

PubSEG

Public Safety &
Economic Growth

Statement of Qualifications

For Solicitation RFP 6599 Z1

April 26, 2021

Public Safety and Economic Growth

Option 3



**Public Safety and Economic Growth (PubSEG)
Statement of Qualifications
Solicitation Number: RFP 6499 Z1
April 26, 2021**

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Understanding of Need for Option 3: Contact Tracing and Vaccine Helpline

Public Safety and Economic Growth (PubSEG, <https://pubseg.com/>) understands that the State of Nebraska has a need for a contractor to support two COVID-19 initiatives:

- 1) Contact tracing of individuals who have been exposed to, or diagnosed with, COVID-19
- 2) Staffing and managing a Vaccine Helpline

PubSEG also understands that the State has specific requirements for each of these initiatives which the contractor will perform and report on daily and weekly to the State's Department of Health and Human Services. The State is therefore seeking a qualified, experienced contractor with the know-how to fully manage each of these two initiatives while also working as a strong partner to the State of Nebraska.

Because much is unknown about the pandemic, the contractor must have the ability to increase or decrease capacity as required. This requires a flexible workforce and exceptional workforce management skills to ensure availability of the required coverage for each of these critical, public-facing support initiatives.

PubSEG Commitment to Support

PubSEG has prepared this response to the State of Nebraska's RFP 6499 – Z1. We are a joint venture between two entities and bring combined skill sets that uniquely qualify us to deliver against the requirements set out by the State. We also provide the State a single point of contact with decision-making authority. We are accustomed to programs with fluctuating call volumes and will be able to adjust staffing accordingly to meet shift needs.

We regard the RFP as a request for two distinct initiatives that require unique skill sets. By sharing a unified management structure, however, we leverage best practices across both initiatives, gain economies of scale and, as a result, can pass savings on to the State.

This RFP response will show how PubSEG differentiates the needs of the two initiatives, brings specific skill sets to address each, and also delivers operational efficiencies through a common management.

Meeting the Unique Needs of each Program

- 1) **Contact tracing** requires effective communication skills designed to gather critical information from individuals who may be fearful, and achieve compliance with quarantine and isolation guidelines from those who may be resistant. Contact tracers make outbound calls to Nebraskans who often regard the calls as unwanted intrusions. Success will be in large part based on training and quality assurance monitoring to ensure motivational interviewing skills, empathy, appropriate follow-up and thorough information gathering and documentation.

PubSEG offers fully trained, rapid response contact tracing teams to private and public entities. We hire from the CONTRACE (www.contrace.org) database, a nationwide pool of 150,000 highly qualified contact tracers, case investigators, team supervisors and care resource coordinators. Candidates are prioritized by level of public health, nursing, clinical and social work backgrounds. Our management infrastructure is dedicated to contact tracing and employs best practices in training, communication skills, quality assurance and privacy protection from experienced public health leaders.

- 2) The **Vaccine Helpline** answers calls quickly and accurately. Helpline agents will be required to answer a range of questions. Agents will respond to inbound calls made by concerned Nebraskans who may be frustrated and confused. Success is largely dependent on a management structure with expertise in large-scale inbound contact center initiatives to support a high volume of shorter-duration calls, provide full and accurate responses, and apply strong workforce management skills to match resources with call volumes by shifts that may change frequently.

Our team was awarded a project to support the COVID-19 Vaccination Program in the UK, the first health system to roll out a clinically approved vaccine. We successfully launched this program in the second quarter 2021 and employed our Work@Home platform, which the firm strategically introduced in 2017 to adapt to the changing workplace landscape.

PubSEG's helpline capabilities are second to none. Customer service is at the very core of our business and we excel at providing best-practices training. In addition, we adhere to the highest quality security and compliance standards including communications transmitted via an encrypted network, directing website traffic through a content filter, secure connections, and workspace inspections, to name a few. We support multiple languages and ensure capacity through forecasting and real-time management. We value excellence, knowledge, empathy and accessibility, and can ensure consistent excellence for helpline support.

Gaining Efficiencies though Best Practices and a Unified Program Management Structure

Our added value comes in how we will create efficiencies and leverage best practices across these two programs.

- 1) PubSEG will provide a single point of contact to the State of Nebraska for both initiatives. Our goal is to streamline communications with the State's Department of Health and Human Services, improve information flow between the two initiatives, establish a common set of facts, and allow for faster decision making.
- 2) We commit to focusing our rapid recruitment approach to hire citizens from the State of Nebraska, deriving efficiencies from a common hiring process across both projects. We anticipate opportunities to share staff across initiatives in cases where staffing needs on one initiative decrease while the other increases. We can thus simplify the application process for Nebraskans, allow for career progression and pass savings onto the State.
- 3) Most critically, we will leverage our deep expertise in the execution and management of the Work@Home model across both initiatives. Since 2017—well before the pandemic—we have revolutionized the Work@Home staffing model in response to shifting work preferences.

PubSEG's framework for our Work@Home solution for Nebraska is focused on identifying the right talent, recruiting, training and ongoing operations management through the Work@Home staff.

Many organizations could not fathom a remote program for customer service in the pre-Covid world due to fears about security. Our Work@Home model places great focus on privacy, including HIPAA, data protection and remote IT management.

We will focus our recruitment on residents from the State of Nebraska with a balance of urban vs. rural employees, using our geo-targeting recruitment capabilities.

Some of the attributes we look for in potential remote hires are highlighted below. We will also focus on hiring staff who are fluent in reading, writing and speaking Spanish.



Because this Work@Home model is key to our ability to deploy staff quickly, we have included more information about it on pages 6-8 of this RFP.

- 4) Our best practices in hiring, training and continuous improvement address cultural sensitivity, empathy and cultural awareness. We are committed to employing effective communication skills that will result in better engagement between our staff and Nebraskans, reduced fear and confusion, and a more effective operation.
- 5) We will build an operation that reflects the State’s geographic and cultural variations. We realize that attitudes and perceptions about the pandemic, the vaccines and contact tracing will vary by the different populations we will serve. Our goal is to build an organization that reflects Nebraska, whether it’s for the helpline or contact tracing.

About PubSEG

PubSEG (www.pubseg.com) was created to provide rapid response to COVID-19 initiatives. We bring a depth of experience from industry leaders to collaborate with the State.

Our roots in call center management have enabled us to build the significant and required technology infrastructure, processes and people oversight needed to manage virtual contact tracing and helpline teams. Yet, we understand the sensitive nature of the communications required by these two initiatives and therefore have created a separate and dedicated management operation to ensure our ability to focus solely on COVID response.

Bios of our leadership are below.

Valerie Schlitt, Managing Partner

Valerie Schlitt earned her MBA from The Wharton School and gained 18 years of marketing and consulting experience in Fortune 500 and large consulting firms prior to founding a call center business in 2001. This business was named three consecutive years to the Inc. 5000. Valerie places high value on people and consistently considers the human aspect of sales and customer service. She has always found importance in not only creating professional opportunities for people who work for her, but providing a flexible schedule, work/life balance and a culture in which each individual feels important and valued.

In recognition of her exceptional leadership, Valerie was named a *Philadelphia Business Journal* Most Admired CEO in November 2020.

Michael Maxey, Director of Operations

Michael Maxey is a seasoned leader of both domestic and international public programs. Previously, he was contracted by the Institute for Public Health Innovation to help develop and administer the training program for Contact Tracing with the Fairfax, VA Department of Health. He also was responsible for quality assurance review of his team's investigations and notifications, as well as their data entry. Michael has leveraged his prior expertise to build PubSEG's contact tracing capabilities, including standard operating procedures, workflows, communications, infrastructure, training, and QA.

Diana Lu, Director of Training

Diana (Lihan) Lu, MSPH supports the training of case investigators and contact tracers. Diana earned her Master of Science in Public Health from the Johns Hopkins Bloomberg School of Public Health and has four years of combined federal service in surveillance, quarantine station, immunization and epidemiology programs; collaborative projects with refugee health screening; tuberculosis (TB) control; and public health preparedness programs. She was deployed by the CDC to Sierra Leone in 2015 as part of the International Ebola Outbreak Response, working on case investigation for missing Ebola contacts, engaging communities and health units in increasing sick alerts, and coordinating Viral Hemorrhagic Fever Database (VHF) training for local data staff. In addition, Diana completed the Johns Hopkins program "COVID-19 Contact Tracing" in August 2020.

Work@Home

Work@Home has become our dominant staffing and management model and we will employ this model for the State of Nebraska.

We have added this section to demonstrate how PubSEG has incorporated our commitment to recruiting the right team, privacy and security into our Work@Home model.

Prior to COVID-19, 18% of our North America agents worked at home. During COVID, PubSEG effectively enabled 86% of the agents in North America to Work@Home.

This transition required tremendous planning and preparation. We committed time, communication and thoughtfulness to ensure that our people could Work@Home effectively.

Our Transition from Brick and Mortar to Work@Home

Virtual methodology as opposed to a Hub and Spoke

- Exponentially increased recruiting footprint
- Rapid ramp up and down capabilities
- Time zone scheduling (follow the sun scheduling methodology)

Self scheduling/micro shift to enhance flexibility AND put capacity where and when needed

- Expanded recruiting footprint
 - 100% fill rates
 - Attrition decrease of 10-15%
 - Attendance improvement of 8%
 - Service levels met with scheduling flexibility
- Robust shift swap and extra time site to drive further efficiencies
- Creates a positive work/life balance where work is scheduled around life

Work@Home Center of Excellence

- Our operations leaders are trained in setting up Work@Home teams of all sizes for both complex and simple programs. Therefore, we will adopt a proven process for recruiting, training and managing a Work@Home team—regardless of size—for the State of Nebraska.
- The single most important element of a successful Work@Home program is communication. Clearly communicating expectations and direction is critical at every stage of the employee life cycle.
- Our ability to audit and provide feedback has ensured effective communication between agents and team leaders.

Work@Home IT Security Controls

- All voice and screen recordings shall be transmitted via an encrypted network connection and stored on the corporate servers.
- All communication channels between the Work@Home agents and other PubSEG locations/employees shall be encrypted at the industry required minimum standards.
- Browser settings shall be hardened to prohibit access to unauthorized sites.
- All website traffic for the Work@Home agents will pass through a content filter.
- Web conferencing services will be restricted to a vanity URL in the content filter.
- Active Directory accounts for an agent will be disabled if a Work@Home agent has missed consecutive shifts with no notification. If the agent does not return, the account will be deleted upon termination.

- All Work@Home agents that have access to client information require two-factor authentications in order to gain access to the PubSEG network.
- Work@Home agents will not be able to access the system outside the program hours of operation. The phone line used by the agent will only be capable of delivering the voice call to the agent with no additional features.

Work@Home Physical Security Controls

- The work area will be in a separate, designated room.
- The High-Speed Internet connection (modem) must be dedicated to the agent's use during working hours. No shared access by anyone else in home during these hours is permitted.
- The PubSEG-owned equipment must always remain in the designated office space.
- The agent is not permitted to power on the equipment or attempt to access the PubSEG network from any other location.
- No other individuals are permitted in the office while PubSEG equipment is powered on.
- Workspace Inspections are conducted via webcam and signed off by PubSEG Security and Compliance before Agent takes first call and on a biweekly basis by the Agent's Team Leader thereafter. A physical security checklist is completed and filed on each inspection.
- The Work@Home agent is required to comply with the Clean Desk and Clear Screen Policy which encompasses the following for the designated work area:
 - No cell phones, cameras, tablets, laptops, printers or PDAs (i.e. wireless devices)
 - No paper or pens to write down any customer information.

Bidder Requirements – Option 1 – Contact Tracing

1. Describe your understanding of the project requirements, including but not limited to the Performance Requirements. Describe your approach of how you will accomplish the project requirements.

This contact tracing RFP requires a Contractor who can meet the project description and statement of work outlined on pages 28 – 31 of the State of Nebraska State of Purchasing Bureau, Solicitation Number RFP 6499 Z1. The key elements are summarized briefly below:

- Fully supervised, trained (using state-approved contact tracing training program via train-the-trainer and state-approved online HIPAA and privacy training) team of a minimum of 25 full-time equivalent contact tracers, up to 1,000 FTEs. Full-time equivalent equals 40 hours/week. The exact number will be dependent on the State's needs and will vary. The vendor must provide a flexible workforce that can increase and decrease based on the State's needs, with one week's advance notice of changes.
- Sufficient availability of staff during the hours of 8 a.m. to 8 p.m. Central Time, 7 days/week, with most of the staff working during the peak hours of 10 a.m. through 7 p.m. Central Time. Ability to shift time frames based on need. Maintenance of a continuous and trained staff, despite potential turnover, absences, etc.
- At least 10% of staff able to read, write and speak fluent Spanish and English. Ability to use the State's telephone interpretation Contractor for other languages; include ability to communicate with deaf and hard of hearing individuals (TTY, RTT, etc.) Ability to pulse out using a specific caller ID (Nebraska COVID Response Team) and have return calls received by members of the contact tracing team supporting this contract.
- Ability to connect with the State's system, access new cases and enter data correctly. Active monitoring of the queue to ensure cases are addressed, follow-up completed and documented in the time frame and number of attempts required by the State. An ongoing quality assurance program to identify issues and take corrective action up to the point of contact tracer termination. In short: initial call placed within 8 Business Hours and at least 5 subsequent attempts, no fewer than 30 minutes apart, unless a best time is offered. Will use the State's average talk time as a basis for monitoring acceptable call duration.
- Contact Tracers who have all the appropriate equipment and internet connectivity to properly perform the role, which will include but not be limited to a laptop, phone, second monitor, internet connectivity.
- All administrative requirements for time tracking, payroll, taxes, benefits (if applicable), background checks, drug-free workplace, and the required level of insurance coverage are the Contractor's responsibility.
- Daily and Weekly Reports to DHHS that focus on hours worked and attempted and completed calls, as well as ad hoc reporting, along with regular communication with the State. Contractor should not rely on the State's platform to prepare these reports.

- Compliance with the State’s contact tracing process (number of calls, time frames for attempts, etc.), scripting, privacy policies, and updates to the State’s system.

PubSEG will accomplish the project requirements.

PubSEG routinely provides fully trained and managed teams to support non-profits, governmental agencies, and private sector organizations of all sizes. We have thoroughly read the requirements outlined in RFP 6499 Z1 and commit to delivering against these requirements. Critical to our approach is:

- Our Work@Home model that enables us to recruit, onboard, train and manage qualified individuals to perform contact tracing from their homes.
- A focus on hiring residents from across the State of Nebraska, and potentially from the contiguous 48 states, if needed. Use of the E-Verify system to confirm the eligibility of our employees to work in the United States.
- A tested approach to creating fully trained and managed remote, rapid response COVID-19 Contact Tracing teams using best practices from public health entities.
- Training that focuses on technical skills as well as communication, empathy and cultural sensitivity.
- A scheduling process that allows us to expand and contract based on the needs of the State of Nebraska.
- Strict compliance with privacy and confidentiality regulations, especially HIPAA.
- A proven track record of partnering with our clients to exceed expectations and report regularly on our progress.

2. Describe your language capabilities, including the percentage of contact tracers who are bilingual in English and Spanish, and any other languages available.

We currently support languages required by our clients. The languages we support with live representatives include primarily English, followed by Spanish, French and Portuguese. We use a TTY line to support a range of other languages including Mandarin, Cantonese, German, Vietnamese, and others.

Currently 15% of our staff are bilingual in English and Spanish.

The CONTRACE database of over 150,000 contact tracing applicants, a key applicant pool for our contact tracing staffing, shows 16% of the current 400 Nebraskan applicants are fluent in English/Spanish (read, write and speak).

As a Work@Home organization, with rapid recruitment capabilities, we are able to hire the balance of the required staff to meet Nebraska’s language needs from applicants we identify outside the CONTRACE database. Our commitment is to prioritize recruitment from the State of Nebraska and secure 10% bilingual staff from the State, before we recruit from within the contiguous 48 states.

3. Describe your experience handling Protected Health Information, including any HIPAA training that employees have previously received. If you are a covered entity under HIPAA, please provide the number of breach notifications you reported to the Office of Civil Rights in the last 3 years. If you are a business associate under HIPAA, please provide the number of security incidents which required notifications to Office of Civil Rights for any covered entities for which you are a business associate in the last three (3) years.

PubSEG adheres to the highest quality security and compliance standards, both in the US and in the international data community. We have been HIPAA compliant for years because of our focus on healthcare. We retain a compliance consultant, VanRein Compliance, that performs our Risk Summary Management Reports.

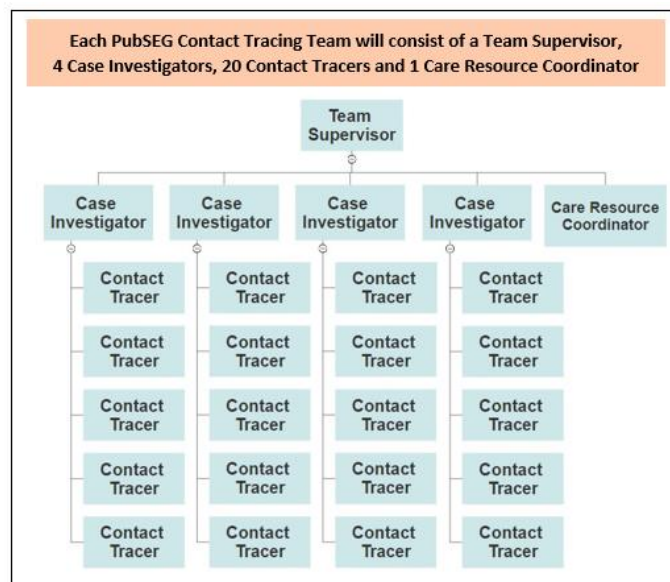
We are a business associate under HIPAA and have reported no security incidents which required notifications to the Office of Civil Rights in the past three years.

4. Describe your staffing availability, including whether you can meet the required hours specified in Section V.C.3. Provide the maximum number of contact tracers that can be provided, and the timeframe additional contact tracers can be on-boarded.

PubSEG staffs both small and large programs for our clients. We have 7-day operations with extended hours beyond those required by the State of Nebraska, and other programs that require work only during business hours. All of our programs fluctuate in call volumes by shift, day of week, and season.

We operate in a continuous hiring mode to support both our organization’s growth as well as staff turnover. We use W2 employees. All contact tracers participate in PubSEG’s internal training as well as the training from our clients.

We have a staffing model of 1 team supervisor who supervises a team of 4 case investigators, who in turn each supervise 5 contact tracers. We have adapted this model from the George Washington University Tracing Workforce Estimator Tool and Brief. We add a second supervisor for clients where hours extend into shifts beyond the coverage of a single supervisor.



We are confident that PubSEG can meet the required hours of 8 a.m. to 8 p.m. Central Time, 7 days a week, as specified in Section V.C.3.

- We will transfer any existing staff who are available and meet the requirements of this program for Nebraska’s contact tracing initiative. Mainly, however, we will recruit specifically for this program based on requirements of rural/urban, language skills, etc.
- To recruit new employees, our staff planning effort starts by determining the right number of contact tracers, by shift, language and geography, to reflect the staffing requirements.
- We then target our recruitment accordingly.
- We apply a series of behavioral-based questions via video interview to screen applicants for: empathy, data entry accuracy, confidentiality and privacy, and dealing with difficult conversations and emotions. We also confirm that language skills, as well as each candidate’s home office connectivity, meet the client’s requirements
- We confirm applicant availability by shift to ensure full coverage.
- We make remote offers and onboard remotely, including I-9’s through E-Verify and background checks.

The maximum number of contact tracers as stated by the RFP is 1,000. PubSEG requires a 6-week timeframe to recruit, onboard and train the full 1,000. For the minimum staff of 25, we require a 2-week timeframe. Any staff size between these will range from 2 – 8 weeks.

5. Describe your approach to workforce planning, including the speed, agility, and flexibility necessary to match your workforce to the fluctuating demand of this contract. Response should include a description of equipment provided to staff.

PubSEG adjusts our staff’s schedules weekly to reflect fluctuations in demand, planned employee absences, turnover, and other required adjustments.

Our staff understands that they will be asked to adjust their schedules (increase or decrease) with some advance notice, and we are able to make adjustments mid-week.

Our custom scheduling platform matches hours needed against contact tracer availability. We release the new schedule weekly; contact tracers access it through a link to our platform. By hiring part-time contact tracers to balance our full-time staff, we build in excess capacity to our schedule. We therefore commit to a 1-week response time for reasonable scheduling adjustments of 10% fluctuation.

In addition to building in excess capacity, PubSEG commits to adding new contact tracers to the existing team as follows quickly, requiring 1 week for up to 25 contact tracers and up to 5 weeks for over 500 contact tracers. (This timeframe is shorter than referenced in Question #7, because we are adding to an established program.)

| # of Weeks Advance Notice | # of Contact Tracers to be Added |
|---------------------------|----------------------------------|
| 1 | up to 25 |
| 2 | 26 - 50 |
| 3 | 51 - 200 |
| 4 | 201 - 500 |
| 5 | 501 - 1000 |

We deliver a Chromebook, second monitor and headset to each contact tracer. We anticipate that up to 20% of the workforce will require Internet connectivity. We have budgeted accordingly to provide hotspots/Internet to 20% of our contact tracing staff for the State of Nebraska in order to ensure that we can recruit tracers who reflect all populations and geographic areas within Nebraska. We feel it is critical to provide this technology in order to ensure our staff reflects the multiple populations within Nebraska.

6. Describe your ability to meet the timelines established in this RFP.

PubSEG will use the following Project Workplan to meet the timelines established in this RFP. Our success is highly dependent on establishing a strong and ongoing partnership. We consider the early stages immediately after the contract award date to be extremely critical, especially as we learn more details about your needs and come to agreement on the detailed Statement of Work (SOW), and staffing projections by shift.

| Activity | Start Date | End Date |
|--|------------|-------------------|
| PubSEG Leadership Team meets key contacts in the State of Nebraska | 6/1 | ongoing |
| Detailed knowledge sharing and further definition (Processes, State System, Scripting, Reporting) | 6/1 | 6/11 (ongoing) |
| Detailed SOW Draft submitted to the State of Nebraska. Also includes details on daily reports. | 6/18 | |
| Milestone: SOW Detailed Documentation Agreed to by both PubSEG and the State of Nebraska | 6/25 | |
| Define Team Composition: # Supervisors vs. # contact tracers, shift sizes, languages and populated/rural per shift Agreed to by both PubSEG and State of Nebraska | 6/9 | 6/14 |
| Recruitment – Hire | 6/7 | 7/2 |
| New Employee Onboarding (Application, E-Verify I-9s, Background Testing, Johns Hopkins and astho® certifications, signed technology affidavit, HR policies: handbooks, anti-harassment and anti-discrimination training) | 7/5 | 7/14 |
| Internal Training (not charged to the State of Nebraska) 5 Modules, see illustration below | 7/15 | 7/23 |
| State-approved Training (State System, HIPAA and privacy, Contact Tracing) Not to exceed 10 hours/employee | 7/26 | 7/28 |
| Contract Start Date | 7/29 | |

7. Describe capacity of in-house trainers and approach to project on-boarding.

- 1) PubSEG’s internal Training Team will deliver PubSEG’s proprietary contact tracing training (not charged to the State), as well as the State-approved online HIPAA and privacy training, the State-approved contact tracing training, and train-the-trainer of the State’s system. We will send a list of individuals who have passed the training curriculum along with HIPAA and Johns Hopkins certificates to the Contract Manager.
- 2) Our proprietary training focuses on:
 - **Module 1:** Overview of COVID-19, confidentiality/data security and effective communications (cultural sensitivity, empathy, interviewing styles)
 - **Module 2:** Review of contact tracing procedures and scripts
 - **Module 3:** Simulated case investigation calls and contact interviews to include role play reinforcing culturally sensitive interview methodology
 - **Module 4:** (Supervisors) Workshop
 - **Module 5:** (Supervisors) Q/A, coaching



- 3) We require our new hires to have completed the Johns Hopkins and astho® online training courses and will send these certificates to the Contract Manager via email. We recognize that the State of Nebraska has included the Johns Hopkins Coursera course in your training curriculum, also.
- 4) Our Training Team is available for remedial coaching and training as needed. Typically, we hold a remedial training class every 6 months, and regular coaching sessions based on Quality Assurance outcomes. (see below)

5) On an ongoing basis, the Team Supervisor will perform QA by listening in on calls and reviewing data entry. The QA rubric assesses callers' quality against these criteria:

- Communication which includes: Professionalism, trust & rapport, active listening, motivates and encourages active participation by the person under investigation, presents nonjudgmental behavior
- Problem Solving which includes: Flexibility, ability to identify and address person under investigation's concern, recognizes/addresses non-verbal problem indicators, identifies and begins resolution of barriers to adherence to isolation or quarantine protocols
- Documentation which includes correct completion of data entry, follows steps to identify and label contact investigations and outbreaks, updates all necessary fields and persons

QA will rely on listening to live calls. No contact tracing calls will be taped.

