 - 2006**

### **Tele Tech**

Customer Service Representative for cable television services company.

- Met or exceeded sales quotas for new accounts.
- Performed Tier 1 troubleshooting repair/restore services by phone.

## **Education & Certifications**

### **Ashford University - 2010-2013**

Coursework (110 credits) in Psychology

### **University of Phoenix - 2016-2017**

Coursework (45 credits) in Elementary Education

### **West Virginia Business College - 1998**

Coursework (15 credits) for Medical Assistant certificate

## Terrance S. Greene, Senior Data Analyst

### Synopsis

Focused and dependable Data Analyst with expertise in designing data pipelines, building statistical models, and transforming complex datasets into actionable insights. Deep experience in AWS, Python, Power BI, and SQL, with a commitment to driving data-driven decision-making and operational efficiency. Known for effective teamwork and a proactive approach to problem-solving.

### Experience

#### 2023 - Present

##### **Direct Interactions, Inc.**

Senior Data Analyst managing projects and translating data into actionable insights using AWS, Python, and Power BI.

- Utilize advanced DAX calculations, including time intelligence and custom measures, to support data-driven decision-making.
- Collaborate with external vendors to automate data analysis processes for increased operational efficiency.

#### 2021 - 2023

##### **Texas Education Agency**

Software Developer/Data Analyst with responsibility for leading a team of six Data Analysts while establishing coding standards and analysis validation frameworks.

- Managed database administration and design, creating APIs for secure client data sharing.
- Designed and maintained AWS Data Lakes for large-scale data storage, ingestion, and analysis.
- Developed Python scripts to automate reporting processes, enhancing business intelligence.

#### 2020 - 2021

##### **Nucamp & Tech Talent South**

Bootcamp Instructor for regional industry-leading technical training program for IT professionals obtaining technical certifications.

- Guided students in developing foundational skills for data analytics and technology implementation.
- Assigned cohorts enjoyed a 95% first-time success on testing for industry certifications.
- Skilled at platform instruction, hands-on tutoring, and online training presentations.
- Instructed courses on Python, Power BI, SQL, AWS Database Administration, and Data Science fundamentals.

## Education & Certifications

**American Public University - 2021**

MA, Business Administration

**American Public University - 2018**

BA, Business Administration

**Amazon Web Services - 2023**

Certified Data Analytics

**Microsoft Power BI - 2022**

Analyzing Data

**Amazon Web Services - 2022**

Certified Solutions Architect Associate

**Amazon Web Services - 2022**

Certified Machine Learning

**Google - 2021**

Data Analytics Certificate

## Specialized Skills

Python

Power BI (DAX, Power Query, Power Pivot)

SQL

AWS

Google Big Query

MongoDB

Pandas

Athena

R

Scikit-Learn

## Jeanie Burgan, Director of Quality & Performance

### Synopsis

Develop and implement Quality Assurance standards. Monitor and evaluate customer interactions and conduct customer feedback analysis. Train and coach agents based on quality assessments. Review data analytics and conduct strategic pivots to improve best practices across entire staff of customer service representatives. Collaborate with senior management to meet or exceed service levels and quality goals for entire corporate customer portfolio.

### Experience

#### 2012 - Present

##### **Direct Interactions, Inc.**

Director of Quality & Performance for a major nationwide call center company. Develop, track, and report on key performance indicators (KPI) such as average handle time, first call resolution, service level agreements, customer satisfaction, and agent productivity.

- Oversee a team of 12 quality monitoring specialists.
- Collaborate with VP of Operations in creating and maintaining customized quality scorecards using client agreed upon KPIs.
- Provide insight to identify potential errors/issues in advance and participate in bi-weekly and ad hoc meetings as a part of the continuous improvement phase of service management.
- Manage active call monitoring and provide call assessment reports, displayed in near real-time on Power BI performance management dashboard.
- Collaborate with VP of Operations, Client Service Manager, Performance Managers, Team Supervisors and Client Contacts for quality assurance calibrations to quickly address any customer service deviations, patterns in customer behavior and scorecard updates based on feedback.
- Recognized by management for meeting or exceeding quality benchmarks and service level agreements in a dynamic environment characterized by rapid hiring and effective agent assimilation.



## **2009 - 2012**

### **Convergys**

Customer Service Representative for a Fortune 500 global leader in customer management and business process outsourcing services tailored to communications, financial services, technology, retail, healthcare and government markets.

- Provided effective customer service for technical support calls.
- Established new accounts, and sustained billing and sales processes throughout the customer support cycle.

## **2007 - 2009**

### **Fairfield/Wyndham Vacations (now Wyndham Destinations)**

Customer Service Agent providing account management services to multiple customer accounts.

- Managed customer accounts, including updating personal information and billing details.
- Handled membership-related questions, such as ownership status, points balance, and usage.
- Provided information on payment schedules, fees and charges, and assisted with payment processing and payment plans.
- Informed customers about ongoing promotions, special offers, or incentives related to vacation ownership.

## **2004 - 2007**

### **Dial America**

Customer Service representative for prominent telemarketing and call center outsourcing company providing a wide range of services including sales, customer service, fundraising, lead generation, and market research.

- Promoted products and services in the company's vast portfolio.
- Provided inbound customer service resolving issues, providing technical support, and assisting with orders.
- Conducted data management to assist customers in tracking interactions and account activity.

## **Education & Certifications**

### **Mountain Empire Community College - Big Stone Gap, VA - 1999-2000**

Coursework in Criminal Justice (45 credits)

### **Lee High School - Jonesville, VA - 1999**

Diploma, College Prep Studies

## Connie Milton, Director of Recruiting

### Synopsis

Senior recruiting executive with nearly ten years of experience with high volume nationwide recruiting for the call center industry. Conduct agent onboarding in conjunction with IT, HR, Training, and Operations management. Partner with VP of Operations for employment of large contingent of Spanish/English bilingual agents. Assess candidate qualifications through management of ATS and rigorous interview processes. Collaborate with client organizations to develop specialized job descriptions. Renowned for the election of emotionally intelligent customer service representatives.

### Experience

#### 2015 - Present

##### **Direct Interactions, Inc.**

Director of Recruiting for a leading nationwide call center company reputed for its large and stable work-at-home staff with a high percentage of disabled, veteran, and military spouse employees. Maintain staffing exceeding 1,000 personnel to meet myriad full-time and part-time client requirements and support company growth.

