

# HEALTH & HUMAN SERVICES



# CHILDREN



**HEALTH**

**SAFETY**

**WELL-BEING**

**Submitted to:**  
Mr. Bradley Murphy  
Procurement Contract Officer  
Nebraska Dept of Health & Human Services  
301 Centennial Mall S., Suite 500  
Lincoln, NE 68509

**Submitted by:**  
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July 28th, 2026

Nebraska Department of Health & Human Services  
Attention: Mr. Bradley Murphy  
Procurement Contract Officer  
301 Centennial Mall S, Suite 500  
Lincoln, NE 68509

**Subject: RFP #126010 O3 CSE Customer Call Center Services**

Dear Mr. Murphy,

F.H. Cann & Associates, Inc. (FHC) is pleased to submit our proposal to DHHS Nebraska in response to RFP #126010 O3, for CSE Customer Call Center Services. FHC understands the importance of delivering responsive, accurate, and student-centered support across the full student services experience. We are prepared to support Red Hawk Central through professional inbound rollover call handling, outbound campaign support, ServiceNow documentation and escalation, and knowledgeable assistance for Student Accounts, Financial Aid, Registrar, and general student service inquiries. FHC also provides default prevention, collections, and Business Process Outsourcing (BPO) solutions. The following distinguishes FHC from the competition:

- **Decades of Call Center Experience:** FHC has over 25 years of contact center experience and we have provided top notch service to each and every client and contract that we have been fortunate to work with during our years in service.
- **Project Team with 200 Years of Combined Relevant Experience:** Our dedicated project team results driven with over 200 years of combined experience specializing in contracts in call center service and collection work.
- **Comprehensive Information Security Management Program:** FHC has a comprehensive Information Security Management Program that goes beyond what is required to safeguard personally identifiable information (PII). FHC has passed rigorous security and compliance audits; ensuring your data is safe and secure when placed with FHC.

Highlighting our commitment to quality and customer care, our vision is a collaborative partnership with D.H.H.S. Nebraska, that provides unparalleled customer service in compliance with all applicable laws and regulations, underscored by our commitment to **Focused, Holistic, Customer Care**. I am the individual empowered and duly authorized to bind F.H. Cann & Associates, Inc. Should you have any questions about our response, or the company, please feel free to contact me via email at [rfp@fhcann.com](mailto:rfp@fhcann.com), or directly at (978) 215-3602.

Sincerely,



Sheri A. Cann, President/CEO

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Prepared for: State of Nebraska, Department of Health and Human Services

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### **Appendix B – Forms Signed/Initialed –     Section II Terms & Condition     Section III Vendor Duties     Section IV Payment     Contractual Agreement Form.**

### **Appendix C – Financial Documents (Proprietary Information, provided as separate attachment)**

## Executive Overview



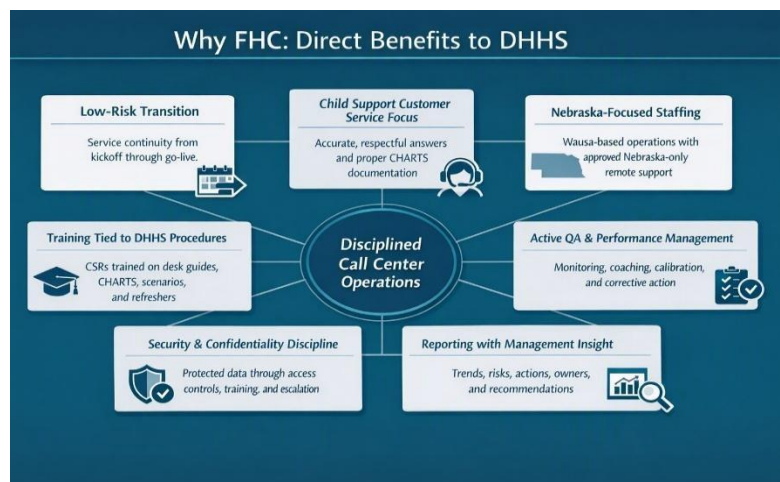
F.H. Cann & Associates, Inc. (“FHC”) is a proven contact center, collections, and business process outsourcing provider with extensive experience. Founded in 1999, FHC began in Massachusetts and is a woman-owned company. Since that time, FHC has grown into a national organization serving government agencies, colleges, universities, and large-scale public programs that require accurate information delivery, professional customer service, secure data handling, and scalable staffing.

FHC is pleased to submit this Technical Proposal to the Nebraska Department of Health and Human Services (“DHHS”) for operation of the Nebraska Child Support Enforcement Customer Service Call Center. FHC understands that this procurement is about continuity, accuracy, security, and accountability. Nebraska families, employers, legal partners, and DHHS staff rely on the Call Center for clear information about child support services, court-ordered responsibilities, payments, case updates, outreach, and next steps. DHHS needs a contractor that can assume responsibility without disruption, operate within DHHS systems and procedures, protect sensitive information, staff and supervise the Wausa Call Center, and provide reporting that gives DHHS a practical view of performance.

FHC’s approach is deliberately practical. We will not ask DHHS to change its systems, create unnecessary technology dependencies, or absorb a complicated transition model. Instead, FHC will build a disciplined operating environment around the work DHHS already needs performed: answer calls accurately, document contacts properly in CHARTS, support inbound and outbound customer communication, staff the Wausa operation, train CSRs on Nebraska-specific procedures, monitor quality, protect confidential data, report performance clearly, and recommend improvements in collaboration with DHHS.

During transition, FHC will focus on low-risk continuity: confirming current-state operations, communicating with staff, identifying staffing and access dependencies, validating training and security readiness, establishing DHHS communication channels, and preparing for full operations on **October 1, 2026**. After go-live, FHC will manage performance through daily supervision, staffing review, queue and hold-time monitoring, QA review, coaching, training updates, outreach tracking, complaint and escalation review, security controls, technical coordination, and monthly and quarterly reporting.

FHC will support the required on-site Call Center Manager and CSR staffing model with corporate resources for recruiting, human resources, training support, quality assurance, security/compliance, reporting, contract administration, and escalation. Remote Call Center work will not be used outside Nebraska. Any remote work will be treated as a controlled operating option, only after training and probationary requirements are satisfied and only with DHHS approval.



**FHC Advantage:** FHC’s advantage is disciplined execution in regulated service environments. We will adapt our management, training, staffing, QA, reporting, and security practices to Nebraska’s child support environment, rather than asking DHHS to adapt to a generic call center model. Our approach is designed to help DHHS maintain service continuity, improve visibility, support outreach, protect confidential information, and manage the Call Center with clear accountability from transition through full performance.

## Corporate Overview

FHC is a qualified, experienced, and responsible service provider with more than two decades of experience supporting highly regulated customer service, contact center, account resolution, compliance, training, quality assurance, reporting, and secure operational environments. Since 1999, FHC has supported government-backed student loan servicing, default prevention, account resolution, customer communications, and back-office support programs where accuracy, confidentiality, documentation, and audit readiness are essential. For Nebraska DHHS, FHC will bring a disciplined operating model grounded in proven regulated-program experience: clear accountability, trained staff, documented procedures, quality review, secure information handling, transparent reporting, and responsive client communication.

FHC's work for federal student aid and other regulated programs demonstrates the same competencies Nebraska requires for child support customer service: staffing and training customer-facing representatives, operating within client systems and procedures, protecting sensitive customer information, maintaining compliance with contractual and regulatory requirements, monitoring quality, responding to customer complaints, supporting audits, and producing reports that help clients manage performance. FHC has scaled operations, supported large portfolios, maintained rigorous quality controls, and trained staff to deliver accurate, respectful, compliant service in environments where customers depend on clear explanations and proper account documentation.

### FHC Proof Points: Why They Matter to Nebraska DHHS



## **A. Bidder Identification and Information**

**F.H. Cann & Associates, Inc. (“FHC”) is a S-corporation** and is the Bidder submitting this Technical Proposal and is incorporated in the state of Massachusetts.  
FHC’s headquarters is located at **1600 Osgood Street, Suite 3058, North Andover, Massachusetts 01845** and has operated as a customer service, business process outsourcing, contact center, account resolution, and compliance-focused organization since **1999**.  
FHC has at no time changed the name, or form of organization since its inception.

## **B. Financial Statements (Proprietary Information)**

FHC will provide Financial Statements and any financial disclosures, in accordance with this RFP, which is being submitted separately as Proprietary Information.  
FHC does not have any judgements, pending litigation, or other real or potential financial reversals which might materially affect the viability or stability of the organization.

## **C. Change of Ownership**

FHC does not anticipate any change in ownership or control during the twelve months following proposal submission.

## **D. Office Location Responsible for Performance**

FHC’s corporate headquarters in North Andover, Massachusetts will provide executive oversight, contract administration, compliance support, human resources, recruiting, training support, quality assurance, and corporate resources for this engagement. FHC also understands that the Nebraska Call Center is currently located in Wausa, Nebraska and that DHHS expects continuity of operations at that location. FHC’s operating model will support the Wausa Call Center as the primary service location and will incorporate Nebraska-based remote work only as permitted by the RFP and approved by DHHS.

## **E. Relationships with the State**

FHC has not had any business relationships, contracts, or dealings with the State of Nebraska during the five years preceding proposal submission.

## **F. Bidder’s Employee Relations to State**

No proposed personnel were employed by the State of Nebraska within the past twelve months. No current State of Nebraska employee is employed by FHC or proposed as a subcontractor or member of FHC’s project team.

## **G. Contract Performance**

FHC has not had any contract terminated for default, convenience, non-performance, non-allocation of funds, or any other reason during the past five years.

## **H. Summary of Bidder’s Corporate Experience**

FHC’s corporate experience is directly relevant to the Nebraska Child Support Enforcement Customer Service Call Center. FHC has supported high-volume, customer-facing, regulated service environments requiring accurate information, strong training, clear documentation, secure handling of sensitive information, quality review, reporting, and client coordination.

FHC's experience includes public-sector work, federal student loan servicing and account support, contact center operations, customer communications, outreach, back-office support, compliance management, audit support, quality control planning, training administration, and secure operations. FHC has operated within client systems and procedures, supported client-directed workflows, and trained staff to follow program-specific rules rather than forcing a generic call center model onto a specialized program.

## FHC Experience Applied to Nebraska DHHS

| Experience Area                                                                                                                     | FHC Capability / Proof Point                                                                                                                                              | Relevance to Nebraska DHHS                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
|  <b>Regulated Public-Sector Customer Service</b>   | Federal student aid and regulated-program support requiring accurate communications, secure account handling, documentation, complaint response, and contract compliance. | Accurate, respectful service for child support customers, employers, courts, county attorneys, and DHHS stakeholders. |
|  <b>Contact Center Operations</b>                  | Inbound/outbound communications, staffing, supervision, escalation, call monitoring, outreach, and service quality.                                                       | Reliable Call Center operations, queue management, outreach, and performance visibility.                              |
|  <b>Training &amp; Knowledge Management</b>        | Structured onboarding, scenario practice, coaching, refresher training, comprehension checks, and training records.                                                       | Accurate use of DHHS procedures, desk guides, CHARTS, approved scripts, outreach instructions, and service standards. |
|  <b>Quality Assurance &amp; Compliance</b>         | Call monitoring, documentation review, calibration, corrective action, internal audits, complaint review, and trend reporting.                                            | Early issue identification, error correction, consistency, and improved service delivery.                             |
|  <b>Information Security &amp; Confidentiality</b> | Secure environments, role-based access, background screening, security awareness, incident response, and audit support.                                                   | Protection of child support case information and DHHS security expectations.                                          |
|  <b>Staffing &amp; Retention</b>                 | Dedicated recruiting, screening, onboarding, coaching, engagement, recognition, and retention practices.                                                                  | Retain qualified Wausa staff, maintain service levels, and avoid disruption.                                          |
|  <b>Reporting &amp; Performance Management</b>   | Metrics, reporting, audits, action tracking, and management review to identify risks, trends, corrective actions, and improvement.                                        | Usable visibility into staffing, call performance, QA, outreach, complaints, security, and improvement actions.       |

## FHC Corporate Strengths Applied to Nebraska

FHC's Nebraska solution will draw on corporate strengths that have been proven in regulated service environments: structured transition management, dedicated recruiting support, practical training, quality assurance tied to corrective action, compliance oversight, secure handling of sensitive information, incident response discipline, complaint management, and performance reporting that supports client decision-making.

## H.1 References and Past Performance Project Narratives

The following project narratives highlight FHC's experience performing similar high-volume, regulated customer service, contact center, account support, outreach, documentation, compliance, training, quality assurance, and secure information handling services. Each example demonstrates capabilities directly relevant to the Nebraska Child Support Enforcement Customer Service Call Center, including serving customers who need clear explanations, handling sensitive account information, documenting interactions, following client-approved procedures, supporting compliant communication, and maintaining performance accountability.

### **Project 1: State of Illinois Low Income Home Energy Assistance Program (LIHEAP)**

|                               |                                                                             |
|-------------------------------|-----------------------------------------------------------------------------|
| Customer / Reference          | <b>State of Illinois Low Income Home Energy Assistance Program (LIHEAP)</b> |
| Contact                       | David Wortman, Deputy Director; 217-299-3561;<br>David.Wortman@illinois.gov |
| Time Period                   | 2021 – Ongoing                                                              |
| Scheduled / Actual Completion | Projected completion: Ongoing. Actual/current planned completion: Ongoing.  |
| Contractor Role               | Prime Contractor                                                            |
| Budget                        | Original contract amount: \$2.9M. Final/current contract amount: \$2.9M.    |

FHC provides call center services for residents accessing assistance through the State of Illinois Low Income Home Energy Assistance Program (LIHEAP), including heating, gas, propane, and electricity assistance. Under the Community Services Block Grant program, FHC agents help residents navigate and complete application processes and direct them to the appropriate State agency. Agents assist underserved and compromised citizens with appointment reminders and scheduling for assistance related to necessities such as rent, food, temporary shelter, medicine, and weatherization. The project expanded to include the Low-Income Water Assistance Program, where FHC assists Illinois residents facing water or sewer disconnections caused by unemployment and other socioeconomic hardship. FHC also supports the Help Illinois Families hotline and makes outbound calls to process energy application backlogs. The contract involves more than 68,000 calls monthly and requires specialized knowledge across multiple assistance programs, application processes, eligibility criteria, governmental regulations, program updates, and service level requirements. FHC's performance includes less than a 2% abandonment rate against a 5% or less SLA and an average 93% quality scorecard against a 90% or higher SLA. This project is similar to Nebraska's Call Center because it requires trained agents to support statewide public benefit programs, assist callers under stress or hardship, explain application or program requirements, document contacts, conduct outbound follow-up, manage multiple program lines of inquiry, and meet service level and quality expectations.