**PubSEG Case Investigation & Contact Tracing
Quality Control Matrix
Evaluation of Skill Elements**

| Skill Elements | Excellent | Satisfactory | Needs Improvement | Strengths/Weaknesses |
|---|------------------|---------------------|--------------------------|-----------------------------|
| Communication | | | | |
| Demonstrates professionalism. | | | | |
| Establishes trust and rapport. | | | | |
| Listens actively. | | | | |
| Uses open-ended questions. | | | | |
| Communicates at the contact's level of comprehension. | | | | |
| Gives factually correct information. | | | | |
| Solicits contact's feedback. | | | | |
| Provides encouragement. | | | | |
| Motivates and encourages active participation by the contact. | | | | |
| Presents nonjudgmental behavior. | | | | |

| Skill Elements | Excellent | Satisfactory | Needs Improvement | Strengths/Weaknesses |
|--|------------------|---------------------|--------------------------|-----------------------------|
| Problem Solving | | | | |
| Displays flexibility in the interview process. | | | | |
| Recognizes need to stop and reschedule a stalled interview. | | | | |
| Identifies and addresses the contact's concerns. | | | | |
| Recognizes/addresses verbal problem indicators such as need for translation services, unwillingness to continue interview. | | | | |
| Recognizes/addresses nonverbal problem indicators. | | | | |
| Maintains control of the interview. | | | | |
| Identifies and begins resolution of barriers to adherence to isolation or quarantine protocol. | | | | |
| Provides appropriate referral to Community Health Worker. | | | | |
| Documentation | | | | |
| Correctly completes data entry for contact to forward to supervisor. | | | | |
| Correctly completes monitoring software for contact follow-up messages during isolation or quarantine period. | | | | |
| Follows steps to identify and label contact investigations and outbreaks. | | | | |
| Updates all necessary fields and persons for client who has been hospitalized or has expired. | | | | |
| Comments | | | | |
| | | | | |

- 1) The size of the State's team will determine the number of trainers allocated. We have a ratio of trainers to contact tracers of 1:100 for ongoing programs. For programs that are launching, the Director of Operations, Team Supervisor and Team Leads support training to augment our staff to the needed levels.
- 2) PubSEG also has an internal Technology Support Team. Tech Team members instruct contact tracers on the use of hardware and software. They will become familiar with the State's system.
- 3) The Tech Team members are available to answer technical questions through an inbound phone line, or via email during onboarding and throughout the program, and are on call evenings and weekends.

8. Describe your ability to meet the reporting requirements set forth in Section V. F, including ad hoc reporting capabilities.

PubSEG clients rely on our reporting to validate the level of work being performed and confirm that contact tracing is an effective use of the State's investment.

We will use two systems to deliver the reports in section V.F:

- 1) Time Tracking: Each employee will install our time clock software, and PubSEG's Team Supervisor, along with our team of Staffing Coordinators, will use this software to track attendance and hours worked. We match this to calls made to ensure contact tracers are actively engaged throughout their shifts. We will report total hours worked to the State's Contract Manager daily.
- 2) Call Tracking: PubSEG's VOIP Call Center phone system assigns a unique extension to each contact tracer. We produce reports at any time for calls made at any given period in the past. We will use reports from the VOIP system to provide data on total number of calls, either completed or uncompleted, made by PubSEG the prior day.

Our clients routinely request ad-hoc reports and we are prepared to deliver to you. Such reports may address calls by shift, by day, by week, by contact tracer. Reports may also address call duration, # of attempts, etc. PubSEG will work with the State to determine the need for ad hoc reporting.

9. Describe how you would ensure that contact tracers will reflect the geographic and cultural diversity of the state. Describe how you would ensure proper geographic coverage in both more populated communities versus more rural locations.

PubSEG understands that contact tracing is most effective when trust is built between the contact tracer and the individual receiving the call. Trust can be enhanced by ensuring similarities between the contact tracer and those being called.

PubSEG will use a population map of the State of Nebraska to determine the make-up as well as COVID cases by population density. This map will guide the percentage of contact tracers we recruit from higher density populations and those we recruit from more rural populations, including their cultural composition.

The CONTRACE database currently has 400 candidates in the State of Nebraska, and they come from throughout the state. The database grows daily with new applicants. We plan to focus initially on CONTRACE applicants from the State of Nebraska. Depending on the number of contact tracers the State wants, we will augment the CONTRACE database with our own rapid recruitment and hiring process to bring on additional contact tracers, focusing on residents of the State of Nebraska first before we recruit from the contiguous 48 states. Whether we are hired to staff 25 contact tracers or 1000, we will recruit from a database and additional labor pool with ample supply of qualified applicants to mirror the composition of the State of Nebraska. The eligibility of each to work in the United States will be validated through E-Verify.

10. Describe how you would overcome cultural barriers in communities that don't typically give personal information over the phone or via the internet. Describe how you would overcome cultural barriers in communities that are fearful of giving personal information to anyone because of fear of legal retaliation.

Our approach to overcoming cultural barriers is multi-fold:

- As previously stated, our focus will be to create a contact tracing team that reflects the State of Nebraska in language and geography because we know that this is critical to trust creation and overcoming cultural barriers in certain communities that are most fearful.
- Additionally, we have been most effective when relying on information given about cases and contacts, especially if we know the individual's spoken language. We will assign an individual who speaks the same language or use our TTY.
- Our internal training emphasizes rapport building, which requires demonstration of genuine concern for the individual during the phone interaction. Our training also includes a segment and live role playing focusing on culturally sensitive and motivational interview methodology which relies on listening, showing empathy, providing critical information and assurance that privacy is protected.
- Success is also extremely dependent on how we structure the scripting. We will never ask if someone is a legal resident or citizen, nor ask for a Social Security Number. We will explain that the information shared is health information that is protected under HIPAA and is only used for medical purposes for the COVID-19 pandemic.
- To reinforce trust, we will also mirror the messaging of local leaders and community outreach about contact tracing in our scripting,
- Lastly, our ability to provide information on care resources for those we call, including food and medication deliveries, will significantly boost the compliance with quarantine and isolation guidelines.

11. It is DHHS policy that contact tracing Contractors do not conduct contact tracing directly with minors and that contact tracers speak to one parent or guardian in a household. However, this has occurred in the past and may occur in the future during times of peak infection rates. Describe your experience with these situations.

Talking to a minor is simply not part of our policy and our training ensures we do not hold any contact tracing conversations with minors:

- When we begin a call to a case, we will see the birthdate of the individual. Automatically, we will rule out a minor from moving forward with the traditional case investigation script.
- When calling a close contact, we use scripting that starts with validating the birthdate, and do not move forward if the individual is a minor.

In prior situations, if we found that we reached a minor, we asked for the parent or guardian's name and to speak to them. If they were not available, we have been successful asking about the guardian's place of work and using online research to track down the guardian directly for telephone outreach.

12. Describe how you would address individuals with disabilities as part of your contact tracing services.

The primary objective of contact tracing calls is to achieve compliance with quarantine and isolation guidelines. This is particularly difficult for individuals with disabilities because they often need care from others outside the home. Our experience is that the most effective scripts ask, "Is there anything that would prevent you from quarantining or isolating?" or "Is there anything that makes it difficult for you to take care of yourself for the next 10-14 days?" By learning the challenges, we can typically point to public or private resources that will allow the individual with disabilities to successfully quarantine or isolate.

Bidder Requirements – Option 2 – Vaccine Helpline

1. Describe your understanding of the project requirements, including but not limited to the Performance Requirements. Describe your approach of how you will accomplish the project requirements.

The Nebraska COVID-19 Vaccine Call Center (“Call Center”) will support the State’s strategic aims of a robust COVID-19 Vaccine program that:

- Provides equitable access to all who live, work, and/or are educated in Nebraska
- Achieves community protection, assuming vaccine effectiveness, availability, and uptake
- Builds sustainable trust in COVID-19 and other vaccines

The Nebraska COVID-19 Vaccine Call Center will provide separate queues for:

- **Consumer** registration and scheduling (inbound calls) and outbound calls (e.g., second dose appointment reminders and scheduling reminders, especially during downtime)
- Technical support to vaccine **providers**

The State is looking to set up the Call Center for a minimum of 1 year. Approximately 25 – 1,000 agents will be needed for the consumer and provider segments. We have reviewed and agree to the attached service level requirements.

Recruitment & Training of Work@Home Agents in Nebraska

As referenced in the “PubSEG Commitment to Support” section above, we will deploy our proven framework for Work@Home delivery for the Nebraska COVID-19 Vaccine Call Center. The framework is focused on identifying the right talent, recruiting, training and ongoing operations management through the W@H agents.

We will focus our recruitment on residents from the State of Nebraska with a balance of urban vs. rural employees, using our geo-targeting recruitment capabilities

Some of the attributes we look for in potential remote hires are highlighted below. We will also focus on hiring staff who are fluent in reading, writing and speaking Spanish.



WORK@HOME

Work@Home will be a big part of the post-Covid world. W@H has become our dominant staffing and management model and we will employ a W@H model for the Vaccine Helpline. During COVID, PubSEG effectively enabled 86% of our agents in North America to Work@Home while also growing the existing business of our clients. Pre-Covid we had 18% of agents in North America working at home.

We took time to ensure that our people W@H effectively. How did we do this?

Communication and Thoughtfulness.

Transition from Brick and Mortar to W@H

| | |
|---|---|
| <p>Virtual methodology as opposed to a Hub and Spoke</p> <ul style="list-style-type: none"> ▪ Exponentially increased recruiting footprint ▪ Rapid ramp up and down capabilities ▪ Time zone scheduling (follow the sun scheduling methodology) | <p>Self scheduling/micro shift to enhance flexibility AND put capacity where and when needed</p> <ul style="list-style-type: none"> ▪ Expanded recruiting footprint <ul style="list-style-type: none"> – 100% fill rates – Attrition decrease of 10-15% – Attendance improvement of 8% – Service levels met with scheduling flexibility ▪ Robust shift swap and extra time site to drive further efficiencies ▪ Creates a positive work/life balance where work is scheduled around life |
|---|---|

W@H Center of Excellence

- We are now mobilizing to a global W@H operation. Having geo-specific differences identified, we can offer solutions with multi-geo W@H to our clients.
- Our operations leaders are trained in setting up W@H teams of all sizes for both complex and simple programs. Therefore, we will adopt a proven process for recruiting, training and managing a W@H team of up to 1000 employees or larger, if needed, for the State of Nebraska.
- The single most important element of a successful W@H program is communication—it is critical at every stage of the employee life cycle.
- Our ability to audit and provide feedback has ensured effective communication between agents and team leaders.

Our Keys to Success



Innovation

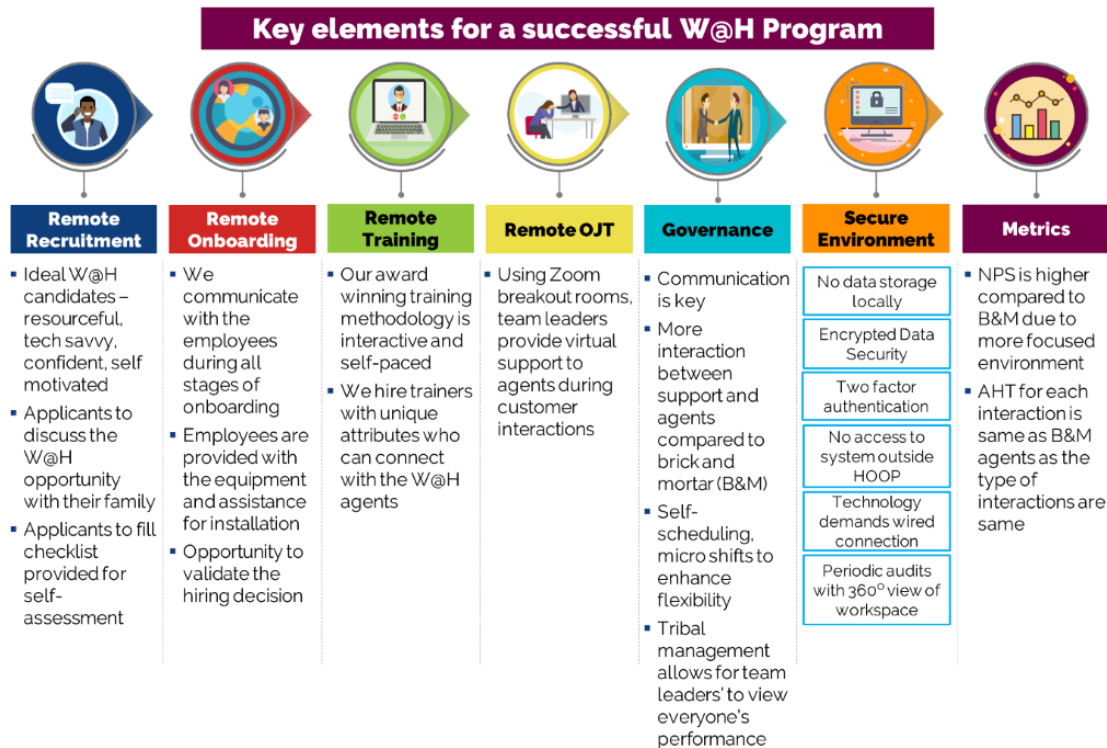


Value Proposition



Communications

Many organizations could not fathom a W@H program for customer service in the pre-Covid world due to fears about security. We have leveraged this model since 2017 and have revolutionized it.



W@H IT Security Controls

- All voice and screen recordings shall be transmitted via an encrypted network connection and stored on the corporate servers.
- All communication channels between the Work@Home Agents and other PubSEG locations/employees shall be encrypted at the industry required minimum standards.
- Browser settings shall be hardened to prohibit access to unauthorized sites.
- All website traffic for the W@H agents will pass through a content filter.
- Web conferencing services will be restricted to a vanity URL in the content filter.
- Active Directory accounts will be disabled if a W@H agent has missed consecutive shifts with no notification. If the agent does not return, the account will be deleted upon termination.
- All W@H agents that have access to client information will require two-factor authentications in order to gain access to the PubSEG network.
- W@H agents will not be able to access the system outside the program hours of operation. The phone line used by the agent will only be capable of delivering the voice call to the agent with no additional features.

W@H Physical Security Controls

- The work area will be in a separate, designated room.
- The High-Speed Internet connection (modem) must be dedicated to the Agent's use during working hours. No shared access by anyone else in home during these hours.
- The PubSEG-owned equipment must always remain in the designated office space.
- The agent is not permitted to power on the equipment or attempt to access the PubSEG network from any other location.
- No other individuals are permitted in the office while PubSEG equipment is powered on.
- Workspace Inspections are conducted via webcam and signed off by PubSEG Security and Compliance before Agent takes first call and on a biweekly basis thereafter by the Agent's Team Leader. A physical security checklist is completed and filed on each inspection.
- The Work@Home Agent is required to comply with the Clean Desk and Clear Screen Policy which encompasses the following for the designated work area:
 - No cell phones, cameras, tablets, laptops, printers or PDAs (i.e. wireless devices)
 - No paper or pens to write down any customer information.

2. Describe your language capabilities, including the percentage of contact tracers who are bilingual in English and Spanish, and any other languages available.

We currently support 40 global languages for close to 250 clients. These languages include English, Canadian French, LATAM Spanish, Filipino, Nihongo, Mandarin, Cantonese, Indonesia Bahasa, Thai, Vietnamese, Malay Bahasa, Korean, French, Spanish, Dutch, Welsh, Italian, Polish, German, Portuguese, Belgian, Greek, Swedish, Finnish, Norwegian, Danish, Russian, Creole, Hebrew, Turkish, Arabic, Urdu, Korean, Japanese, Bengali, Gujarati, Hindi, Sinhala, Tamil, and Kannada.

Currently 12% of our staff are bilingual in English and Spanish.

As a Work@Home organization with rapid hiring capabilities, we are capable of recruiting to meet the language needs of the State of Nebraska. Our focus is to recruit from the State of Nebraska and secure bilingual staff from the State before we recruit elsewhere in the contiguous 48 states.

3. Describe your experience handling Protected Health Information, including any HIPAA training that employees have previously received. If you are a covered entity under HIPAA, please provide the number of breach notifications you reported to Office of Civil Rights in the last 3 years. If you are a business associate under HIPAA, please provide the number of security incidents which required notifications to Office of Civil Rights for any covered entities for which you are a business associate in the last three (3) years.

PubSEG adheres to the highest quality security and compliance standards, both in the US and in the international data community. We have current certifications for ISO 9001:2015 (Process quality), ISO/IEC 27001:2013 (Data security) and SSAE 16 / ISAE 3402 Type 1 (HIPAA compliance). Our HIM data is not available to outside vendors. Patients' records are highly confidential and contain sensitive data; however, many newer systems have been designed to securely export patient records for many purposes. PubSEG has numerous recognized accreditations for health IT data collection and information security.

- HIPAA Compliance
- GLBA Compliance
- ISO 9001:2015
- ISO/IEC 27001:2013
- URAC Health Utilization Management – Certified
- URAC Health Call Center – Accredited
- AHIMA certified medical coders who have experience in managing data registries

PubSEG is a business associate under HIPAA and has not needed to provide breach notifications to the Office of Civil Rights in the last 3 years.

4. Describe your staffing availability, including whether you can meet the required hours specified in Section V.J.1.

PubSEG routinely staffs large operations with fluctuations in call volumes by shift. Our clients almost always demand 7-day coverage and often 7/24.

Based on our depth of prior experience, we are confident that PubSEG can meet the required hours specified in Section V.J.1

The staff planning effort consists of determining the right number of agents, at the right time, to meet the service level goals. PubSEG will work jointly with the client to leverage forecasting expertise, monthly, weekly, and daily trending and to develop half-hour requirements that match call arrival trends. Once key data has been identified, it is entered into our workforce management (WFM) platform.

To create optimal work schedules that consistently achieve service levels and long-term performance, the WFM software accepts the following data elements:

- Hours of operations
- Service level targets
- Average handle time
- Available staff
- Call volume forecast
- Historical call arrival patterns
- Agent requests for vacations and days off
- Agent off-phone activities such as training and research time

5. Describe your approach to workforce planning, including the speed, agility, and flexibility necessary to match your workforce to the fluctuating demand of this contract. Response should include a description of equipment provided to staff.

PubSEG takes a centralized approach to workforce management (WFM) comprising four intertwined functions:

- Capacity Planning—Creates the hiring plans required to achieve service levels and occupancy goals
- Forecasting/Scheduling—Schedules and forecasts for all our programs
- Real-Time Management—Actively manage service levels by overseeing agents’ schedule adherence and ensuring agent availability to handle forecasted call volume
- Rapid Recruitment, Onboarding and Training – Based on input from the Workforce Management forecasting, if we don’t have existing capacity, we initiate hiring based on the employee profile needed for the role.

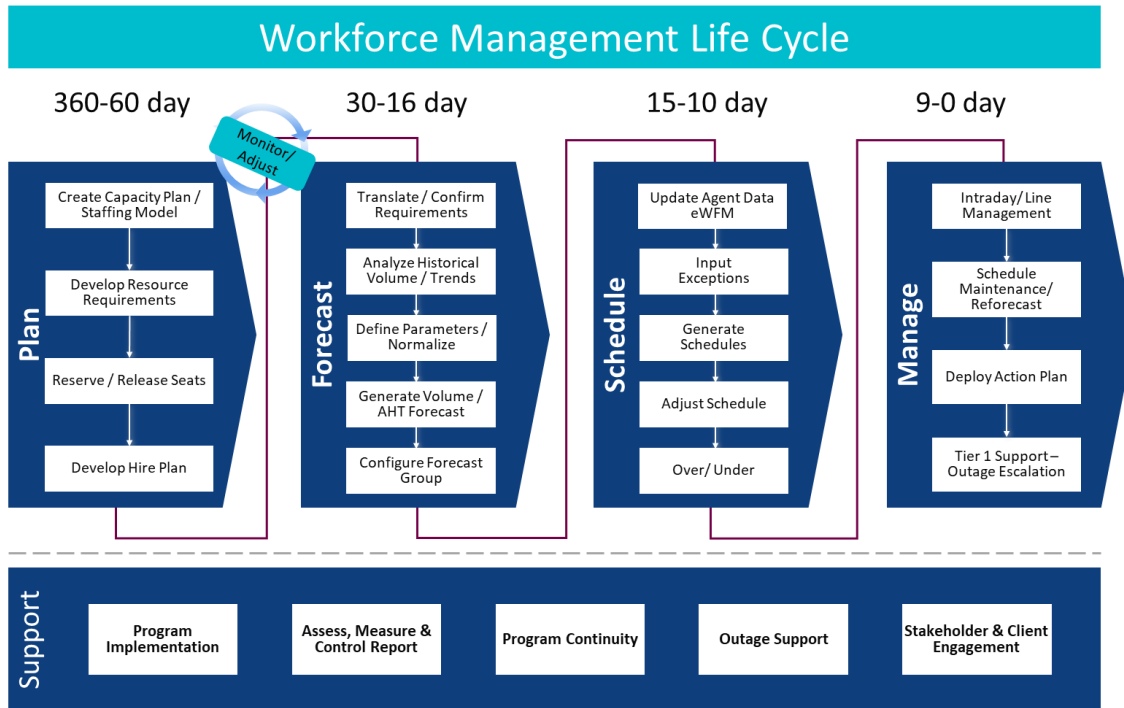
We send each new employee an “Office in a Box” that includes all equipment necessary to perform their job in a Work@Home environment.

The integration of Workforce Management through onboarding and then the hiring and training process allows PubSEG to expand or contract our staff to meet your needs in the appropriate timeframe.

The objective of effective workforce management is to get the right people, in the right places, at the right times, doing the right things.

Failing to make those connections directly impacts service levels, hold times, handle times, and customer satisfaction, ultimately creating a negative customer experience.

Through diligent capacity planning, forecasting, staffing, scheduling, and real-time management, PubSEG is able to ensure we will answer questions and support the citizens of Nebraska as their demand shifts throughout the pandemic. Our goal is that the call will connect on time and on point, paving the way for customer experience excellence.








Call Volume Fluctuations

PubSEG has a very successful track record for delivering additional hours and reducing hours in response to planned and unplanned events. Our Capacity Planning/Workforce Management Team (WFM) determines the hiring plan required to achieve service level and occupancy goals for a rolling 12-month period. The capacity planning process considers all relevant factors when setting the hiring plan. Such factors may include seasonality in hiring, attrition, shrinkage, forecast requirements, and any known marketing of major campaigns or significant events that may result in volume changes.

We recognize that there is no true historical data from which to project for the COVID-19 vaccine helpline; however, we will leverage our experience in the UK and other similar healthcare programs to approximate the factors that will affect staffing levels. Initially, we commit to being responsive to call volume fluctuations. As we gain more data, we will be in a position to actually project call volume fluctuations and plan accordingly.

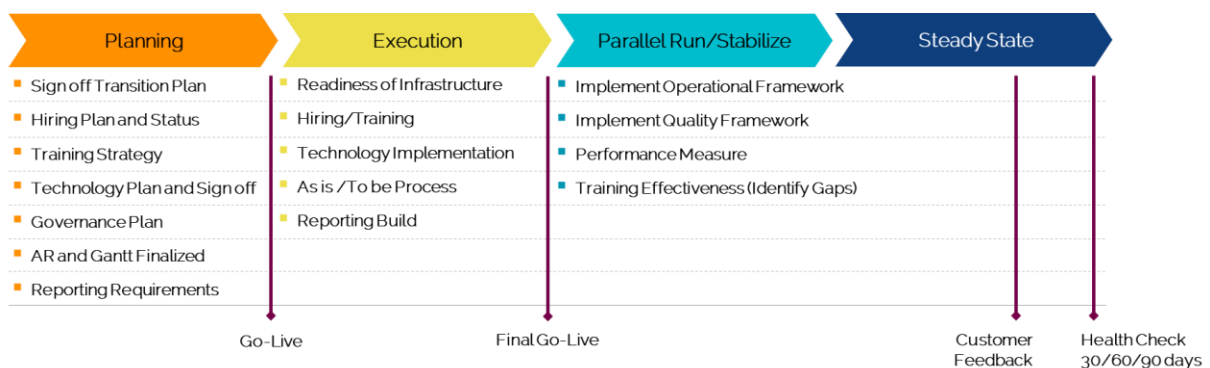
Strategies to Manage Volume Spikes

| | |
|--|--|
|  <p>Flex existing schedules</p> | <ul style="list-style-type: none"> Adjust schedules to accommodate maximum shift length (allowable hours) Set expectations that schedules will fluctuate and extended hours will be required |
|  <p>Schedule based on performance</p> | <ul style="list-style-type: none"> Use rank and preference model to allow employees to “earn” their schedules |
|  <p>Shift mix</p> | <ul style="list-style-type: none"> Recruit staff with flexible part-time or split shift option and offer additional benefits; the shorter shift durations in 4 to 5-hour blocks will complement full-time staff |
|  <p>Flex shifts</p> | <ul style="list-style-type: none"> Adjust shift to increase or decrease employee hours without the added cost or timelines associated with onboarding additional agents Make overtime and voluntary go home options visible to our employees |
|  <p>Optimize real time schedules</p> | <ul style="list-style-type: none"> Conduct mass schedule adjustments with 48 hours’ notice to address volume fluctuations |

6. Describe your ability to meet the timelines established for the vaccine helpline.

PubSEG has established an industry-leading implementation and transition methodology built on our learnings from decades of transition experience, best practices, and risk mitigation. The PubSEG transition team will ensure a seamless and smooth transition of the State of Nebraska program to an operation fully managed by us, working in partnership with you.