- Oversee creation, posting and applicant response to online and social media job postings for existing and emerging clients.
- Screen applicants by designing personality profiles and customized assessments based on collaboration with client key stakeholders. Tailor interview formats of potential candidates based on these strategies.
- Share applicant selection recommendations based on results of completed assessments and relevant experience in collaboration with VP of Operations and VP of Human Resources for final hiring approval.
- Conduct onboarding, including development and distribution of onboarding packets and specialized orientations.
- Develop strategies for, and implementation of, new processes designed to improve the recruiting department's efficiency while increasing agent retention.
- Execute training and performance evaluations for dedicated team of recruiting specialists.

## **2012 - 2016**

### **NexRep LLC**

Virtual Receptionist for an industry leader in providing dynamic virtual contact center solutions, including talent acquisition, certification and learning, technology and security, and workforce optimization.

- Recognized by management for strong communications skills while performed as primary point of contact using a virtual platform to answer incoming client calls.
- Provided customers with product information using web-based resources.
- Set appointments, resolved customer service issues, and developed effective workflows for screening calls, routing messages, and providing technical support.

## **2005 – 2013**

### **Sam's Club**

Versatile Technology Manager for big box retail location, assisting several departments with technology infrastructure, integration in sustainment of daily operations, and operational support.

- Supported Human Resources Department with multifaceted assignments including recruiting and interviewing of new employees for front of house operations.
- Handled high volume of inbound calls including billing inquiries, new memberships, member services changes, credit issues, marketing, and cashiering.
- Created automated schedules and workflows for three primary high-volume store departments, as well as front-end scheduling for 30-40 cashiers. Developed improved operational procedures for the Cash Office using in-house systems.

## **Education & Certifications**

### **Bakersfield College - Bakersfield, CA - 2003-2005**

Coursework, BS Nursing Program

### **West High School - Bakersfield, CA - 2001**

Diploma, General Studies

## Malcolm Moore, JD, MBA, Chief People Officer

### Synopsis

25 years' experience as a corporate Human Resource Director. Supported dynamic personnel requirements in retail, e-commerce, and call center industry segments. Develop plans to manage HR finances. Create strategies for talent acquisition, employee retention, and compensation and benefits. Parlay strong legal background to ensure corporate compliance with complex HR laws and requirements.

### Experience

#### **2021 - Present**

##### **Direct Interactions, Inc.**

Chief People Officer running the HR Department for a growing call center company with over 800 employees and hundreds of part-time and seasonal personnel assets.

- Developing plans to effectively establish HR objectives, manage HR finances, and administer policies.
- Ensure compliance with myriad federal, state and local employment law requirements.
- Provide mentorship and guidance to HR team members and assist senior executives in crucial decision-making and execution of dynamic recruiting, onboarding, and leadership development programs for a growing organization.

#### **2017 - 2020**

##### **Charter Communications**

HR Director for the eCommerce division of a major telecommunications and mass media company with the largest US cable operations.

- Provided visionary leadership and HR guidance in framing an employee-oriented, high-performance culture to support the company's strategic goals.
- Sr. HR business partner in the launch, startup and ongoing operation of a 700+ employee call center in South Carolina.
- Multi-Site HR Director with employee relations responsibilities for the company's New York, Florida, North Carolina, and South Carolina locations.
- Managed close-out operations at select locations nationwide.
- Established, managed, and evaluated a variety of emerging initiatives such as recruiting, staffing, compensation, performance management, employee relations, orientation, on-boarding, talent management, and professional development.

#### **2012 - 2016**

##### **JC Penney**

Employee Relations Director for a major US retailer. Strengthened business and management's ability to develop and lead talent by creating/improving employee and labor relations.

- Developed effective tools and training that mitigated the risk of labor disruptions while improve employee engagement.
- Drove the development of a new risk assessment tool known as Union Vulnerability Index that identified risk severity for management prioritization.
- Collaborated with cross-functional stakeholders to capture and measure data for trend analysis of risk factors, and prioritizing at-risk locations for corrective action.
- Led project for creating/delivering soft-skills communications training for leaders and supervisors, focused on Conflict Resolution in support of employee relations.
- Led a team of Directors focused on providing additional multi-state HR generalist support, as needed, as well as employee relations training, and strategic leadership and support to the southeast U.S. and Puerto Rico.
- Coached field leaders through organizational restructuring to reduce turnover and increase engagement.

## **2010 - 2012**

### **Lowe's Companies**

Director of Employee relations and Compliance for a major home improvement retail chain. Managed all areas of employee relations including strategic impact on benefits administration, leave policies, talent development, corrective coaching, progressive discipline, and separations.

- Served as a key member of the rapid response team and delivered union avoidance training to field locations across the country.
- Worked to improve enterprise-wide employee morale and engagement. Conducted employee engagement audits and took ownership of the Employee Opinion Survey in assigned areas to ensure follow up and managerial accountability on action items.
- Strengthened relationships with functional departments, making HR a strategic partner in process development, staffing, and employee relations.
- Provided advice and counsel on employment and labor relations operational issues, restructuring activity to support HR Directors at retail locations, as needed.
- Analyzed statistical data and reports to ascertain trends in performance, resulting in maximum effective and efficient use of logistical resources.

## **Education & Certifications**

### **Malone University - 1997**

Master of Business Administration

### **Case Western University School of Law - 1995**

Doctor of Law-JD

### **Malone University - 1990**

BA, Business Administration and Management



## Kevin Els, IT Manager & Information Security Officer

### Synopsis

Experienced IT Manager and corporate Security Officer with extensive expertise in cybersecurity, risk management, and IT operations. Proven track record in overseeing IT infrastructure, maintaining compliance with HIPAA and regulatory standards, and implementing industry-leading security measures. Skilled in Microsoft 365, Amazon Web Services, and continuity of operations.

### Experience

#### 2020 - Present

##### **Direct Interactions, Inc.**

Corporate IT Manager for growing call center/customer service organization. Leads all IT operations and supervises internal 24/7/365 help desk supporting all nationwide corporate accounts. Manages ticketing systems and IT metrics and reports for continuous service improvement using IT Service Management approach.