### **Project 2: State of New Hampshire Department of Public Health and Human Services**

|                               |                                                                                                                            |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Customer / Reference          | <b>State of New Hampshire Department of Public Health and Human Services</b>                                               |
| Contact                       | Kerrileigh Schroeder, NH Dept. of Health & Human Services Administrator IV; 603-271-9273; kerrileigh.schroeder@dhhs.nh.gov |
| Time Period                   | 2023 – Ongoing                                                                                                             |
| Scheduled / Actual Completion | Projected completion: Ongoing. Actual/current planned completion: Ongoing.                                                 |
| Contractor Role               | Prime Contractor                                                                                                           |
| Budget                        | Original contract amount: \$3M. Final/current contract amount: \$3M.                                                       |

FHC provides inbound call center services to constituents of the Bureau of Family Assistance and the New Hampshire Department of Public Health and Human Services. The work supports those seeking assistance with Temporary Assistance, Permanently and Totally Disabled benefits, Old Age Assistance, Aid to the Needy Blind, SNAP Food Stamps, Benefit Programs, Child Care Support, and ACA/Medicaid-related inquiries. FHC provides telephony, computer, internet connection, and other required equipment; supports regular hours of 8:00 a.m. to 5:00 p.m. Monday through Friday; and maintains staffing capacity to manage volume on a 24/7 basis as needed during surges. The project averages 55,000 calls monthly and requires agents to support compromised constituents needing aid, with forms, qualification questions, escalations, and general inquiries. This project is similar to Nebraska's Call Center because it requires trained representatives to support statewide public assistance programs, use State systems and portals, manage sensitive constituent information, provide accurate guidance to individuals seeking public benefits, meet service level expectations, and maintain a smooth customer experience for callers who may be under stress or hardship.

### ***Project 3: Massachusetts Department of Unemployment Assistance (DUA)***

|                               |                                                                                                                                                                                                                                            |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer / Reference          | <b>Massachusetts Department of Unemployment Assistance (DUA)</b>                                                                                                                                                                           |
| Contact                       | Wendy Savary, Director of Claims & Appeals; 774-454-6168; wendy.savary@mass.gov                                                                                                                                                            |
| Time Period                   | Contract 1: April 2020 – August 2022; Contract 2: March 2023 – June 2023; Contract 3: February 2025 – April 2025; Contract 4: April 2025 – Ongoing                                                                                         |
| Scheduled / Actual Completion | Projected completion: Contract 1 – August 2022; Contract 2 – June 2023; Contract 3 – April 2025; Contract 4 – Ongoing. Actual completion: Contract 1 – August 2022; Contract 2 – June 2023; Contract 3 – April 2025; Contract 4 – Ongoing. |
| Contractor Role               | Prime Contractor                                                                                                                                                                                                                           |
| Budget                        | Original contract amount: \$37M. Final/current contract amount: \$37M.                                                                                                                                                                     |

FHC provides emergency and non-emergency call center services for the Massachusetts Department of Unemployment Assistance to support Commonwealth residents accessing critical unemployment insurance benefits and services. FHC's DUA work includes staffing in accordance with call volumes, support for high monthly call volumes, Tier I agent services, IT interface coordination, agent workstation and user access configuration, expedited development of DUA-approved training materials, daily collaboration with program management, quality assurance reviews, and rapid staffing ramp-up for English-speaking and bilingual agents. FHC has supported an average of approximately 118,000 calls per month and, under its first contract, provided approximately 350 agents; under the current non-emergency contract, FHC provides approximately 200 knowledgeable Tier I agents as the prime contractor. DUA rated FHC Excellent in every category on its Contractor Performance Evaluation Form. This project is similar to Nebraska's Call Center because it requires trained agents to support residents accessing critical public benefits, handle high call volumes, operate within State-approved systems and procedures, protect sensitive information, provide accurate guidance to callers under stress, coordinate closely with State program leadership, rapidly scale staffing when required, and maintain strong quality and customer satisfaction performance.

### **I. Summary of Proposed Personnel and Management Approach**

FHC will provide a management approach with clear accountability for contract performance, daily Call Center operations, staffing, training, quality assurance, security, compliance, reporting, and DHHS communication. FHC understands that the RFP requires an on-site Call Center Manager for the Wausa operation and a management staff list, duties, and communication methods within 15 days after contract execution. FHC's proposed management structure is designed to give DHHS a dedicated Nebraska-facing operational leader supported by experienced corporate resources with direct experience in public-sector call center operations, staffing, training, technology, security, compliance, and client service delivery.

FHC proposes Robert Gauthier as the Call Center Manager responsible for day-to-day operational delivery. Mr. Gauthier has more than 17 years of call center experience and is responsible for the contact center service delivery model, including supervisors and agents, service levels, handle times, speed of answer, queue times, one-call resolution, coaching, team assignments, and operational reporting. He has led large public-sector and regulated call center operations. He has experience managing supervisors, hundreds of agents, training coordination, daily trend review, coaching, and performance improvement.

Sara Alosa will serve as Project Manager and primary DHHS liaison. Ms. Alosa has 28 years of senior executive leadership experience in call center and BPO operations and has served as the point of contact and program manager for client onboarding, implementation, client services, operational issue resolution, and service delivery. Her experience includes State of New Hampshire DPHHS, State of Illinois LIHEAP Program Call Center, Massachusetts EOHHS, Federal Student Aid NextGen BPO, and emergency call center deployment for Massachusetts DUA.

FHC's corporate support team will provide specialized management support to the Wausa operation. Ernesto Bencosme, Senior Vice President of Operations, will support staffing and operations oversight, including performance monitoring, staffing levels, forecasting, process improvement, and customer satisfaction. Lisa Reams, Training Manager, will support training implementation and updates, drawing on more than 20 years of training experience and public-sector call center training work for Massachusetts DUA, New Hampshire DHHS, and FSA NextGen. Kate Jones, Director of Human Resources, will support recruiting, onboarding, background check coordination, HR compliance, and staffing pipeline development. Don Dittmore, CIO, will support technology coordination and technical issue escalation. Michael Beatty, CCO and GC, will support compliance and security oversight, including contractual compliance, policies and procedures, audit readiness, complaint and dispute oversight, and risk mitigation.

## I.1 Proposed Management Team

| Team Member / Role                                   | Primary Responsibilities for Nebraska                                                                                                                                                                          | Relevant Experience                                                                                                                                                                                     |
|------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Robert Gauthier – Call Center Manager                | Day-to-day Wausa Call Center leadership, supervisor and CSR support, queue and service level management, coaching, call handling performance, one-call resolution, escalation, and daily operational delivery. | More than 17 years of call center experience; managed public-sector programs including MA DUA, MA DOR, and FSA NextGen; led supervisors and large agent teams.                                          |
| Sara Alosa – Project Manager / DHHS Liaison          | Primary client liaison, implementation coordination, contract communication, issue resolution, service delivery oversight, management reporting coordination, and escalation support.                          | 28 years of senior leadership experience; project experience includes NH DPHHS, IL LIHEAP, MA EOHHS, FSA NextGen, and MA DUA emergency call center deployment.                                          |
| Ernesto Bencosme – Staffing and Operations Oversight | Support staffing levels, forecasting, operational performance, process improvement, management review, and customer satisfaction controls.                                                                     | 16 years of call center/BPO experience; senior operations leader for multi-site operations, staffing, performance monitoring, and large contact center projects.                                        |
| Lisa Reams – Training Manager                        | Training planning, train-the-trainer coordination, onboarding, refresher training, LMS support, training updates, and QA-driven retraining support.                                                            | More than 20 years of training experience; training manager for MA DUA, NH DHHS, and FSA NextGen call center programs.                                                                                  |
| Kate Jones – HR / Recruiting Manager                 | Recruiting, onboarding, personnel readiness, background check coordination, HR compliance, employee relations, and staffing pipeline support.                                                                  | Director of Human Resources with experience in large-scale recruiting, onboarding, labor compliance, background check support, HR policy rollout, and multi-state workforce support.                    |
| Don Dittmore – Technology / IT Lead                  | Technology coordination, technical issue escalation, access readiness support, State equipment and systems coordination, continuity planning, and operational technology support.                              | More than 25 years of IT leadership; CIO with project experience supporting MA DUA, NH DHHS, and FSA NextGen call center environments.                                                                  |
| Michael Beatty – Compliance and Security Oversight   | Compliance oversight, security coordination, contract compliance, confidentiality controls, policy and procedure review, audit support, complaint and dispute oversight, and corrective action guidance.       | Chief Compliance Officer and General Counsel with experience in compliance management systems, internal audit, quality assurance, complaints, disputes, policies, procedures, and regulatory oversight. |

## I.2 Communication Methods and Accountability

FHC's management approach provides DHHS with clear points of contact and defined escalation paths. Robert Gauthier will manage daily Call Center operations and immediate staff support. Sara Alosa will serve as the primary DHHS liaison for implementation, contract communication, issue escalation, and service delivery oversight. Ernesto Bencosme will support staffing and operational performance review. Lisa Reams will support training readiness and ongoing training updates. Kate Jones will support recruiting, onboarding, and HR readiness. Don Dittimore will support technology coordination and technical escalation. Michael Beatty will support compliance, security, confidentiality, policy, and audit-related matters.

Within 15 days after contract execution, FHC will provide DHHS with the required management staff list, duties, and communication methods. That list will identify day-to-day contacts, escalation contacts, communication methods, backup contacts, reporting responsibilities, and the appropriate path for operational, staffing, training, technology, security, compliance, reporting, and contract administration issues. Resumes for key management personnel are provided in Appendix A.

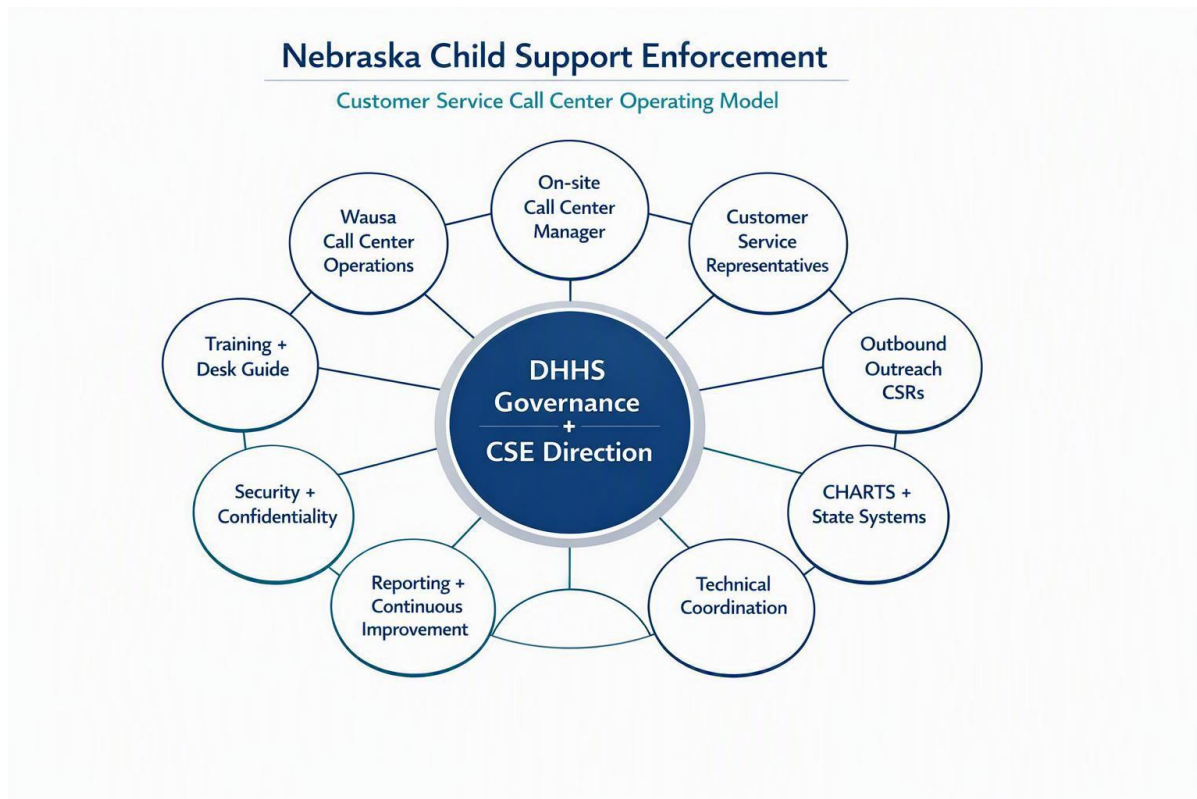
### FHC Management and Support Commitments



Nebraska-facing operation backed by FHC corporate infrastructure.

## **Technical Approach**

FHC's Technical Approach is built around a simple operating principle: Nebraska families and DHHS staff need correct answers, respectful service, secure handling of information, and a Call Center that is ready every business day. This section explains how FHC will operate the Nebraska Child Support Enforcement Customer Service Call Center through a controlled transition, clear management structure, practical staffing plan, hands-on training, active quality assurance, secure use of DHHS systems, transparent reporting, and continuous improvement that is coordinated with DHHS before implementation.



### **A. Understanding of the Project Requirements**

FHC understands that this Call Center is a specialized child support operation, not a general customer service queue. CSRs must support callers who may be trying to understand court-ordered obligations, payments, income withholding, address or employment updates, billing statements, case status, IV-D services, or next steps with DHHS, the SDU, County Attorneys, Clerks of the District Court, or field staff.

The Call Center's value is measured not only by how quickly the call is answered, but by whether the caller receives accurate, understandable, respectful information and whether the case record is documented correctly in CHARTS.

FHC also understands the operational profile described by the RFP: the Wausa Call Center supports approximately 85,000 child support cases, handles approximately 35,000 calls per quarter, must manage average calls of four minutes or less, and experiences peak call volume of approximately 1,000 calls on Mondays and the day after a holiday. FHC will use this profile to plan staffing coverage, supervisor availability, breaks, training time, outreach assignments, QA review, and contingency support so the Call Center can maintain performance during both routine and peak conditions.

DHHS provides the core technology environment, including CHARTS, data network connectivity, voice connectivity, computer and software equipment for the Call Center site, equipment for authorized remote staff, DHHS Help Desk support, CHARTS Production Support, Annual Security Awareness Training access, initial and ongoing training direction, outreach direction, and contract management. FHC's role is to make that environment work operationally: hire and retain qualified staff, train them to use DHHS procedures and systems correctly, monitor quality, protect confidential information, document customer contacts, report performance, and coordinate with DHHS when decisions or support are needed.

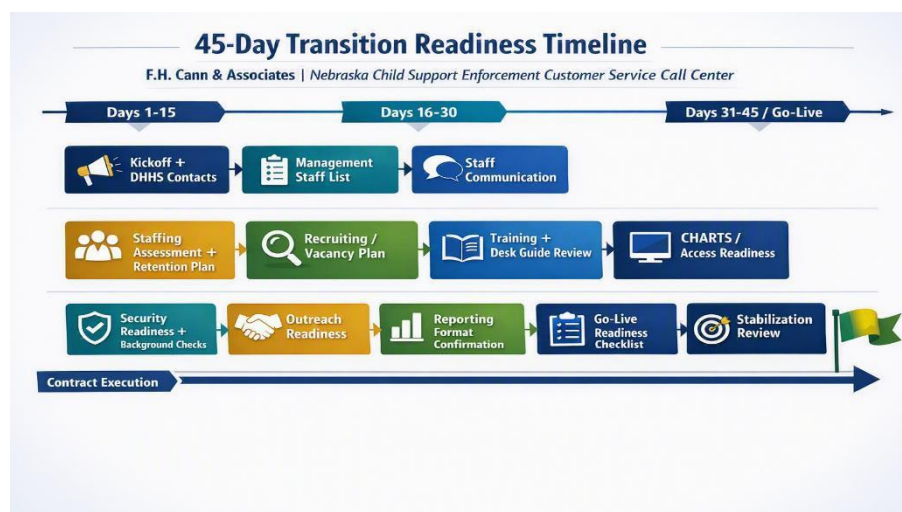
## A.1 Transition Plan

FHC will use transition as a readiness period, not an administrative waiting period. The objective is to protect service continuity, stabilize staffing, establish management communication, confirm DHHS dependencies, and ensure the Call Center is ready for full performance on October 1, 2026. FHC's transition approach follows the same disciplined structure reflected in FHC's prior public-sector implementations: define ownership, document dependencies, communicate early, track risk, and verify readiness before go-live.