Our solution for the State of Nebraska is underpinned by our ability to attract and retain high caliber agents and management who will deliver, from Day 1, the technology each agent will need to connect to your system and take phone calls (Office in a Box) and establish all the administrative oversight to manage a remote team. PubSEG facilitates all implementations/transitions within the framework of our formal Transition methodology as shown below:



| Task | 5/15 WK1 | 5/22 WK2 | 5/29 WK3 | 6/5 WK4 | 6/12 WK5 | 6/19 WK6 | 6/26 WK7 | 7/1 WK8 | 7/8 WK9 | 7/15 WK10 | 7/22 WK11 | 7/29 WK12 | 8/7 WK13 | 8/14 WK14 | 8/21 WK15 | 8/28 WK16 | 9/4 WK17 |
|------------------------------------|-----------------|-----------------------------------|----------------------------|------------|-------------|--------------|-------------|------------|------------|-----------------|--------------|--------------|-------------|--------------|--------------|--------------|-------------|
| Kickoff | Kickoff | | | | | | | | | | | | | | | | |
| IT Systems | | | | | | | | | | | | | | | | | |
| Listening/SSO/Config Workbook | Config Workbook | | | | | | | | | | | | | | | | |
| Call flow Build | | | | Build | | | | | | | | | | | | | |
| Training Content Development | | | | | | Training Dev | Train | | | | | | | | | | |
| Scoping | Scoping/Design | | | | | | | | | | | | | | | | |
| Technology - Connectivity | Requirements | Connectivity | | | Test | | | | | | | | | | | | |
| Technology - Telecom and Reporting | Requirements | Telecom & Reporting Configuration | | | | Test | | | | | | | | | | | |
| Facilities Prep | | Design | Production Space Readiness | | | | | | | | | | | | | | |
| Ops Mgmt Selection/Readiness | | Ops Mgmt | | | | | | | | | | | | | | | |
| Training Creation and Prep | | Review Training | Design Training Plan | | | | | | | | | | | | | | |
| Training - Class 1 | | | CSR Recruitment | | | Training | Nesting | Go Live | | | | | | | | | |
| Ramp Training- Class 2 | | | | | | | | | | CSR Recruitment | | Training | Nesting | Go Live | | | |

7. After State provided train-the-trainer session is complete, describe bidder’s capacity of in-house trainers and approach to project on-boarding.

PubSEG’s Training leaders recognize they have a unique opportunity to improve the lives of every employee who chooses to work at PubSEG as well as of the Nebraskans who will be calling the Vaccine Helpline.

Our modular sessions are easily maintained and customized. Our new hires receive soft skills, process, and client-specific training, integrated with consistent and constructive feedback. We establish clear individual targets for the associates and manage those targets through continuous assessment.

Our movement to becoming largely a Work@Home enterprise means we have invested significantly in creating a well-designed virtual training environment.

We run each training program in small groups and assign our knowledgeable trainers to handle each session. Participants in the PubSEG training process and their responsibilities are outlined below:

- Dedicated trainers design, deliver, and adjust training based on progress and performance of associates.
- Associates-in-training develop and improve knowledge of our clients’ programs. By displaying positive attitudes, a high degree of overall professionalism, and outstanding communication skills, associates achieve excellent monitoring scores.
- Supervisors serve as liaisons between associates and trainers in the training process; they are process and procedure experts who assist associates on difficult or complex calls.
- PubSEG conducts training classes in a relaxed, no-pressure atmosphere and facilitates associates’ learning through the use of modern tools and unique exercises, including slides, e-module software and mobile apps, role play, outdoor boot camps for team building, and hands-on simulations.

Our training program consists of these levels:

Customer Service University (CSU)

Customer service is at the very core of our business. Every employee will be enrolled and participate through our interactive and thought-provoking course. CSU is designed to leave lecture-style training in the past and focus on group discussion, role play, activities and peer-to-peer learning to drive home the basic foundational approach.

Client-Specific Training

New hires passing the CSU and our existing staff being trained on the Vaccine Helpline will move to specific training that reflects the State of Nebraska's needs. We will adopt a train-the-trainer model to ensure we train on the specifics of your system, the detailed information we will be approved to share, and methods for scheduling vaccine appointments. Your training will be conducted 100% by our trainers.

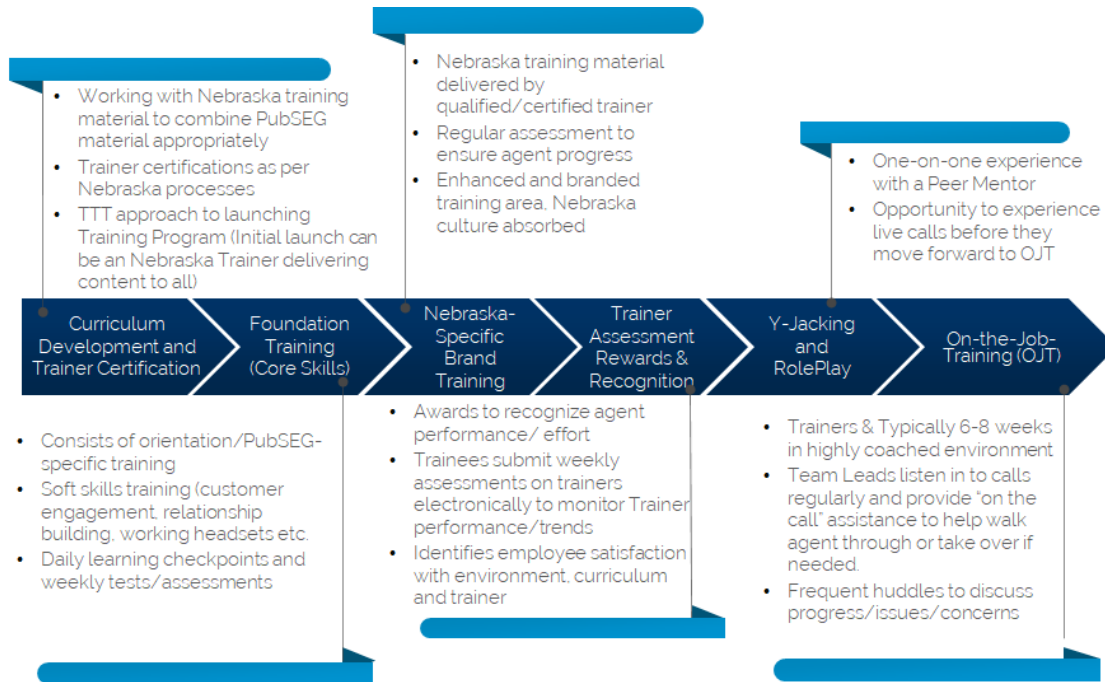
We invite you to observe new associate training, spending as much or little time as desired. New associates receive supportive transition to learn the technical phase, covering overview of the State of Nebraska, the varied populations we'll serve, the vaccine delivery process, systems, and applications. From training to production can take 10 to 60 days, depending on program complexity.

Client-specific training begins with Process Training that will indoctrinate values of the client and cover the technical phase to ensure PubSEG associates become proficient in the client's tech support processes, systems, and applications. During this stage, cross-training is also conducted to prepare associates to handle all appropriate skills necessary for their job.

On-the-Job Training (OJT)

On-the-Job Training (OJT) is a combination of live practice and virtual classroom learning. During OJT a support team—including dedicated trainers, quality analysts, team leaders and tenured associates—conducts side-by-side monitoring of associate performance. They provide coaching and feedback to address areas for improvement and assess trends for review and follow-up in the classroom. During this phase, trainees can handle calls in a controlled environment and a glide path is established to ensure performance is progressing, yet is reasonable and not overwhelming to a new associate. At the end of training, all trainees are certified and evaluated to handle the end-to-end interaction/support process. Associates not meeting the required minimum standards can be returned to the OJT environment for further one-on-one training and coaching.

Training Workflow



As a global leader in service delivery, we incorporate a cultural awareness component within our Foundation Training to ensure associates learn about cultural differences in the geographies their programs service. In addition, PubSEG provides a thorough understanding of the client and client culture enabling our employees to identify with their program and become a part of our client's cultural structure.

The Foundation Training blends customer service, building rapport, etc. with account-specific topics that include call flow mastery and approved and detailed Q&A regarding COVID-19 vaccines. This approach will also be utilized in the learning sessions and interventions throughout the year.

8. Describe your ability to meet the reporting requirements set forth in Section V.L, including ad hoc reporting capabilities.

PubSEG will deploy its global operations methodology to ensure all required consumer contact handling quality KPIs are consistently achieved.

Service quality is ensured through a framework of best practice processes and procedures covering Transaction Monitoring, Feedback and Coaching, Calibration, Performance Management, Quality Reporting, Complaint Management and the correction and prevention of issues.



We provide the foundation for our team to track and understand overall performance, including the reporting requirements in section V.L. Reports will be provided to the operations team in real time, daily and weekly and monthly tracking cumulative performance across the year. This is then overlaid with insight from the PubSEG Speech Analytics software, Nexidia, combining to provide trend and data insight that the Operations team use to drive CCP and team performance, develop greater customer insight, and identify how innovation and transformation opportunities could drive operational and Customer First service change.

PubSEG recognizes that during COVID, call volumes, Nebraskans' knowledge level of the vaccine process, as well as outside forces are constantly changing and will impact the Vaccine Helpline. Our processes are designed to provide early indicators where performance is not on target, and by comparing daily results against agreed and expected service levels, we will be able to identify what may be changing and—more importantly—why. Knowing the why, and through further investigation understanding the real reasons for changes to the expected, enables our management team to work with the operational delivery teams to control situations quickly and put forward data-driven recommendations for what rectifying actions need to be taken to either prevent or reverse any failures.

PubSEG uses quality reporting to track various Customer Experience and quality metrics. Our reporting brings together multiple data sources into one consolidated view to identify trends across Customer Experience and Productivity dashboards to include historical and real-time performance trending on Quality Excellence, RTF, and CFR Analysis.

Performance Ownership

- All Service Level failures are reported to Executive level on a weekly basis, and any rectification plans defining the process to get services back on track are overseen by our SVP of North America.

Operations Manager/Program Delivery Manager is responsible for monitoring, managing, and delivering all Service Levels across the call center. Through the team of Team Leaders, they will monitor service level adherence throughout the day. They will attend weekly operational performance reviews with the General Manager, Operations in which underperformance will be discussed and improvement plans put in place and then tracked.

- **Team Leaders** – Responsible for performance ensuring their team meets the State's KPI targets with performance measured daily, weekly and monthly. The Team Leaders meet every day to review previous day's performance with the Operations Manager/Service Delivery Manager, enabling a review against all performance outliers, quality and adherence. Where there is any risk of underperformance, or a trend is spotted that is outside of expected, they deliver a plan of coaching and support that will be developed and tracked through the next 48 hours to reduce any risk of services not meeting requirement metrics. They will also attend monthly quality calibration sessions with the Quality Analysts and Operations Manager to ensure performance assessment is aligned. Any outlier performance will be identified and addressed.

9. Describe how you would ensure that Vaccine Helpline staff will reflect the geographic and cultural diversity of the state. Describe how you would ensure proper geographic coverage in both more populated communities versus more rural locations.

We customize each Client Services team to align with the culture, vision, and mission of our clients. We are a “virtual extension” of our client and our Client Services team is available 24 hours a day.

10. Describe how you would overcome cultural barriers in communities that don't typically give personal information over the phone or via the internet. Describe how you would overcome cultural barriers in communities that are fearful of giving personal information to anyone because of fear of legal retaliation.

During initial client engagement, PubSEG fully analyzes our client's existing hiring requirements, culture and business objectives to establish the hiring criteria and guidelines that make a right fit for the State of Nebraska.

We will work with the State to develop scripting and rebuttal strategies to reduce the fears of particular segments of the population. These strategies will be reinforced in our training curriculum.

11. Describe how you would address individuals with disabilities as part of your vaccine helpline services.

In an environment of rising citizen demands and diminishing public funding, we realize the importance of cost-effective, efficient contact programs which meet public expectations. Over the years, we've helped our government clients cut costs, rationalize services, introduce new channels and quite simply make their organizations more accessible to the people they serve. By doing this, we've simplified customer journeys, enabled channel choice, including TTY lines, and improved access to self-funding services. Additionally, we will work with the State to develop processes and options for individuals who may require transportation, in home visitation, or other means of support. Read on to know more about how we've championed successful engagement programs which focus on citizen need.

Corporate Overview

- A. Bidder identification and Information
- a. Valerie Schlitt Associates Incorporated / dba VSA, Inc., VSA Prospecting and Public Safety and Economic Growth, with all names actively used
 - b. Corp. Location – 441 Station Avenue, Haddonfield, NJ 08033
 - c. Office Location #1 – 212 Haddon Avenue, Haddonfield, NJ 08108
 - d. Office Location #2 – 1835 Market Street, Suite 820, Philadelphia, PA 19103
 - e. Valerie Schlitt Associates was founded under the same name in July 2001 and incorporated as a S-Corporation in New Jersey in July 2002.
- B. Financial Statements attached in Appendix A
Business Description:
- VSA is a recognized leader nationwide in the call center industry, particularly for the firm’s capabilities in the healthcare market where we service clients who include: Strategic Healthcare Partners (Roper Technologies), the Charge Group (Global Affiliates, Inc.) and Care Logistics
 - Our client base comprises corporations, governmental agencies and non-profits, with a heavy focus on corporations. Key clients: Cass Information Systems, Avencore, Harris Computer (Constellation Software) and RSM
 - The company started as a high-end lead generation agency, making outbound calls to set sales appointments for clients’ sales teams.
 - We have since begun to support larger non-profit and not-for-profit organizations who require outreach to both business entities and consumers. Examples: SEPTA Southeastern Pennsylvania Transportation Authority, MED-Project, Prison Fellowship
 - In 2016, VSA opened a second call center dedicated to inbound customer service calls, after having been awarded a multi-year contract as a subcontractor with the Southeastern Pennsylvania Transportation Authority.
 - In 2020, VSA built a third line of business dedicated to contact tracing. We hired individuals with expertise in contact tracing, integrated HIPAA compliant technology and software, and required all subcontractors to sign BAAs with us. We use the CONTRACE (www.CONTRACE.org) database to recruit staff for our contact tracing programs. Currently, we are a preferred provider in the State of Missouri and have offerings at universities across multiple states. (Non-disclosures apply)
 - VSA supports on average 45 clients at any time and 200 clients annually. Our average client tenure is 8 months. Program durations run from 2 months to 10 years.
 - Banking reference:
James S. Zakrzewski
TD Bank
856.302.4510
James.Zakrzewski@td.com
 - Growth rate 2016 – 2020 has been 800%
 - Named to the Inc. 5000 three consecutive years: 2018, 2019, 2020
- C. VSA has been in business for over 19 years
- D. Valerie Schlitt has owned 100% of the stock since VSA’s founding and there are no plans for a change in ownership in the next 12 months.

- E. Corporate address – 441 Station Avenue, Haddonfield, NJ 08033
- F. VSA has had no dealings with the State of Nebraska over the previous two (2) years.
- G. No party named in VSA’s proposal response is or was an employee of the State of Nebraska within the past 2 years.

No employee of any agency of the State is employed by or is a subcontractor to VSA.

- H. Contract Performance – VSA has performed on all its contracts without default for over the past 5 years. Many of VSA’s customers are on a week-to-week scheduling basis and VSA offers customers the maximum flexibility to start and stop as required for their business needs. For customers that are on annual contracts, VSA has fulfilled these contracts to their completion.

I. Summary of Bidder’s Corporate Experience

a. Project #1: SEPTA Key Customer Call Center

Initial Timeframe: November 2016 for 3-year term, renewable in 1-year periods

Actual Timeframe: November 2016 – ongoing

Services: VSA is a subcontractor to PRWT Services, Inc. one of the largest minority-owned business process outsourcers in the country. PRWT subcontracts to Conduent. VSA is responsible for managing the call center operation for the SEPTA Key Customer Call Center:

- Staff the call center, 6 a.m. – 8 p.m. Monday – Friday and 8 a.m. – 6 p.m. Saturday and Sunday, including all hiring, onboarding, training and HR management
- Staffing levels:
 - Up to 33 FTEs during the week
 - Total agents: 60
 - Managers and Supervisors: 6
 - This program reports to VSA’s Chief Operating Officer
- Answering over 25,000 calls/month
- Workforce management to schedule shifts to meet call variations by day of week, time of day, and dates during month by the ½ hour
- Meet SLAs on abandon rates and quality
- Answer questions from ridership of the SEPTA mass transit system about the new payment technology
- Meet PCI compliance standards, because we accept credit card payments

Key contact:

Alton Shaw

PRWT Services, Inc.

VP of Operations

215.988.8943

Alton.Shaw@PRWT.com

www.PRWT.com

b. Project #2: Harris Computer Corporation, owned by Constellation Software

Initial Timeframe: July 2016, renewable annually

Actual Timeframe: July 2016 – ongoing

Services: VSA delivers surveys and performs outbound lead generation and appointment setting services to the over 25 business units within Harris Computer Corporation's three divisions which include: Healthcare, Public Sector and Municipalities throughout North America.

- VSA is a preferred provider for Harris business units
- Under our master services agreement, we contract with individual business units to define project needs, establish staffing, program design, processes, metrics and scripting
- Demand for VSA's services fluctuates, which requires VSA to demonstrate responsiveness; typically set up a program of 2- 5 individuals within 1 week
- Report program results weekly

Key contact:

Jean Soucy

Group President

Harris Computer Corporation

514.952.4209 (phone)

613.226.3377 (fax)

JSoucy@HarrisComputer.com

www.HarrisComputer.com

c. Project #3: Prison Fellowship, Angel Tree

Initial Timeframe: August 2020 – December 2020

Actual Timeframe: August 2020 – December 2020

Services: VSA was responsible for supporting this Christian-based charity that normally works through churches. During COVID, the organization needed other resources to support their Christmas outreach. VSA offered a discounted rate to fulfill the mission of speaking to caregivers of individuals whose loved ones were incarcerated and gaining agreement for the children to receive a Christmas on behalf of the incarcerated individual.

- Staffed up a 4.5-month program with 2 - 5 FTEs which fluctuated frequently
- Sent emails, took inbound calls and made outbound calls, with up to five follow up attempts to reach caregivers
- Documented agreement to participate as well as details about the children's ages, preferences, sizes, genders, etc.
- Provided weekly metrics

Key contact:

Karen Beauford

Angel Tree Project Manager

Prison Fellowship

571.252.6820 (Phone)

866.906.7462 (Fax)

Karen_Beauford@pfm.org

www.prisonfellowship.org

Experience managing a successful call center:

In 2001, after 17 years in corporate marketing, Valerie Schlitt recognized a need—that many companies don't have the time, expertise or resources to build a sales lead pipeline—and founded VSA, Inc. to fill that void. Nearly two decades later, with sales topping \$5 million, VSA is one of the country's premier telesales and customer service firms with associates working from home or in offices in New Jersey and Philadelphia.

We are proud to be certified as a Woman Owned Small Business. While we qualify as a small business, we are in growth mode and think more like a larger business. Valerie has structured the organization to support growth while maintaining the ability to contract and expand quickly, with strong sales and operations leaders and a team of managers who can take on new clients as they come on board.

VSA has been named to the Inc. 5000 list of the fastest-growing private companies in America for the last three years, 2018 – 2020, and is on track to make the list again in 2021. The company was named to the *Philadelphia Business Journal's* Soaring 76 list of fastest growing companies in the Greater Philadelphia area in 2019 and 2020, as well as to the Philadelphia 100 list of fastest-growing, privately held organizations in 2018 and 2019.

In 2020, Valerie and VSA received a Bronze Stevie® Award in the Achievement in Organization Recovery category, recognizing her successful leadership in getting VSA back on course after a downturn in 2019. VSA has received a Bronze Stevie® Award three consecutive years, 2018-2020, in the category of Company of the Year – Business Services, and Valerie has been selected as a silver level winner of the Stevie® Award for Female Entrepreneur of the Year for business services for the past two years.

Driving all this success are these key factors:

- Nearly two decades of experience supporting companies across industries with outsourced B2B lead generation and inbound customer service programs, with several Fortune 500 firms as clients.
- VSA's business development reps do what our clients don't have the time, resources or expertise to do: fill their sales funnels with leads that meet criteria through cold and warm calls and emails to reach decision makers and set sales appointments. VSA's customer service reps answer inbound telephone calls seven days a week from riders of a leading regional transportation agency.
- Our internal Program Management operations ensure seamless onboarding for new clients, continuous improvement, and results measurement against key performance indicators.
- Our dedication to building VSA's technology stack optimize our clients' results. We invest in new technology to support process efficiencies, including new dialing platforms, upgraded telephony, and database management tools and apply selectively to drive our effectiveness.

- Our commitment to HIPAA compliance and data security is ongoing. The level of clients we serve demand that we protect their data. We work only with IT, telephony vendors, and CRM applications who are stringent about data security and protection.

Commitment and adaptability have always been at the heart of VSA. They are rooted in the collaborative, supportive culture, team-based approach and flexible scheduling that accommodate talented personnel who don't fit the typical 9-to-5 schedule, thereby attracting a dedicated, multigenerational, diverse workforce with low turnover not typically seen in the industry.

Until 2020, our call center capabilities were focused in two areas:

1. **Outbound Lead Generation and Appointment Setting** services to support business development efforts for our clients nationwide. We communicate with multiple populations, ensuring the accurate collection and reporting of data for more than 120 business clients annually. Several are Fortune 500 companies, and over 40% are in the healthcare space. Our business development representatives are 100% virtual within the contiguous 48 states and we have developed a competence for managing remote employees and maintaining a positive workplace throughout COVID-19.
2. **Inbound Customer Service** primarily for the Southeastern Pennsylvania Transportation Authority (SEPTA), the public transit system for Philadelphia and the surrounding area. In 2016 we opened a completely new call center focused on inbound calls with a dedicated management team. We support more than 25,000 calls monthly, responding to customer inquiries and complaints, as well as solving payment and service problems. This operation is considered an essential workplace and we have maintained consistent on-site staffing levels throughout COVID-19.

Today, VSA also offers services that support COVID-19 response. We have leveraged close to two decades of experience to launch this line of business, as well as the talents of individuals we have hired to support development of this business line.

- J. Summary of Bidder's Proposed Personnel/Management Approach (See resumes in Appendix B.)
VSA has built a team dedicated to our COVID-19 Response line of business that includes:

1) Michael Maxey, Director of Operations

This role oversees all support functions involved in the delivery of COVID-19 Response programs:

- Training
- Technology Support
- Scheduling and Staffing Coordination
- Process Development and Improvement
- Staff Recruitment and Onboarding

Michael is a seasoned leader in both domestic and international public programs and is fluent in Spanish. He has lived abroad for a significant part of his career which fostered his appreciation and respect for other cultures. Prior to VSA, Michael was contracted by the Institute for Public Health Innovation to help develop and administer the training program for Contact Tracing with the Fairfax, VA Department of Health. Resume attached.

2) Diana (Lihan) Lu, MSPH, Training

This role oversees VSA's COVID-19 Response training team and Q/A process.

Diana earned her Master of Science in Public Health at Johns Hopkins Bloomberg School of Public Health. She is fluent in Mandarin and Portuguese and has working knowledge of Spanish. Diana was deployed by the CDC to Sierra Leone in 2015 as part of the International Ebola Outbreak Response, working on case investigation.

3) Leona Davidson, Scheduling and Staffing Coordination

This role oversees our weekly scheduling process and supervises the staffing coordinators who monitor employee attendance. This is a critical call center role especially for our Work@Home environment and when staffing levels fluctuate.

Leona has over thirty years of call center experience in administration and operations for Fortune 500 Clients. She has managed workflow distribution and hired, trained and coached call center staff to meet service level requirements.

4) Kerry Dougherty, Recruitment and Onboarding

This role is responsible for the rapid screening of applications, remote hiring and onboarding of new employees. This function is critical to our success as a Work@Home organization.

Kerry Dougherty has been with VSA since 2013. She started on the phones and subsequently held most operational roles in the company including Technology Support, Development & Coaching and Program Management. Kerry has been instrumental in VSA's ability to successfully support the expansion of 2016 – 2020 by hiring and retaining required talent.

5) Amy Stevens, Process Development and Improvement

This role develops our standard operating procedures, scripting (for clients who do not have their own), and makes all process improvements.

Amy has over 25 years of experience in call centers, mainly making outbound calls. Over the last five years, she has been accountable for the success of client programs and has leveraged her knowledge of scripting, call cadence, communication styles and documentation. Currently, Amy collaborates closely with our Director of Operations and Training to tailor our processes for each client.