- Maintains HIPAA compliance across numerous corporate engagements, monitors cybersecurity protocols, and protects company systems against threats.
- Collaborates with leadership to align security measures with business objectives and regulatory requirements.
- Designs and tests data backup procedures, ensuring secure access control and data integrity.
- Provides information security training to staff and enforces defense-in-depth strategies to secure network resources.

#### 2019 - 2020

##### **Compucom, Inc.**

Served as Audio Video Technician for a leading IT Solutions provider with support to the executive leadership team. Provided customized AV technology support, including firmware updates and on-demand sustainment of all salient internal and external business processes.

- Worked with third-party vendors, managed hardware inventory, and handled executive meeting AV setups.
- Provided technical support for teleconferencing technologies, such as Skype, Webex, and Zoom and trained key staff in their use to support operations and outreach.
- Standardized audio/visual equipment configurations for ease of use, accountability, and rapid deployment.

## **2017 - 2019**

### **Community Health Choice**

Served as Help Desk and Audiovisual Manager for a Regional nonprofit managed care organization. Provided key sustaining support at the corporate level to enhance availability of critical information support systems.

- Managed the audiovisual support capability, including conference and meeting room, special configuration and setups, maintenance, and technology upgrade.
- Provided valet support to the executive leadership team.
- Worked with third-party vendors, managed hardware inventory, and kept corporate capability on the cusp of latest innovations and capabilities.
- Provided technical support for teleconferencing technologies, such as Skype, Webex, and Zoom, and assisted in the management of the organization's help desk.

## **Education & Certifications**

### **Stephen F. Austin University - 2006**

AS, Information Technology

### **United States Air Force, Peterson Force Base, MS - 1991**

Data Systems Operator Certification

## **Specialized Skills**

Microsoft 365

Amazon Web Services - managing 7 corporate certifications and 5 technical attestations

Data backup and recovery operations

24/7/365 IT support and help desk operations

## **j. SUBCONTRACTORS**

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

- *Name, address, and telephone number of the subcontractor(s),*
- *Specific tasks for each subcontractor,*
- *Percentage of performance hours intended for each subcontract;*
- *Total percentage of subcontractor(s) performance hours.*

Direct Interactions does not intend to utilize subcontractors to perform work in the event of a contract award from the State of Nebraska.

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## 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.)
MS		

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,

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.)
MS		

#### 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 contractors' 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.

<b>REQUIRED INSURANCE COVERAGE</b>	
<b>COMMERCIAL GENERAL LIABILITY</b>	
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>	
<b>WORKER'S COMPENSATION</b>	
Employers Liability Limits	\$500K/\$500K/\$500K
Statutory Limits- All States	Statutory - State of Nebraska
Voluntary Compensation	Statutory
<b>COMMERCIAL AUTOMOBILE LIABILITY</b>	
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
<b>UMBRELLA/EXCESS LIABILITY</b>	
Over Primary Insurance	\$5,000,000 per occurrence
<b>PROFESSIONAL LIABILITY</b>	
All Other Professional Liability (Errors & Omissions)	\$1,000,000 Per Claim / Aggregate
<b>COMMERCIAL CRIME</b>	
Crime/Employee Dishonesty Including 3rd Party Fidelity	\$3,000,000
<b>CYBER LIABILITY</b>	
Breach of Privacy, Security Breach, Denial of Service, Remediation, Fines and Penalties	\$5,000,000
<b>MANDATORY COI SUBROGATION WAIVER LANGUAGE</b>	
"Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska."	
<b>MANDATORY COI LIABILITY WAIVER LANGUAGE</b>	
"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 provide the Contract Manager, via email, with a certificate of insurance coverage meeting the above requirements before commencing work at:

121962 O3

Nebraska Department of Labor Attn: Procurement

550 S 16th Street Lincoln, NE 68508

[NDOL.Procurement@nebraska.gov](mailto:NDOL.Procurement@nebraska.gov)

These certificates or the cover sheet shall reference the solicitation number and include the company name, policy numbers, effective dates, expiration dates, and amounts and types of coverage provided. If the Vendor fails to maintain such insurance, causing damage to the State, the Vendor shall be responsible for all reasonable costs related to this failure.

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 must be provided immediately to ensure continuous coverage.

**4. DEVIATIONS**

The insurance requirements are subject to limited negotiation, typically including, but not 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 assigns to the State all claims for overcharges related to goods and/or services provided under this contract resulting from antitrust violations under United States and State antitrust laws.

**L. CONFLICT OF INTEREST**

By submitting a solicitation response, the Vendor certifies that no relationship exists between the Vendor and any person or entity that constitutes, or appears to constitute, a conflict of interest related to this solicitation or project. The Vendor further certifies that it will not employ any individual known to have a conflict of interest nor take any action or acquire any interest that conflicts, or appears to conflict, with its contractual obligations.

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

**M. ADVERTISING**

The Vendor agrees not to reference the contract award in advertising in a manner that implies endorsement or preference by the State. Publicity releases about 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, provides equivalent access to employees, program participants, and members of the public with disabilities, as well as those without disabilities.
2. By entering into this Contract, the Vendor agrees that if providing a product or service containing ICT intended for direct user interaction or public-facing use, such ICT must provide equivalent access or be modified during implementation to afford equivalent access. Compliance can be achieved by adhering to Section 508 of the Rehabilitation Act of 1973, as amended, and its standards adopted by the U.S. Access Board.



3. ICT refers to information technology and various equipment, systems, technologies, or processes whose main function is to create, manipulate, store, display, receive, or transmit electronic data and information, including any associated content. The vendor agrees that ICT includes computers and peripheral equipment, information kiosks and transaction machines, telecommunications equipment, customer premises equipment, multifunction office machines, software, applications, websites, videos, and electronic documents. For the purposes of these assurances, ICT does not include ICT 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

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.)
MS		

- 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](mailto: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.

## VI.A.2. Technical Response

*The Technical Response section of the solicitation response should consist of the following subsections: a. Understanding of the business requirements (A. Project Overview SOW)*

Direct Interactions fully understands and is aligned with the Nebraska Department of Labor's (NDOL) clarified business requirements for this solicitation. NDOL is seeking a U.S.-based, secure, and scalable first-tier call center solution to support its Unemployment Insurance Claims Center. The primary objective is to improve claimant experience, reduce wait times, and ensure consistent service delivery during periods of high call volume. Based on the original RFP and subsequent clarifications in Addendum 1, Direct Interactions recognizes two critical updates: (1) there will be no system integration with NDOL platforms, and (2) all callbacks will be completed by NDOL staff, not the contractor.