Immediately after contract execution, FHC will hold a transition kickoff with DHHS to confirm contacts, workstreams, decision points, meeting cadence, reporting expectations, facility and technology dependencies, training responsibilities, staff communication protocols, and required deliverables. FHC will maintain a transition issue log and action tracker so DHHS can see open items, owners, target dates, decisions needed, and risks to readiness.

Staff communication will be a priority. FHC understands from the Nebraska example proposal that continuity is strongest when staff are informed, respected, and supported during change. FHC will communicate what is changing, what is staying the same, who the management contacts are, how schedules and duties will be handled, how questions will be answered, and how FHC will support current qualified staff. FHC's intent is to retain current staff where possible and appropriate while also maintaining recruiting activity to fill vacancies and reach the required staffing level.

FHC will also review the responsibilities assigned to DHHS, including facility access, State-provided technology, network and voice connectivity, remote equipment, Help Desk support, CHARTS Production Support, training, outreach direction, and contract management. These dependencies will be tracked in the transition issue log so both parties have a clear view of open items, owners, target dates, and risks.



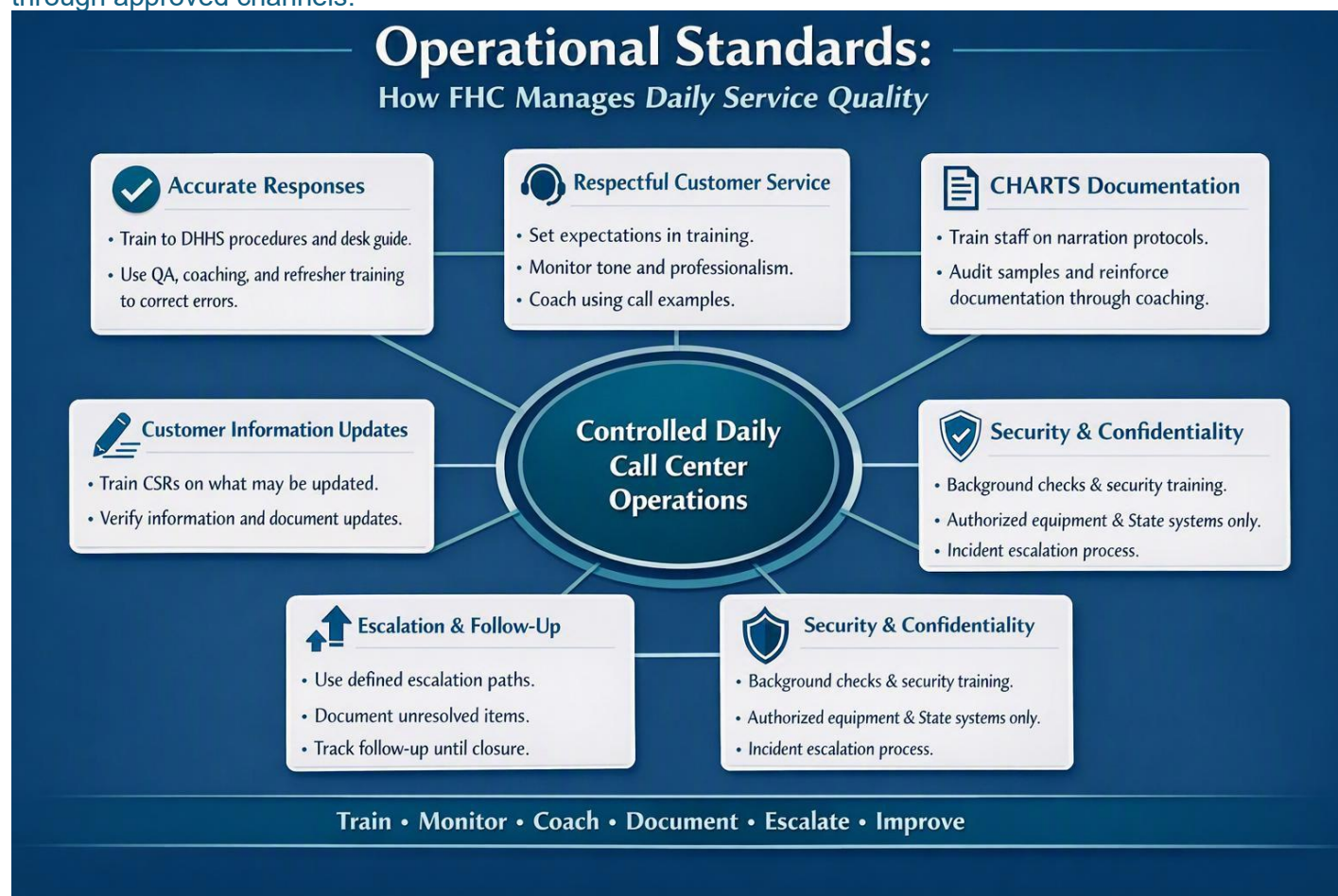
## A.2 Start Up

FHC confirms that contract services will begin on October 1, 2026 and that the Nebraska Customer Service Child Support Call Center must be fully operational starting October 1, 2026, at 8:00 a.m. Central Time. FHC will treat this date as a non-negotiable readiness milestone. Our start-up work will focus on verifying that staffing, supervision, equipment, system access, procedures, training, security controls, reporting, and escalation paths are ready before the start of services.

Before go-live, FHC will complete an operational readiness review with DHHS. The review will confirm minimum staffing coverage, Call Center Manager readiness, supervisor coverage, CSR schedules, two dedicated outreach/outbound CSR assignments, CHARTS access status, desk guide availability, call documentation expectations, interpretation and TDD procedures, complaint escalation path, security training completion, background check status, and reporting expectations. Any open item will be tracked, assigned, and resolved before the October 1 start date whenever within FHC's control.

## A.3 Operational Standards

FHC will operate the Call Center as a controlled, documented service environment. The operating model is designed around the daily work of the CSR: answer the call, identify the caller's need, verify information, consult CHARTS and approved guidance, provide a courteous and accurate response, update customer information when permitted, document the call and follow-up actions, and escalate or route unresolved issues through approved channels.



FHC will cooperate fully with DHHS and other state or federal auditors, allow DHHS access for audits and reviews consistent with contract requirements, permit DHHS staff visits to the Call Center as required by the RFP, and implement improvements or modifications identified through audits, reviews, or security assessments. FHC will also inform DHHS before implementing major decisions that may affect shared processes or customer service, including the expected impact of the decision.

FHC will protect DHHS information by using CHARTS and existing State security controls to limit access and manipulation within CHARTS and related systems. FHC staff will access data only from State-authorized equipment and will store data only in State-authorized systems. FHC will ensure staff complete mandatory Annual Security Awareness Training as directed by DHHS and will perform required background checks before staff receive access to sensitive information.

FHC will maintain QA accuracy at or above the level agreed upon with DHHS using the agreed evaluation tool. QA will include call monitoring, CHARTS narration/documentation review, coaching, calibration, corrective action, and trend reporting. FHC will also support a joint customer complaint resolution process with DHHS and will reinforce desk guide use so staff have current, practical direction for handling caller questions.



#### A.4 Outreach / Outbound Call Requirements

FHC will treat outreach as a proactive customer education and case support function. The Nebraska winning proposal demonstrates that outreach is most effective when it is specific, scripted, documented, and tied to the child support journey. FHC will build on that concept by using DHHS-approved outreach instructions to help custodial and noncustodial parties understand IV-D services, court-ordered responsibilities, income withholding, billing statements, address and phone updates, employer verification, and available customer service resources.

Outbound calls to noncustodial parties will include information regarding new child support court orders, court-ordered responsibilities, the income withholding process, address verification, phone number verification, employer verification, explanation of monthly billing statements, and answers to questions about court-ordered obligations. Outbound calls to custodial parties will include explanation of the Title IV-D child support program, general program questions, and information about the benefits of receiving IV-D services and how to apply for and receive those services.

FHC will manage outreach as a structured workstream. Each outreach interaction will have a defined purpose, approved talking points, verification steps, documentation expectations, and follow-up rules. FHC will adjust outbound work schedules, as permitted by the RFP, to improve the likelihood of reaching customers at appropriate times while maintaining service coverage and supervisor visibility.

## A.5 Vendor Performance Standards

FHC will be responsible for oversight and management of Call Center staff and will answer and provide necessary follow-up on incoming calls and outreach/outbound calls. FHC will manage performance against DHHS standards, including the requirement that initial queue time for incoming calls not exceed four minutes and hold times not exceed four minutes. FHC will monitor performance, review staffing coverage, identify trends, and take corrective action when results indicate risk to service levels.

FHC will provide accurate responses to customers on incoming calls. When inaccurate information is identified, FHC will correct the information through customer contact when appropriate and in consultation with DHHS when necessary. Errors will be incorporated into the ongoing training plan, and FHC will verify performance accuracy by auditing a sample of calls and/or narratives. DHHS may audit at any time, and FHC will cooperate fully with those reviews.

FHC will store and process information and data received or created in providing services under the contract in a secure manner and will ensure that only authorized personnel have access to such information and data. Upon contract termination, FHC will transfer, return, or delete information and data as directed by DHHS and as mutually agreed by the parties regarding format, timing, and manner. FHC will also provide appropriate messaging or call routing when the VRU or phone system is non-operational, consistent with DHHS procedures.

### A.5.1 Quality Assurance and Performance Management

FHC will manage quality assurance and performance as an active daily discipline, not a month-end reporting exercise. The purpose of QA is to confirm that Customer Service Representatives provide accurate information, follow DHHS-approved procedures, communicate respectfully, protect confidential information, document work properly in CHARTS, and complete follow-up actions in accordance with established expectations. The purpose of performance management is to ensure the Call Center remains staffed, responsive, measurable, and accountable to DHHS throughout the contract term.

FHC will work with DHHS to confirm the QA evaluation tool, scoring methodology, accuracy expectations, review frequency, calibration process, reporting format, and corrective action thresholds. Once approved, FHC will apply the evaluation tool consistently across inbound calls, outbound calls, CHARTS narration, customer information updates, escalation handling, complaint handling, and follow-up documentation. QA results will be used to coach staff, identify training needs, recognize strong performance, correct inaccurate responses, and support continuous improvement.



FHC's QA process will include regular monitoring, scoring, coaching, calibration, and trend review. Supervisors and QA staff will review a sample of interactions and documentation to measure performance against the agreed tool. When QA identifies an individual performance issue, FHC will coach the employee and document the corrective action. When QA identifies a trend across multiple staff or call types, FHC will address the root cause through refresher training, desk guide clarification, scripting reinforcement, workflow adjustment, or escalation to DHHS if State direction is needed.

Performance management will be tied to the operational standards in the RFP. FHC will monitor initial queue time, hold time, call volume, staffing coverage, attendance, schedule adherence, outreach activity, training completion, QA accuracy, complaints, escalations, security items, and open issues. FHC will use these measures to identify risk early, adjust schedules, reinforce training, support supervisors, and keep DHHS informed through monthly reports, quarterly meetings, and ad hoc communication when a service issue requires attention.



FHC will support calibration with DHHS to ensure QA scoring remains fair, consistent, and aligned to program expectations. Calibration may include review of sample calls, sample CHARTS narratives, complaint examples, outreach documentation, or recurring error types. The goal is to maintain a shared understanding of what "accurate," "complete," and "customer-focused" means in Nebraska's child support environment. When FHC identifies inaccurate information provided to a customer, FHC will determine whether customer follow-up is appropriate and will consult with DHHS when necessary. FHC will document the issue, correct the information when required, coach the employee, and determine whether the error reflects an individual issue or a broader training or procedure gap. Errors and corrective actions will feed directly into FHC's ongoing training plan.

## A.5.2 Security and Confidentiality

FHC understands that security and confidentiality are core operating requirements for the Nebraska Child Support Enforcement Customer Service Call Center. Call Center staff will access sensitive child support case information, participant addresses, employment information, health insurance information, payment-related information, and other confidential data. FHC will protect this information through controlled access, staff screening, training, supervision, documented procedures, audit cooperation, incident response, and strict use of DHHS-authorized systems and equipment.

FHC will use CHARTS and existing State security controls to limit access and manipulation within CHARTS and related systems. FHC staff will access data only from State-authorized equipment and will store data only in State-authorized systems. FHC will not create separate repositories of DHHS data outside approved State systems unless specifically authorized in writing by DHHS. Staff will be trained that confidential information must be accessed only for legitimate work purposes and shared only as permitted by DHHS procedures, applicable law, and contract requirements.

FHC will maintain a secure environment for disbursement data, records, and data processing operations as required by DHHS. FHC understands that the secure environment must meet applicable IRS requirements and must protect data from sabotage, manipulation, theft, unauthorized access, and breach of confidentiality. FHC will work with DHHS to implement improvements or modifications identified through security reviews, audits, or corrective action requests.

| Security Control Area               | FHC Approach                                                                                                                                            | Evaluator Benefit                                                                               |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <b>Authorized access</b>            | Use CHARTS and State security controls to limit access based on role and approved business need.                                                        | Reduces risk of unauthorized viewing, manipulation, or disclosure of child support information. |
| <b>State-authorized equipment</b>   | Require staff to access DHHS data only from State-authorized equipment and store data only in State-authorized systems.                                 | Supports consistent technical control and reduces unmanaged data risk.                          |
| <b>Background checks</b>            | Perform background checks for employees with access to facilities or operations, including participant addresses, consistent with RFP requirements.     | Supports safe assignment of personnel before access to sensitive information.                   |
| <b>Security awareness</b>           | Ensure staff complete mandatory Annual Security Awareness Training as directed by DHHS and track completion.                                            | Reinforces staff understanding of confidentiality, handling, and reporting expectations.        |
| <b>Remote work controls</b>         | Permit remote work only after training/probation, only within Nebraska, only with DHHS approval, and only with required security expectations in place. | Protects information while allowing approved continuity and staffing flexibility.               |
| <b>Audit and review cooperation</b> | Allow DHHS and state/federal auditors access for audits and reviews and implement required improvements.                                                | Gives DHHS visibility and control over security performance.                                    |

FHC will complete background checks for employees who will have access to facilities or operations. Individuals with access to participant addresses must have a successfully adjudicated background check. FHC understands that disqualifying items include restraining orders, violent crimes against persons, burglary, or theft. FHC will coordinate background check status with access readiness so employees do not receive access to sensitive information before they satisfy applicable screening requirements.

FHC will support HIPAA Business Associate requirements to the extent applicable to the services performed under the contract. FHC will use and disclose protected information only as permitted or required by the contract or law, apply administrative, physical, and technical safeguards to prevent unauthorized use or disclosure, ensure applicable subcontractors or agents agree to required confidentiality obligations, report unauthorized use or disclosure as required, and support DHHS in responding to security incidents, audits, or corrective action requirements.

Remote work will be governed by the same confidentiality and security standards as work performed at the Wausa Call Center. Remote work may occur only after training and probationary requirements are satisfied, only with DHHS approval, and only from locations within Nebraska. Remote staff will use State-authorized equipment, follow DHHS-approved procedures, maintain a private work environment, protect information from unauthorized viewing or disclosure, participate in supervision and QA monitoring, and comply with all DHHS and NITC security standards and policies.