6) Brenden Rochford, Technology Support

This role oversees a team of Technology Support staff. This team is responsible for onboarding all new employees with the right hardware and software including email, time clock, our VOIP phone system, etc. The team also responds to frontline employee questions and troubleshoots technology issues to maximize up-time. Importantly, Brenden manages our external technology vendors that include our IT support, phone system, file sharing apps and email. All vendors are HIPAA compliant and sign BAAs with us. Brenden's team supports the development of daily, weekly and ad-hoc reports.

Brenden has been with VSA for five years and had been a member of the Technology Support Team until his promotion two years ago.

7) The Contact Tracing and Vaccine Helpline Teams

VSA will dedicate contact tracing and vaccine helpline teams to the State of Nebraska.

VSA hires these teams for each client and will do so for Nebraska when/if we are awarded the contract.

Additionally, our executive leadership remains involved in the day-to-day activities of our organization. VSA has placed great importance on COVID-19 Response as a line of business, as well as a way to help the company remain safe and productive. As a result, VSA's executive leadership has played a key role in the design of our COVID-19 Response offerings and selection of our staff.

1) Valerie Schlitt, Chief Executive Officer

Valerie Schlitt is CEO of VSA. Valerie earned her MBA at the Wharton School and held marketing and consulting roles at Fortune 500 firms prior to launching VSA in 2001. After nearly 20 years leading VSA, Valerie knows the call center industry and how to successfully manage both inbound and outbound programs successfully. Likewise, she has made wise strategic decisions including one in 2016 to move the company's direction into healthcare where we currently earn 40% of our revenues. This decision led to VSA becoming HIPAA compliant, a designation not earned by most of our competitors.

In April 2020, Valerie once again made a strategic decision to pursue contact tracing and other COVID-19 Response services. Valerie was committed to differentiating VSA from other call centers doing the same and hired critical personnel with expertise in public health and contact tracing. She also developed a relationship with CONTRACE, a global advocate for COVID-19 contact tracing. VSA now recruits from CONTRACE's database of over 150,000 highly qualified contact tracing candidates nationwide, with backgrounds in public health, nursing and related experience.

2) Michele Plunkett, Chief Operating Officer

Michele Plunkett is COO of VSA. She has been with VSA for eleven years and has consistently been promoted to more senior levels. Currently, Michele oversees all three of VSA's business lines. She is fully committed to delivering successful program for our clients and incorporates a hands-on approach to our highest priority clients, which would include the State of Nebraska.

Michele has upgraded our technology infrastructure and considers our technology stack a key differentiator. She is committed to data privacy, security and confidentiality. Michele works with our compliance consultant on our Risk Summary Management Reports. She is committed to remaining a leader in the healthcare space and knows adherence to privacy and confidentiality are critical to doing so.

Terms and Conditions

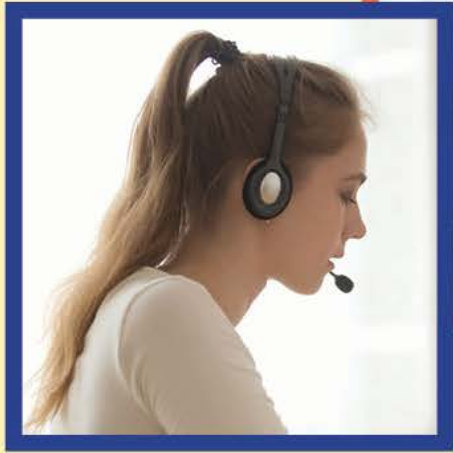
See Appendix C

Addenda

See Appendix D

Signed Request for Proposal for Contractual Services Form and Form A

See Appendix E



PubSEG

Public Safety &
Economic Growth

Statement of Qualifications

For Solicitation RFP 6599 Z1

April 26, 2021

Public Safety and Economic Growth

Option 3

APPENDICES

APPENDIX A

VSA, Inc. Balance Sheet As of December 31, 2020

| | <u>Total</u> |
|-------------------------------------|----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| Total Bank Accounts | \$ 365,031.63 |
| Other Current Assets | |
| 1200 Undeposited Funds | 101,798.75 |
| Total Other Current Assets | \$ 101,798.75 |
| Total Current Assets | \$ 466,830.38 |
| Fixed Assets | |
| 1500 EQUIPMENT & FURNITURE | |
| Total 1500 EQUIPMENT & FURNITURE | \$ 505,971.59 |
| 1599 z. Accumulated Dep | -505,971.59 |
| Total Fixed Assets | \$ 0.00 |
| TOTAL ASSETS | \$ 466,830.38 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Credit Cards | |
| Total Credit Cards | \$ 2,322.41 |
| Other Current Liabilities | |
| 2180 Flex Spending Account /P | 1,636.68 |
| 2999 PPP Loan | 665,330.00 |
| Total Other Current Liabilities | \$ 666,966.68 |
| Total Current Liabilities | \$ 669,289.09 |
| Total Liabilities | \$ 669,289.09 |
| Equity | |
| 3020 Paid-In Capital | 75,340.02 |
| 3030 Capital Stock | 400.00 |
| 3039 Retained Earnings | -56,226.00 |
| 3040 Stockholder's DRAW | -502.52 |
| Net Income | -221,470.21 |
| Total Equity | -\$ 202,458.71 |
| TOTAL LIABILITIES AND EQUITY | \$ 466,830.38 |

Wednesday, Apr 14, 2021 12:50:35 PM GMT-7 - Cash Basis

VSA, Inc.

Profit and Loss

January - December 2020

| | TOTAL |
|--|-----------------------|
| Income | |
| 4000 General Income | 0.00 |
| 4010 Services | 12,237.97 |
| 4020 Appointment Generation | 5,597,030.68 |
| 4025 Commission Revenue | 2,450.24 |
| Total 4010 Services | 5,611,718.89 |
| Total 4000 General Income | 5,611,718.89 |
| 4140 Interest | 0.11 |
| 4150 Other Service Income | |
| 4300 Reimbursed Expenses | |
| 4330 List Purchase Revenue | 4,275.00 |
| Total 4300 Reimbursed Expenses | 4,275.00 |
| Total 4150 Other Service Income | 4,275.00 |
| 4700 Other Income | -100.00 |
| Total Income | \$5,615,894.00 |
| Cost of Goods Sold | |
| 5030 Communications | |
| 5031 Call Processing Software | 149,622.64 |
| 5032 CRM | 28,076.00 |
| 5034 Telephone | -450.00 |
| 5036 Connect & Sell | 402,550.17 |
| Total 5030 Communications | 579,798.81 |
| 5120 Other Services | |
| 5130 Reports | 2,254.94 |
| 5138 Lease - Philadelphia | 414,000.00 |
| 5140 Letter Writing | -10.00 |
| 5145 Database | 68,765.82 |
| Total 5120 Other Services | 485,010.76 |
| 5200 Payroll | |
| 5211 Temp Agency Services | 755,251.51 |
| 5220 Employee payroll | 1,658,945.22 |
| 5240 ER FICA | 208,996.59 |
| Total 5200 Payroll | 2,623,193.32 |
| 5420 Commissions | 82,024.56 |
| Total Cost of Goods Sold | \$3,770,027.45 |
| GROSS PROFIT | \$1,845,866.55 |

VSA, Inc.

Profit and Loss

January - December 2020

| | TOTAL |
|---|-------------------|
| Expenses | |
| 6000 Administration | |
| 6020 Automobile Expense | |
| 6022 Gas | 511.33 |
| 6024 Auto Maintenance | 58.71 |
| 6026 Parking | 2.50 |
| 6028 Tolls | 295.00 |
| Total 6020 Automobile Expense | 867.54 |
| 6030 Bank Service Charges | 1,154.69 |
| 6050 Contributions | 4,940.00 |
| 6060 Depreciation Expense | 20,561.00 |
| 6070 Dues and Subscriptions | 0.00 |
| 6100 Insurance | |
| 6113 Management Liability Insurance | 13,439.92 |
| 6115 Cyber Liability Insurance | 1,592.55 |
| 6130 Work Comp | 7,459.38 |
| 6150 Auto Insurance | 745.06 |
| 6160 Business Owners Policy | 3,781.00 |
| 6180 Professional Liability Ins | 5,265.40 |
| 6190 Health Insurance | 73,431.40 |
| 6191 Employer Health Contributions | 14,613.44 |
| Total 6100 Insurance | 120,328.15 |
| 6200 Interest Expense | |
| 6212 Bank Service Charges | 41.87 |
| 6220 Loan Interest | 284.06 |
| Total 6200 Interest Expense | 325.93 |
| 6230 Licenses and Permits | 2,956.50 |
| 6235 Office Enhancements | 1,276.50 |
| 6240 Miscellaneous | 948.12 |
| 6250 Postage and Delivery | 1,472.78 |
| 6270 Professional Fees | 472.00 |
| 6275 Legal Fees | 36,739.33 |
| 6280 Accounting | 21,474.50 |
| 6289 Payroll Processing | 81,695.87 |
| Total 6270 Professional Fees | 140,381.70 |
| 6290 Rent | 74,200.00 |
| 6300 Repairs & Maintenance | |
| 6330 Equipment Repairs | 2,247.00 |
| 6340 Janitorial Exp | 17,738.40 |
| Total 6300 Repairs & Maintenance | 19,985.40 |

VSA, Inc.

Profit and Loss

January - December 2020

| | TOTAL |
|------------------------------------|---------------------|
| 6400 Telephone | |
| 6296 Voice & Data Line | 4,141.77 |
| 6420 HF (HO FIOS) | 1,779.85 |
| 6450 Teleconferencing | -20.00 |
| 6455 Operations Conferences | 872.40 |
| 6456 Mobile | 3,501.72 |
| Total 6400 Telephone | 10,275.74 |
| 6600 Travel | 290.80 |
| 6640 Office Supplies | 13,155.88 |
| 6660 Recruiting staff | |
| 6670 Background Checks | 529.55 |
| 6685 New/Termination Employee | 2,410.00 |
| 6690 Recruitment Services | 3,473.32 |
| Total 6660 Recruiting staff | 6,412.87 |
| 6700 Taxes | 55.70 |
| 6720 Phila - BIRT | 4,349.76 |
| 6740 State Corporate Tax | 1,475.00 |
| Total 6700 Taxes | 5,880.46 |
| 6840 Bookkeeping | 7,910.55 |
| 6900 Computer | 1,866.80 |
| 6910 Antivirus Software | 127.94 |
| 6920 Computer Repairs | 21.31 |
| 6930 Online Communications | 7,225.30 |
| 6940 Hardware Expense | 816.40 |
| 6960 Computer Maintenance | 45,842.21 |
| 6970 Software Expense | 6,457.71 |
| Total 6900 Computer | 62,357.67 |
| 7030 Merchant Account Fees | 36,665.84 |
| 7200 Marketing | |
| 7205 Advertising | 15,015.90 |
| 7221 Team Meetings | 12,190.06 |
| 7236 Marketing Technology | 2,102.40 |
| 7245 Management Meeting | 0.00 |
| 7260 Other Marketing | 4,229.90 |
| 7265 Other Networking | 5,119.47 |
| 7280 Search Engine Optimization | 47,722.00 |
| 7295 Online Marketing | 3,490.00 |
| Total 7200 Marketing | 89,869.73 |
| 7410 Payroll Expenses | |
| 7425 Admin Payroll | 1,212,541.66 |
| Total 7410 Payroll Expenses | 1,212,541.66 |

VSA, Inc.

Profit and Loss

January - December 2020

| | TOTAL |
|--|-----------------------|
| 7430 Payroll Taxes | 89,876.63 |
| 7455 PA ER SUI | -0.03 |
| Total 7430 Payroll Taxes | 89,876.60 |
| 7565 Training | -663.00 |
| Total 6000 Administration | 1,923,973.11 |
| 6926 Voice & Data Line | 4,789.59 |
| 7012 Consultants | 170,683.75 |
| 7600 Unapplied Cash Bill Payment Expense | -262.08 |
| COVID-19 Medicare Credit | -457.08 |
| COVID-19 Retro Credit | -578.00 |
| COVID-19 Wage Credit | -31,780.23 |
| Uncategorized Expense | 878.17 |
| Total Expenses | \$2,067,247.23 |
| NET OPERATING INCOME | \$ -221,380.68 |
| Other Income | |
| 9000 Interest Income | 0.47 |
| Total Other Income | \$0.47 |
| Other Expenses | |
| 8200 Bad Debt Expense | 90.00 |
| Total Other Expenses | \$90.00 |
| NET OTHER INCOME | \$ -89.53 |
| NET INCOME | \$ -221,470.21 |

APPENDIX B

Valerie J. Schlitt

441 Station Avenue
Haddonfield, NJ 08033
856-240-8100 (office)
856-266-0112 (cell)

Valerie.Schlitt@vsapropecting.com
www.vsapropecting.com

Professional Experience:

CEO, Valerie Schlitt Associates 2001- present
Haddon Township, NJ

Founded and continue to lead awarded winning inbound & outbound contact center with offices in Westmont NJ and Philadelphia PA. Key industry focuses include: Healthcare, Education, Logistics, Software.

- Large contracts: 1) 2016: Inbound call center to support SEPTA's key card (replaced tokens); 2) 2016: Multi-divisional Montreal-based software firm serving municipalities and K-12 schools; 3) 2019: Multi-year program to survey drug take-back sites.
- Key service offerings: outbound sales development, inbound customer support, surveys, contact tracing and other COVID-19 Response initiatives
- Named to Inc 5000 fastest-growing private companies in America: 2018, 2019, 2020; twice named on of Philadelphia's Best Places to work
- Drive strategic growth, new market penetration and creation of large contracts

Manager, KPMG Consulting 1999-2001
Radnor, PA

Manager in the Financial Services consulting practice. Served as project manager and team member on US client engagements, regardless of geographic area. Focused on Customer Relationship Management projects.

Senior Consultant, Pricewaterhouse Coopers 1997 – 1999
Philadelphia, PA

Senior Consultant in PwC's SAP Change Management practice. Served in PwC's Global Training Center, with responsibility for the SAP Change Management curriculum.

Director, CIGNA's Direct Marketing Division and Group Benefits Division 1989 – 1997
Philadelphia, PA

Served in increasingly responsible roles, including:

- Managed division-wide process improvement initiatives for Group Benefits
- Held solid and dotted line call-center responsibilities
- Created and managed direct marketing programs promoting group health insurance to small businesses

Schlitt, Valerie
Page 2

Assistant Director, The Travelers, Business Diversification Group 1986 – 1989

Hartford, CT

Managed a team of 4 marketing professionals to promote a new multi-service package to employees of Fortune 500 companies.

Manager, American Express, Cardmember Services 1984 – 1985

Held P&L responsibility for the Expressphone Product during the telecom deregulation period. Employed direct mail to cross-sell American Express Cardmembers the MCI service and earn a % of billed revenue. Managed the MCI relationship; held dotted line responsibility for call centers and technology team supporting the program. Collaborated with Advertising Agency, Ogilvy and Mather Direct.

Education:

- MBA, Wharton School, University of Pennsylvania 1984
- BA University of Pennsylvania, 1979

Personal:

Married, 2 grown children.

Michele M Plunkett
Chief Operating Officer

Work History:

Valerie Schlitt Associates

2011 – present

Haddon Township, NJ

Held multiple roles, each with increased levels of responsibility, authority and accountability:

- 2011 – 2015: Business Development Representative. Responsible for representing VSA clients on the telephone to generate sales leads.
- 2016 – February 2017: Program Manager. Responsible for developing and running Client Programs. Responsibilities included regular client communication, ongoing management of Internal VSA Team assigned to client, process development and improvement, script refinement, weekly client reporting, results delivery.
- March 2017 – August 2017: Director of Operations. Responsible for the day-to-day operation of VSA's Business Development Representatives and Technology Teams.
- September 2017 – July 2020: Vice President, Operations. Managed VSA's Client Associate Teams, Program Managers, Team Leads, Technology Team of roughly 80 individuals. Responsible for all personnel decisions, staffing and managing client teams, new technology upgrades and developments.
- July 2020- Present: Chief Operating Officer. Oversees VSA's strategic accounts. Active participation in large account onboarding and ongoing management to ensure program success. Has led VSA's operation to support exponential growth, staff expansion, transition to Work@Home environment, adoption of new technology. Continues an active role in compliance initiatives, including meeting privacy and confidentiality requirements. Oversee three lines of business: inbound customer service, outbound lead generation, COVID-19 reponse.

First Presbyterian Pre-School

September 2007- June 2016

Lead Teacher, Haddonfield NJ

Held multiple roles including Assistant Preschool teacher, Extended Care teacher and Lead teacher.

John Wanamaker

November 1994 – June 1996

Senior Area Sales Manager, King of Prussia PA

Responsible for sales growth and activity for soft lines and accessories, responsible for all staffing and management assigned to those areas

Education:

The College of New Jersey, Ewing Township, NJ

BA Psychology, Sociology

Graduated 1990

Michael Maxey
5525 Talon Court, Fairfax, Virginia
703-888-9143 – Email: michael.maxey@pubseg.com

Senior health and economic development advisor. Fully fluent in Spanish. Thirty years of experience in the design and management of social and economic development projects. Extensive experience managing community development and health services programs in Latin America and the Middle East. Fully trained as a COVID Case Investigation and Contact Tracing Team Leader. Certified as a member of the Fairfax Virginia Medical Response Corps with multiple deployments during COVID pandemic.

Work Experience

December 2020 – Present – Senior Advisor to Public Safety and Economic Growth (PubSEG), VSA, Inc. - Primary focus is on the design and implementation of case investigation, contact tracing, and vaccine programs. Created online, in-house training platform for PubSEG staff to augment Johns Hopkins and ASTHO contact tracing training, promote uniform and compassionate interview techniques, and ensure staff understand and can effectively use PubSEG's case investigation and contact tracing tools. To date, managed the design and start-up of COVID response programs with the private sector and a national university system with campuses in five major U.S. metropolitan areas.

June 2020 – November 2020 – Contact Tracing Team Leader – Completed Johns Hopkins and ASTHO training along with FEMA emergency responder training. Hired by Fairfax County Health Department to lead contact tracing team and assist in training of contact tracing staff. Conducted interviews, established quality control procedures, and managed contact tracing team by providing coaching, supervision and backstopping support. Provided private consulting services to private companies that were considering establishing their own COVID response programs.

November 2016 – May 2020 – Senior Program Manager - Provided youth mentoring, skills training, and workforce development support to the United States Agency for International Development (USAID). Conducted economic analysis and strategy development for the USAID Honduras Health and Education Office. Designed innovative concept to raise support for these programs. See – [Diaspora Outreach for Youth](#).

July 2015 – October 2016 – Senior Advisor – Provided analytical and program design advisory services to Texas A&M, Volunteers for Economic Growth Alliance, Cultivating New Frontiers in Agriculture (CNFA), Valbin Corporation, and Dexis. Served as advisor on health and education programs. Worked as a Subject Matter Expert and training facilitator at the Foreign Service Institute – Foreign Affairs Counter Threat (FACT) course.

August 2012 – June 2015 - Senior Program Advisor – USAID Yemen - Designed rural sector strategy to support stabilization and transition to sustainable economic development and better health outcomes. Identified key areas of opportunity, designed a \$24.5 million, five-year program aimed at increasing livelihoods, reducing malnutrition, and leveraging private sector investment in the agriculture sector.

January 2011 – July 2012 – Senior Program Manager – USAID West Bank Gaza – Managed a \$100 million Palestinian Community Assistance Project (PCAP) in Gaza. This program provided social and healthcare assistance to over 90,000 people, created 87,000 workdays of employment, provided 41,000 people with non-food humanitarian assistance. The project helped youth develop life skills, improved mental health, and supported accelerated learning programs for over 2,000 children.

January 2010 – December 2010 - Senior Development Advisor – USAID Middle East Iraq Reconstruction Office – Led rural development support activities in USAID Iraq, participated in senior level inter-agency meetings, and led discussions and briefings related to Iraq. Provided technical support on social and economic issues and served as a development officer supporting program design and implementation.

December 2007 – December 2009 – ePRT USAID Representative – Led design and implementation of USAID Iraq funded counter-insurgency program on an embedded Provincial Reconstruction Team (ePRT) in Babil Province, Iraq. Guided implementation of a multi-sectoral development program to support rural livelihoods, increase access to food, and improve citizen security.

May 2007 – November 2007 – Migration Advisor – Provided youth migration advisory services to non-profit groups in Mississippi. Helped assess Hispanic migration and education needs. Created demographic maps by county of Hispanic immigrant children based on U.S. Census data. Highlighted need for bi-lingual education and youth health services, and supported fund-raising efforts to provide those services.

January 2004 – April 2007 – Senior Officer-in-Charge, Central America and Mexico Office, Latin America and the Caribbean Bureau, USAID Provided strategic analysis and program design support to field mission senior staff implementing a US\$1 billion development program in Central America and Mexico. Identified youth gang prevention as a critical transnational issue and led efforts in developing LAC Bureau response. Led the design of the Millennium Challenge Corporation’s El Salvador program.

Education

Master of Business Administration – International Marketing- University of Costa Rica; Bachelor of Science – Agriculture – Mississippi State; Master of Science – Agronomy – Mississippi State; Foreign Service Institute (FSI) – Fully Fluent in Spanish (Speaking 3/Reading 3).

Contact Tracing Certification – Successfully completed Johns Hopkins University and ASTHO Contact Tracing training courses as well as Federal Emergency Management Agency (FEMA) volunteer training.

Community Experience

In November 2018, established a 501c3 Non-Profit – the [Marie Maxey Foundation](#) – to promote better health and education outcomes for Latin American youth. Led fund-raising efforts to finance scholarships for college expenses of Hispanic youth and initiated a youth mentoring program in Fairfax County, Virginia.

PROFILE

Survey specialist working in Neglected Tropical Disease with a Master of Science in Public Health. Have 4 years of combined federal service in surveillance, quarantine station, immunization and epidemiology programs; collaborative projects with refugee health screening, tuberculosis (TB) control, and public health preparedness programs.

PROFESSIONAL HIGHLIGHTS

October 2020–present

VSA, Inc., remote

Director of Training

- Provided training-related consultation and plans for contact-tracing bids
- Reviewed and provided feedback on Covid-19 contact tracing documents and training modules

Act to End Neglected Tropical Diseases – East (USAID-funded), Washington DC

May 2019–present

Global Health Division, International Development Group, RTI International

Data Systems Associate

- Built electronic data collection (EDC) tools using the Open Data Kit (ODK)-based platform for surveys including transmission assessment survey (TAS), coverage evaluation survey (CES), direct inspection protocol (DIP)
- Enhanced EDC survey form logic to minimize data quality issues based on prior data review and feedback solicited from country partners
- Managed EDC server via Secure Data Kit (SDK) and liaised with SDK support on resolving server and platform issues
- Produced data monitoring reports and standard tabulation outputs using Stata macros and commands
- Liaised with in-country colleagues on resolving data issues
- Created standard operating procedures for EDC setup, server user guide, data management
- Streamlined process to standardize variables across historical surveys from various countries
- Provided feedback for country-specific survey protocols and reports
- Facilitated regional TAS workshop for lymphatic filariasis country representatives from 13 afro-countries
- Developed and coordinated conference and publication submission processes for division colleagues

Countrywide Mortality Surveillance for Action (COMSA), Maputo, Mozambique

Jun 2018–Dec 2018

Global Health Experience Field Placement, Center for Global Health, JHSPH

Graduate Student Awardee

- Designed protocols for field data collection in 700 clusters across Mozambique as part of surveillance system.
- Collaborated with national government partners in Mozambique to carry out project logistics.
- Developed efficient data collection via in-application data linkage; provided feedback for Open Data Kit development.
- Developed and conducted training for cartographers on baseline population data collection.
- Provided weekly progress report of data collection and identified data errors to address in the field.
- Monitored progress and trends in cartography activities using Excel and QGIS for over 200,000 records.
- Facilitated communications between partners to ensure progress in activities despite logistical obstacles.
- Resolved data correction in previously collected data with in-country province leads.
- Analyzed scope of data errors in server and presented findings in report for project team.
- Produced baseline population dataset for COMSA-Mozambique for over 700,000 households
- Evaluated data linkage between different data collection activities and provided recommendations for optimal linkage
- Produced MSPH Capstone on descriptive analysis of COMSA baseline population

International Center for Maternal and Newborn Health, JHSPH

1/2018-8/2018

Graduate Student Research Assistant

- Conducted literature review and abstracted data from over 50 peer-reviewed journal articles on rates and demographics on maternal mortality for maternal health publication
- Conducted literature search and review for maternal mortality and natural language processing from over 900 journal articles; provided summaries for grant writing
- Provided feedback on direction of descriptive data analysis from abstracted data

Los Angeles Quarantine Station, Los Angeles, CA

Quarantine Public Health Officer

- Coordinated contact investigation of communicable diseases of public health concern at the Los Angeles port of entry.
- Collected and analyzed data for illness and importation cases into surveillance database and identified training needs for relevant airport partners.
- Conducted trainings for travel-industry and federal partners regarding CDC regulations and protocols.
- Developed written port-specific in-station protocols for importation procedures of CDC-regulated items; streamlined process for associated partners by creating forms to identify shipment information.