*(Section V.B.1.(a-c) – Call Center Service Requirements)* Direct Interactions will manage all inbound calls on behalf of NDOL, including those related to unemployment insurance claim inquiries and the scheduling of callbacks. Our agents will be fully trained to handle each call with professionalism, accuracy, and empathy, ensuring that claimants receive timely and helpful assistance. To support consistent and compliant communication, Direct Interactions will develop call scripts tailored to NDOL's requirements and submit them for the State's review and approval. These scripts will be designed to ensure clarity, accuracy, and a positive claimant experience, while also allowing for updates as policies or procedures evolve.

### Call Volume and Service Expectations

*(Section V.B.4a.-b. - Service Hours)* Direct Interactions understands that the call center must manage approximately 71,000 calls annually, with seasonal peaks during November–February and May–July, and weekly spikes on Mondays, Tuesdays, Fridays, and days following state holidays. Direct Interactions will provide inbound call services for NDOL unemployment insurance claimants from 8:00 AM to 5:00 PM Central Standard Time, Monday through Friday, excluding official State holidays as defined by Nebraska state law.

Our operations will be structured to ensure full coverage during these designated hours, with trained agents, supervisors, and support staff available to deliver consistent, high-quality service. Should there be any need to modify the established service days or hours, Direct Interactions will work collaboratively with NDOL to evaluate the request and implement changes only upon mutual written agreement. This approach ensures flexibility while maintaining clear communication and operational alignment with NDOL's expectations.

Our staffing model is designed to scale responsively to meet these fluctuations while maintaining NDOL's required service levels, including:

- Answering 95% of calls answered 100% of the time (excluding IVR drops)
- Keeping average speed to answer under 3 minutes
- Maintaining an abandoned call rate below 10%
- Resolving 80% of calls on first contact

*(V.B.5.a.i-iii - Staffing and Training Requirements)* Direct Interactions will proactively manage staffing levels to align with NDOL's projected call volumes, ensuring that the right number of qualified personnel are available at all times to maintain service quality and responsiveness. Our workforce planning model is designed to scale efficiently, with flexibility to adjust staffing for Account Managers, Supervisors, Quality Assurance Analysts, and Call Center Agents based on seasonal trends, weekly patterns, and daily fluctuations. We will assign a dedicated point of contact with extensive call center leadership experience who will serve as the primary liaison with NDOL, ensuring seamless communication, operational oversight, and accountability. To maintain consistent service quality, Direct Interactions will ensure that both an onsite Supervisor and a QA Analyst are present and actively engaged during all service hours. These roles are critical to real-time performance monitoring, coaching, and issue resolution, and they will work closely with NDOL to uphold the highest standards of claimant service and compliance.

### No System Integration

In response to NDOL's clarification, Direct Interactions has removed any assumptions of technical integration with NWorks or other internal systems. Instead, we will utilize a secure, standalone CRM to capture and manage all required claimant data. This CRM will:

- Record caller name, phone number, last four digits of SSN, call disposition, and callback details
- Generate daily and weekly reports in NDOL-approved formats
- Support NDOL staff in reviewing, prioritizing, and assigning callbacks efficiently
- Provide real-time dashboards and ad hoc reporting capabilities

In addition to full transparency regarding our implementation of our proprietary CRM, Direct Interactions will provide NDOL with the permission-based access required to monitor operations both onsite and online.

*Direct Interactions Proprietary CRM + Call Center Technical Solution Overview below (Fig. 13):*



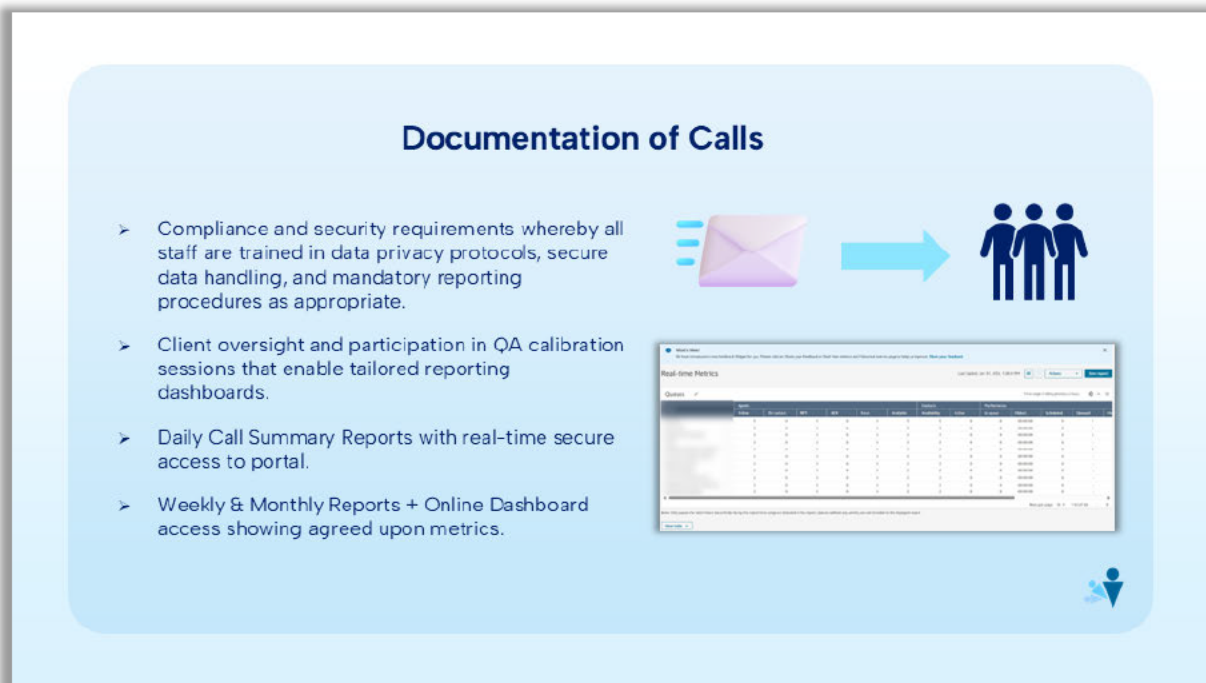


*(Section V.B.2.a. – Data Entry Services)* Direct Interactions will ensure that all required claimant information is accurately and securely entered into both our internal CRM system and the NEworks platform, in full compliance with NDOL's data entry standards. Our agents will be trained to collect and input essential data fields, including the claimant's name, address, claim number, phone number, and mother's maiden name, at a minimum. This process will be integrated into our workflow to ensure consistency, accuracy, and data integrity across both systems. We understand the importance of precise and timely data entry in supporting NDOL's operations and will implement quality control measures to verify that all information is recorded correctly and securely. All data will be securely stored and transmitted in compliance with applicable privacy and confidentiality standards.