FHC will provide a security plan covering all RFP requirements within sixty business days of contract award. The plan will describe FHC's approach to access control, staff screening, annual security training, confidentiality, secure handling of DHHS data, State-authorized equipment, CHARTS access, remote work controls, incident reporting, audit cooperation, corrective action, data return or deletion at contract termination, and coordination with DHHS on security review findings.

If FHC becomes aware of an unauthorized use, disclosure, suspected security incident, or confidentiality concern, FHC will notify DHHS in accordance with contract requirements, take immediate steps to mitigate risk, preserve relevant information, support investigation, document corrective actions, and retrain staff when needed. FHC will treat security incidents as operational events requiring prompt escalation, not as routine administrative issues.



## A.6 Staffing

FHC will manage staffing as an operational discipline, not simply a headcount requirement. The staffing model is built around the Wausa Call Center as the primary operating location, with the required on-site Call Center Manager providing full-time daily leadership. FHC understands the RFP requires at least fourteen full-time CSRs, including two full-time CSRs dedicated to outreach/outbound calls. FHC will plan coverage for operating hours, Monday and post-holiday peaks, breaks, training time, coaching, QA feedback, absenteeism, vacancies, and supervisor support.

**FHC will recruit for judgment, reliability, empathy, attention to detail, and ability to follow structured procedures—not just general call center experience.**

| Staffing Component                          | Primary Responsibilities                                                                                                                                                                                                                        | FHC Response                                                                                                                                                                                                        |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>On-site Call Center Manager</b>          | Works full-time on site in Wausa; manages daily Call Center operations, staff supervision, schedules, recruitment, performance, training reinforcement, escalation, DHHS coordination, and security expectations.                               | FHC will identify the proposed manager if selected before submission or provide the required qualifications, recruitment/assignment process, and commitment to have the position in place for contract performance. |
| <b>Customer Service Representatives</b>     | Answer incoming calls, verify information, use CHARTS and DHHS procedures, document calls and follow-up actions, update customer information, support respectful customer communication, and route/escalate matters as required.                | FHC will maintain at least fourteen full-time CSRs as required by the RFP.                                                                                                                                          |
| <b>Outbound / Outreach CSRs</b>             | Conduct informational outbound calls to custodial and noncustodial parties, explain IV-D services, court-ordered responsibilities, income withholding, billing statements, and verify address, phone, employer, and other required information. | FHC will dedicate two full-time CSRs to outreach/outbound calls as required by the RFP; these staff may be Wausa-based or approved Nebraska remote staff.                                                           |
| <b>Supervisory / Administrative Support</b> | Supports coverage, coaching, schedule adherence, escalation, documentation consistency, and operational coordination.                                                                                                                           | FHC will provide support sufficient to maintain the required standard of operation.                                                                                                                                 |
| <b>Corporate Support Resources</b>          | Provides recruiting, human resources, training support, QA support, security/compliance support, reporting support, contract administration, and executive escalation as needed.                                                                | FHC will make these resources available to support the Nebraska operation; they are not presented as separate by-name required project positions unless DHHS requires otherwise.                                    |

FHC's recruiting process will use multiple sourcing channels to reach Wausa and eligible Nebraska candidates. Recruiting activity may include online postings, employee referrals, local advertising, workforce resources, professional networks, community outreach, and targeted search for candidates with customer service, administrative, human services, call center, or public-facing experience.

FHC will screen candidates for clear communication, reliability, computer aptitude, confidentiality judgment, ability to follow policy, and willingness to learn child support procedures.

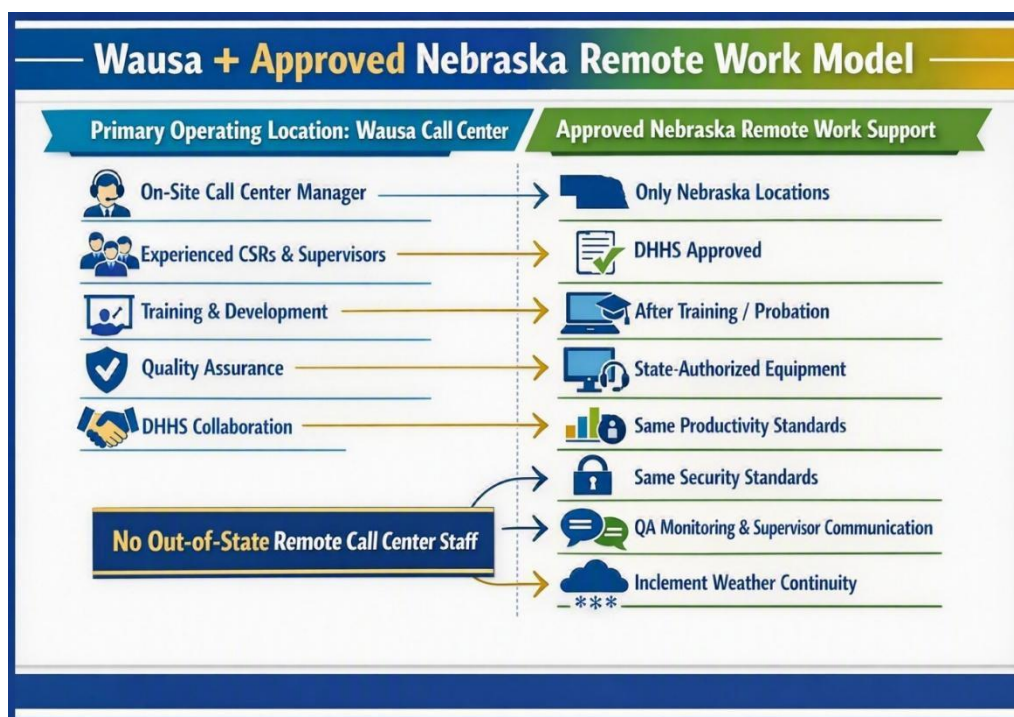
If a position remains vacant for more than 30 days, FHC will document the vacancy, the recruiting activity underway, the expected fill date, and the interim coverage plan. The interim plan may include schedule adjustments, supervisor support, cross-trained staff, temporary redistribution of non-critical duties, and other measures needed to continue meeting contract obligations. Staffing deficits will be disclosed in monthly reports and addressed during quarterly meetings with a remediation strategy and timeline for restoring required staffing levels.

Retention will be supported through clear supervision, structured onboarding, coaching, performance feedback, recognition, realistic expectations, and opportunities to build skill and confidence. FHC's proposal examples emphasize that retention improves when employees understand the importance of the work, receive consistent support, and see a path to becoming stronger performers. FHC will apply those principles to this contract by ensuring CSRs receive clear expectations, practical training, supervisor access, QA feedback, and timely recognition of strong performance.

FHC will manage staffing with attention to the actual operating pattern described

by the RFP, including the Monday and post-holiday peak periods. The staffing plan will account for required operating hours, full-time CSR coverage, outreach assignments, breaks, meetings, training, coaching, QA feedback, absenteeism, vacancies, and periods when supervisors may need to provide additional floor support. FHC will not rely on minimum headcount alone; we will manage coverage so the Call Center can meet customer demand and performance expectations during normal and peak operating conditions.

Recruiting will be treated as a continuing operational activity, not a one-time transition task. FHC will maintain a pipeline for Wausa and eligible Nebraska-based staff so vacancies can be addressed quickly. Recruiting activity will focus on candidates who can communicate clearly, handle sensitive conversations, follow procedures, document accurately, protect confidential information, and work reliably within a structured public-sector program. FHC will screen for customer service judgment and attention to detail because those skills directly affect the accuracy and quality of child support interactions.



The on-site Call Center Manager will be responsible for translating staffing plans into daily coverage. This includes reviewing attendance, monitoring queue conditions, adjusting break and lunch coverage, coordinating supervisor support, confirming outreach assignments, tracking vacancies, escalating staffing risks, and keeping DHHS informed when staffing issues may affect performance. This daily management focus is especially important because the RFP requires FHC to disclose staffing deficits and remediation steps in reporting and meetings with DHHS.

Remote work will be treated as a controlled operating option, not a default staffing model. FHC will not use out-of-state remote Call Center staff for this contract. After completion of training and satisfaction of probationary requirements, Call Center employees may work remotely only with DHHS approval and only from locations within Nebraska. Remote staff will be expected to meet the same standards as Wausa-based staff for productivity, availability, confidentiality, CHARTS use, call documentation, customer service, quality review, security, coaching, and participation in meetings or training. FHC will work with DHHS to activate a remote work plan during inclement weather or other events that may prevent staff from working at the physical Wausa location.

## A.7 Training

FHC will train Call Center staff to become effective Nebraska child support customer service representatives, not generic agents. Training will combine DHHS-provided requirements, the desk guide, CHARTS navigation, customer service techniques, confidentiality, outreach procedures, call documentation, and QA feedback. The goal is to move staff from classroom understanding to supervised practice to production readiness, with ongoing reinforcement after go-live.

| Training Method                | How FHC Will Use It                                                                                                           |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Desk guide study               | Train CSRs to use DHHS-approved guidance as the first reference point for customer questions and call handling.               |
| CHARTS navigation practice     | Practice locating case information, updating permitted fields, entering narration, and documenting follow-up actions.         |
| Scenario-based exercises       | Practice common caller situations, difficult conversations, verification, escalation, and outreach calls.                     |
| Shadowing and supervised calls | Allow new CSRs to observe experienced staff, then handle calls with supervisor or lead support before independent production. |
| QA-driven coaching             | Use call review and narration review to identify training needs and reinforce correct behavior.                               |
| Refresher training             | Address CHARTS updates, policy changes, recurring errors, complaint trends, outreach updates, and DHHS direction.             |

FHC's training approach will combine DHHS-provided instruction, job aids, desk guide review, scenario practice, role play, CHARTS navigation, call handling practice, supervisor coaching, QA feedback, and refresher training. Training will not end after onboarding. FHC will update training when DHHS changes policy, procedures, systems, outreach instructions, desk guide content, security expectations, or customer service standards. Training completion and retraining activity will be tracked and reported as part of FHC's management process.

Training will be role-specific and practical. Inbound CSRs will be trained to verify callers, locate and interpret case information using DHHS-approved procedures, explain next steps in plain language, document contacts in CHARTS, update customer information as permitted, and identify when a question must be escalated. Outreach CSRs will receive additional training on outbound call purpose, approved talking points, noncustodial and custodial party outreach topics, verification steps, documentation expectations, and follow-up rules. Supervisory staff will receive additional emphasis on coaching, queue monitoring, escalation handling, QA feedback, and documentation review.

FHC will use QA findings to keep training current. If call monitoring shows recurring confusion about a policy, script, CHARTS narration expectation, caller type, escalation path, or outreach topic, FHC will convert that trend into refresher training. This may include short huddles, job aids, desk guide reminders, scenario practice, supervisor coaching, or targeted retraining for specific employees. This closes the loop between what QA finds and what staff need to improve.

Training records will be maintained so FHC can confirm who completed required instruction, when refresher training was provided, what topic was covered, and whether follow-up coaching or review was needed. Training completion will be included in FHC's internal management review and summarized in reporting when relevant to DHHS oversight.

FHC will organize training as a lifecycle, beginning with onboarding and continuing through daily coaching, quality feedback, refresher training, policy updates, and corrective action. Initial training will prepare staff before they handle production calls. Ongoing training will keep staff current when DHHS procedures, CHARTS instructions, desk guide content, outreach scripts, security expectations, customer service standards, or reporting needs change. Supervisors, QA, Training, and Operations will work together so training is reinforced through actual call reviews and documented coaching.



## A.8 Reporting

FHC will treat reporting as a governance tool. Monthly and quarterly reports will provide DHHS with statistics, trends, risks, actions taken, and recommendations. The strongest reporting examples in the source proposals do more than present numbers; they explain what the numbers mean and how the contractor is responding. FHC will follow that approach by pairing operational data with management interpretation, corrective action status, and clear requests for DHHS input when needed.

FHC will also submit quarterly reports within two weeks after the end of each quarter according to the State of Nebraska fiscal calendar. The quarterly report will include relevant statistics and detailed suggestions for process improvements through technology and innovation to improve Call Center operations and customer satisfaction. FHC will use reporting not just to satisfy a deliverable, but to give DHHS a practical management view of performance, issues, trends, corrective actions, and opportunities for improvement.

FHC will design reports so DHHS receives both statistics and management interpretation. A useful report should not only state what happened; it should explain what the data means, whether performance is stable, where risk exists, what corrective action is underway, and what decision or support may be needed from DHHS. FHC will use reporting to create a shared operating picture between the Call Center and DHHS.

Monthly reports will provide operational visibility into call volume, peak patterns, queue time, hold time, abandonment trends if available, staffing levels, vacancies, attendance issues, recruiting activity, outreach/outbound work, QA results, coaching activity, training updates, complaints, escalations, security/access issues, technology issues affecting operations, open action items, and process improvement opportunities. When a metric shows risk, FHC will identify the cause, the corrective action, the owner, and the expected resolution date.

Quarterly reports will take a broader view. In addition to required statistics, FHC will use the quarterly report to identify trends across months, summarize improvement actions, review staffing stability, highlight recurring customer issues, evaluate outreach effectiveness, identify training themes, and recommend practical improvements through process, reporting, training, quality assurance, or technology coordination. Recommendations will be grounded in observed performance and will be presented for DHHS discussion before implementation when they affect shared processes or State direction.



## **B. Proposed Development Approach**

FHC's proposed development approach is to build, refine, and improve the Nebraska DHHS Child Support Enforcement Customer Service Call Center as a controlled operating program, not as a technology replacement effort. FHC will not introduce unnecessary systems, separate data repositories, or unapproved workflows. Instead, FHC will develop the service model around DHHS-approved procedures, CHARTS documentation, State-provided technology, required staffing, outreach expectations, quality assurance, reporting, confidentiality, and continuous improvement. The approach is practical: define the process, train the staff, operate the process, measure performance, identify gaps, recommend improvements, obtain DHHS direction when needed, implement approved changes, and re-measure results.

For this contract, "development" means developing the operating model, procedures, training reinforcement, quality controls, reporting practices, outreach support, escalation paths, and improvement rhythm needed to run the Wausa Call Center reliably. FHC will develop these components in coordination with DHHS and will keep DHHS decision authority intact. FHC will recommend changes based on observed performance and customer service data, but will not independently alter DHHS policy, CHARTS requirements, customer-facing procedures, outreach direction, or security expectations.

### **B.1 Development Principles**

FHC will use five principles to guide development of the Call Center operating model. First, DHHS-approved procedures and CHARTS documentation will control how work is performed. Second, staff will be trained on Nebraska-specific child support workflows rather than generic call center scripts. Third, quality assurance will be used to identify both individual coaching needs and broader process improvements. Fourth, reporting will explain trends, risks, and corrective actions rather than simply listing statistics. Fifth, improvements will be coordinated with DHHS before implementation whenever they affect shared processes, customer-facing guidance, reporting expectations, technology use, security, or outreach direction.