Centers for Disease Control and Prevention (CDC), Atlanta, GA

Jul 2013–Aug 2015

Public Health Associate Program (PHAP) | Idaho Division of Public Health, Boise, ID

Public Health Associate

- Coordinated statewide recalibration of vaccine-temperature monitoring devices at >300 providers. Monitored and resolved provider issues with vaccine cold-chain compliance.
- Analyzed state immunization registry of >350,000 entries for HPV series initiation and completion to identify patterns in vaccine uptake.
- Evaluated trainings at state epidemiology and immunization conferences to recommend improvement from identified training needs.
- Conducted descriptive epidemiologic evaluation of legionellosis case reports in Idaho during 2009–2013; synthesized findings and recommendations into an article for the Idaho Disease Bulletin, a quarterly publication of the Bureau of Communicable Disease Prevention distributed to ~4,000 Idaho physicians and public health staff.
- Improved programmatic data collection form for Refugee Health Screening Program for qualitative and quantitative measurement of program impact; provided data quality assessment.

CDC Deployment

Epi-Aid following meningitis outbreak at University of Oregon, Eugene, OR

Mar 8,2015–Mar 13,2015

Assisted a 1,200-participant evaluation for serogroup B carriage among students; responsibility in event preparation, supply transportation, student recruitment and enrollment, oropharyngeal swabs, culture plating, and data entry.

2014-2015 International Ebola Outbreak Response, Kambia, Sierra Leone

Jun 28, 2015–Jul 26,2015

Case investigation for missing Ebola contacts. Engaged communities and health units in increasing sick alerts
Coordinated Viral Hemorrhagic Fever Database (VHF) training for local data staff. Performed analysis on VHF data and prepared report.

EDUCATION

Masters of Science in Public Health (MSPH)

Aug 2017-present

Johns Hopkins Bloomberg School of Public Health, Baltimore, MD

Program: Global Disease Epidemiology and Control, Department of International Health

Relevant coursework: *Epidemiology, Biostatistics, STATA programming, Large-scale evaluations, Longitudinal data analysis, Spatial Statistics, Design and conduct of community trials, Demography methods, Survey methods*

GPA: 4.00 | John Snow Award, Global Health Experience Field Placement Travel Award

Bachelor of Science (BS)

Sep 2009–Jun 2013

University of California, San Diego (UCSD), La Jolla, CA

Major: Human Biology | Minor: Global Health GPA: 3.7 Honors: Cum Laude, Phi Beta Kappa, Provost Honors

RELEVANT TRAINING

COVID-19 Contact Tracing, Johns Hopkins University – completed August 2020

SKILLS

Stata 16; RStudio; Microsoft Office Suite; EpiInfo7; QGIS; ArcGIS; Open Data Kit; SurveyMonkey; Google Forms; Notepad++.

LANGUAGES

Chinese (Mandarin), native speaker; Portuguese-European, limited working; Spanish, conversational

Leona M. Davidson
Leonamdav@gmail.com

- Over thirty years of call center experience in administration and operations for Fortune 500 Clients.
- Building and maintaining a motivated team to effectively support client service programs, products and services while exceeding service and revenue goals.
- Managing workflow distribution and floor management to ensure the satisfaction of service levels.
- Hiring, training/developing, motivating, coaching, evaluating and retention of qualified staff. Managing service levels, talk/wrap times, data and both client and consumer satisfaction levels.

Professional Experience:

Manager, Workforce Development, Valerie Schlitt Associates (January 2019-present)

Leverage prior experience with Workforce Management to create weekly schedule for 7-day/week operation, 6 am – 8 pm weekdays and 8 am – 6 pm weekends. Review historical data by 30-minute blocks to create staffing model each week to deliver against SLAs. This is an essential business that has remained open during COVID, with significant turnover and absences.

Educational Testing Service (2010 - 2018) Sr. Manager Operations

Managing, supervising, supporting and assessing the tasks performed by the Teacher Licensure call center's employees.

Ensuring call center agents, mentors, Team Leads and Supervisors were performing their job responsibilities well.

Scheduling for new hire training, cross training and refresher trainings.

Provide appropriate customer service by consistently meeting service levels, abandonment rates, chat and email service levels.

Supported the SBU's Customer Service projects, In-Country Call Centers and start-up of outside vendors. Handled conference calls to go over issues of concern and updates. Attended Governance, Peak Staffing and on site meetings. Organized and supported a team of agents to work on Market Research Projects.

Conducted quarterly reviews with staff concerning attendance, compliance and quality metrics as well as coaching for improved performance in order to contribute to the growth and development of the employee and ETS.

Process documentation (SOPs, process maps & FYI) completed and reviewed according to ETS standards defined by the Office of Quality.
Maintained financial forecast by managing expenses.
Prepared staff Performance Objectives and Performance Reviews for yearly Calibration Sessions.
Worked with the Quality Dept. to develop quality standards for call monitoring.
Prepared Contact Center Monthly Metric Presentations.
Designed and implemented an expense tracking database used by all managers across all programs.

Harte-Hanks Response Management (2005 - 2008)
Pennsauken, New Jersey
Inbound & Outbound Call Center Manager

Start-up of call center unit from ground zero to 8 million dollars a year.
Managed and developed teams of Supervisors, CSR's and TSR's to effectively support and surpass company and client standards.
Established and implemented process improvements for call center processes and programs, specifically client expectations, goals and characteristics of all accounts.
Managed call center statistics and monthly goals based on client initiatives, strategic planning, forecasting and scheduling.
Provided appropriate counseling, coaching, direction and resolution for work and non-work-related situations.
Monitor and audited day-to-day productivity to measure staff performance and the need for improvement in accordance with established programs and policies.
Monitor interaction between staff and customers to ensure quality assurance standards
Managed the call center as the liaison between client services, client, supervisors and call center employees.

Education:

High School Diploma, Riverside High School, Riverside, NJ 08075 Business Major
Dale Carnegie Courses
Business and Industry Training, Montgomery County Community College
Total Call Management Predictive Dialing System, Tele Systems Marketing, Inc. Fairfax VA
EIS Predictive Dialing System
Work Force Management Training
Attended seminars sponsored by the American Telemarketing Association: In addition, numerous company- sponsored seminars and soft skill training courses.
Skills: Microsoft Word, Excel, PowerPoint, Web Mail, Chat, Mini Tabs.

Kerry Dougherty

Director of Operations

Work Experience

VSA Prospecting, Westmont, NJ

Director of Operations

10/2019 - Present

- Make company wide decisions on data driven, quantitative analysis and team collaboration
- Created and hired new positions on my team, including the Special Projects Coordinator, and QA Coordinator
- Manage and supervise four administrative positions, Special Projects Coordinator, and QA Coordinator, and often assign projects/collaborate, and additionally manage 40+ BDR's on a regular basis
- Schedule and assign BDR's to teams according to skills necessitated by client and program specifications
- Assist sales team with proposals and join sales calls as needed, as a representation of operations department
- Developed consistent and objective success metrics and benchmarks for BDRs and clients to meet
- Overhauled the existing payroll and PTO program with a simpler, more efficient process
- Consulted on operational procedures in remote, customer service oriented remote office and successfully implemented new processes at based conclusion
- Lead remote office hiring initiatives, training and onboarding
- Served an integral role by ensuring the company continues to maintain productivity and efficiency during substantial growth which saw its revenue increase from \$1.5 million to over \$5 million.

Director of Associate Development/Program Manager

01/2017 - 10/2019

- Implemented and oversaw new process for scheduling more than 40 calling programs for more than 65 BDR's and team leads
- Responsible for hiring and training new BDR's and successfully coached and trained all BDR's
- Developed training and onboarding process for new BDR's in conjunction with HR team, program managers, and team leads to streamline hiring during aggressive company growth, while maintaining company culture
- Developed BDR's inside sales skills in the context of sales campaign
- Increased productivity of BDR's that were not hitting target success rates, and enabled them to meet benchmark metrics
- Managed program and team for a major capital equipment manufacturer while meeting success goals identified by client, which was a 35% response rate for market research campaign, compared to 15% response rate achieved by other firms in industry
- Wrote and drafted scripting and email template materials for highly complex accounts and clients, in addition to review and revision messaging to ensure campaign success in collaboration with teams
- Utilized various programs and CRM's for clients, including Excel, spreadsheets, Salesforce, HubSpot, PipeDrive, ConstructConnect, ZoomInfo, and more. Often learned new systems for clients quickly.

Head of Technology Support

08/2015 - 01/2017

- Turned position into team of four technology specialists during company growth
- Helped improve operational and procedural efficiency of the CRM system and trained client associated to our CRM system
- Learned and produced complex reports and data analysis for clients, while simultaneously identifying new key performance indicators (KPI's)

Business Development Representative

03/2013 - 08/2015

- Generated sales leads for clients through cold calling and emails
- Communicated complex products and set sales appointments with decision makers on various levels
- Hit opportunity/success starting of 3% consistently across all campaigns and programs, which led me to be the top performer/producer on numerous programs

Aramark/Legends Hospitality, BB&T Pavilion, Camden, NJ

Beer Portable Manager/Bartender

05/2012 - 06/2017

- Managed 2-8 employees and bartenders at various bars within the venue
- Responsible for counting money and product
- Recognized by leaders in company for exhibiting superior customer service and ensuring guest satisfaction

Education

Rutgers University, College of Arts & Sciences, Camden, NJ - May 2017

- Bachelor of Arts, Major in Political Science, Minor in Sociology
- Graduated cum laude with 3.7 GPA
- Member of Political Science Honor Society: Pi Sigma Alpha

Amy Stevens

Valerie Schlitt Associates, Haddon Township, NJ

May 2016 to present

Program Manager

Process Development and Improvement

Develop core processes for Client Programs in collaboration with the COO and Director of Operations. Leveraged program design experience from Program Management tenure and live experience making outbound calls.

Management of multiple accounts across several verticals including Education (K-12, College and Graduate Level), healthcare, software, manufacturing, and professional services. In addition to calling on all managed accounts, responsibilities include onboarding accounts, developing and refining processes, optimizing messaging to continuously improve results, working with BDR teams, reporting, and acting as the point of contact to the client and the calling team.

Arvato Bertlesmann North America, Weaverville, NC

1 year 7 mos

Inbound Call Center Customer Service Representative / Outbound Research Associate – for Ally Bank

Started as Inbound Customer Service Representative for Ally Bank's 24-hour customer service center.

Handled inbound calls to trouble-shoot a variety of banking issues, including opening and closing accounts, wire transfers and debit card issues.

Promoted to Outbound Research Associate calling Ally customers to handle problems and disputes.

Worked through Salesforce. Knowledge of 7 financial systems where information was obtained to perform job function optimally.

Sceris, Sudbury, MA

2 years 8 mos

Business Development Associate / Inside Sales

Lead generation and new account development. Cold call prospecting to CFO, Controller and Accounting levels promoting Sceris' software for accounting departments. Healthcare was the primary target although multiple verticals were contacted. Assisted Sceris's CEO and Senior VP with web product demos, and all follow-up until prospect resolution reached.

Bottom Line Inc. (Formerly Boardroom Inc), Stamford, CT

16 years 11 mos

Director of List Sales and Insert Media

Premier direct marketing company founded in 1972 by Martin Edelston, Boardroom published newsletters and books focusing on health and finances. The company remains privately held today, run by the Edelston family. Handled in-house list management and insert media program for over 20 titles. Started as an Account Executive selling and servicing our lists and programs. This involved cold calling potential list users and current customers, promoting programs, tracking results, fulfilling list orders through our service bureau and handling issues for our customers. Ran our list promotion programs which incorporated interviews with some of legends of direct marketing.

Educational experience

Ursinus College, Collegeville, PA

B.A. in English

Brenden Rochford
VSA, Inc., Lead Technology Specialist
Email: Broch919@gmail.com

Lead Technology Specialist, Valerie Schlitt Associates

March 2016-Present

Promoted to Lead Technology Specialist supervising a VSA' Technology Support team in February 2020. Oversee all technology vendor management, database management, compliance and data security programs, hardware management and the tech support process for the VSA's Westmont operation.

Initially hired to support a venture-backed client in its go-to-market strategy, which involved a complex process of emails, videos, web research and follow-up.

Key accomplishments:

- Led the decision-making process on VSA's new VOIP telephony system, making a detailed comparison of three potential partners.
- Oversaw the migration from the former VOIP system to the new platform with no disruption in client programs.
- Served as technology lead in discussion to select two new dialing platforms: Convoso and ConnectAndSell, and supported the implementation of these technologies. Increased production by 50% - 100%.
- Supervised the process of becoming HIPAA compliance and ensuring BAAs signed with all technology partners.
- Onboarded the data platform, ZoomInfo. Became the subject matter expert within the Technology Support Team.
- Managed expansion of workforce, initially office-based and currently Work@Home to deliver hardware, software (communications tools, time clock, access to networks and all platforms). Supervise the Technology Team's response to staff questions to optimize staff production up-time.
- Led the expansion of the Technology Support Team; implemented processes to remain highly responsive to the staff especially in a Work@Home environment.

Business Development Representative

Member of team to drive business leads through emails and videos for a venture-backed client, subsequently purchased by Google. Required complex process of personalized video creation of prospect websites, and inclusion into 1:1 emails. Supported process refinement to generate targeted results for VSA's client.

Prior Experience:

Customer-facing, service roles at:

The Grand Cherry Hill Apartment Homes, May 2014-November2015

Spring Hills Assisted Living, January 2013-May 2014

Recreational Management Services, June 2012-Sept. 2012

The Taproom Bar & Grill, May 2008- Aug 2010

Watson Landscaping, June 2006-Sept 2009

Education:

-Rutgers University (2011-Present)

-Albright College (2010-2011)

-Haddonfield Memorial High School (2006-2010)

APPENDIX C

II. TERMS AND CONDITIONS

Bidders should complete Sections II through VI as part of the proposal. Bidder should read the Terms and Conditions and should initial either accept, reject, or reject and provide alternative language for each clause. The bidder should also provide an explanation of why the bidder rejected the clause or rejected the clause and provided alternate language. By signing the solicitation, bidder is agreeing to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the proposal. The State reserves the right to reject or negotiate the bidder's 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 proposal. The State of Nebraska reserves the right to reject proposals that attempt to substitute the bidder's commercial contracts and/or documents for this RFP.

Bidders should submit with their proposal any license, user agreement, service level agreement, or similar documents that the bidder wants incorporated in the Contract. The State will not consider incorporation of any document not submitted with the bidder's proposal. 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 have been negotiated and agreed to, the Addendum to Contract Award shall be interpreted as follows:

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

A. GENERAL

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

The contract resulting from this solicitation shall incorporate the following documents:

1. Request for Proposal and Addenda;
2. Amendments to the solicitation;
3. Questions and Answers;
4. Contractor's proposal (Contractor's response to the solicitation and properly submitted documents); and
- 5.
6. Amendments/Addendums to the Contract.

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) Amendments and addendums to the executed Contract with the most recent dated amendment or addendum, respectively, having the highest priority, 2) Amendments to the solicitation, 3) Questions and Answers, 4) the original solicitation document and any Addenda, and 5) the contractor's submitted Proposal.

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

B. NOTIFICATION

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

Communications regarding the executed contract shall be in writing and shall be deemed to have been given if delivered personally, electronically, or mailed. All notices, requests, or communications shall be deemed effective upon receipt, unless mailed and in such case, notices, requests, and communications will be deemed effective within five (5) calendar days following deposit in the mail.

C. BUYER'S REPRESENTATIVE

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

D. GOVERNING LAW (Statutory)

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

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

E. BEGINNING OF WORK

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

F. AMENDMENT

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

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

G. CHANGE ORDERS OR SUBSTITUTIONS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

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

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

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

H. VENDOR PERFORMANCE REPORT(S)

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

The State may document any instance(s) of products or services delivered or performed which exceed or fail to meet the terms of the purchase order, contract, and/or solicitation specifications. The State Purchasing Bureau may contact the Vendor regarding any such report. Vendor performance report(s) will become a part of the permanent record of the Vendor.

I. NOTICE OF POTENTIAL CONTRACTOR BREACH

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VS | | | |

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

J. BREACH

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

Either Party may terminate the contract, in whole or in part, if the other Party breaches its duty to perform its obligations under the contract in a timely and proper manner. Termination requires written notice of default and a thirty (30) calendar day (or longer at the non-breaching Party's discretion considering the gravity and nature of the default) cure period. Said notice shall be delivered by Certified Mail, Return Receipt Requested, or in person with proof of delivery. Allowing time to cure a failure or breach of contract does not waive the right to immediately terminate the contract for the same or different contract breach which may occur at a different time. In case of default of the Contractor, the State may contract the service from other sources and hold the Contractor responsible for any excess cost occasioned thereby. The State may recover from the Contractor as damages the difference between the costs of covering the breach. Notwithstanding any clause to the contrary, the State may also recover the contract price together with any incidental or consequential damages, but less expenses saved in consequence of Contractor's breach.

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

K. NON-WAIVER OF BREACH

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

Allowing time to cure or the acceptance of late performance with or without objection or reservation by a Party shall not waive any rights of the Party, including, but not limited to the right to immediately terminate the Contract for the same or a different breach, or constitute a waiver of the requirement of timely performance of any obligations remaining to be performed.

L. SEVERABILITY

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

M. INDEMNIFICATION

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

1. GENERAL

The Contractor agrees to defend, indemnify, and hold harmless the State and its employees, volunteers, agents, and its elected and appointed officials ("the indemnified parties") from and against any and all third party claims, liens, demands, damages, liability, actions, causes of action, losses, judgments, costs, and expenses of every nature, including investigation costs and expenses, settlement costs, and attorney fees and expenses ("the claims"), sustained or asserted against the State for personal injury, death, or property loss or damage, arising out of, resulting from, or attributable to the willful misconduct, negligence, error, or omission of the Contractor, its employees, Subcontractors, consultants, representatives, and agents, resulting from this contract, except to the extent such Contractor liability is attenuated by any action of the State which directly and proximately contributed to the claims.

2. INTELLECTUAL PROPERTY

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

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

3. PERSONNEL

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

4. SELF-INSURANCE

The State of Nebraska is self-insured for any loss and purchases excess insurance coverage pursuant to Neb. Rev. Stat. § 81-8,239.01 (Reissue 2008). If there is a presumed loss under the provisions of this agreement, Contractor may file a claim with the Office of Risk Management pursuant to Neb. Rev. Stat. §§

81-8,829 – 81-8,306 for review by the State Claims Board. The State retains all rights and immunities under the State Miscellaneous (Section 81-8,294), Tort (Section 81-8,209), and Contract Claim Acts (Section 81-8,302), as outlined in Neb. Rev. Stat. § 81-8,209 et seq. and under any other provisions of law and accepts liability under this agreement to the extent provided by law.

5. ALL REMEDIES AT LAW

Nothing in this agreement shall be construed as an indemnification by one Party of the other for liabilities of a Party or third parties for property loss or damage or death or personal injury arising out of and during the performance of this contract. Any liabilities or claims for property loss or damages or for death or personal injury by a Party or its agents, employees, contractors or assigns or by third persons, shall be determined according to applicable law.

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

N. ATTORNEY'S FEES

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| WS | | | |

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

O. LIQUIDATED DAMAGES

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| WS | | | |

Failure to initiate contact with an individual upon receiving notification from DHHS within three (3) business days may result in an assessment of liquidated damages due the State of \$1,000 (one thousand dollars) per day, per individual that is to be contacted until contact is initiated. Contractor will be notified in writing when liquidated damages are assessed. Damages will be assessed against Contractor's subsequent submitted invoice(s).

P. ASSIGNMENT, SALE, OR MERGER

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| WS | | | |

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

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

Q. CONTRACTING WITH OTHER NEBRASKA POLITICAL SUB-DIVISIONS OF THE STATE OR ANOTHER STATE

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

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

R. FORCE MAJEURE

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

Consistent with the purpose of this Agreement – to obtain from the Contractor contact tracing services to combat the COVID-19 pandemic – the Parties agree that default or delay in the performance of obligations caused by the COVID-19 pandemic shall not constitute a Force Majeure Event.

S. CONFIDENTIALITY

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

It is incumbent upon the Parties to inform their officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a. Specifically, 5 U.S.C. 552a (i)(1), which is made applicable by 5 U.S.C. 552a (m)(1), provides that any officer or employee, who by virtue of his/her employment or official position has possession of or access to agency records which contain individually identifiable information, the disclosure of

which is prohibited by the Privacy Act or regulations established thereunder, and who knowing that disclosure of the specific material is prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

All information entered into the State's Systems or otherwise collected while performing services under this agreement shall not be sold by Contractor. This provision shall survive the termination or expiration of this contract.

All information entered into the State's Systems or otherwise collected while performing services under this Agreement shall not be shared or disclosed by Contractor with any other entity or individual, unless (a) required by applicable law, or (b) authorized by the State in writing, prior to such disclosure or sharing. This provision shall survive the termination or expiration of this contract.

T. OFFICE OF PUBLIC COUNSEL (Statutory)

If it provides, under the terms of this contract and on behalf of the State of Nebraska, health and human services to individuals; service delivery; service coordination; or case management, Contractor shall submit to the jurisdiction of the Office of Public Counsel, pursuant to Neb. Rev. Stat. §§ 81-8,240 et seq. This section shall survive the termination of this contract.

U. LONG-TERM CARE OMBUDSMAN (Statutory)

Contractor must comply with the Long-Term Care Ombudsman Act, per Neb. Rev. Stat. §§ 81-2237 et seq. This section shall survive the termination of this contract.

V. EARLY TERMINATION

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| WS | | | |

The contract may be terminated as follows:

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

W. CONTRACT CLOSEOUT

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| WS | | | |

No later than 30 days after termination or expiration of the contract, the Contractor shall, unless stated otherwise herein:

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

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

III. CONTRACTOR DUTIES

A. INDEPENDENT CONTRACTOR / OBLIGATIONS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| VJS | | | |

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

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

The Contractor shall secure, at its own expense, all personnel required to perform the services under the contract. The personnel the Contractor 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 Contractor's proposal 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 Contractor to the contract shall be employees of the Contractor or a subcontractor, and shall be fully qualified to perform the work required herein. Personnel employed by the Contractor or a subcontractor to fulfill the terms of the contract shall remain under the sole direction and control of the Contractor or the subcontractor respectively.

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

1. Any and all pay, benefits, and employment taxes and/or other payroll withholding;
2. Any and all vehicles used by the Contractor's employees, including all insurance required by state law;
3. Damages incurred by Contractor'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 Contractor's employees; and,
6. All claims on behalf of any person arising out of employment or alleged employment (including without limit claims of discrimination alleged against the Contractor, its officers, agents, or subcontractors or subcontractor's employees)

If the Contractor intends to utilize any subcontractor, the subcontractor's level of effort, tasks, and time allocation should be clearly defined in the bidder's proposal. The Contractor shall agree that it will not utilize any subcontractors not specifically included in its proposal in the performance of the contract without the prior written authorization of the State.

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

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

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

B. EMPLOYEE WORK ELIGIBILITY STATUS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

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

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

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

C. COMPLIANCE WITH CIVIL RIGHTS LAWS AND EQUAL OPPORTUNITY EMPLOYMENT / NONDISCRIMINATION (Statutory)

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

D. COOPERATION WITH OTHER CONTRACTORS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| VSS | | | |

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

E. PERMITS, REGULATIONS, LAWS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| WS | | | |

The contract price shall include the cost of all royalties, licenses, permits, and approvals, whether arising from patents, trademarks, copyrights or otherwise, that are in any way involved in the contract. The Contractor shall obtain and pay for all royalties, licenses, and permits, and approvals necessary for the execution of the contract. The Contractor must guarantee that it has the full legal right to the materials, supplies, equipment, software, and other items used to execute this contract.

F. OWNERSHIP OF INFORMATION AND DATA / DELIVERABLES

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| WS | | | |

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

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

G. INSURANCE REQUIREMENTS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| WS | | | |

The Contractor shall throughout the term of the contract maintain insurance as specified herein and provide the State a current Certificate of Insurance/Acord Form (COI) verifying the coverage. The Contractor shall not commence work on the contract until the insurance is in place. If Contractor subcontracts any portion of the Contract the Contractor must, throughout the term of the contract, require each subcontractor to have equivalent insurance and provide written notice to the State that the Contractor has verified that each subcontractor has the required coverage.