### Callback Management

Direct Interactions understands that the contractor's role is to schedule but not conduct callbacks. Our agents will identify calls requiring escalation, collect all necessary information, and schedule the callback in accordance with NDOL's 24-hour business-day window. Callback logs will be submitted daily and weekly, and our CRM will allow NDOL staff to easily assign and track these follow-ups. We will also provide daily summaries and escalate any missed or misrouted callbacks to NDOL's designated point of contact.

*Direct Interactions Call Documentation & Reporting Protocol (Adjusted to Client Needs) below (Fig. 14 & 15):*



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### Documentation of Calls

- Daily, weekly, and monthly summary reports provided to NDOL based on agreed upon frequency, method, and format.
- Direct Interactions tracks SLAs and KPIs in real time using Power BI data visualization and Amazon Connect analytics.
- 100% of after-hours calls are logged, stored in Amazon S3 bucket for at least 60 days with permission-based secure internet access.
- Tailored to NDOL's preferred categories, disposition codes, and incident types, tagged for easy retrieval.



### Bilingual and Multilingual Support

*(Section V.B.6.(a-b.i) - English/Spanish Services)* Direct Interactions will provide comprehensive language interpretation services to ensure equitable access for all NDOL claimants. During all business hours, we will maintain a workforce in which at least ten percent of our agents are fully fluent in reading, writing, and speaking both English and Spanish. These bilingual agents will be available to assist Spanish-speaking claimants directly, ensuring clear and accurate communication without delay. For claimants who speak languages other than English or Spanish, Direct Interactions will offer telephonic interpretation services through a reliable third-party provider. This service will be seamlessly integrated into our call handling process, allowing agents to quickly connect with interpreters as needed. The cost of these interpretation services will be fully included in our cost proposal, ensuring transparency and alignment with NDOL's expectations. Our commitment to language accessibility reflects our broader mission to deliver inclusive, respectful, and effective support to every individual we serve.

### Security and Compliance

All Direct Interactions operations will be conducted from a secure, dedicated U.S.-based facility. Our infrastructure and protocols are designed to meet or exceed federal and state data security requirements, and we maintain a comprehensive disaster recovery and business continuity plan.

### Training and Quality Assurance

*(V.B.5.b.ii - Contractor Training Responsibilities) / (V.B.5.b.i - NDOL Training Responsibilities)* Direct Interactions will follow NDOL's "Train the Trainer" model and provide ongoing training for all agents assuming full responsibility for all training-related expenses unless otherwise approved and deliver continuous and refresher instruction to all personnel. Our training program includes modules on UI policy, customer service, conflict resolution, and confidentiality.

*(V.B.5.c.i - Training Locations)* Training will be conducted online with a preapproved web

application. We will maintain call recordings for at least 30 days and make them available to NDOL within 24 hours upon request. Our quality assurance team will monitor calls, provide feedback, and ensure compliance with NDOL's standards.

*Direct Interactions Training Methodology below (Fig. 16):*



**(V.B.5.b.ii.(a-e) - Agent Training Program Requirements)** Direct Interactions will develop, conduct, and maintain a comprehensive, ongoing training program designed to equip all agents with the knowledge and tools necessary to deliver high-quality service in alignment with NDOL's expectations. Our training approach is dynamic and continuously updated to reflect the most current policies, procedures, and operational requirements. All training content will be developed in close collaboration with NDOL and will be subject to the agency's review and approval to ensure full compliance with Federal, State, and Local guidelines. We will maintain detailed training manuals and records, which will be regularly updated and made available to NDOL for transparency and oversight. Copies of all training materials will be provided to the State Agency on a rolling basis to ensure alignment and accountability. To support continuous learning, Direct Interactions will implement a structured schedule for ongoing and refresher training sessions, led by a dedicated onsite trainer. This trainer will be responsible for delivering instruction, monitoring agent progress, and ensuring that all training activities meet NDOL's standards. Our commitment to training excellence ensures that every agent remains informed, prepared, and capable of delivering exceptional service throughout the life of the contract.

### Reporting and Transparency

Direct Interactions will provide NDOL with:

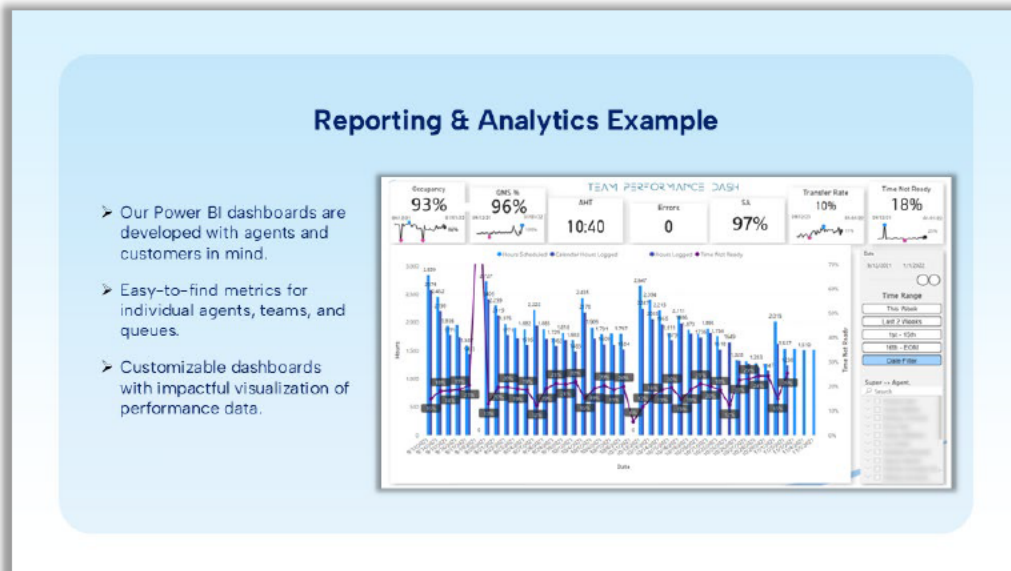
**(V.B.6.a.i-vi-Report Requirements)** Real-time dashboards for key performance indicators (KPIs) accessible to NDOL daily with performance monitoring throughout the contract term with adherence to transparency protocols including but not limited to:

- Time-Based Reports sortable reports by hour, day, or week.
- Live Call Feed real-time display of current call activity.
- SLA Monitoring tracking of response times and abandonment rates.
- Agent Metrics performance data on handling time, resolutions, and satisfaction.
- Call Types breakdown of call reasons, trends, and feedback.
- **(V.B.6.b - Customizable Reports)** Customizable reports on call volume, customer satisfaction, service level adherence, resolution rates, and callback status at an agreed upon frequency and as needed
- Ad hoc reports upon request
- Access to call recordings and CRM data for oversight and auditing

*Direct Interactions Reporting & Quality Assurance Processes below (Fig. 17):*



*Direct Interactions Power BI Reporting & Analytics Example below (Fig. 18):*





*(V.B.4.a-c - Performance Monitoring)* Direct Interactions will fully support NDOL's monthly performance monitoring process and will collaborate closely to ensure all service expectations are consistently met. We understand that NDOL will conduct regular evaluations of our performance, including a monthly review of staffing levels and phone system capacity. In response, we will proactively assess and adjust our resources to ensure optimal service delivery, and we will do so at our own expense when necessary to maintain compliance with performance standards. Should any performance benchmarks be missed, Direct Interactions will respond swiftly with corrective actions and process improvements, working transparently with NDOL to resolve issues and prevent recurrence. Our commitment to accountability, responsiveness, and continuous improvement ensures that NDOL receives the highest level of service throughout the contract term.

### **Direct Interactions' Financial Commitment to NDOL**

Direct Interactions is committed to full compliance with the financial and contractual terms outlined in the State of Nebraska's Request for Proposal 121962 -o3. We understand the importance of fiscal responsibility and transparency in public sector partnerships and are pleased to align our practices with NDOL's expectations.

Direct Interactions will not request or require any form of advance payment. We recognize and respect the statutory requirement that no goods or services are deemed received until they are fully delivered and accepted by the agency. Accordingly, all invoicing will reflect only those services that have been completed and approved.

To support NDOL's operational and financial workflows, Direct Interactions will submit invoices on a bi-weekly basis. Each invoice will be accompanied by comprehensive supporting documentation, including detailed service logs, performance metrics, and any additional records requested by NDOL to facilitate timely and accurate processing.

We fully accept the State's 45-day payment terms and will not impose any conditions that conflict with this timeline. Our internal financial systems are structured to accommodate this schedule without disruption to service delivery or staffing.

Furthermore, Direct Interactions agrees without exception to the audit clause and the funding-out clause as stipulated in the RFP. We will maintain all relevant records in accordance with generally accepted accounting principles and will provide NDOL and its authorized representatives with full access to these records upon request. We also acknowledge that the continuation of this contract is subject to legislative appropriation and will comply with all procedures should funding become unavailable.

Direct Interactions values the opportunity to support NDOL's mission and is fully prepared to meet all contractual obligations with integrity, accountability, and transparency.

Direct Interactions fully understands and is aligned with NDOL's clarified business requirements for this project. We recognize that the contractor's role is to provide high-quality first-tier call center support, without system integration, and to facilitate but not perform callbacks, which will be completed by NDOL staff. Our solution is designed to ensure accurate data capture, secure

operations, and exceptional claimant service, while maintaining flexibility to meet fluctuating call volumes. With a strong focus on compliance, transparency, and performance, Direct Interactions is confident in its ability to support NDOL's mission and deliver a seamless, claimant-centered experience.

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## VI.A.2. Technical Response

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

*b. Detailed project work plan*

Direct Interactions will implement a structured, time-sensitive approach to ensure a seamless launch and ongoing delivery of first-tier call center services for NDOL. Assuming an award date of September 10, 2025, and a go-live date of October 1, 2025, our project work plan is designed to meet all business and technical requirements outlined in the RFP within a 21-day ramp-up period. The plan includes key phases, milestones, and activities to ensure readiness and compliance with NDOL's expectations.

### **Phase 1: Project Kickoff (September 10–12, 2025)**

- Direct Interactions will initiate the project with a formal kickoff meeting with NDOL stakeholders.
- We will review project objectives, timelines, communication protocols, and deliverables.
- A dedicated project manager will be assigned as the primary point of contact.
- A shared project plan and collaboration workspace will be established for transparency and coordination.

### **Phase 2: Infrastructure Setup (September 10–15, 2025)**

- Direct Interactions will configure and test all telephony systems, CRM platforms, and IVR workflows.
- A dedicated toll-free number will be provisioned.
- Secure, onshore call center facilities will be prepared, including workstation setup and network security validation.
- CRM customization will begin, including intake forms, call disposition fields, callback scheduling tools, and reporting dashboards. \*If NDOL wishes to retain the existing CRM to reduce start up time, Direct Interactions will assume the responsibility of CRM management as a pass-through cost of implementation to be determined in contract negotiations.

### **Phase 3: Training and Knowledge Transfer (September 13–20, 2025)**

- NDOL will conduct “Train the Trainer” sessions for Direct Interactions’ supervisors and QA leads.
- Direct Interactions will develop and deliver a comprehensive training program for all agents, including:
  - UI program basics
  - Call handling protocols
  - Sensitivity and confidentiality
  - Script adherence and escalation procedures
- Training will be conducted onsite or via secure virtual platforms, as approved by NDOL.
- All training materials will be submitted to NDOL for review and approval.



#### Phase 4: Pilot Testing and Soft Launch (September 21–24, 2025)

- Direct Interactions will conduct a soft launch with a limited number of agents to simulate live operations.
- Test calls will be monitored for quality, script compliance, and CRM data capture accuracy.
- NDOL will be invited to observe and provide feedback.
- Adjustments will be made based on pilot results to ensure readiness for full-scale operations.