### **B.2 Operating Model Development**

During transition, FHC will develop the operating model by translating RFP requirements into daily management routines. This includes how calls are answered, how callers are verified, how staff use CHARTS and the desk guide, how customer information is updated when permitted, how calls and follow-up actions are documented, how unresolved matters are escalated, how outreach/outbound work is assigned, how supervisors monitor the floor, how training questions are captured, and how issues are reported to DHHS. The result will be a practical operating model that staff can follow and supervisors can manage. FHC will develop daily management tools to support the operating model, including schedule review, attendance tracking, staffing risk review, outreach assignment tracking, training topic tracking, QA trend review, complaint/escalation tracking, technology issue tracking, security/access item tracking, and open action item review. These tools will help the on-site Call Center Manager manage the work in real time while giving FHC corporate support and DHHS a clear view of operating risk.

### **B.3 Procedure, Desk Guide, and Knowledge Support Development**

FHC will work within the DHHS-approved desk guide and procedures. When staff questions, QA findings, customer complaints, outreach trends, or escalation patterns show that guidance needs clarification, FHC will document the issue and discuss it with DHHS. FHC may recommend desk guide clarifications, job aids, call handling reminders, outreach talking point updates, escalation instructions, or training refreshers; however, any change that affects DHHS policy or customer-facing direction will be submitted for DHHS review and approval before implementation.

### **B.4 Call Handling and Outreach Workflow Development**

FHC will develop call handling workflows that make the CSR's work clear and repeatable. For inbound calls, the workflow will include greeting, caller verification, CHARTS review, use of DHHS-approved guidance, response to the caller, permitted updates, CHARTS narration, follow-up action, escalation when needed, and QA review.

For outreach/outbound calls, the workflow will include DHHS outreach direction, customer segment or call purpose, approved talking points, verification steps, documentation in CHARTS, follow-up requirements, escalation triggers, and reporting. These workflows will help staff provide consistent service while preserving DHHS control over program content.

## B.5 QA, Training, and Corrective Action Feedback Loop

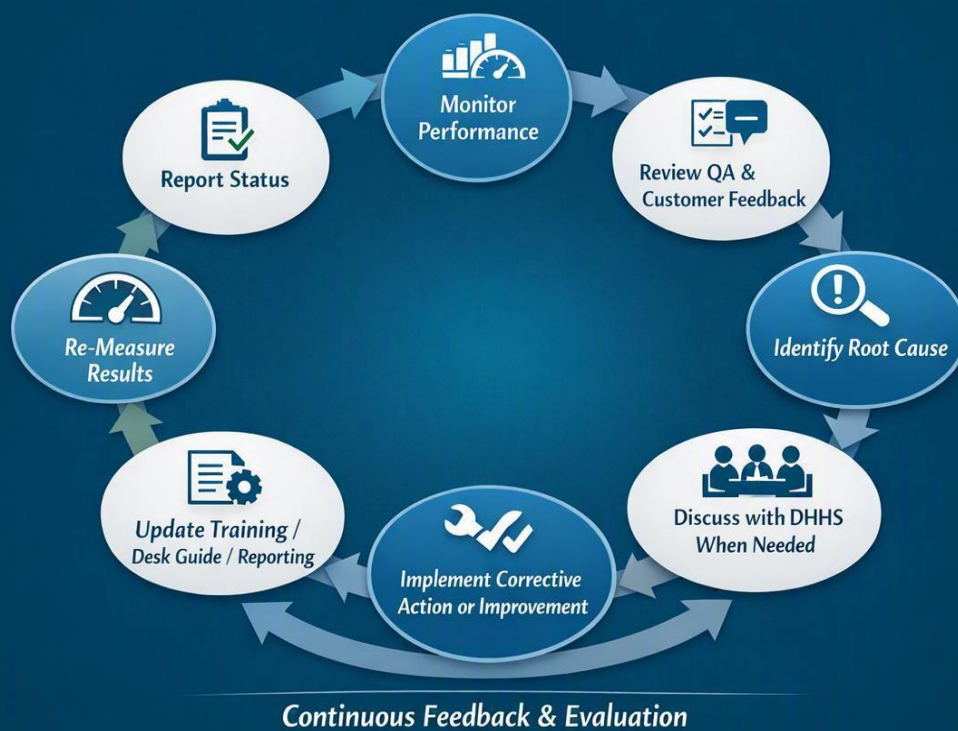
FHC will develop the Call Center through a closed feedback loop between quality assurance, training, supervision, and reporting. QA findings will not remain isolated scores. When QA identifies an individual error, FHC will coach the employee and document the corrective action. When QA identifies a recurring trend, FHC will determine whether the issue is caused by training, guidance, workflow, staffing, system access, documentation habits, or unclear escalation instructions. The corrective response may include refresher training, job aid development, desk guide clarification request, supervisor coaching, schedule adjustment, outreach script reinforcement, or DHHS discussion when State direction is needed.

## B.6 Reporting and Improvement Development

FHC will develop reporting so DHHS receives useful management information, not just raw counts. Monthly and quarterly reports will be structured to show what happened, what it means, what FHC is doing about it, and where DHHS input or approval may be needed. FHC will use reporting trends to identify improvement opportunities related to call volume patterns, Monday and post-holiday peaks, queue and hold time, staffing gaps, outreach activity, QA results, training needs, customer complaints, escalations, technical issues, security/access items, and recurring customer questions.

### Continuous Improvement Operating Rhythm

*Data-driven improvement that preserves DHHS decision authority.*



## **B.7 Change Control and DHHS Approval**

FHC will distinguish between operational adjustments within FHC's management authority and changes that require DHHS direction. FHC may adjust schedules, coaching, internal reminders, recruiting activity, supervisor focus, QA sampling emphasis, and training reinforcement to improve performance. FHC will seek DHHS review or approval before implementing changes that affect customer-facing guidance, outreach content, DHHS procedures, CHARTS documentation requirements, reporting definitions, technology use, remote work controls, security expectations, or any shared process. This protects DHHS authority while allowing FHC to respond quickly to operational needs.

## **B.8 Implementation of Approved Improvements**

When an improvement is approved or within FHC's authority to implement, FHC will assign an owner, define the action, communicate the change to affected staff, update training or job aids when needed, document the effective date, monitor results, and report status to DHHS. FHC will re-measure the affected performance area after implementation to determine whether the improvement worked or whether additional action is needed. This discipline ensures that proposed development remains connected to measurable operating results.

## **C. Technical Considerations**

FHC's technical approach is based on disciplined operation within the DHHS-provided technology environment. FHC is not proposing to replace DHHS systems, introduce a separate contact center platform, create independent data repositories, or assume ownership of State technology. Instead, FHC will operate inside the State's technology model by preparing users, managing access discipline, documenting work in CHARTS, reporting technical issues through approved channels, tracking operational impact, and coordinating with DHHS before any change affects systems, reporting, remote work, security, or customer-facing procedures.

The technical environment for this contract is a shared operating model: DHHS provides and maintains the core technology and support channels, while FHC ensures staff use those resources correctly, securely, and consistently. FHC will coordinate with DHHS on CHARTS access, user readiness, equipment assignment, voice and data readiness, remote equipment needs when approved, Help Desk procedures, CHARTS Production Support, incident reporting, and issue escalation. FHC supervisors will track whether technical issues affect customer service, queue conditions, CHARTS documentation, outreach work, reporting, security, or service continuity.

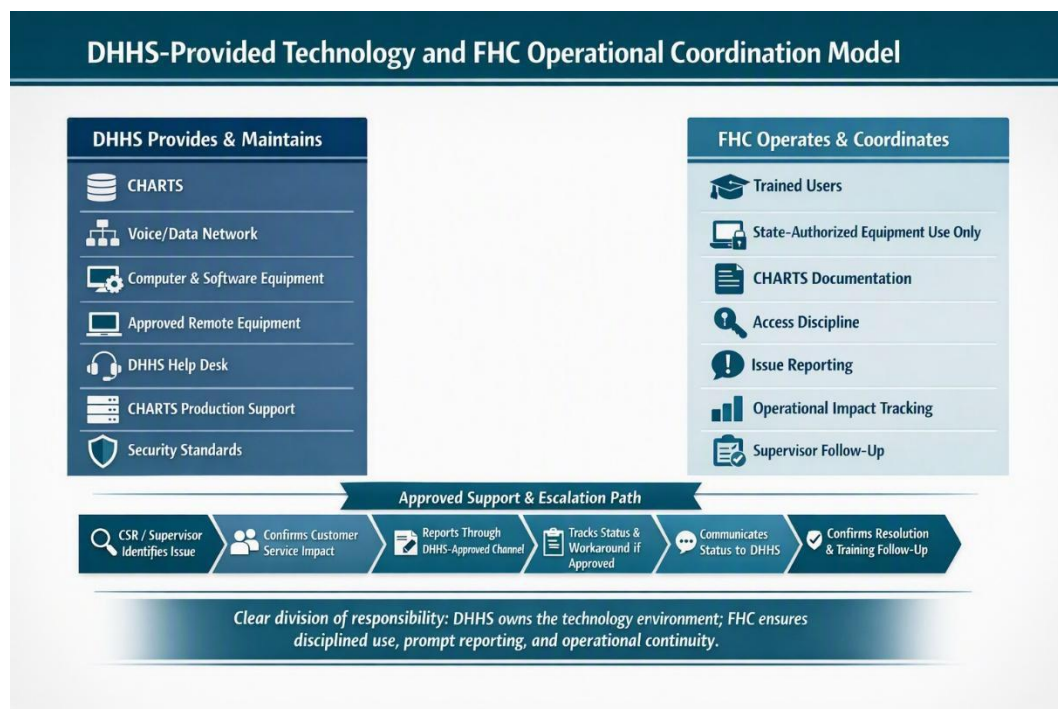
Because the Call Center depends on DHHS-provided systems, FHC will focus on disciplined user procedures. This includes confirming that staff use State-authorized equipment only, document calls in CHARTS according to DHHS requirements, follow the desk guide and approved procedures, escalate technical problems through the correct support paths, and avoid storing State data outside authorized systems. FHC will also coordinate with DHHS before implementing any change that may affect technology use, call routing, reporting, remote work, or customer-facing procedures.

## C.1 Technical Operating Assumptions

FHC understands that DHHS provides the core technical environment required to operate the Call Center, including CHARTS, data network connectivity, voice connectivity, computer and software equipment for the Wausa Call Center, approved remote equipment for authorized Nebraska-based remote staff, DHHS Help Desk support, CHARTS Production Support, Annual Security Awareness Training access, security standards, and direction regarding approved procedures. FHC will plan implementation and operations around these State-provided resources and will not assume responsibility for replacing or modifying them unless directed by DHHS.

## C.2 User Readiness and Access Discipline

FHC will manage the user side of the technology environment. During transition and steady-state operations, FHC will track which employees require CHARTS access, which staff have completed required prerequisites, which staff are authorized to use State equipment, and which issues may prevent an employee from working productively. FHC will coordinate access readiness with staffing, training, background check status, and security training so staff are prepared to use DHHS systems appropriately when assigned to production work.



Staff will not use personal devices, unapproved storage locations, informal spreadsheets, or separate repositories for DHHS customer information unless DHHS provides written authorization. Supervisors will reinforce access discipline through onboarding, security reminders, QA review, coaching, and incident escalation when needed.

## C.3 CHARTS Documentation and Data Handling

CHARTS will be treated as the authoritative system of record for Nebraska child support case activity. FHC will train staff to document customer contacts, permitted updates, outbound outreach, follow-up actions, escalation notes, and relevant call outcomes in CHARTS according to DHHS procedures.

FHC will not create a parallel case record outside CHARTS. If an operational tracker is needed for staffing, training, issues, or action items, it will not be used as a substitute for CHARTS case documentation or as a repository of confidential case information.

## C.4 Technical Issue Reporting and Operational Impact Tracking

FHC will establish a practical issue reporting process for staff and supervisors. When a CSR or supervisor identifies a CHARTS access issue, equipment issue, voice connectivity issue, data network issue, remote equipment issue, Help Desk issue, or other technical barrier, the issue will be reported through the DHHS-approved support channel.

## C.5 Remote Work Technology Controls

Remote work will be treated as a controlled extension of the DHHS technology environment, not as an alternate technology model. FHC will use remote work only as permitted by the RFP, only within Nebraska, only after training and probationary requirements are satisfied, and only with DHHS approval. Remote staff will use State-authorized equipment, follow DHHS security expectations, protect the work area from unauthorized viewing or disclosure, participate in supervision and QA, and report technical issues through the same approved support paths used by Wausa-based staff.

## C.6 Technology Change Coordination

FHC will not independently change DHHS technology, CHARTS procedures, call routing, reporting definitions, remote work procedures, security controls, customer-facing guidance, or approved workflows. If FHC identifies a technology-related improvement opportunity, FHC will document the business need, operational issue, expected benefit, affected process, risk, and DHHS decision needed. FHC will implement only those changes that are within FHC's operational authority or approved by DHHS through the agreed process.

## C.7 Continuity During Technical Disruption

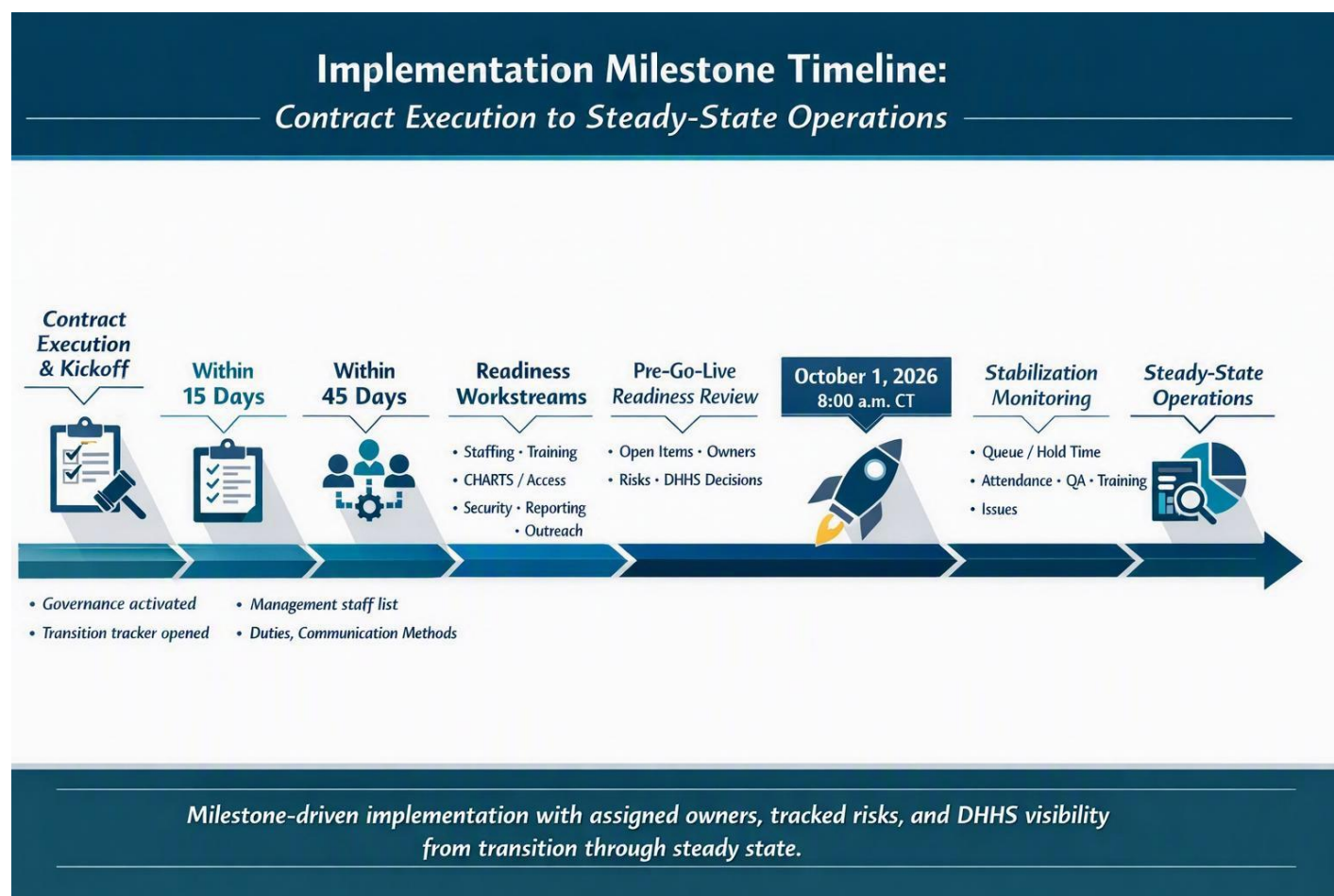
When a technical disruption affects operations, FHC will focus on service continuity, DHHS communication, and approved workarounds. FHC will identify the affected function, determine customer service impact, report the issue through the approved support channel, notify DHHS when the issue affects service levels or customer access, use only DHHS-approved workarounds, communicate status to affected staff, and confirm resolution before closing the issue. After resolution, FHC will determine whether refresher training, supervisor guidance, reporting adjustment, or process clarification is needed to prevent recurrence.