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

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

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

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

1. WORKERS' COMPENSATION INSURANCE

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

2. COMMERCIAL GENERAL LIABILITY INSURANCE AND COMMERCIAL AUTOMOBILE LIABILITY INSURANCE

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

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

| REQUIRED INSURANCE COVERAGE | |
|--|-------------------------------|
| COMMERCIAL GENERAL LIABILITY | |
| General Aggregate | \$2,000,000 |
| Products/Completed Operations Aggregate | \$2,000,000 |
| Personal/Advertising Injury | \$1,000,000 per occurrence |
| Bodily Injury/Property Damage | \$1,000,000 per occurrence |
| Medical Payments | \$5,000 any one person |
| Damage to Rented Premises (Fire) | \$300,000 each occurrence |
| Contractual | Included |
| Independent Contractors | Included |
| <i>If higher limits are required, the Umbrella/Excess Liability limits are allowed to satisfy the higher limit.</i> | |
| WORKER'S COMPENSATION | |
| Employers Liability Limits | \$500K/\$500K/\$500K |
| Statutory Limits- All States | Statutory - State of Nebraska |
| Voluntary Compensation | Statutory |
| UMBRELLA/EXCESS LIABILITY | |
| Over Primary Insurance | \$1,000,000 per occurrence |
| CYBER LIABILITY | |
| Breach of Privacy, Security Breach, Denial of Service, Remediation, Fines and Penalties | \$3,000,000 |
| MANDATORY COI SUBROGATION WAIVER LANGUAGE | |
| "Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska." | |
| MANDATORY COI LIABILITY WAIVER LANGUAGE | |
| "Commercial General Liability & Commercial Automobile Liability policies shall name the State of Nebraska as an Additional Insured and the policies shall be primary and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory as additionally insured." | |

3. EVIDENCE OF COVERAGE

The Contractor shall furnish the Buyer, with a certificate of insurance coverage complying with the above requirements prior to beginning work at:

State of Nebraska
 State Purchasing Bureau
 Attn: Connie Heinrichs
 RFP: 6499 Z1
 Email: connie.heinrichs@nebraska.gov

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

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

4. DEVIATIONS

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

H. ANTITRUST

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| VSS | | | |

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

I. CONFLICT OF INTEREST

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

By submitting a proposal, bidder certifies that no relationship exists between the bidder and any person or entity which either is, or gives the appearance of, a conflict of interest related to this Request for Proposal or project.

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

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

J. SITE RULES AND REGULATIONS

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

The Contractor shall use its best efforts to ensure that its employees, agents, and Subcontractors comply with site rules and regulations while on State premises. If the Contractor must perform on-site work outside of the daily operational hours set forth by the State, it must make arrangements with the State to ensure access to the facility and the equipment has been arranged. No additional payment will be made by the State on the basis of lack of access, unless the State fails to provide access as agreed to in writing between the State and the Contractor.

K. ADVERTISING

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

L. NEBRASKA TECHNOLOGY ACCESS STANDARDS (Statutory)

Contractor shall review the Nebraska Technology Access Standards, found at <http://nita.nebraska.gov/standards/2-201.html> and ensure that products and/or services provided under the contract are in compliance or will comply with the applicable standards to the greatest degree possible. In the event such standards change during the Contractor's performance, the State may create an amendment to the contract to request the contract comply with the changed standard at a cost mutually acceptable to the parties.

M. DISASTER RECOVERY/BACK UP PLAN

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

N. DRUG POLICY

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

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

O. WARRANTY

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VJS | | | |

Despite any clause to the contrary, the Contractor represents and warrants that its services hereunder shall be performed by competent personnel and shall be of professional quality consistent with generally accepted industry standards for the performance of such services and shall comply in all respects with the requirements of this Agreement. For any breach of this warranty, the Contractor shall, for a period of ninety (90) days from performance

of the service, perform the services again, at no cost to the State, or if Contractor is unable to perform the services as warranted, Contractor shall reimburse the State all fees paid to Contractor for the unsatisfactory services. The rights and remedies of the parties under this warranty are in addition to any other rights and remedies of the parties provided by law or equity, including, without limitation actual damages, and, as applicable and awarded under the law, to a prevailing party, reasonable attorneys' fees and costs.

IV. PAYMENT

- A. PROHIBITION AGAINST ADVANCE PAYMENT (Statutory)**
Neb. Rev. Stat. §§81-2403 states, "[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 (Statutory)**
The State is not required to pay taxes and assumes no such liability as a result of this solicitation. The Contractor 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 Contractor's equipment which may be installed in a state-owned facility is the responsibility of the Contractor.
- C. LATE PAYMENT (Statutory)**
The Contractor may charge the responsible agency interest for late payment in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §81-2401 through 81-2408).
- D. SUBJECT TO FUNDING / FUNDING OUT CLAUSE FOR LOSS OF APPROPRIATIONS (Statutory)**
The State's obligation to pay amounts due on the Contract for a fiscal years following the current fiscal year is contingent upon legislative appropriation of funds. Should said funds not be appropriated, the State may terminate the contract with respect to those payments for the fiscal year(s) for which such funds are not appropriated. The State will give the Contractor written notice thirty (30) calendar days prior to the effective date of termination. All obligations of the State to make payments after the termination date will cease. The Contractor shall be entitled to receive just and equitable compensation for any authorized work which has been satisfactorily completed as of the termination date. In no event shall the Contractor be paid for a loss of anticipated profit.
- E. RIGHT TO AUDIT (First Paragraph is Statutory)**
The State shall have the right to audit the Contractor's performance of this contract upon a thirty (30) days' written notice. Contractor shall utilize generally accepted accounting principles, and shall maintain the accounting records, and other records and information relevant to the contract (Information) to enable the State to audit the contract. (Neb. Rev. Stat. §84-304 et seq.) The State may audit and the Contractor shall maintain, the Information during the term of the contract and for a period of five (5) years after the completion of this contract or until all issues or litigation are resolved, whichever is later. The Contractor shall make the Information available to the State at Contractor's place of business or a location acceptable to both Parties during normal business hours. If this is not practical or the Contractor so elects, the Contractor may provide electronic or paper copies of the Information. The State reserves the right to examine, make copies of, and take notes on any Information relevant to this contract, regardless of the form or the Information, how it is stored, or who possesses the Information. Under no circumstance will the Contractor be required to create or maintain documents not kept in the ordinary course of contractor's business operations, nor will contractor be required to disclose any information, including but not limited to product cost data, which is confidential or proprietary to contractor.

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
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| WS | | | |

The Parties shall pay their own costs of the audit unless the audit finds a previously undisclosed overpayment by the State. If a previously undisclosed overpayment exceeds one-half of one percent (0.5%) of the total contract billings, or if fraud, material misrepresentations, or non-performance is discovered on the part of the Contractor, the Contractor shall reimburse the State for the total costs of the audit. Overpayments and audit costs owed to the State shall be paid within ninety (90) days of written notice of the claim. The Contractor agrees to correct any material weaknesses or condition found as a result of the audit.

F. INVOICES

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| DS | | | |

Invoices for payments must be submitted by the Contractor to the agency requesting the services with sufficient detail to support payment. Invoices shall be sent bi-weekly to:

Department of Health and Human Services
 ATTN: Director of Contact and Care
 301 Centennial Mall S.
 Lincoln, NE 68509
 An email address will be provided upon contract execution.

Invoices shall include itemization of training hours, active hours, back-up capacity headcount with tier, and total amount due. Invoice shall also include documentation log of hours per rep each week.

The terms and conditions included in the Contractor's invoice shall be deemed to be solely for the convenience of the parties. No terms or conditions of any such invoice shall be binding upon the State, and no action by the State, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping the State with respect to any such term or condition, unless the invoice term or condition has been previously agreed to by the State as an amendment to the contract.

G. INSPECTION AND APPROVAL

| Accept (Initial) | Reject (Initial) | Reject & Provide Alternative within Solicitation Response (Initial) | NOTES/COMMENTS: |
|------------------|------------------|---|-----------------|
| VSS | | | |

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 Contractor 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.

H. PAYMENT (Statutory)

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

APPENDIX D

ADDENDUM ONE

Date: March 17, 2021
To: All Bidders
From: Connie Heinrichs / Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)
RE: Addendum for Request for Proposal Number 6499 Z1 to be opened April 8, 2021 at 2:00 p.m. Central Time

Section I.K. Prices will be deleted and replaced with:

K. PRICES

Prices quoted shall be net, including transportation and delivery charges fully prepaid by the contractor, F.O.B. destination named in the solicitation. No additional charges will be allowed for equipment, packing, packages, or partial delivery costs. When an arithmetic error has been made in the extended total, the unit price will govern. All prices, costs, and terms and conditions submitted in the proposal shall remain fixed and valid commencing on the opening date of the proposal until the contract terminates or expires.

Upon request by either Party, the monthly amount for vaccine helpline may be adjusted by the Parties through a written amendment if the average daily call volume, measured over four consecutive calendar weeks ("Measured Amount"), increases or decreases by 25% (twenty-five percent) from the most recent Measured Amount. The requesting Party must provide at least seven (7) days' notification of an adjustment to the monthly rate. The initial baseline of call volume will be calculated as an average of the number of calls on the first four (4) weekly reports (see Section V.L.1).

This Addendum will become part of the Request for Proposal and should be acknowledged with the Request for Proposal response.

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ADDENDUM TWO REVISED SCHEDULE OF EVENTS

Date: March 30, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal 6499 Z1 to be opened ~~April 8, 2021~~ April 15, 2021 at
2:00 p.m. Central

Schedule of Events

The State expects to adhere to the tentative procurement schedule shown below. It should be noted, however, that some dates are approximate and subject to change. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

| ACTIVITY | DATE/TIME |
|---|---|
| 1. Release Solicitation | March 8, 2021 |
| 2. Last day to submit written questions https://nebraska.sharefile.com/r-red1b7bcd3ab24d3bbbed87cc3423a9eb9 | March 23, 2021 |
| 3. State responds to written questions through Solicitation "Addendum" and/or "Amendment" to be posted at: http://das.nebraska.gov/materiel/purchasing.html | March 30, 2021 April 5, 2021 |
| 4. Proposal Opening – Online Via Zoom: https://us02web.zoom.us/j/87564469194?pwd=bW11bkpvZDRGcmVna1IzcFJSTHFCUT09 Electronic proposal submissions link: https://nebraska.sharefile.com/r-r80302c7a339945f4a1b40bf33ff0dfb0 | April 8, 2021 April 15, 2021 2:00 PM Central Time |
| 5. Review for conformance to solicitation requirements | April 8, 2021 April 15, 2021 |
| 6. Evaluation period | April 9, 2021 through April 23, 2021 April 16, 2021 through April 28, 2021 |
| 7. "Oral Interviews/Presentations and/or Demonstrations" (if required) | TBD |
| 8. Post "Notification of Intent to Award" at: http://das.nebraska.gov/materiel/purchasing.html | April 27, 2021 May 3, 2021 |
| 9. Contract finalization period | April 28, 2021 through May 21, 2021 May 4, 2021 through May 21, 2021 |
| 10. Contract award | May 24, 2021 |
| 11. Contractor start date | July 29, 2021 |

This Addendum will become part of the proposal and should be acknowledged with the Request for Proposal.

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ADDENDUM THREE REVISED SCHEDULE OF EVENTS

Date: April 5, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal 6499 Z1 to be opened ~~April 8, 2021~~ ~~April 15, 2021~~ April 16, 2021 at 2:00 p.m. Central

Schedule of Events

The State expects to adhere to the tentative procurement schedule shown below. It should be noted, however, that some dates are approximate and subject to change. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

| ACTIVITY | | DATE/TIME |
|----------|--|---|
| 1. | Release Solicitation | March 8, 2021 |
| 2. | Last day to submit written questions https://nebraska.sharefile.com/r-red1b7bcd3ab24d3bbbed87cc3423a9eb9 | March 23, 2021 |
| 3. | State responds to written questions through Solicitation "Addendum" and/or "Amendment" to be posted at: http://das.nebraska.gov/materiel/purchasing.html | March 30, 2021 April 5, 2021 April 6, 2021 |
| 4. | Proposal Opening – Online Via Zoom: https://us02web.zoom.us/j/87564469194?pwd=bW11bkpvZDRGcmVna1lzcFJSTHFCUT09 Electronic proposal submissions link: https://nebraska.sharefile.com/r-r80302c7a339945f4a1b40bf33ff0dfb0 | April 8, 2021 April 15, 2021 April 16, 2021 2:00 PM Central Time |
| 5. | Review for conformance to solicitation requirements | April 8, 2021 April 15, 2021 April 16, 2021 |
| 6. | Evaluation period | April 9, 2021 through April 23, 2021 April 16, 2021 through April 28, 2021 April 19, 2021 through April 29, 2021 |
| 7. | "Oral Interviews/Presentations and/or Demonstrations" (if required) | TBD |
| 8. | Post "Notification of Intent to Award" at: http://das.nebraska.gov/materiel/purchasing.html | April 27, 2021 May 3, 2021 May 4, 2021 |
| 9. | Contract finalization period | April 28, 2021 through May 21, 2021 May 4, 2021 May 5, 2021 through May 21, 2021 |
| 10. | Contract award | May 24, 2021 |
| 11. | Contractor start date | July 29, 2021 |

This Addendum will become part of the proposal and should be acknowledged with the Request for Proposal.

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ADDENDUM FOUR REVISED SCHEDULE OF EVENTS

Date: April 6, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal 6499 Z1 to be opened ~~April 8, 2021~~ April 15, 2021 April 16, 2021 TBD at 2:00 p.m. Central

Schedule of Events

The State expects to adhere to the tentative procurement schedule shown below. It should be noted, however, that some dates are approximate and subject to change. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

| ACTIVITY | | DATE/TIME |
|----------|--|--|
| 1. | Release Solicitation | March 8, 2021 |
| 2. | Last day to submit written questions https://nebraska.sharefile.com/r-red1b7bcd3ab24d3bbbed87cc3423a9eb9 | March 23, 2021 |
| 3. | State responds to written questions through Solicitation "Addendum" and/or "Amendment" to be posted at: http://das.nebraska.gov/materiel/purchasing.html | March 30, 2021 April 5, 2021 April 6, 2021 TBD |
| 4. | Proposal Opening – Online Via Zoom: https://us02web.zoom.us/j/87564469194?pwd=bW11bkpvZDRGcmVna1lzcFJSTHFCUT09 Electronic proposal submissions link: https://nebraska.sharefile.com/r-r80302c7a339945f4a1b40bf33ff0dfb0 | April 8, 2021 April 15, 2021 April 16, 2021 TBD 2:00 PM Central Time |
| 5. | Review for conformance to solicitation requirements | April 8, 2021 April 15, 2021 April 16, 2021 TBD |
| 6. | Evaluation period | April 9, 2021 through April 23, 2021 April 16, 2021 through April 28, 2021 April 19, 2021 through April 29, 2021 TBD |
| 7. | "Oral Interviews/Presentations and/or Demonstrations" (if required) | TBD |
| 8. | Post "Notification of Intent to Award" at: http://das.nebraska.gov/materiel/purchasing.html | April 27, 2021 May 3, 2021 May 4, 2021 TBD |
| 9. | Contract finalization period | April 28, 2021 through May 21, 2021 May 4, 2021 May 5, 2021 through May 21, 2021 TBD |

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| 10. | Contract award | May 24, 2021 TBD |
| 11. | Contractor start date | July 29, 2021 |

This Addendum will become part of the proposal and should be acknowledged with the Request for Proposal.

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ADDENDUM FIVE REVISED SCHEDULE OF EVENTS

Date: April 16, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal 6499 Z1 to be opened ~~April 8, 2021~~ April 15, 2021 April 16, 2021 ~~TBD~~ April 26, 2021 at 2:00 p.m. Central

Schedule of Events

The State expects to adhere to the tentative procurement schedule shown below. It should be noted, however, that some dates are approximate and subject to change. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

| ACTIVITY | | DATE/TIME |
|----------|--|--|
| 1. | Release Solicitation | March 8, 2021 |
| 2. | Last day to submit written questions https://nebraska.sharefile.com/r-red1b7bcd3ab24d3bbbed87cc3423a9eb9 | March 23, 2021 |
| 3. | State responds to written questions through Solicitation "Addendum" and/or "Amendment" to be posted at: http://das.nebraska.gov/materiel/purchasing.html | March 30, 2021 April 5, 2021 April 6, 2021 April, 16, 2021 |
| 4. | Proposal Opening – Online Via Zoom: https://us02web.zoom.us/j/87564469194?pwd=bW11bkpvZDRGcmVna1lzcFJSTHFCUT09 Electronic proposal submissions link: https://nebraska.sharefile.com/r-r80302c7a339945f4a1b40bf33ff0dfb0 | April 8, 2021 April 15, 2021 April 16, 2021 TBD April 26, 2021 2:00 PM Central Time |
| 5. | Review for conformance to solicitation requirements | April 8, 2021 April 15, 2021 April 16, 2021 TBD April 26, 2021 |
| 6. | Evaluation period | April 9, 2021 through April 23, 2021 April 16, 2021 through April 28, 2021 April 19, 2021 through April 29, 2021 TBD April 27, 2021 through May 10, 2021 |
| 7. | "Oral Interviews/Presentations and/or Demonstrations" (if required) | TBD |
| 8. | Post "Notification of Intent to Award" at: http://das.nebraska.gov/materiel/purchasing.html | April 27, 2021 May 3, 2021 May 4, 2021 TBD May 13, 2021 |
| 9. | Contract finalization period | April 28, 2021 through May 21, 2021 |

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| | | May 4, 2021 May 5, 2021 through May 21, 2021 TBD May 14, 2021 through May 31, 2021 |
| 10. | Contract award | May 24, 2021 TBD June 1, 2021 |
| 11. | Contractor start date | July 29, 2021 |

This Addendum will become part of the proposal and should be acknowledged with the Request for Proposal.

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ADDENDUM SIX QUESTIONS and ANSWERS

Date: April 16, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal Number 6499 Z1 to be opened April 26, 2021 at 2:00 p.m. Central Time

Questions and Answers

Following are the questions submitted and answers provided for the above-mentioned Request for Proposal. The questions and answers are to be considered as part of the Request for Proposal. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

| Question Number | RFP Section Reference | RFP Page Number | Question | State Response |
|-----------------|-----------------------|-----------------|---|---|
| 1. | Section V – A. | | To ensure eligibility for all options, should the vendor submit 3 separate proposals? | Bidder may submit a proposal for Option 1 - Contact Tracing, Option 2 - Vaccine Helpline, or Option 3 – both, Contract Tracing and Vaccine Helpline. See Section I.Q. |
| 2. | | | Will the vendor be provided with credentials for the State's vaccination portal? | The Contractor(s) will be provided with login credentials to the State's vaccination portal. |
| 3. | | | Why has this bid been released at this time? | The State requires Contact Tracing and Vaccine Helpline services in response to the COVID-19 pandemic. |
| 4. | | | Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories? | No, bidders may not deviate from the pricing structure provided in the Cost Proposals. Bidders must provide pricing on the Cost Proposals. |
| 5. | | | Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable. | See response to question #8. |
| 6. | | | Has the current contract gone full term? | No |
| 7. | | | Have all options to extend the current contract been exercised? | This is outside the scope of this RFP. |
| 8. | | | Who is the incumbent, and how long has the incumbent been providing the requested services? | Copies of the current contact tracing contracts can be found at the following links: |

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| | | | | <ul style="list-style-type: none"> • <u>Nelnet Servicing, LLC</u> • <u>North End Teleservices</u> • <u>Professional Research Consultants</u> <p>Copy of the current vaccine helpline contract can be found at:</p> <ul style="list-style-type: none"> • <u>Professional Research Consultants</u> |
| 9. | | | To what extent will the location of the bidder's proposed location or headquarters have a bearing on any award? | The proposed location or headquarters will not have any bearing on an award. However, all staff must be located within the contiguous 48 states. |
| 10. | | | How are fees currently being billed by any incumbent(s), by category, and at what rates? | See response to question #8. |
| 11. | | | What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)? | Bidders may visit www.statespending.nebraska.gov to view all expenditures to the incumbent Contractors. |
| 12. | | | Is previous experience with any specific customer information systems, phone systems, or software required? | No. |
| 13. | | | What is the minimum required total call capacity? | <p>For contact tracing, call capacity is dependent on the case prevalence in the State of Nebraska.</p> <p>For vaccine helpline, call capacity is dependent on the case prevalence in the State of Nebraska and new information released by the State of Nebraska and the CDC.</p> |
| 14. | | | What is the minimum simultaneous inbound call capacity? | See response to question #13. |
| 15. | | | What is the maximum wait time? | <p>For contact tracing, maximum wait time is 4 minutes. However, inbound calls for contact tracing are minimal.</p> <p>For Vaccine Helpline, the maximum wait time is 4 minutes.</p> |
| 16. | | | What percentage of inbound calls must be answered by a live operator? | <p>All contact tracing calls received during operating hours shall be answered by a live operator. However, inbound calls for contact tracing are minimal.</p> <p>All Vaccine Helpline calls received during operating hours shall be answered by a live operator.</p> |

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| 17. | | | What percentage of calls must be resolved without a transfer, second call, or a return call? | The State does not have a set percentage of calls. |
| 18. | | | What is the maximum percentage of calls that can be terminated by the caller without resolution? | The State does not have a set percentage of calls. |
| 19. | | | Is there a minimum or maximum number of operators and supervisors? | The number of operators and supervisors will be based on call volume. |
| 20. | | | What is the required degree of dedication for the call center? | The State does not have a degree of dedication; however, the State will pay the hourly rate for staff that are dedicated to working the contact tracing and/or vaccine helpline. |
| 21. | | | What is the required degree of dedication for the operators? | The State does not have a degree of dedication; however, the State will only pay the hourly rate for staff that are dedicated to working the contact tracing and/or vaccine helpline. |
| 22. | | | What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained? | Contact Tracing calls shall not be recorded. Vaccine Helpline calls shall be recorded and maintained by the Contractor until the end of the contract, or as requested by the State. The recorded calls shall be transferred to the State upon expiration of the contract. |
| 23. | | | What are the recording and storage requirements for non-phone communications? | Communications with the public will only be by telephone. |
| 24. | | | What information is to be included in call logs? | For contact tracing, Contractors must complete all the required fields in the State's system for each investigation. For vaccine helpline, the following information will be logged: <ul style="list-style-type: none"> - Name, if provided - Any comments regarding an issue that is not addressed in the FAQ provided by the State or require further research |
| 25. | | | What was your average monthly call volume over the past year? | See Section V.B of the RFP. |
| 26. | | | What is the current number of seats for operators and supervisors at your existing call center? | This is outside the scope of this RFP. |
| 27. | | | What is the current average wait time for phone calls? | Contact tracing is mostly outbound. Wait time for in bound calls is not tracked. For vaccine helpline, the current wait time is 32 seconds. |

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| 28. | | | What is the current average handle time for phone calls and other types of communications? | For contact tracing, the average handle time is 10 minutes per call. For vaccine helpline, the average handle time is 6 minutes. See response to question #37. |
| 29. | | | What is the current average after-call work time for operators? | For contact tracing, all data entry is performed during the call with the individual. For vaccine helpline, this is not measured. Also see response to question #24. |
| 30. | | | Is this work being outsourced today? | See response to question #8. |
| 31. | | | Can you disclose who the current supplier is? | See response to question #8. |
| 32. | | | How many suppliers are currently servicing the contract? | See response to question #8. |
| 33. | | | Can you provide us with a copy of the contract? If not, can you direct us to a copy of where we can locate the contract? | See response to question #8. |
| 34. | | | What was the length of last contract? | See response to question #8. |
| 35. | | | Was a contract extension used? | See response to question #8. |
| 36. | | | Will there be a notification for short-list and if so, what is the anticipated timeline? | Bidders should monitor the SPB Website for any correspondence related to this RFP. See section I.C for the Schedule of Events. |
| 37. | | | Can you provide average monthly volumes, handle times and service levels for each of the contact types listed? | For contact tracing, the average handle time is 10 minutes per call. Since January 1, 2021, the range of contact tracing positive cases is 2,500 – 12,000 per month. There is an average of one contact per positive case. Actual call volume is dependent on the case prevalence in the State of Nebraska. For vaccine helpline, the average handle time is 6 minutes. The average number of calls to the vaccine helpline is 15,000 calls per month. Actual call volume is dependent on the case prevalence in the State of Nebraska and new information from the CDC regarding vaccination. Because call volume varies based on the case prevalence in the State of Nebraska and new information from the CDC regarding vaccination, the |

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| | | | | information in this response may conflict with Section V.B of the RFP. The information in this response is current as of April 5, 2021. |
| 38. | | | Can you provide historical daily call volumes by intervals? | No, the State does not have this information. |
| 39. | | | Can you provide historical call volumes for an indicative week and seasonal fluctuations? | For contact tracing, see the link to the COVID-19 online dashboard in section V.B for historical case rates. The State does not have this information for the vaccine helpline, as it was implemented in mid-February 2021. See also response to question #37. |
| 40. | | | How many FTE's currently service the program? | Please provide a response that best meets the requirements of the RFP. |
| 41. | | | How long is the new hire training for each Line of Business? | For contact tracing, the State-required training is approximately 4 hours. Additional in-house training by the Contractor is approximately 4-6 hours. For the vaccine helpline, the State-required training is approximately 1 hour. |
| 42. | | | Are there expected ongoing training requirements? If so, please define. | For contact tracing, any updates in processes will be accompanied by necessary training. For the vaccine helpline, Contractor's staff must keep current with most recent information regarding vaccination provided by DHHS. |
| 43. | | | Does the State require dedicated trainers and/or training managers? | No, the State does not require dedicated trainers. However, a bidder's training plan will be evaluated on questions V.I.7 and V.N.7. |
| 44. | | | What is the expected Average Handle Time for calls? | See response to question #37. |
| 45. | | | Can you provide more detail around your Quality Assurance expectations for each Line of Business? (e.g. number of monitors per agent per week, quality assurance processes, quality scorecards, etc.)? | Bidders should describe their approach to Quality Assurance in responses to questions V.I.1 and V.N.1. |
| 46. | | | How is CSAT measured/calculated today? | The State does not measure CSAT. |
| 47. | | | What are the system requirements, will it be hosted by the supplier or provided by you, the State? | For contact tracing, the system is cloud-based. See also the definition of "System" in the Glossary of Terms. The Contractor |