#### Phase 5: Full-Scale Implementation Prep (September 25–30, 2025)

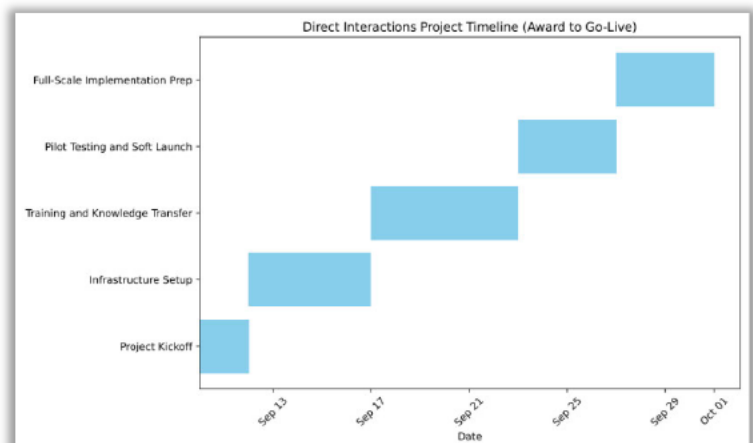
- Final system checks, staffing confirmations, and readiness assessments completed.
- Callback scheduling workflows will be validated and tested.
- Real-time dashboards and reporting tools will be finalized and shared with NDOL.
- NDOL will receive a final readiness report and go-live checklist.

#### Phase 6: Go-Live and Ongoing Operations (October 1, 2025, and beyond)

- Direct Interactions will launch full operations with all trained agents and supervisors.
- All inbound calls will be handled in accordance with NDOL's service hours and performance standards.
- Callback scheduling fully operational, with daily logs and summaries provided.
- Real-time dashboards and daily reports made available to NDOL for performance monitoring.
- Ongoing operations will include:
  - Weekly and monthly performance reviews
  - Quality assurance through call monitoring and coaching
  - Ad hoc reporting and system enhancements
  - Monthly meetings and availability for in-person sessions, as needed at NDOL's site in Lincoln, Nebraska

#### Direct Interactions Project Timeline

The following Gantt-style timeline outlines Direct Interactions' project work plan aligned with the award date of September 10, 2025, and a go-live date of October 1, 2025. This timeline ensures all ramp-up activities including kickoff, infrastructure setup, training, pilot testing, and final implementation are completed within the 21-day window before launch.



*Project Timeline above (Fig. 19)*

## VI.A.2. Technical Response

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

### *c. Deliverables and due dates.*

Direct Interactions will deliver a comprehensive, phased implementation and operational support plan that aligns with NDOL's expectations and performance standards. Our approach ensures timely, high-quality service delivery, continuous performance monitoring, and transparent reporting throughout the contract lifecycle.

#### **1. Implementation Deliverables and Timeline**

Direct Interactions will initiate the project with a structured implementation plan that includes the following key deliverables and associated due dates:

Deliverable	Description	Due Date
<b>Project Kickoff Meeting</b>	Formal launch of the project with NDOL stakeholders to align on goals, timelines, and communication protocols.	Within 5 business days of contract execution
<b>Detailed Project Plan</b>	A comprehensive plan outlining all phases of implementation, including kickoff, staffing, training, pilot, systems configuration, testing, and full implementation.	Within 10 business days of contract execution
<b>System Configuration &amp; Testing</b>	Configuration of Direct Interactions' telephony and CRM systems with NDOL's infrastructure, including IVR configuration and testing.	Within 20 business days of contract execution
<b>Training Completion</b>	Completion of "Train the Trainer" sessions and internal agent training based on NDOL-provided materials.	Within 25 business days of contract execution
<b>Pilot Launch</b>	Soft launch of services with limited call volume to validate readiness and performance.	Within 30 business days of contract execution
<b>Full-Scale Go-Live</b>	Full operational launch of call center services.	October 1, 2025

*Implementation Deliverables and Timeline Chart above (Fig. 20)*

## 2. Ongoing Operational Deliverables

Direct Interactions will provide the following deliverables on a recurring basis to ensure service quality and compliance with NDOL's performance standards:

- Daily Real-Time Dashboard Access: Continuous visibility into KPIs such as Average Speed to Answer (ASA), Abandonment Rate, and Customer Satisfaction Score (CSAT).
- Weekly Callback Reports: Detailed logs of all scheduled callbacks, including claimant information, disposition, and resolution status.
- Monthly Performance Reports: Comprehensive reports covering all KPIs, agent performance, call categories, and service level adherence.
- Ad Hoc Reports: Custom reports generated upon NDOL's request, with delivery timelines mutually agreed upon based on complexity and urgency.
- Monthly Review Meetings: Regular meetings with NDOL to review performance, discuss trends, and implement continuous improvements.

## 3. Performance Standards and Compliance

Direct Interactions will meet or exceed the following performance metrics as outlined in the RFP:

- Average Speed to Answer (ASA):  $\leq 3$  minutes
- Average Handle Time (AHT):  $\leq 10$  minutes
- After Call Work (ACW):  $\leq 1.5$  minutes
- Abandoned Call Rate:  $\leq 10\%$
- Repeat Caller Rate:  $\leq 20\%$
- Scheduled Callback Rate:  $\leq 20\%$
- Customer Satisfaction Score (CSAT):  $\geq 85\%$
- CRM/NEworks Data Accuracy:  $\geq 95\%$  of all calls

Performance will be reviewed monthly, and any deviations will be addressed through corrective action plans developed in collaboration with NDOL.

*(Section V.B.3.a.i.-viii. – Turnkey Solution)* Direct Interactions will deliver a fully operational, turnkey call center solution that meets all requirements outlined by NDOL, including trained staff, secure workspaces, and all necessary technology and infrastructure. We will provide and maintain telephony and computer equipment, software, and network systems, along with the installation and upkeep of telephone and data lines. Each agent will be equipped with the appropriate tools, including telephony software, headsets, CRM systems, and connectivity to ensure seamless operations. We will also supply a dedicated toll-free (800) number for call routing and can accommodate an existing number if preferred. As the State will not provide equipment, Direct Interactions will assume full responsibility for all operational resources. Our phased implementation plan ensures a smooth transition to full operations by October 1, 2025, supported by real-time dashboards, callback tracking, and performance reporting. By aligning service delivery with measurable KPIs and clear timelines, we are committed to delivering timely, accurate, and high-quality support that advances NDOL's mission and enhances the claimant experience.