| Technical Area                      | DHHS Role                                                                    | FHC Role                                                                                                                      |
|-------------------------------------|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| <b>CHARTS</b>                       | Provides and maintains the system and related support.                       | Uses CHARTS as the system of record, trains users, documents contacts, reports issues, and avoids parallel case repositories. |
| <b>Voice and data network</b>       | Provides required connectivity and support paths.                            | Monitors operational impact, reports issues through approved channels, and communicates customer-impacting issues to DHHS.    |
| <b>Equipment and software</b>       | Provides State-authorized equipment and software for approved users.         | Ensures staff use authorized equipment only, report equipment issues, and follow security expectations.                       |
| <b>Remote work technology</b>       | Provides or approves remote equipment and remote work expectations.          | Uses remote work only with DHHS approval, only within Nebraska, and only with required security and supervision controls.     |
| <b>Help Desk and CHARTS support</b> | Provides support channels and resolution processes.                          | Reports issues promptly, tracks status and operational impact, and confirms resolution with affected staff.                   |
| <b>Security standards</b>           | Defines security requirements, training expectations, and approved controls. | Trains staff, enforces access discipline, escalates incidents, supports audits, and coordinates corrective actions.           |

## D. Detailed Project Work Plan, Management, and Implementation

FHC will implement the Nebraska DHHS Child Support Enforcement Customer Service Call Center through a controlled, milestone-driven work plan that establishes leadership, staffing, training, access, security, reporting, and operating controls before the October 1, 2026 go-live date. FHC's implementation plan begins at contract execution, moves through structured transition and readiness validation, launches full operations at 8:00 a.m. Central Time on October 1, 2026, and continues through a defined stabilization period into steady-state management. The plan is designed to protect service continuity at the Wausa Call Center, retain and support qualified staff where appropriate, fill vacancies promptly, prepare staff to use DHHS systems and procedures correctly, and give DHHS clear visibility into progress, risks, decisions, and operational readiness.

FHC will manage implementation through six connected controls: executive governance, workstream ownership, transition tracking, readiness validation, issue escalation, and stabilization monitoring. FHC will assign accountable owners for each implementation workstream, maintain a transition action tracker, document risks and issues, confirm required deliverables, and review progress with DHHS on a regular cadence. This structure ensures that implementation work is not handled informally; every major activity will have an owner, target date, status, dependency, and escalation path.



### D.1 Implementation Governance

Immediately after contract execution, FHC will activate its implementation governance model. FHC will designate an executive sponsor for senior oversight, a contract/implementation lead for day-to-day transition coordination, the required on-site Call Center Manager for Wausa operations, and corporate support leads for staffing, recruiting, training, quality assurance, reporting, security/compliance, and contract administration.

The on-site Call Center Manager will be the daily operational authority at the Wausa Call Center and will coordinate with FHC's implementation lead and DHHS to ensure staffing, training, call handling, escalation, security, and reporting expectations are executed consistently.

FHC will conduct a formal kickoff with DHHS, establish the transition meeting cadence, and maintain written meeting notes with owners, due dates, decisions, and open items. During transition, FHC will use implementation meetings to review staffing progress, staff communication, recruiting status, training readiness, access and equipment dependencies, security prerequisites, outreach preparation, reporting formats, open risks, and go-live readiness. FHC will escalate unresolved or time-sensitive items promptly so they do not affect the October 1, 2026 launch.

## D.2 Implementation Workstreams

FHC will execute implementation through coordinated workstreams with defined outputs. The **staffing and retention workstream** will complete staff communication, assess current staffing, support retention of qualified staff where appropriate, identify vacancies, activate recruiting, confirm schedules, and assign the two dedicated outreach/outbound CSRs.

The **training and procedure workstream** will prepare staff to follow DHHS-approved procedures, use CHARTS correctly, document contacts, protect confidential information, handle inbound calls, complete outbound outreach, escalate unresolved matters, and apply desk guide direction.

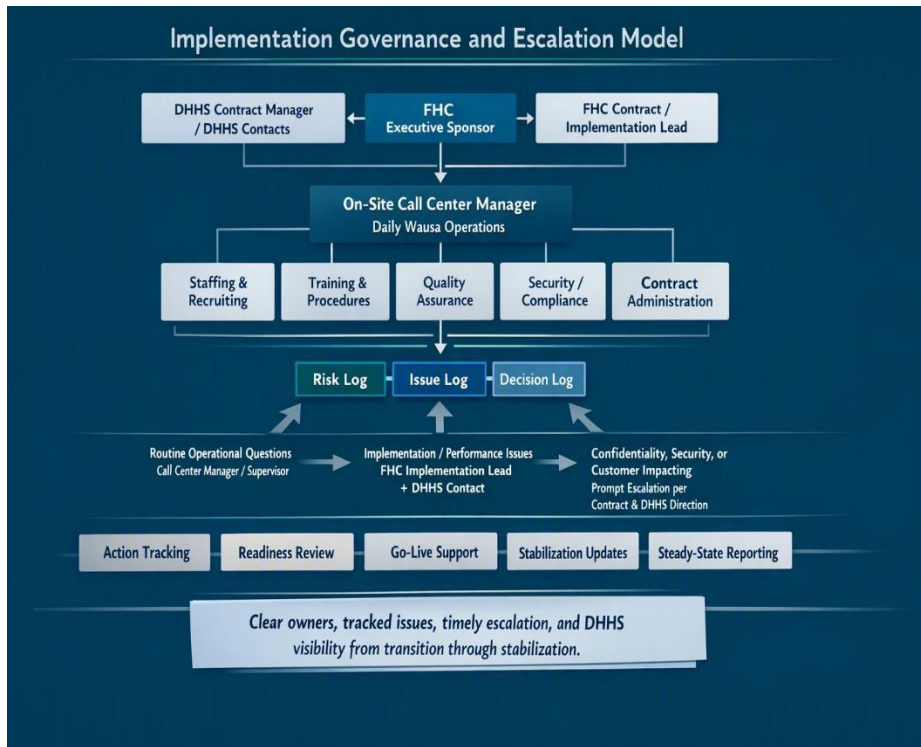
The **technology and access workstream** will coordinate State-provided equipment, CHARTS access, voice/data readiness, approved remote equipment if applicable, Help Desk procedures, and CHARTS Production Support processes. The **security and compliance workstream** will track background checks, Annual Security Awareness Training, confidentiality requirements, remote work controls, incident escalation procedures, audit readiness, and the required security plan. The **reporting and governance workstream** will confirm monthly and quarterly report content, staffing deficit reporting, QA and training metrics, outreach reporting, complaint and escalation tracking, and process improvement reporting.

## D.3 Readiness Validation Before Go-Live

FHC will complete a formal go-live readiness review with DHHS before October 1, 2026. The readiness review will confirm the on-site Call Center Manager is prepared to lead daily operations, required CSR staffing and schedules are established, the two outreach/outbound CSR assignments are confirmed, supervisory coverage is in place, staff communication is complete, training and security prerequisites are tracked, CHARTS and equipment access are ready or assigned for completion, desk guide and approved procedures are available, call documentation expectations are established, QA and coaching processes are active, reporting templates are confirmed, and escalation paths are understood. FHC will document any remaining open items with owners, due dates, operational impact, mitigation steps, and escalation status. FHC will resolve items within its control before go-live and will coordinate with DHHS on items dependent on State systems, access, facility, or policy direction.

## D.4 Risk, Issue, and Decision Management

FHC will manage risks, issues, and decisions through separate logs so DHHS can quickly distinguish potential future risk from active implementation barriers and items requiring State direction. FHC will document each risk with an owner, potential impact, mitigation action, target date, and escalation status. FHC will document each issue with the date opened, operational impact, responsible owner, corrective action, target resolution date, and current status. FHC will document each DHHS decision request with the background, decision needed, timing impact, and recommended path when appropriate.



FHC will use a practical escalation path. Routine operating questions will be handled by the Call Center Manager and supervisors. Staffing, training, reporting, access, security, customer service, or go-live readiness issues that require broader action will be escalated to FHC's implementation lead and the appropriate DHHS contact.

Confidentiality concerns, suspected security incidents, service disruptions, system access problems affecting operations, and customer-impacting issues will be escalated promptly according to contract requirements and DHHS direction. FHC will not allow unresolved issues to remain informal; significant items will be tracked until closed.

## Section D: Detailed Project Work Plan, Management, and Implementation

*Nebraska DHHS Child Support Enforcement Customer Service Call Center Implementation*

| Executive Governance                                                                                                                      | Workstream Ownership                                                                                                                                                                                        | Transition Tracking                                                                                                          | Readiness Validation                                                                                                                                                                     | Risk / Issue / Decision Management                                                                                                   | Go-Live + Stabilization                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>► FHC Executive Sponsor</li> <li>► FHC Implementation Lead</li> <li>► DHHS Coordination</li> </ul> | <ul style="list-style-type: none"> <li>► Staffing / Retention</li> <li>► Training / Procedures</li> <li>► Technology / Access</li> <li>► Security / Compliance</li> <li>► Reporting / Governance</li> </ul> | <ul style="list-style-type: none"> <li>► Action Tracker</li> <li>► Owners &amp; Due Dates</li> <li>► Dependencies</li> </ul> | <ul style="list-style-type: none"> <li>► Staffing &amp; Schedules</li> <li>► Training &amp; CHARTS Access</li> <li>► Equipment &amp; QA</li> <li>► Reporting &amp; Escalation</li> </ul> | <ul style="list-style-type: none"> <li>► Risk Log</li> <li>► Issue Log</li> <li>► Decision Log</li> <li>► Escalation Path</li> </ul> | <ul style="list-style-type: none"> <li>► October 1, 2026, 8:00 A.M. CT</li> <li>► Queue / Hold Monitoring</li> <li>► Attendance &amp; QA</li> <li>► Outreach Activities</li> <li>► Technical Issues</li> <li>► Corrective Action</li> </ul> |

*Milestone-driven implementation with accountable owners, tracked risks, DHHS visibility, and controlled transition to steady-state operations.*

### Steady-State Management Rhythm



Daily Coverage Review



Weekly Management Review



Monthly Reports



Quarterly Meetings

## **D.5 Go-Live and Stabilization**

On October 1, 2026, FHC will launch full Call Center operations at 8:00 a.m. Central Time with management, staffing, supervision, reporting, issue escalation, and DHHS communication channels active. The Call Center Manager will manage the Wausa operation in real time, including attendance, coverage, queue conditions, break and lunch schedules, outreach assignments, escalations, and staff questions. FHC's implementation lead and corporate support resources will remain engaged during launch to address staffing, training, access, reporting, security, or operational issues that require immediate attention.

During stabilization, FHC will monitor queue time, hold time, call volume, attendance, schedule adherence, staffing levels, CHARTS documentation, outreach activity, QA results, training questions, complaints, escalations, technical issues, security/access items, and open action items. FHC will provide DHHS with stabilization visibility through status updates and issue tracking. When trends emerge, FHC will identify the cause, assign corrective action, communicate the expected resolution, and re-measure results. Stabilization will transition into steady-state operations once staffing, reporting, escalation, QA, training, outreach, and technical coordination are functioning consistently.

## **D.6 Steady-State Management Rhythm**

After stabilization, FHC will manage the contract through a repeatable operating rhythm. Daily management will include attendance review, schedule coverage, queue monitoring, escalation review, staff support, outreach assignment review, and immediate issue resolution. Weekly management review will focus on staffing status, recruiting progress, QA trends, coaching needs, training updates, outreach activity, technology issues, complaints, security/access items, and open action items. Monthly reporting will provide DHHS with operating data, analysis, staffing status, remediation steps, and improvement opportunities. Quarterly reporting and meetings will provide a broader review of trends, performance, staffing stability, outreach effectiveness, QA themes, training needs, customer issues, security/compliance items, and recommended improvements.

## **E. Deliverables and Due Dates**

FHC will manage deliverables as part of contract governance and operational accountability. Each deliverable will have an assigned owner, due date, data source, internal review step, submission path, and follow-up process. The Call Center Manager and FHC's designated contract/implementation lead will track required submissions, confirm due dates, gather supporting data, review content for accuracy, and coordinate with DHHS when clarification, correction, approval, or follow-up action is needed. Deliverables will be treated as evidence of operating control, not as stand-alone paperwork.

### **E.1 Deliverables Governance**

FHC will maintain a deliverables calendar that tracks all required transition, operational, security, reporting, staffing, and continuous improvement submissions. The calendar will identify the deliverable, due date or frequency, responsible FHC owner, DHHS contact or submission path, source information, internal review step, and status. During implementation, the deliverables calendar will be reviewed as part of transition meetings. During steady-state operations, it will be reviewed as part of the management rhythm so deadlines, open items, and corrective actions remain visible.

## E.2 Transition and Start-Up Deliverables

Transition deliverables will be managed as readiness controls for the October 1, 2026 go-live date. FHC will submit the management staff list, duties, and communication methods within 15 days after contract execution; the transition and staff retention plan within 45 days after contract execution; and the security plan within 60 business days of contract award.

These submissions will be developed from the same transition governance process used in Section D, including assigned owners, open item tracking, DHHS decision needs, and readiness review.

## E.3 Operational and Reporting Deliverables

Operational deliverables will be tied to the actual management of the Call Center. Monthly reports will summarize performance, staffing, outreach, quality assurance, training, complaints, escalations, security/access items, technology issues, process improvement activity, and remediation steps. Quarterly reports will provide broader trend analysis and process improvement recommendations, including practical opportunities related to technology coordination, training, reporting, workflow, quality assurance, outreach, and customer satisfaction. When staffing deficits occur, FHC will disclose the deficit, describe recruiting and interim coverage activity, and provide a remediation timeline.

## E.4 Quality Control Before Submission

Before submitting a deliverable to DHHS, FHC will review the content for completeness, consistency, accuracy, and alignment with contract requirements. Operational data will be checked against available source information; narrative explanations will be reviewed to ensure they explain the issue, impact, action taken, owner, and target date when applicable; and any DHHS decision needs will be clearly identified. This review process will help ensure that deliverables are useful to DHHS for oversight and decision-making, not merely compliant in form.