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| | | | | <p>is responsible for all equipment and telephony systems.</p> <p>For the vaccine helpline, the State will provide only a phone number. See also the definition of "System" in the Glossary of Terms. The Contractor is responsible for all equipment and telephony systems.</p> |
| 48. | | | Will agents be working off the State's system platform? | Yes. See also response to question #47. |
| 49. | | | What technology will be provided by the State? | See response to question #47. |
| 50. | | | Please confirm if the State will be providing voice/data circuits to the vendor's Points of Presence (POP)? If this will be handled by the vendor instead, please provide your data center locations/address. | <p>No, this is the responsibility of the Contractor. For the Vaccine Helpline only, the State will provide a toll-free number that will be routed to the Contractor's network. The State will pay for the toll-free number.</p> <p>The State cannot provide data center location information.</p> |
| 51. | | | What are the communication channels required? Voice, Chat, Email, Other? Can you provide contact volumes by channel? | All communication will be by telephone. See Section V.B. |
| 52. | | | Are you considering proposals from offshore providers? | No, all staff must be located within the contiguous 48 states. |
| 53. | | | The bid was awarded last time but the bid was rescinded. Is there a chance of that happening again? What is the chance of the State not moving forward with a chosen vendor? | This is outside the scope of this RFP. |
| 54. | | | What is the States long-term plan for a partnership with a company in regards to Contact Tracing and Hotline Services? | This is outside the scope of this RFP. |
| 55. | | | What are the Systems that vendors will gain access to with the State for both Contact Tracing and Vaccine Helpline? | See response to question #47. |
| 56. | | | What is are the reporting functions of the State's Systems? | <p>See Section V.F.4.</p> <p>The Salesforce system is able to provide reporting on cases. The Contractor will have the ability to create reports and dashboards regarding cases.</p> |
| 57. | | | Will the State be making multiple awards? | See section I.W. |
| 58. | V. Project Description and Scope of Work; C. Scope of Work - Option 1 - Contact Tracing; Number 2; Letter b: | Pg. 38 of the pdf; pg 29 of document | Will the State of Nebraska include the Johns Hopkins certification program or equivalent, or will the Contractor be expected to provide that as part of the foundation onboarding requirement? | The State will provide the certification program. |

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| 59. | V. Project Description and Scope of Work; J. Scope of Work - Option 2 - Vaccine Helpline; Number 4: | 41 of pdf; 32 of rfp | Will the helpline staff be performing the registration and scheduling of the patient for the vaccine? If so is there an estimate on the inbound call volume for this purpose? | Yes, the current average is 500 calls per day. |
| 60. | V. Project Description and Scope of Work; K. Performance Requirements; Number 1: | Pg. 42 of pdf; 33 of rfp | Callers cannot be on hold greater than 4 minutes. Is the Contractor permitted to provide patient with option to leave a voice mail during peak inbound call times? | Yes. |
| 61. | V. Project Description and Scope of Work; K. Performance Requirements; Number 1: | Pg. 42 of pdf; 33 of rfp | Is there hourly call volume reporting available to ensure the scheduling plan provides the correct coverage to comply with the maximum hold time of 4 minutes? | See response to question #38. |
| 62. | Cost Proposal Option 3, Table 3: | | Is there a State estimate to be applied? There are remarks on Table 1 (25 individuals) , Table 2 (425 individuals @425 hours) Table 3 has no set criteria. | The State requires a flat monthly fee for the Vaccine Helpline. See Section V.B for call estimates. |
| 63. | | | What multiple vendors are currently providing contact tracing services for Nebraska? | See response to question #8. |
| 64. | | | How many vendors will be selected for the Vaccine line? | See response to question #57. |
| 65. | | | How many EEs are employed by the incumbent vendor for the vaccine line? | This is outside the scope of this RFP. |
| 66. | V.B. Project Environment for All Options | Page 28 | Is the State of Nebraska open to a Work from Home (WFH) staffing model, if necessary? | Yes. |
| 67. | I.H.1.b I.Q | 4 6 | If bidder want to submit for all three options, does the bidder only submit for Option 3, or should bidder submit for Option 1, 2 and 3 separately? And if a proposal needs submitted for all three of the options, would the naming convention reflect that ex. RFP 6499 Z1 Company Name Option 1 Contact Tracing Services, RFP 6499 Z1 Company Name Option 2 Vaccine Helpline Services, and RFP 6499 Z1 Company Name Option 3 Contact Tracing and Vaccine Helpline Services | In order to be considered for an award in each option, bidders must submit separate responses. Bidders should submit Option 1 for just contact tracing, Option 2 for just Vaccine Helpline, and/or Option 3 for both contact tracing and Vaccine Helpline. Please see Section V. A. paragraph two. Yes |
| 68. | I.H.1.b I.Q | 4 6 | Several items are listed in proposal requirements. What is to be included in the Technical Proposal Submission and what is to be included in the Cost Proposal Submission (including all attachments that should be provided in each) AND do submissions also need to be titled as such ex. RFP 6499 Z1 Company Name Contact Tracing and Vaccine Helpline Services Technical | Everything except the Cost Proposal can be included in the Technical Proposal file. The Cost Proposal should be submitted as a separate file. Proprietary information should be submitted as a separate file. |

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| | | | Proposal File 1 of 2, RFP 6499 Z1 Company Name Contact Tracing and Vaccine Helpline Services Cost Proposal File 2 of 2. | Yes. |
| 69. | I.Q.1.c | 6 | What is the state looking for specifically in regard to Clarity and responsiveness of the proposal? | The State must be able to understand the bid. If the bid is confusing, ambiguous, or otherwise not understandable, the State may, in the State's discretion, deem the bid non-responsive and reject such bid. Similarly, if the bid does not adequately respond to the requirements of the RFP, the State may, in the State's discretion, deem the bid nonresponsive and reject such bid. |
| 70. | V.C.2.a | 29 | What documentation is required to send to the Contract Manager that HIPAA training has been completed? | The State will provide HIPAA training. The Contractor must provide the Contract Manager a list of individuals who have completed the training via email. |
| 71. | V.C.2.b | 29 | What documentation is required to send to the Contract Manager that Contact Tracing Training has been completed? | The State will provide Contact Tracing training. The Contractor must provide the Contract Manager a list of individuals who have completed the training via email. |
| 72. | V.J.8 V.M.5 | 32 33 | Does the state have a system that this documentation will occur in, or will the awarding contractor need to provide their own solution to document these call reasons and questions? If it is a state system, will the awarding contractor be granted adequate permissions to pull a variety of reports needed to meet the reporting requirements expected. | New information or questions will be communicated to the DHHS Director of Emergency Preparedness. The DHHS Director of Emergency Preparedness compiles the information and loads it onto the SharePoint system. |
| 73. | V.K.1 | 33 | Does the 4 minutes reference time in queue or a mid-call hold? What is the Occupancy percentage? | In queue. This question is not clear, unable to provide a response. |
| 74. | V.M.6 | 33 | What are these telephone lines to be used for? | See response to question #50. |
| 75. | I.AA | 8 | What States provide an in-State bidder preference that Nebraska would reciprocate for Nebraska bidders? | Bidders should refer to Neb. Rev. Stat. §§ 73-101.01 and 73-101.02. |
| 76. | V.B | 28 | How many FTEs are staffing the Vaccine Helpline? | This is outside the scope of this RFP. |
| 77. | V.B | 28 | What is the average after-call work time for the Vaccine Helpline? | See response to question 29. |
| 78. | V.F.2.b. | 30 | Is the State looking for a COUNTED SUM of the Uncompleted Calls in hourly time blocks (8am = 34, 9am = 95, 10am - 82, etc) or is the State looking for a CALL LOG EXPORT Date and Time of uncompleted calls (3/26/2021 1:34pm 402-555-1212, 3/26/2021 1:36pm 402-999-8425, 3/26/2021 1:39pm 531-555-1212, etc.)? | Section V.F.2.b is deleted and replaced with the following: "Total number of calls, either Completed or uncompleted, made by Contractor per day." |

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| 79. | V.J.3.i. | 32 | Does the State have hotline registering callers via their appropriate county notification portal? | Callers will be registered in the State of Nebraska system, not individual counties. |
| 80. | V.L.1.c.d.e | 33 | We assume that the vendors systems will be tracking these items for reporting, is that correct? | For V.L.1.c and d, see response to question #72. For V.L.1.e, the Contractor's system will track the information. The information is then provided to the DHHS Director of Emergency Preparedness. |
| 81. | V | | What is the expectation regarding holiday coverage? | See definition of Business Day in the Glossary of Terms. |
| 82. | V | | Are there minimum quality monitoring expectations required by the contractor? | See response to question #45. |
| 83. | II-IV | 9-27 | Is there a specific format that we should respond to these terms and conditions? Should the contractor use the tables provided under each of the terms and conditions? | Please use the tables provided in the RFP. Bidders should initial in the appropriate box and, if necessary, provide any additional notes, comments, or proposed alternative language. |
| 84. | V.I & N | 31-34 | Can we answer these questions (requirements) in the same table format that they are presented in the RFP solicitation? | Yes. |
| 85. | VI | 35-36 | Is there a specific format that the contractor should use to respond to this section of the proposal, and should this section be its own file separate from the cost and technical proposal and if so, how should it be named? | There is no specific format required for the Corporate Overview section. It can either be included with the technical proposal or as a separate file. |
| 86. | Form A | | Should this form be attached at the beginning or the end of the technical proposal? Or should it be submitted as a separate file and if so, how should it be named? | Form A can be included with the technical proposal. There is no required placement for this form within the technical proposal. |
| 87. | V. C | 28-29 | Are attempts outside of telephone calls permitted? For example attempts by email, or text messages? Will the vendor also be responsible for follow up calls to individuals already interviewed to monitor symptoms? If so, how often are follow up calls currently made? For example, daily follow up calls? | No. No. |
| 88. | V | | How long does a new user set up take for either option? | For training, see response to question #41. Setting up a user's access to the State's systems can take up to 72 hours. |
| 89. | V. C | 28-29 | Will Contact Tracers be responsible for both new case/initial call interviews and subsequent contact tracing calls? | Yes. |
| 90. | V. C | 28-29 | How do you prioritize cases such as student's vs the elderly, high-risk, immune, etc.? | The Local Health Departments prioritize the cases and send the cases to DHHS. DHHS then sends the cases to the Contractors. |
| 91. | | | In order to create a cleaner appearance in our response, may vendors place the | Yes. |

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| | | | content of these pages onto a company template/letterhead—with the understanding that no material changes to content be made? | |
| 92. | V.G | 30 | Will the awarded contractor be given adequate State system access to generate reporting to ensure calls are being completed: within 8 hours of being assigned, making 5 follow up calls, subsequent calls made no less than 30 min after first, etc. | Contractors will not have access to this reporting themselves, but the State can provide the reports upon request. |
| 93. | V.G.1 | 30 | What is the time span that the 5 subsequent calls can be made within? You want the five-attempt completed in what time frame? | The five subsequent attempts must be made within 72 hours. |
| 94. | V.C.2.a & b | 29 | Will the state provide administrative access/login to allow the contractor reporting on if State training has been completed? | No, but the State can provide the reports upon request. |
| 95. | V.B | 28 | Who is the incumbent for the Vaccine Helpline? | See response to question #8. |
| 96. | I.C. | 2 | What is the probability/likelihood of changes being made to your published Vaccination Timeline? Could work begin sooner than late-July? | Per section I.C, The State expects to adhere to the procurement schedule shown below, but all dates are approximate and subject to change. |
| 97. | I.X. | 8 | Are there any additional guidelines to allow for a variance of proposals from the specifications listed in Section 1.Q - Page 6? | There are no specific guidelines in addition to those stated in section I.X. |
| 98. | V.B. | 28 | We are requesting confirmation of a July 29, 2021 start date for this work. Per the Vaccination Timeline (link published on page 28 of the RFP), the final phase of vaccinations will commence beginning in May. | Per section I.C, the State expects to adhere to the procurement schedule shown below, but all dates are approximate and subject to change. |
| 99. | VI.K. | 35 | Section VI.K. states that the use of subcontractors is not allowed, however, the use of potential subcontractors is referenced throughout the RFP. We are requesting clarification regarding the use of sub-contractors to support this effort - is the use of sub-contractors acceptable? | Subcontractors are not permissible. |
| 100. | V.B. | 28 | What is the anticipated call volume (number of calls) demand for both contact tracing and vaccine helpline? Number of cases specifically for contact tracing? | See section V.B and response to question #37. |
| 101. | V.B. | 28 | Will the work for contact tracing and vaccine helpline be 100% remote and virtual or is there a required number of contractors that would need to be physically located in the State of NE? | The location of the Contractor's staff is to be determined by the Contractor. The only requirement is that all staff must be located within the contiguous 48 states. |
| 102. | V.B. | 28 | Section V.C. Scope of Work specifically states that all contractors need to be physically located in the United States for the contact tracing workstream. Is this the same for vaccine helpline? Related to both: • Is there a minimum requirement for the number of contractors that would need | See response to question #101. No. |

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| | | | to be permanent residents of Nebraska? Are there specific states where permanent residents would not be able to be sourced to fill contractor roles? | Alaska and Hawaii. |
| 103. | V.C. V.J. | 28 32 | Do the systems used for contact tracing and vaccine helpline have the ability to be accessed by VDI (Virtual Desktop Interface) or similar remote feature? | The systems are cloud based. |
| 104. | V.C. V.J. | 28 32 | For both options, will the State provide QA oversight, or will it be the sole responsibility of the chosen Vendor? | QA will be the responsibility of the Contractor. |
| 105. | V.C V.J. | 28 32 | For both options, is there any special clearance required for contractors to hold either contact tracing or vaccine helpline positions outside of a full background check? Any specific NE background check requirements? | No. No. |
| 106. | V.C V.J. | 28 32 | For both options, does the state have an established intake/qualification review for callers to qualify for services? | Not enough information was provided to respond to the question. |
| 107. | V.G V.K | 30 33 | For both options, are there any requirements for phone-type used by operators (cell phone, smart phone, soft phone, etc.) and any required security to be installed on phone in relation to voicemail housing PII and PHI? | Phones must comply with section V.C.7. |
| 108. | V.F. V.L. | 30 33 | For both options, are reporting requirements specific to each vendor providing operations support? For example, if multiple 3rd party vendors are operating the helplines, would [REDACTED] weekly reporting require us to present status of other 3rd party(s) partners, or only that of our own team? | Contractors will be responsible for their reporting only. Subcontractors are not permissible. |
| 109. | V.H. V.M. | 31 33 | For both options, are there existing training materials created and/or used by the current DHHS support for operating the phone line? | Yes. |
| 110. | V.C | 28 | Please describe the system(s) being used for contact tracing, and the capabilities. | See the definition of 'System' in the Glossary of Terms. The contact tracing system allows users to enter data about the individual and their contacts. See response to question #56 regarding reporting capabilities. |
| 111. | V.C. | 28 | Please describe the state's process for developing and updating contact tracing scripts and notifying the contractors of updates to scripts. | The State updates the scripts per CDC guidelines. Changes will be shared with the Contractor(s) via email and weekly touch-point calls. |
| 112. | V.C. | 28 | What is the telephonic / voice software currently used for external calls? | This is outside the scope of this RFP. All telephony equipment will be the responsibility of the Contractor(s). |
| 113. | V.E. V.H. | 30 | What is the State's management structure for managing the contact tracing activities, | The State will assign a contract manager for the awarded |

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| | | | and who would be the key stakeholders involved in the effort? | contract(s). DHHS agency contracts will be provided to the Contractor(s) after award. |
| 114. | V.F. | 30 | What reporting platform is currently used by the State to analyze call volumes and metrics for reporting? | This is outside the scope of this RFP. |
| 115. | V.J | 32 | Please describe the system(s) being used for vaccine helpline, and the capabilities. | See the definition of 'System' in the Glossary of Terms. See responses to questions #24 and #72. |
| 116. | V.J | 32 | Are hours of operation for vaccination helpline subject to change? Will contractors be required to mirror the State's holiday observance schedule and hours of operation? | The State does not foresee changing the hours of operation, but reserves the right to do so. An amendment to the contract would be executed if the schedule does change. See definition of 'Business Day' in the Glossary of Terms. |
| 117. | V.J | 32 | Section V.C. within the contact tracing scope of work states that contractors must complete Contractor's State-approved online HIPAA and privacy training. Is there any special training(s) required by the State for vaccine helpline contractors as it relates to protecting PHI and PII? | The State's HIPAA training will be required for the Vaccine Helpline. |
| 118. | V.J | 32 | Confirming that the contractors are to register (schedule) Nebraska residents for both Vaccines and COVID testing? | Yes. |
| 119. | V.M. | 33 | What is the State's management structure for managing the vaccine helpline activities, and who would be the key stakeholders involved in the effort? | The State will assign a contract manager for the awarded contract(s). DHHS agency contracts will be provided to the Contractor(s) after award. |
| 120. | V.K. | 33 | RFP states that the "Contractor must respond to 100% of voicemails within 24 hours". In what system are voicemails stored? | All telephony equipment will be the responsibility of the Contractor(s). |
| 121. | V.K. | 33 | Does the state have established dispositions identified or will this need to be created by the contractor? | Yes, dispositions are built in to the SharePoint system. |
| 122. | V.L. | 33 | What reporting platform is currently used by the current contractor to analyze call volumes and metrics for reporting to the State? Is it the contractor's system or the States system? | This is outside the scope of this RFP. |
| 123. | V.M. | 33 | What are the existing processes to approve updated training materials? For example, as guidance changes related to Vaccine requirements, testing & vaccine availability, etc. who ensures that the latest State guidance is available in the telephony database so Operators can provide the most up-to-date information? | The State updates the training materials per CDC guidelines. Changes will be shared with the Contractor(s) via email and weekly touch-point calls. |
| 124. | V.M. | 33 | What is the telephonic / voice software currently used for inbound calls? | This is outside the scope of this RFP. All telephony equipment will be the responsibility of the Contractor(s). |

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| 125. | V.M. | 33 | How many telephone lines are currently in existence and if so, what are the distinguishments between the different telephone lines? | This is outside the scope of this RFP. Call volume is dependent on the case prevalence in the State of Nebraska. |
| 126. | V.M. | 33 | Do the following require separate database access? • Schedule a vaccine • Schedule a COVID test Answer general COVID / Vaccine related inquiries | The items listed are in different systems. The Contractor(s) will be given necessary access to the systems and public websites to assist callers in scheduling a vaccine and/or COVID test. |
| 127. | V.M. | 33 | Do additional State Responsibilities include a technology helpdesk that supports software to housing FAQ answers to Vaccine and COVID related calls? Additionally, who will be the technology point of contact for Vaccine & COVID scheduling site updates which would make available additional sites for scheduling as well as remove sites for site closures? | There is not a dedicated helpdesk, but the DHHS Division of Information and Systems Technology can assist with any technical questions. The State will assign a point of contact for technical questions for the awarded contract(s). |
| 128. | Section V | 28 | Will this project support a fully remote work environment? | Yes. |
| 129. | Section V.I - K | 36 | Can the selected vendor have a telephony vendor as a project infrastructure partner, but not acting as a Subcontractor on the project? | Joint ventures and subcontractors are not permitted. The vendor(s) directly contracting with the State are responsible for providing the telephony system. |
| 130. | Section V - B | 28 | Does the State of Nebraska intend to transfer any existing staff working on either scope of work to the employ of the selected vendor? | No. |
| 131. | Section V - C.1.b | 29 | Is the State of Nebraska open to contact tracers and/or vaccine support staff using personally provided equipment, such as computers? | Yes. |
| 132. | Section V - A | 28 | If a bidder submits under Option 3, are they eligible to be selected for ONLY Option 3, or could they be selected for an Option 1 or Option 2 award? | See response to question #67. |
| 133. | Section V.I - J | 36 | If the bidder submits under Option 3, does the bidder need to include staffing structures for all 3 possible Options? | See response to question #67. |
| 134. | Pricing | | Would you allow other positions such as Team Supervisors and Managers in the pricing structure? Or is only a blended rate allowed? | Other positions may be included in the proposal, but the costs for the additional positions must be included in the hourly rate for contact tracing and monthly rate for vaccine helpline. |
| 135. | Scope of Service | i | Will the State of Nebraska allow for company financials to be marked as Confidential and be redacted from a published version of the proposal? | See the first page of the RFP for instructions regarding proprietary information. |
| 136. | | | For any contractor previously awarded this bid what key components were they not able to deliver on? | This is outside the scope of this RFP. |

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| 137. | | | <p>Is the contractor responsible for managing the daily activities and functions of the contract tracers?</p> <p>Is the contractor responsible for managing the daily activities and functions of the vaccine helpline services personnel?</p> | <p>Yes.</p> <p>Yes.</p> |
| 138. | | | <p>Do contractors need to identify/utilize their own services for the deaf and hard of hearing individuals or will the state provide this?</p> <p>Is the contractor responsible for having their own Spanish language contact interpreter or will this be provided by the state?</p> | <p>Yes, the Contractor must provide services for the deaf and hard of hearing and Spanish language interpretation.</p> <p>See sections V.C.1.d and V.J.5.</p> <p>Section V.J.5 is deleted and replaced with the following:</p> <p>At all times of operation, all telephone staffers must be fluent in reading, writing, and speaking English and at least 10% (ten percent) of telephone staffers must be fluent in reading, writing, and speaking in both Spanish and English.</p> |
| 139. | | | <p>Would the contractor have to provide their own telephonic software and hardware equipment for the contact tracers?</p> | <p>Yes.</p> |
| 140. | | | <p>For the contact tracing role will personnel be required to travel or drive to any location? Or is this role 100% remote?</p> | <p>See response to question #128.</p> |
| 141. | Section VI Corporate Overview, Item E | Page 35 | <p>This section states "the bidder's office location responsible for performance pursuant to an award of a contract with the State of Nebraska should be identified". Please clarify if the State has any geographic preferences or requirements regarding site locations, or is any domestic location acceptable?</p> | <p>Please see response to questions #101 and #102.</p> |
| 142. | Section V Corporation Overview, Item C5 | Page 29 | <p>Would the State be open to work-to-home arrangements whereby agents may start work in an on premise location, and based on performance transition to work-from-home status/remote agents?</p> <p>1. Does the State allow work-to-home agents on this program? Does the State have virtual training capabilities such that remote agents could also be trained remotely without having to attend a physical brick-and-mortar location just for training?</p> | <p>See response to question #128.</p> <p>Yes.</p> <p>Yes.</p> |
| 143. | Section V Scope of Work, C1b | Page 28 | <p>This section states, "Contractor must ensure all contact tracers are supplied with telephony software, telephony equipment and computer equipment". For pricing reasons, please provide the following information:</p> <p>a. Desktop requirements (how many monitors are required for</p> | |

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| | | | <p>each agent's workstation, what is the monitor size; please define the PC processor speed, operating systems, and RAM)</p> <p>b. Do the agents require Microsoft Office products?</p> <p>c. Since the vendor is required to provide the telephony technology, does the State reimburse vendor's long distance charges for the required outbound return calls during staffing hours? Can these charges be billed as a pass-through expense on the invoice?</p> <p>d. Regarding the technology (e.g. CRM systems), please confirm how the Vendor will access the States' Salesforce and SharePoint platforms? Will it be via VPN or via the internet?</p> <p>e. If you have a high-level network to show how the Vendor will integrate with any of the State's applications, please share.</p> <p>f. Please provide the estimated bandwidth requirements per user.</p> | <p>Contact tracers' workstations must be able to access the cloud-based system.</p> <p>No.</p> <p>Contractor is responsible for the telephony system and expenses and must be included in the proposed cost.</p> <p>The system can be accessed via the internet. Contractors may provide a VPN to its staff.</p> <p>The system is cloud based.</p> <p>This is unknown, but the State's system is cloud based and can be accessed with a standard internet connection.</p> |
| 144. | Section V – Scope of Work, Item H4, | Page 31. | Regarding training program, process and technology content, please clarify if the Department is providing the training materials (e.g. instructor-training guide and a trainee guide). | Yes. |
| 145. | Section V – Scope of Work, Item I2, | Page 31. | <p>This section requires the Vendor to describe their language capabilities. Would the State please clarify the percentage estimate of your volume for all other languages besides English?</p> <p>a. Would the State please confirm if they allow the use of a language line service if multiple languages are needed?</p> <p>If a language line service provider can be utilized, does the State already have a language line service provider the vendor will use, or would the selected vendor be responsible for providing the language line services?</p> | <p>This is currently not tracked, but an estimate is 10%.</p> <p>Contractors will utilize the State's language line service for non-English and non-Spanish languages.</p> |
| 146. | Section V – Scope of Work, J.3. | Page 32 | Could the State please provide an estimate of the existing Average Handle Time (including talk, hold and after-call work time) for these types of calls? | See response to question #37, |