## **VI.A.2. Technical Response**

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

*d. Attachment #1: Required Bidder Responses.*

This Attachment is provided in a separate document, titled “121962 O3 Direct Interactions File 2 of 3”.

*e. Attachment #2: Cost Proposal*

This Attachment is provided in a separate document, titled “121962 O3 Direct Interactions File 3 of 3”.

# Appendix



1/10/2025

To Whom It May Concern,

I am delighted to write this letter of reference for Direct Interactions. The Direct Interactions team has become an integral part of our organization, providing comprehensive support services that have greatly enhanced our operations and ensured seamless connectivity. Their tailored solutions have significantly improved our customer interactions and support with remarkable flexibility and adaptability.

Direct Interactions has successfully implemented systems to assist our callers with general information through FAQ sections and other online resources. They successfully migrated CRM systems when our center transitioned to Sophia, ensuring that all interactions were thoroughly documented to uphold service quality and client satisfaction. Their team also worked closely with our contact center team, utilizing detailed knowledge bases and interactive guides to support continuous learning opportunities.

In recognizing the fluctuating nature of call volumes, Direct Interactions continuously adjusts agent capacity and provides scalable solutions to meet our operational demands efficiently. Their ongoing technical support includes maintaining secure internet connections and managing a full-support helpdesk to address connectivity issues promptly, ensuring consistent service reliability.

Direct Interactions has demonstrated their commitment to dynamically adapting their services, whether it's managing varying call volumes or expanding support to new channels or markets. Throughout the engagement, Direct Interactions continuously refines their service offerings to align with our strategic trend analysis and policy development efforts, further bolstering community resilience and well-being. We have found Direct Interactions to provide exceptional service. Together, we create a seamless experience for those relying on our services, fostering satisfaction and loyalty.

Sincerely,

DocuSigned by:  
  
9B0A0D63DC66496...

Victoria Schwandt, LMSW  
VIA LINK Vice President of Contact Center Operations  
5001 Hwy 190, Suite C-1, Covington, LA 70433  
[vschwandt@vialink.org](mailto:vschwandt@vialink.org)





**UNITED WAY**  
of Southwestern  
Pennsylvania



Get Connected. Get Help.™

1250 Penn Avenue  
Pittsburgh, PA 15222  
412-261-6010

January 10, 2025

To Whom It May Concern,

I am writing to express our utmost satisfaction with the professional call center services provided by Direct Interactions. Their assistance has been invaluable in managing inquiries regarding upcoming elections, and their commitment to quality service has significantly enhanced our operations.

Direct Interactions' dedicated staff, including highly trained agents supported by experienced supervisors and managers, provided outstanding support for our organization and for the people of Pennsylvania. Their approach to service delivery was comprehensive, encompassing ongoing training, technology maintenance, and performance management.

Throughout their engagement, Direct Interactions maintained full-time staffing of our phone lines, allowing constituents to receive timely and accurate information about upcoming elections. They established and configured technology and security measures to safeguard our operations and provided extensive training courses, role-playing activities, assessments, and certification calls to prepare agents for their roles.

Communication of ongoing training updates was conducted through email, Microsoft Teams, and virtual team meetings, keeping staff informed and engaged. Additionally, Direct Interactions continually monitored and configured data metrics to maintain and improve service efficiency of their call center services. To foster continual improvement, Direct Interactions managed call quality with periodic reporting and performance review meetings. Regarding Direct Interactions service to our organization, they have demonstrated dedication to excellence and implemented a proactive approach to addressing our needs which has made them an invaluable partner.

Sincerely,

*Michele Breisinger*

Michele Breisinger  
PA 211 Southwest Senior Director  
1250 Penn Ave  
Pittsburgh, PA 15222  
michele.breisinger@unitedwayswpa.org  
412-577-8745

January 10, 2025

To Whom It May Concern,

It is with great satisfaction that we provide this letter of reference for Direct Interactions as they have become a true partner, working with our team to handle phone calls and texts for our organization. They have done this with professionalism and efficiency. The commitment and expertise demonstrated by Direct Interactions' team have consistently exceeded our expectations.

Direct Interactions has provided the United Way of Alabama with live agents who are well-trained to manage texts on our platform. Their team adeptly assists our callers with a wide range of needs, including food, health care, housing and utilities payment assistance, employment services, veteran services, childcare, crisis and emergency counseling, disaster assistance, and more. Their dedication to executing each interaction's tasks and objectives, and commitment to proper documentation in our applications, has been instrumental in maintaining our operational efficiency.

Direct Interactions' team, which includes bilingual English/Spanish agents, have managed all training after the initial "train the trainer" session. Minor updates are delivered through emails and through Direct Interactions' utilization of Microsoft Teams and discussed in virtual team meetings. Major updates involve trainer-led conference calls, role-playing activities, assessments, and additional quality assurance work.

Furthermore, Direct Interactions configures real-time and historical data reports on all contact center activity, including service level reports, provides periodic quality reports, and holds weekly/monthly meetings with us to ensure continuous improvement.

Direct Interactions' commitment to excellence, adaptability, and proactive support have made them a partner and an asset to our organization.

Sincerely,



Becky Wilburn Booker  
Executive Director

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

Bidder's Name: \_\_\_\_\_

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)	\$1,200.00	\$1,230.00	\$1,230.00	\$1,260.00	\$1,260.00
V.D. a	Project Planning and Management	\$40,000.00	\$41,000.00	\$41,000.00	\$42,025.00	\$42,025.00
V.D. b	Outline and phase management	\$12,500.00	\$12,812.50	\$12,812.50	\$13,132.81	\$13,132.80
V.D. c	Daily First Tier Support and call reporting (paid biweekly)	\$840,000.00	\$861,000.00	\$861,000.00	\$882,525.00	\$882,525.00
	<b>Total Project Costs</b>	<b>\$893,700.00</b>	<b>\$916,042.50</b>	<b>\$916,042.50</b>	<b>\$938,942.81</b>	<b>\$938,942.80</b>