## E.5 Follow-Up, Correction, and Continuous Improvement

FHC will not treat submission as the end of the deliverable process. If DHHS requests clarification, correction, additional detail, or follow-up action, FHC will assign an owner, document the request, provide the response, and track the item to closure. Deliverables will also feed the continuous improvement process. Monthly and quarterly reporting trends, QA findings, staffing gaps, customer complaint themes, technology issues,

security/access items, and outreach activity will be used to identify actions that improve Call Center operations and customer service.



## In Conclusion:

FHC appreciates the opportunity to submit this Technical Proposal to support the Nebraska Department of Health and Human Services Child Support Enforcement Customer Service Call Center. FHC understands the importance of this work to Nebraska families, employers, courts, county partners, DHHS staff, and the broader child support program. The Call Center is more than a phone queue; it is a daily public-facing service point where callers need accurate information, respectful communication, secure handling of sensitive information, and clear next steps. FHC's proposal is designed to preserve that service continuity while strengthening management visibility, training discipline, quality assurance, reporting, security, and continuous improvement.

FHC's approach is intentionally practical and Nebraska-specific. We will operate within DHHS-approved procedures, use CHARTS as the system of record, protect confidential information, coordinate through State-provided technology and support channels, staff the Wausa operation with the required on-site leadership and CSR model, and manage outreach, training, QA, reporting, and escalation as connected parts of one disciplined operating program. We will not ask DHHS to adapt to an unnecessary platform or generic call center model; instead, FHC will align its management structure, corporate support, and daily operating controls to the requirements of this contract.

From contract execution through transition, go-live, stabilization, and steady-state operations, FHC will provide DHHS with clear owners, tracked deliverables, documented risks and issues, timely escalation, and management reporting that explains both performance and corrective action. Our proposed approach gives DHHS a contractor that understands the importance of continuity, respects State decision authority, and is prepared to manage the Call Center with accountability every business day.

FHC is committed to being a responsive, transparent, and responsible partner to DHHS. We are prepared to support Nebraska's Child Support Enforcement Customer Service Call Center with experienced leadership, trained staff, secure practices, measurable performance controls, and a continuous improvement mindset focused on accurate service to the people who rely on this program. FHC looks forward to the opportunity to partner with DHHS and contribute to a stable, effective, and customer-focused Call Center operation for the State of Nebraska.

F.

H.

C.

# Appendix A

# SHERI A. CANN

President & CEO

Sheri is a visionary executive with 29 years of experience managing all levels of multiple call center and BPO projects, including operations, budgeting, and administration. Her expertise includes federal government contracting, regulatory affairs, continuous process improvement, and human resources. As President and CEO, Sheri evaluates company initiatives and advises on the impact of long-range planning. She is directly involved with the introduction of new programs and strategies to build the organization management.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA

Owner, President & CEO | 1999 – Present

- Co-founded and developed agency.
- Evaluates and advises on the impact of long-range planning, introduction of new programs/strategies.
- Ensures compliance with applicable federal, state, and local laws, regulations, and client guidelines.
- Plans, develops, organizes, implements, directs, and evaluates the organization's function and performance.
- Optimizes the handling of customer relationships and initiates appropriate strategies to enhance sales.
- Motivates and develops employees; oversees Human Resource policies.

### ***Valentine & Kebartas, Inc.***

Lawrence, MA

Accounts Receivable Management/Customer Service Manager | 1995 – 1999

- Managed a default prevention program focused on utility delinquency.
- Coordinated resolution of borrows disputes per clients' guidelines.
- Managed and maintained a portfolio of medical, utility, and commercial clients, ensuring compliance, with all federal, state, and local regulations.



# SHERI A. CANN

President & CEO

## PROFESSIONAL EXPERIENCE

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- Oversaw customer service/administrative staff.

### **Blue Cross Blue Shield of Massachusetts**

Methuen, MA

Quality Control/Health Information Management | 1990 – 1994

- Managed day-to-day operations of the Risk Identification and Management (RIM) Program, reinforcing compliance, health information best practices, and industry standards.
- Provided leadership for documentation improvement and successful ICD-9 coding.
- Articulated the organization's vision for records and information management through policy, budget, and organizational initiatives.
- Responsible for the management of all recorded information, physical and electronic, generated and maintained by the company.
- Oversaw Quality Control Team for the successful operation of all aspects of health information.
- Management including chart prep and scanning, release of information, quality, audits, legal requests/subpoenas, and record center for all authorized entities in the health care delivery systems.

## EDUCATION

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### **Northern Essex Community College**

Business Management

## JOB SUMMARY

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As the Chief Executive Officer and President, Sheri provides leadership for all aspects of the company's operations with an emphasis on long-term goals, growth, profit, and return on investment.

# KARA CANN-BENCOSME

Chief Operating  
Officer

Kara is a data driven and results-oriented executive with over 12 years of combined executive experience in Chief Operating Officer and Executive Vice President positions. As Chief Operating Officer, she oversees multiple call center and BPO divisions, including operations, business development, finance, human resources, and information technology. Kara is focused on continuous improvement in the company, building better processes and systems, increasing market share, and developing leadership within FHC.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Chief Operating Officer | 2023 - Present**

- Oversees all company operations to include 3 physical locations and national remote workforce for over 1,000 FTE.
- Oversees the creation and execution of budgets and financial management.
- Creates strategic goals and designs efficient operating strategies.
- Assures all client expectations are met or exceeded.
- Efficiently on-boards clients to streamline processes and maximize recoveries.
- Oversees innovative IT strategies that meet the company's business needs and maintains utmost security.
- Provide overall leadership and guidance to the HR function by overseeing talent acquisition, career development, succession planning, retention, training, leadership development, compensation, and benefits nationally.

### **Executive Vice President | 2014 - 2023**

- Contract Administrator on Department of Education, Federal Student Aid (FSA) PCA Contract
- Provided full life cycle strategic contracts administration leadership.
- Displayed knowledge of legal requirements involved with contract.
- Administered contracts with the federal government and subcontracts with large and small business prime contractors for FHC.

# KARA CANN-BENCOSME

Chief Operating  
Officer

- Advised on contractual requirements.
- Displayed knowledge of federal government contracting reporting requirements and the Contractor performance Assessment Reporting System (CPARS)
- Displayed knowledge of federal acquisition regulations (FAR)
- Deputy Contract Administrator on FSA PCA Contract

## COFFEE CANN CAFE

Lawrence, MA and Hampton, New Hampshire

### Chief Operating Officer | 2011 - 2018

- Worked to improve the operational efficiency and enhance customers' experience.
- Ensured products delivered were of a high quality.
- Oversaw the recruitment of staff and ensured strict adherence to safety regulations.

## Massachusetts State House, Committee on Financial Services

Boston, MA

### Relevant Apprenticeship

## EDUCATION

### Emmanuel College

BA, Mathematics Minor, Economics

## JOB SUMMARY

As the Chief Operating Officer, Kara is focused on implementing the company strategies into daily operations to meet objectives.

### Supervisory Responsibilities:

- Oversees the ongoing operations of FHC's Operations, Business Development, Finance, Human Resource, and IT divisions.
- Responsible for revenue and company expenses.
- Assures all client expectations are met or exceeded.

# SARA ALOSA

Point of Contact and  
Program Manager

Sara serves as the Point of Contact and Program Manager. She is the main point of contact during client on-boarding and oversees the Client Services Department to ensure standards of quality service and continuous improvement are maintained. She has 28 years of senior executive leadership experience in call center and BPO operations and possesses expertise in client relations, service excellence, operations and team leadership, project management, and product development.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Senior Vice President of Corporate Strategy | 2019 - Present**

- Leads and manages the prime contractor program with full authority to commit the company on behalf of the contract, and to also direct all subcontractor and vendor efforts in fulfillment of the requirements.
- Leads call center operations for agency, including staffing, costing, and technology.
- Works closely with new clients during contract implementation to ensure FHC addresses the clients' needs and requirements.
- Manages client services personnel and day-to-day operational processes to research and resolve client issues and concerns.
- Communicates with clients, internal departments, and third-party vendors daily.
- Project Experience: She has extensive experience as the Project Manager for State of NH DPHHS, State of IL LIHEAP Program Call Center, MA Executive Office of Health and Human Services (EOHHS) and Department of Education Private Collection Agency Contract and Federal Student Aid NextGen BPO contract. Furthermore, Sara was instrumental in rapidly deploying an emergency call center for MA DUA, for which we were contracted three times for emergency services and recently awarded as the prime contractor on a non-emergency RFP.

### **Granite State Management & Resources**

Concord, NH

# SARA ALOSA

Point of Contact and  
Program Manager

## Vice President and Chief Servicing Officer | 2017 - 2019

- Collaborated with the President/CEO and leadership team on new business development and strategic partnerships to drive call center revenue and ensure operational success.
- Led 100+ direct and indirect reports.
- Oversaw a portfolio with 920,000 borrowers valued at over \$14 billion.
- Provided strategic leadership, management, and vision to build an agile organizational structure that enabled rapid movement of people and resources to capture new market opportunities.

## Vice President and Chief Servicing Officer | April 2018 - August 2018

## Vice President, Loan Servicing | July 2017 - April 2018

## Vice President, Guarantor and Loan Origination | 2010 - 2017

Responsible for all default prevention, collection activity, and private loan origination for the entire organization while managing a \$60 million-dollar loan collection portfolio.

- Ranked #1 nationally for lowest three-year cohort default rate for 6 of past 7 years; strongly emphasized default prevention and helped borrowers prevent and/or cure default.

## EDUCATION

### Franklin Pierce College

Business Management

### Boston University

Corporate Education, Quality Assurance  
for Business Analysts

## JOB SUMMARY

Sara acts as primary liaison for the TWC Call Center and service side of the client relationship including responsibility for relationship management and service delivery.

# ERNESTO BENCOSME

Technical  
Project Manager

Ernesto is an accomplished, strategic, and growth focused professional with 16 years of experience in the call center and BPO industry. As the SVP he provides full oversight of the Operation Team and is responsible for monitoring compliance to client deliverables, staffing levels, and customer satisfaction. Ernesto ensures consistent, high quality, customer-facing service is being provided across multiple communication platforms.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Senior Vice President of Operations | 2020 - Present**

- Maintain full accountability for daily performance of multi-site call center and BPO operations, including personnel management, strategic planning, performance monitoring, process improvement, and forecasting.
- Identify opportunities to implement best practices and strategies for process improvement and overall efficiency.
- Focus on coaching and developing employees into leadership positions by using professional development tactics. Instill self-motivation and professional excellence among staff to drive high productivity and goal achievement.
- Holds full accountability in monitoring daily performance of both front and back-office processes throughout multiple locations and various time zones.
- Oversees strategic implementation of a new branch office, including entire build-out to functional office within six months.
- Sets strategic direction in meeting key performance and revenue objectives as well as key client performance metrics.
- Responsible for managing budgets, revenue, expenditures, recruitments, staff management, and training.
- Project Experience: His qualifications include overseeing other large contact center projects such as the NH DPHHS, IL LIHEAP, MA EOHHS, Department of Education Private Collection Agency Contract and Federal Student Aid NextGen BPO contract.

# ERNESTO BENCOSME

Technical  
Project Manager

- Observes strict compliance with all clients, regulatory, federal, and state requirements (with emphasis on the customer experience).

## Senior Director of Operations | 2018 - 2020

- Established the strategic direction for the organization with a focus on meeting key revenue objectives and client expectations.
- Implemented best practices to consistently meet performance targets, revenue objectives, and performance metrics.
- Led the strategic and financial performance of a 500+ person operation. Directed the overall operation, which included operations management, human resources, performance management, staff supervision, professional development, and information technology.
- Managed hiring, training, and coaching of employees to continually drive performance improvement.

## Collections Manager | 2013 - 2018

## Team Lead Collection Specialist | 2009 - 2013

## Senior Administrative Assistant | 2008 - 2009

### EDUCATION

**Northern Essex  
Community College**  
Business Management

### JOB SUMMARY

As the Technical Project Manager, Ernesto plans, directs, coordinates, and oversees operation activities in the organization, ensuring development and implementation of efficient operations and cost-effective systems to meet current and future needs of the organization.

# DON DITTEMORE

Chief Information Officer

Don is an accomplished IT executive with more than 25 years of success leading and managing mission critical projects. He has broad expertise in developing IT architecture, from infrastructure and back-office software to consumer facing applications. He is skilled in infrastructure design/operation with on premise, hosted, Co-location, and AWS cloud implementations, including migration of existing applications and architecture of new systems.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Chief Information Officer | 2019 - Present**

- Executive leadership over the Information Technology teams including: Engineering, Desktop Support, Information Security, Development
- Primary technical point of contact with both vendors and clients
- Responsible for FHC's technical architecture and maintenance
- Project Experience: Mass Department of Unemployment, Call Center, Primary technical point of contact with MA DUA. Designed and built VDI in support of the contract using Azure Virtual Desktops. Designed and executed technical training for end users. Designed a desktop support model for collaboration between FHC and DUA support personnel.
- Project Experience: New Hampshire Department of Health and Human Services, Call Center, Primary technical point of contact with NH-DHHS. Implemented an intricate IVR flow in support of the contract within aggressive timelines. Designed a desktop support model to reduce client burden. Designed and implemented a robust monitoring program to maximize uptime.
- Project Experience: FSA NextGen, Call Center, Primary technical contact with the Department of Education. Designed and built all technical components to support contract operations. Maintains an operationally efficient environment focusing on confidentiality, integrity and availability.

# DON DITTEMORE

Chief Information Officer

## TD Technologies, LLC

### Consultant | 2017 - 2019

- Completed various consulting engagements concentrating on security stance evaluations as well as implementing technological solutions to streamline small business ecommerce and maximize organizational efficiencies.

## IMAGITAS, a Red Ventures Company (formerly a Pitney Bowes Company)

Waltham, MA

### Chief Information Officer | 2015 - 2017

## RS Information Systems, Office of Naval Research

Arlington, Virginia

### Program Manager | 2000 - 2007

## EDUCATION

### George Mason University

Communications

## CERTIFICATIONS

- Amazon Web Services Training: Tech Essentials
- ISC2: Certified Information Systems Security Professional (CISSP)
- Project Management Institute (PMI): Project Management Professional (PMP)
- Learning Tree International: Project Management Certified Professional
- Oracle University: Principles of SQL and PL/SQL

## JOB SUMMARY

As the Chief Information Officer Don develops, plans, and implements an information technology (IT) strategy that meets the company's business needs, delivers optimal return on investment, and maintains utmost security.

# JEFF MURPHY

Vice President of Development & Information Technology

Jeff has over 24 years of broad experience in the contact center and BPO industry, with a strong emphasis on innovation, systems development, and integration. As the VP of Development, Jeff provides leadership and direction for the maturation of products and services. Keeping up with current technology and trends to further enhance the student experience, the team provides compliant technical solutions to an ever-changing landscape.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Vice President of Development | 2019 - Present**

- Maintains knowledge of emerging technologies and trends in engineering and development related to the organizations industry.
- Negotiates cost-effective contracts for the organization; coordinates and implements contractors work, and resolves any disputes over labor, scheduling, or payments.
- Performs other duties as assigned.
- Project Experience: FSA Next Gen Contact Center, Provides oversight of all internal performance monitoring and reporting. KPIs published multiple times a day to ensure visibility into the project down to the agent level.
- Project Experience: Mass Department of Unemployment, Contact Center, Billing reconciliation, consolidating every individual employee punch to service level tier to ensure accurate and proper billing.
- Project Experience: New Hampshire DHHS, Contact Center, Primary technical point of contact for NH-DHHS data and analytics. Implemented fully customized CRM to aggregate caller needs and call reasons.
- Project Experience: Navy Federal Credit Union, Collections 1st and 3rd Party, Managed the development of all electronic file exchanges between FHC and CACS. Automated daily file transmissions and QA to ensure data quality and delivery.
- Project Experience: Department of Education PCA, Provided application development/customization for the program specifics for the US Department of

# JEFF MURPHY

Vice President of Development  
& Information Technology

Education. Windows, checklists created to ensure compliance with all steps required for various programs including, AWG, Loan Rehabilitation, Consolidation, Income Driven Repayment and more. Built and maintained correspondence and image capture systems that allowed for account identification, correspondence type and upload back to the Department of Education. Managed a team of developers who also provided all required reporting. Implemented electronic document signing capabilities, further increasing efficiency and time to resolution.

## L J Ross Associates Inc

VP of IT | 2018 - 2019

- SOC II and ISO27001:2015 (report and certification).
- Implemented multi-factor authentication (DUO).
- Overhauled all import/exports for improved efficiency and accuracy.

## FACS Transworld Systems Inc.

VP of IT | 2017 - 2018

- Lead a team of 25 remote employees with 4 direct managers to fully support all aspects of the FACS System which supports over 1000 users.
- Improved process efficiencies, and overall performance.
- Reduced ticket resolution times from 6 months to 2 weeks.

## EDUCATION

### US Army

2016 - 2019

## JOB SUMMARY

As the Vice President of Development will plan, direct, coordinate, and oversee activities in the Engineering and Development department, ensuring the development and implementation of efficient operations and cost-effective systems to meet current and future needs of the company.

# MICHAEL BEATTY

Chief Compliance Officer  
& General Counsel

Mike is a seasoned corporate attorney with a background in corporate governance, regulatory compliance, and consumer litigation. He has proven experience developing and implementing strategies focused on compliance, litigation, risk mitigation, and training. Mike is a results-driven leader with a reputation for achieving goals, maintaining employee adherence to corporate rules, and building relationships within the company to ensure cohesion between Operations and Compliance.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



#### **Chief Compliance Officer and General Counsel | 2012 - Present**

- Responsible for FHC's compliance to laws, regulations, and client contractual requirements.
- Investigates and remediates any compliance violations of FHC's processes and procedures.
- Stays abreast of regulatory requirements and legal trends in the industry.
- Responds to consumer complaints, coordinates litigation defense with network of external counsel.
- Negotiates and drafts client contracts.
- Assists in writing, reviewing, and tracking of company policies and procedures.
- Implements and maintains Compliance Management System.
- Develops and manages Internal Audit Program and Quality Assurance Team.
- Responds to external auditors for all clients and regulators.

### **First Marblehead Corporation**

#### **Counsel | 1997 - 2011**

- Responsible for litigation, bankruptcy, and decedent education loan portfolios.
- Drafted and audited Sarbanes-Oxley controls for Collections Department.

# MICHAEL BEATTY

Chief Compliance Officer  
& General Counsel

- Managed relationships with 15 to 20 third party collection agencies.
- Responded to escalated borrower complaints; coordinated litigation defense with network of external counsel.
- Maintained accurate records; ensured proper management of bankruptcy and death claims.
- Ensured data accuracy and integrity in all database systems.
- Worked with Compliance Department to ensure compliance with government regulations and client contracts. Education. Windows, checklists created to ensure compliance with all steps required for various programs including, AWG, Loan Rehabilitation, Consolidation, Income Driven Repayment and more. Built and maintained correspondence and image capture systems that allowed for account identification, correspondence type and upload back to the Department of Education. Managed a team of developers who also provided all required reporting. Implemented electronic document signing capabilities, further increasing efficiency and time to resolution.

## EDUCATION

### New England School of Law

Juris Doctorate

### University of Massachusetts at Boston

Bachelor of Arts

## JOB SUMMARY

- Responsible for the development or implementation of policies and procedures related to compliance throughout the organization.
- Responsible for oversight of Quality Assurance Department, manage Complaints and Disputes, and ensure consumer-facing compliance.
- Manage on-boarding and continued oversight of Third-Party Vendors.

# ROBERT GAUTHIER

Call Center  
Manager

With over 17 years of experience, and 5 years of direct unemployment insurance call center services Robert has a deep knowledge of common claimant pain points, agent coaching and training, and mentoring senior agents for supervisory promotions. He utilizes lessons learned to provide superior service to Texans, TWC subject matter experts, and Telephone Claim Center Leadership. Throughout the contract he oversees all Call Center Supervisors and Trainers, ensuring best practices and workflows meet TWC standards.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Call Center Manager | 2008 – Present**

- Robert is responsible for day-to-day operational delivery and supports all supervisors and agents. Each supervisor reporting to Robert is responsible for monitoring the daily functions of their assigned agents, phone calls, coaching, and additional training. He is responsible for the entire Contact Center service delivery model including SLAs, handle times, speed of answer, hold in queue times, and one-call resolution rates.
- Robert has a proven contact center track record of improving competitive performance through production management, staff development, strategy, and the use of technology. He has outstanding interpersonal, motivational, and presentation skills. He is analytical, articulate, and possesses a diligent work ethic.
- Robert manages the growth and development of supervisors assigned to the TWC Contact Center and executes goaled coaching and call assessments.
- He has extensive experience with MA DUA, MA DOR, and U.S. ED FSA call center projects. Trained over 185+ employees virtually at one time with highest success rate for all Customer Service Divisions.
- Project Experience MA DUA: Served as contact center manager my second time working on this project. Led a team of 7 supervisors and 175 agents. Fully trained in UIO and Five9. Provided daily updates on trends that needed attention to ensure the agents were coached and we continue to provide excellent customer service to

# ROBERT GAUTHIER

Call Center  
Manager

the Claimants. Attended meetings with leaders at DUA and FHC regularly to discuss strategy and current events on the project.

- **Project Experience FSA NextGen:** Served as contract manager for lifetime of the project. Spearheaded meetings with FSA and oversaw successful implementation of services, including meeting the Go-Live milestone. Collaborate with project stakeholders to ensure seamless delivery of all services including CSR phone, chat, and email solutions. Fully trained in Salesforce, NICE CX, NICE WFM. Organized successful implementation of 5 special projects for FSA including PSLF (2021-2022), Borrower Defense, (2023) FAFSA surge support (2024), and FAFSA beta testing (2024) while overseeing operations for a 900 person contact center. Served as contact center manager on this project. Led a team of 12 supervisors and 300+ agents before co-managing a team of 26 supervisors and 800+ agents. Fully trained in Salesforce, NICE CX, NICE WFM. Handled team assignments and created supervisor schedules. Dissected all the reports that were at my disposal, giving direction to the supervisors on who needs coaching's or disciplinaries to ensure quality and customer service expectations were not only met, but exceeded.
- **Project Experience MA DOR:** Served as contact center manager for lifetime of this project. Led a team of 3 supervisors and 100+ agents. Spearheaded meetings with DOR and oversaw successful implementation of services, including meeting the Go-Live milestone. Organized successful implementation of the 62F project while Premium Pay was live.

## EDUCATION

Highschool Diploma

## JOB SUMMARY

Robert is responsible for day-to-day operational delivery and supports all supervisors and agents. He is responsible for the entire Contact Center service delivery model including SLAs, handle times, speed of answer, hold in queue times, and one-call resolution rates.

# KATE JONES

Director of Human Resource

With over 7 years of experience in HR management for call center and BPO operations Kate leads recruitment and on-boarding processes. She is responsible for overseeing the sourcing, hiring, and on-boarding of all staff, including any relationships with third-party agencies or contractors. Additionally, she's responsible for benefits administration, implementation, and roll out to ICHRA from Group Medical for over 1,000 employees nationwide, as well as overseeing the 401k administration and annual audit.

## PROFESSIONAL EXPERIENCE

### ***F.H. Cann & Associates, Inc.***

North Andover, MA



### **Director of Human Resources | 2022 – Present**

- Provides expertise across all HR functions to include, but not limited to compensation and benefits, employee relations, regulatory compliance, recruiting and retention etc.
- Ensures compliance with federal, state, and local labor and employment laws applicable to all HR functions.
- Maintains strong ability to establish and foster positive relationships with employees, managers, executives, and end clients at all levels of the org while maintaining strict confidentiality.
- Development and administration of programs, procedures, and guidelines to help align the multi-state, hybrid workforce with strategic goals of the company.
- Protects the interest of employees and the company in accordance with FHC HR policies and governmental laws and regulations.
- Proponent of continuous improvement; applies strong working knowledge of Federal government contracting HR requirements to include DOL and OFCCP.
- Creates and participates in employee engagement initiatives.
- Creates HR policies and procedures, communicates required changes and manages roll out to our Learning Management System (LMS).
- Oversees FHC's Affirmative Action Plans and Programs (AAP) including compliance

# KATE JONES

Director of Human Resource

requirements with OFCCP, EEO, and VEVRAA.

- Working knowledge of Service Contract Act (SCA) Compliance Principles.
- Benefits administration, implementation, and roll out to ICHRA from Group Medical for 600+ employees nationwide.
- Oversees the 401k administration & annual audit.
- Adept in large scale recruiting and hiring efforts to fulfill end client needs; 2,600+ hires since September 2022.
- NIST & SOC audit preparation.
- Oversees Leave Administration; FMLA, ADA, etc.

## Stratosphere Technical Consulting

Vice President of Human Resources | 2020 – 2022

Human Resources Director | 2018 – 2020

- Member of the Stratosphere Executive Team, comprised of the CEO, CTO, and CBO (company owners) and the CFO.
- Focus on retention efforts; learning & development, career planning, total compensation, employee outreach, stay interviews, and coaching programs.
- Built and managed a trusted employee and culture function that served as an advisor, partner to employees, managers, and leadership throughout the organization.

## EDUCATION

### University of Maine

Bachelor's Degree, Communications Minor, English

## JOB SUMMARY

Provides expertise across all HR functions to include, but not limited to compensation and benefits, employee relations, regulatory compliance, recruiting and retention etc.

# LISA REAMS

## Training Manager

Lisa has over 20 years of experience in training call center and BPO services leading training for FHC employees. She is highly skilled in both traditional classroom and virtual training environments, adept at facilitating, presenting, and developing training programs. She demonstrates effectiveness in motivating and guiding employees, evaluating their needs, driving continuous improvement, and troubleshooting issues. She supervises the development and delivery of training materials, as well as overseeing the Training Team.

### PROFESSIONAL EXPERIENCE

#### ***F.H. Cann & Associates, Inc.***

North Andover, MA

#### **Training Manager | 2020 – Present**

- Trained over 185+ employees virtually at one time with highest success rate for all Customer Service Divisions.
- Employee of the year recognition for the Training Department.
- Developed and maintain all CBT Training and company LMS. Certified Trainer for all Clients.
- Project Experience: Massachusetts Department of Unemployment, Call Center, Served as Training Manager for the lifetime of the project. Oversaw successful implementation of services, including meeting the Go-Live milestones. Spearheaded meetings with DUA and collaborated with project stakeholders to ensure seamless delivery of all services including Agent's phone, chat, and email solutions. Fully trained in DETMA UI Online, Amazon Connect, and Five-9. Organized successful implementation of 5 special projects for DUA including PUA, Hearings, PI, Tier 1 and Tier 2 while overseeing training of operations for 185 persons contact center and training team of 5.
- Project Experience: New Hampshire Department of Health & Human Services, Call Center, Served as Training Manager for the lifetime of the project. Oversaw successful implementation of services, including meeting the Go-Live milestones. Spearheaded meetings with NH DHHS and collaborated with project stakeholders to ensure seamless delivery of all services including Agent's phone, chat, and email



# LISA REAMS

## Training Manager

solutions. Fully trained in NewHEIGHTS, Artiva and Ontario while overseeing training of operations for 55 persons contact center and training team of 15.

- Project Experience: FSA NextGen, Call Center, Served as Training Manager for the lifetime of the project. Spearheaded meetings with FSA and oversaw successful implementation of services, including meeting the Go-Live milestone. Collaborate with project stakeholders to ensure seamless delivery of all services including CSR phone, chat, and email solutions.

### Account Control Technology, Inc.

Mason, OH

**Corporate Trainer | 2011 – 2020**

### London Computer Systems

Hamilton, OH

**Product Support Specialist | 2009-2011**

## EDUCATION

### Wilmington College, Springdale, Ohio

B.A. Business Management

### Miami University, Springdale, Ohio

A.A. Executive Secretarial Technology and Business Information Management Technology

## CERTIFICATIONS

PCS Certification 2010-2022 and 3/2025 to present TS Certification 2010-2022

Affiliations with American Society for Training & Development, Cincinnati 2004-2020 and Greater Cincinnati/Northern Kentucky Apartment Association 2004-2009

## JOB SUMMARY

As the Training Manager Lisa completes Train-the-Trainer sessions and oversees all training implementation and updates for our clients

F.

H.

C.

# Appendix B

## 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. DHHS reserves the right to negotiate rejected or proposed alternative language. If DHHS and bidder fail to agree on the final Terms and Conditions, DHHS reserves the right to reject the solicitation response. DHHS 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:<br>(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.) |
|---------------------------------------------------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| X<br><br>SAC                                                        |                                                                              |                                                                                                                                                                                                                                                                                    |

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. DHHS 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, DHHS'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,

### 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 DHHS and bidder fail to agree on the final Terms and Conditions, DHHS reserves the right to reject the solicitation response. DHHS 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:<br>(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.) |
|--------------------------------------------------------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| X<br>SAC                                                     |                                                                       |                                                                                                                                                                                                                                                                                    |

#### 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 payroll, benefits, 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,

## 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:<br>(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.) |
|----------------------------------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| X<br><br>SAC                                                   |                                                                         |                                                                                                                                                                                                                                                                                    |

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. **All invoices must be submitted monthly by the 10th of each month. Point of contact will be the following: [DHHS.CSEINVOICES@NEBRASKA.GOV](mailto:DHHS.CSEINVOICES@NEBRASKA.GOV)** 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 DHHS, and no action by DHHS, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping DHHS 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 DHHS.**

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.

## CONTRACTUAL AGREEMENT FORM

### BIDDER MUST COMPLETE THE FOLLOWING

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

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

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

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

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

### THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

|                      |                                                                                     |
|----------------------|-------------------------------------------------------------------------------------|
| COMPANY:             | F.H. Cann & Associates Inc                                                          |
| ADDRESS:             | 1600 Osgood St, Suite 3058, North Andover, MA 01845                                 |
| PHONE:               | 877 750-9804                                                                        |
| EMAIL:               | rfp@fhcann.com                                                                      |
| BIDDER NAME & TITLE: | Sheri A Cann, CEO                                                                   |
| SIGNATURE:           |  |
| DATE:                | 07/28/2026                                                                          |

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

|        |              |
|--------|--------------|
| NAME:  | Sara Alosa   |
| TITLE: | SVP          |
| PHONE: | 877 750-9804 |

|        |                |
|--------|----------------|
| EMAIL: | rfp@fhcann.com |
|--------|----------------|