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| 147. | Section V.A. | Page 28 | For each of Contact Tracing and the Vaccine Help Line, will long-distance and toll charges be incurred by the State or are they to be included in bidder's bundled pricing? | See response to question #143.c. |
| 148. | Cost Proposal Option 1 | Page 1 | For Option 1, Table 1, as the rate for evaluation is based on 40 hours per week per individual, please confirm if the hourly rate will be billable for 1) all paid hours (including paid breaks, vacation and other paid time off); 2) all worked hours (excluding any or all of paid breaks, vacation or other paid time off); or 3) some other basis. | The State will only pay for actual hours worked. |
| 149. | Cost Proposal Option 2 | Page 1 | For Option 2, will the cost of the State's interpretation (language translation) line be incurred by the State or is the cost to be included in the bidder's bundled pricing? If to be included in bidder's pricing, please provide the cost per minute of such service. | The costs for language interpretation services will be incurred by the State. |
| 150. | V. Project Description & Scope of Work, J. 4 | Page 32 | What is the anticipated training duration for the Vaccine Helpline? | The State's required training for the vaccine helpline and HIPAA training is approximately one and one-half hours total. The Contractor may also have in-house training. |
| 151. | V. Project Description & Scope of Work J.3 | Page 32 | For the Vaccine Helpline, will the State allow for a call-back functionality to be used by the bidder, where the caller can elect to discontinue holding and receive a call back? | Yes. |
| 152. | II Terms and Conditions | Page 9 | Is it the State's intention that all RFP language of Sections II through VI be replicated in the proposal, or only the tables for each letter? | The language in Sections II – IV (Terms and Conditions) must be included with a bidder's proposal. |
| 153. | V. Project Description and Scope of Work, K.2. | 33 | In the event that the initial period of call measurement varies materially from 1,000 calls a day, would there be an opportunity for a pricing revisions for the initial operating period? | See Addendum One. |
| 154. | V. Project Description and Scope of Work. J.2. | 32 | When and how would the State expect the recordings? | The file format should be .wav or other file agreed to by the Contractor and the State. The State will communicate the method to transfer files with the awarded Contractor. See also response to question #22. |
| 155. | V. Project Description & Scope of Work, Section J.2. | 32 | What is the call recording retention? | See response to question #22. |
| 156. | V. Project Description and Scope of Work. K.3. | 33 | Regarding the system designated by the State, please confirm how the Vendor will access the State's SharePoint (Vaccine Helpline) | The system is cloud based. |
| 157. | V. Project Description and Scope of Work. K.3. | 33 | How will the calls be routed to Vendor? | The State has three numbers that will route to the Contractor's telephony system. |

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| 158. | V. Project Description and Scope of Work M.6. | 33 | Can the State explain what is meant by "Make telephone line(s) available for Contractor's use"? | See response to question #157. |
| 159. | V. Project Description and Scope of Work Section C, 1.d. | 28 & 29 | As it relates to the Contact Tracing and Vaccine Helpline, and the vendor's telephony responsibilities, does the vendor's use of a TTY device or RTT device and/or relay service meet the Network Technology Access Standards 2-201? | Yes. |
| 160. | | | Regarding Vaccine Helpline, the RFP does not address fax nor email inquiries, will the State of Nebraska continue to be responsible for fax and email inquiries related to Vaccine Helpline? | The Contractor will not be responsible for fax or email inquiries. |
| 161. | | | Can The State provide the anticipated volume for each role? | See response to question #37. |
| 162. | | | How many vendors does The State envision choosing? | See response to question #57. |
| 163. | | | Is The State willing to provide a list of current pay rates or rate ranges for in-scope roles? | See response to question #8. |
| 164. | | | Please provide an estimated total hours worked by contingent workers for the previous year, along with an estimate for the current year. | See response to question #37. |
| 165. | | | What are your average time-to-fill rates? Are there any positions which tend to be challenging to fill? | The Contractor is responsible for the hiring of all its staff. |
| 166. | | | What is the average length of assignment? | The Contractor is responsible for the hiring of all its staff. |
| 167. | | | Does The State have tenure limits for contingent labor? If so, how are they enforced? | By law a service contract must be for the term of the project. This RFP involves a service contract, so the duration, which will be one (1) year commencing upon execution of the contract by the State and the bidder. The contract includes the option to renew for three (3) additional one (1) year periods. See the cover page of the RFP. |
| 168. | | | Could The State clarify what types of background/drug screens are required? | The State does not have a required background/drug screen. |
| 169. | | | Is there a The State-specific vendor used for background/drug testing, or can the vendor utilize its own identified processes? If there is a specific vendor, what is the cost per test? | There is not a State-specific vendor for background/drug testing. |
| 170. | | | Does The State expect vendors to provide timecard management or time clocks or does The State intend to leverage an existing internal time management process? | The Contractor is responsible for providing a timecard management system for its staff. |
| 171. | | | Please provide the expected talent to supplier oversight ratio, if applicable. | It is the responsibility of the Contractor to determine the talent to supplier oversight ratio. |
| 172. | | | Please specify expectations for orientation prior to the start of a contingent resource's assignment. Please also define any on- | See responses to questions #41 and #42. |

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| | | | going training requirements and associated frequency of distribution? | |
| 173. | | | What are The State's expected payment terms? | See Section IV.H. |
| 174. | | | What is The State's expected invoicing schedule (weekly, bi-weekly, monthly)? | See Section IV.F. |
| 175. | | | Does The State envision paying with a Purchasing Card? | No. |
| 176. | | | Should funding for background checks be included in our mark-up or billed back separately? | All expenses must be included in the pricing provided on the Cost Proposal. |
| 177. | | | Please describe any overriding factors that tend to impact pay rates, length of assignments, or bill rates at your organization, such as federal/state acts, union requirements, and/or The State guidelines? | This is outside the scope of this RFP. |
| 178. | | | Does The State have mandatory PTO for contingent labor? If so, what is the expectation and does The State want this billed separately or factored into the markup/bill rate? | No. PTO an acronym for "paid time off" and is a benefit normally associated with employees. The contingent labor under the contract would not be the State's employee. Any payment under the contract would be for services provided and the payment structure does not include for paying contingent labor's benefits such as PTO. |
| 179. | | | Will The State be providing all equipment and work spaces needed for office-based positions? | The State will not be providing any equipment or office space. All expenses must be included in the pricing provided on the Cost Proposal. |
| 180. | | | What personal protection equipment (PPE) is required by The State and for which roles? What equipment is provided by The State versus what the vendor needs to provide? Will PPE be billed at cost to The State? | The Contractor is responsible for personal protective equipment. See response to question #179. |
| 181. | | | Pricing for certain positions is dependent upon facility and role evaluations. Will The State allow for site visits/evaluations prior to the RFP deadline? If not, when will site visits be allowable? | There will not be site visits. See response to question #179. |
| 182. | | | Related to on-site management, will The State provide office space, network access, internet, furniture, phones, copier access, internet access, and rooms for interviewing? | See response to question #179. |
| 183. | | | In the Cost Proposal worksheets, what assumptions should be made when providing the all-inclusive monthly rates to the State? Should we assume 40 hours per week x 52 weeks divided evenly over 12 months? For example in this case, we would assume that overtime would still be billed at 1.50 times the regular time bill rate when it has been worked. | All expenses must be included in the pricing provided on the Cost Proposal. The State will not pay overtime. |
| 184. | | | What is the current expected overtime percentage of hours? | The State will not pay overtime. |

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| 185. | I.Q | 6 | Does the State have a preference for how many options a bidder can submit or respond to? | No. |
| 186. | I.S | 6 | Will bidders who offer to provide Option 3, both contact tracing and vaccine helpline receive any evaluation preference(s)? | No. |
| 187. | V.B | 28 | Based on the State's experience with the vendors which provided contact tracing and vaccine helpline services to meet the State's immediate needs, what improvements or enhancements, if any, would the State like to see achieved via this contract? | This is outside the scope of this RFP. |
| 188. | V.C.1.a | 28 | What systems will the State provide to service contact tracing, including the list of system features that must be used by vendors? | See the definition of "System" in the Glossary of Terms. |
| 189. | V.C.5 | 29 | Does the State have a limit on the percentage or number of contact tracing agents which may work contact tracing remotely? | No. |
| 190. | V.D.1 VI.K | 29 36 | Contact tracing vendors must have the capacity to increase the number of available agents from 25 to 1,000 which must be ready to attend training within 1 week of being receiving a notice request from the State. Will the State consider permitting subcontracting to meet the volume increase to 1,000 agents within one week of notification? If yes, may the subcontracting arrangement be limited to meeting surge needs and established following contract award? | No, subcontractors are not permitted. |
| 191. | V.J | 32 | What systems will the State provide to service the vaccine hotline, including the list of system features that must be used by vendors? | See the definition of 'System' in the Glossary of Terms. See response to question #115. |
| 192. | V.J | 32 | How many agents does the State anticipate will be needed to service the vaccine helpline? | Bidders must determine the number of agents based on the estimated volume provided in the RFP. See also the response to question #37. |
| 193. | V.J | 32 | Does the State have a limit on the percentage or number of contact tracing agents which may work the vaccine hotline remotely? | No. |
| 194. | V.J.7 | 32 | What service does the State currently use to assist deaf and hard-of-hearing individuals? | See response to question #8. The current contracts contain language on requirements for services to assist deaf and hard of hearing individuals. |
| 195. | Cost Proposal Opt. 2 | RFP Attachment – Cost Proposal Option 2, Vaccine Helpline | This cost proposal does not specify a staffing model, e.g., number of agents required to perform the work, which would enable all bidders' costs to be evaluated equally. Will the State please provide the number of agents bidders should use to calculate vaccine helpline staffing? | See response to question #192. |

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| 196. | Section IV: Payment, Letter F – Invoices | Pg. 27 | From Proposal: Invoices shall include itemization of training hours, active hours, back-up capacity headcount per tier, and total amount due. Invoice shall also include documentation log hours per rep each week. Question: Please further define what is required for the headcount per tier. | The third paragraph of section IV.F is deleted and replaced with the following: "Invoices shall include itemization of training hours, active hours, and total amount due. Invoice shall also include documentation log hours per rep each week." |
| 197. | Section V: Project Description & SOW--Section B. Project Environment For All Options, 2 nd paragraph | Pg. 28 | For the initial call for positive Covid-19 case, is the 1-2 hour reference to complete a call interview answered by the callee using the State's Salesforce.com system, or does this time frame represent how the cases were handled prior to implementation of Salesforce.com? | Both before and after the implementation of Salesforce. |
| 198. | Section V: Project Description & SOW-- Section B. Project Environment For All Options, 2 nd paragraph | Pg. 28 | For the calls placed to contacts, is the 1-2 hour reference representative of the duration of a single call answered by callee? | No, the 1-2 hour reference is for the initial contact plus any additional contacts derived from the initial contact. |
| 199. | Section V: Project Description & SOW-- Section B. Project Environment For All Options, 2 nd paragraph | Pg. 28 | What system is the State and LHDs using to conduct and document the initial call for positive COVID-19 cases? | Salesforce |
| 200. | Section VI: Corporate Overview— Section B: Financial Statements | Pg. 35 | Clarify which financial statements should be submitted from a company that is not publicly held. For example: Balance Sheet and/or Income Statement. | Acceptable documentation includes any documentation that will allow proposal evaluators to reasonably formulate a determination about the stability and financial strength of the organization. |
| 201. | Section VI: Corporate Overview— Section J: Bidder's Personnel/Mg mt Approach | Pg. 36 | If office location is outside of Nebraska, does the State require a DBA in Nebraska? | No. |
| 202. | Section VI: Corporate Overview— Section J: Bidder's Personnel/Mg mt Approach | Pg. 36 | Clarify definition of professionals in first sentence, second paragraph that states: The bidder should identify the specific professionals who will work on the project. Does "professionals" mean licensed clinical staff, or in general any key management, call center and support staff? | "Professionals" means any key management, call center and support staff. |
| 203. | Section V: Project | Pg. 32 | Does the State require all recorded calls to be sent and become property of the | Yes |

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| | Description & SOW—Section J: SOW Vaccine Helpline #2 | | State? Or will some subset of all be required? | All calls will be required. |
| 204. | Section V: Project Description & SOW—Section J: SOW Vaccine Helpline #2 | Pg. 32 | What digital format should the recorded calls be provided to the State? | See response to question #22 and #154. |
| 205. | Section V: Project Description & SOW—Section J: SOW Vaccine Helpline #8 | Pg. 32 | Clarify where/how to capture new information. Is there a State system to document new information? | See response to question #72. |
| 206. | Section V: Project Description & SOW—Section K: Performance Requirements Vaccine Helpline #3 | Pg. 33 | Will the State provide a list of dispositions required to capture for all (inbound and outbound) calls? | See response to question #121. |
| 207. | Section V: Project Description & SOW—Section J. #9: Scope of Work, Option 2 – Vaccine Helpline & Section V: Project Description & SOW—Section M. #6: State Responsibilities Vaccine Helpline | Pg. 32 (J. #9); Pg. 33 (M. #6) | “Contractor must provide all telephony software, telephony equipment and computer equipment. The State will not provide any equipment.” “Make telephone line(s) available for Contractor’s use.” Clarification requested: These statements are contradictory. Who is responsible, the State or Contractor, for providing telephony? | The State will only provide the line(s) that will forward to the Contractor’s telephony system. |
| 208. | Section I: Procurement Procedure—Q. Request for Proposal/Proposal Requirements | Pg. 6 | Will the State accept documents in an appendix? For example, financial documents: Balance Sheet and Income Statement. Or does all content need to be integrated into the body of the applicable response section? | Yes, documents may be submitted in an appendix, but all appendices and references thereto should be clearly marked. |
| 209. | B. Project Environment for All Options | 28 | Please confirm that the average handle time is 15-20 minutes for the vaccine helpline. | See response to question #37. |
| 210. | J. Scope of Work - Option 2 - Vaccine Helpline | 32 | What is the anticipated headcount for the vaccine helpline? | See response to question #192. |

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| 211. | C. Scope of Work - Option 1 - Contact Tracing J. Scope of Work - Option 2 - Vaccine Helpline | 29, 32 | Please confirm DHHS expects normal hours of operation on state/federal holidays for both contact tracing and the vaccine helpline. | See definition of 'Business Day' in the Glossary of Terms. |
| 212. | J. Scope of Work - Option 2 - Vaccine Helpline | 32 | What is the estimated timeline for training for the vaccine helpline? | See responses to questions #41 and #42. |
| 213. | J. Scope of Work - Option 2 - Vaccine Helpline | 32 | Will agents on the vaccine helpline require HIPAA training? | Yes. |
| 214. | M. State Responsibilities - Option 2 - Vaccine Helpline | 33 | Based on V.M.5 (Provide access to system where calls must be documented), please confirm that DHHS will be providing the core platform, not the vendor. | The State will provide access to the SharePoint system. The Contractor will be responsible for providing the telephony system. |
| 215. | M. State Responsibilities - Option 2 - Vaccine Helpline | 33 | Will DHHS provide access to the system of record (core platform) so that vendors can pull the following information to provide reporting? c. Most frequently asked questions/topics of concern; d. Most frequently used resources; e. Number of vaccine registrations submitted per hour/day/week; | These items are not in the system at this time. See also response to question #72. |
| 216. | Section B Project Environment for All Options | 28 | How well are the current vendors performing? Is the State Happy with their work? | This is outside the scope of this RFP. |
| 217. | Section B Project Environment for All Options | 28 | Do the current vendors have the capacity going forward to provide these services in a long-term contract? | This is outside the scope of this RFP. |
| 218. | Section B Project Environment for All Options | 28 | Does the State anticipate utilizing any of the existing vendors after July 29 th when the new contract starts? | This is outside the scope of this RFP. |
| 219. | Section B Project Environment for All Options | 28 | The contract start date is listed as July 29 th . Does the State anticipate the volume to be at the same level by then that it is currently at? | Volume is dependent on the prevalence of COVID-19 in the State of Nebraska. |
| 220. | Section C Scope of Work Subsection 3 | 29 | Would the State like to accept after hour phone calls on the helpline if a company already operates 24/7/365? | Contact tracing calls will not be made outside the timeframe established by the State. Inbound calls may be accepted outside the established timeframe. |
| 221. | Section B Project Environment for All Options | 28 | Would the State like to provide texting and email services for both helpline and contact tracing? | No. |
| 222. | Section G Insurance Requirements | 22 | If a company has all of the required insurance, but one of their policies covers an amount that is lower than what the | See section III.G.4. |

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| | | | State requires, is the State willing to renegotiate the limits allowed? If not, would the State allow the company to increase their policy after they are selected to perform the work but before the go live date? | Yes. |
| 223. | General | N/A | Would the State please provide the Contractor(s) who are currently performing Contact Tracing and Vaccine Helpline services? | See response to question #8. |
| 224. | General | N/A | What is the peak number of Contact Tracers who have been employed? Was this capacity sufficient? | The peak was 1,687 FTEs per week in December 2020 and January 2021. |
| 225. | General | N/A | How many staff are currently performing Contact Tracing services? | The State is using 478 FTEs per week for the week of March 28, 2021. |
| 226. | General | N/A | Would the State provide call statistics for Contact Tracing the last two months (e.g., number of outbound attempts, number of successful outbound calls where a contact is reached, average talk time, etc.)? | The State does not have this information. |
| 227. | General | N/A | Would the State please provide call statistics for Vaccine Helpline services for the last two months (e.g., number of inbound calls, average talk time, average-speed-to-answer, abandonment rate, etc.)? | The State does not have this information. |
| 228. | I.H.1 | 4 | Is there a file size limit for uploading to ShareFile? | No. |
| 229. | I.H.1.b | 4 | How would the State like the Technical, Cost, and Proprietary Information files to be delimited within the naming structure? Is Technical File 1 of 3, Cost File 2 of 3, and Proprietary Information File 3 of 3 or should the Volume name be included prior to the file number? | Files should be named according to the standard set forth in I.H.1.b. Question is unclear. |
| 230. | I.Q | 6 | If a bidder wishes to be considered for Option 1, Option2, or Option3, must they complete all three submissions? | See response to question #67. |
| 231. | I.Q | 6 | If a bidder submits a proposal for Option 3, can they still be evaluated individual for Option 1 and Option 2? If so, does the bidder need to designate this request for individual awards in their proposal? | No, see response to question #67. |
| 232. | V.B | 28 | Will LDH and DHHS continue to provide contact tracing after the Contractor goes live? | Yes. |
| 233. | V.C | 28 | Are any inbound services required for Contact Tracing? If so, please describe. | Per section V.C.7, all outbound calls must be identified on caller ID. Contractor must answer any inbound calls. |
| 234. | V.C | 38 | Please confirm that no in-person work is needed for Contact Tracing. | Confirmed. |
| 235. | V.C.1.a | 28 | The RFP indicates the State will provide all systems. Please provide a description of each system, how it is accessed, and how/when it is used. | The State will provide access to the cloud based system. This system is used to enter information regarding each contact and case. Contractor is |

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| | | | | responsible for all hardware and telephony systems. |
| 236. | V.C.1.a | 28 | How will the Contractor connect to each system? | The system is cloud based and can be accessed via the internet. |
| 237. | V.J | 32 | Please confirm the Vaccine Helpline is not responsible for scheduling vaccines. | See response to question #126. |
| 238. | V.J.8 | 32 | Where are staff to document Vaccine Helpline calls? | Calls will be documented in the Contractor's system and sent to the DHHS Director of Emergency Preparedness. |
| 239. | V.J.8 | 32 | Please confirm the State is not providing a system that will be available to contractor staff to document calls. | See response to question #238. |
| 240. | I.I.K | 5 | Would the State agree to include Average Handle Time in the price adjustment mechanism for the monthly price for the vaccine helpline, both as a standalone variable and in combination with call volume? | No. |
| 241. | I.I.K | 5 | Please confirm that any price adjustments are to be negotiated with mutual agreement by both parties. | Yes. |
| 242. | V.D.1 | 29 | The ability to add contact tracers in any given week is dependent on supply and demand factors that may bring unfavorable pricing conditions to the State. To alleviate this unfavorable situation, in the event that the state requires more contract tracers, would the state agree to a maximum number of tracers that could be requested to be hired and onboarded in any given week, in order provide the best value for services rendered? | No. The State will work with the Contractor(s) to determine how many contact tracers can be added in a given week. |
| 243. | II.O | 14 | Please confirm that liquidated damages will not be assessed against the Contractor if all contact attempts are made, per Sections V.G.1&2, despite no contact being made. | Correct. Contact must be initiated with an individual upon receiving notification from DHHS with three (3) business days. |
| 244. | V.K.1 | 33 | Based on our extensive contact center experience, performance measures with 100% achievement levels do not provide best value for money. Would the state agree to a less stringent standard such as 90% of callers on hold for no longer than 4 minutes? If so, please confirm that this will be measured monthly. | Section V.K.1 is deleted and replaced with the following: "At least 95% of all calls will be answered in four (4) minutes or less." Yes. |
| 245. | V.B | 28 | For Contact Tracing, shall the Contractor use already established toll free numbers or establish new numbers? | For Contact Tracing, the Contractor must establish a number(s). |
| 246. | V.C.1.c | 28 | Is the script solely created by the State or does the Contractor create script(s) and obtain State approval? | The State creates the scripts. |
| 247. | V.F V.L.1 | 30 33 | For both Contact Tracing and the Vaccine Hotline, can reports be submitted via a secured online dashboard or are physical reports required? | Reports can be submitted via email. |
| 248. | V.J.1 | 32 | For the Vaccine hotline, is the toll-free number already established or shall the | For Vaccine Hotline, the number is already established. |

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| | | | Contractor establish a new toll-free number? | |
| 249. | V.J.3 | 32 | All answers given must be provided to the State. How shall the Contractor respond to questions that the State has not provided an answer to? How will information sharing occur so that the State can update their answer list? | For questions that have no answer provided by the State, the Contractor should record the question and contact the Director of Emergency Preparedness. See response to question #72. |
| 250. | General | General | Did the last Contact Tracing RFP result in a contract with the three Contractors selected? | No, the solicitation was withdrawn. |
| 251. | General | General | Does the Contact Tracing work for this RFP require working with the three Contractors selected in February 2021? If not, is this a new RFP for Contact Tracing independent of the last RFP issued? | The State did not award contracts from the previous RFP. Yes, this is a new RFP independent of the previous RFP. |
| 252. | V.B | 37/47 | Request the State to share historical data on call volume by hour and by day for vaccine helpline | See response to question #37. |
| 253. | V.D.1 | 38/47 | Is the State expecting equivalent of 25 contact tracers to be staffed every day of the week between 8am to 8pm CST or is it equivalent to 25 contact tracers spread over 7 days of the week. | The State is expecting 25 FTE per day, seven days per week. The FTEs can be scheduled between 8:00 am and 8:00 pm CT. |
| 254. | V.D.1 | 38/47 | Does State want 25 contact tracers across every hour for each of the 12 hours | See response to question #253. |
| 255. | V.J | 41/47 | Does State require any specific skillset for the vaccine helpline staff | Vaccine Helpline staff must be able to perform the duties set forth in section V.J. |
| 256. | General | General | Would the state have reservations to a cross training approach between Contact tracing and Vaccine Helpline staff | Staff can be cross trained, but can work on only one service type at any given time. |
| 257. | Table 2 | Cost Proposal | Kindly clarify what Table 2 of Cost proposal - "For purposes of evaluation, the State will estimate 4 hours of training for 425 individuals" refer to? | To establish an extended cost of Contact Tracing training for scoring purposes, the State will estimate 4 hours of training for 425 individuals. |
| 258. | Section J | 5 | The section states "Cash discount periods will be computed from the date of receipt of a properly executed claim voucher or the date of completion of delivery of all items in a satisfactory condition..." Question: Do cash discounts apply to this RFP? | No. |
| 259. | Section A, paragraph 2 | 28 | The section states "A highest scoring bidder will be identified for each of the options 1, 2 and 3." Question 1: Does the State prefer a combined Contact Tracing and Vaccine bid vs. a standalone bid for Options 1 or 2? Question 2: Can a bidder submit separate responses for Options 1, 2 and 3? | No preference. See response to question #1 and #67. |
| 260. | Section C | 28 | Section 1 a states "Contractor shall exclusively utilize the systems provided by the State for contact tracing services..." Section C, number 1b states "Contractor must ensure all contact tracers are supplied with telephony software....and | See response to question #235. |

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| | | | computer equipment. The State will not provide any equipment." Question 1: Please confirm that this assumption is correct. The Vendor is not expected to use a CRM or any other platform. Contact tracers can enter data directly into the State's systems. | |
| 261. | Section C | 28 | What is the percentage of anticipated Spanish call to be received. | See response to question #145. The vast majority of non-English calls will be Spanish. |
| 262. | Section C, number 3 | 29 | The section states "... from 8 am to 8pm Central Sunday through Saturday... Question 1: Is it acceptable to have an announcement for off-hours and use of voicemail where messages can be left and returned the subsequent day? Question 2: What, if any, information will the vendor be required to share in regard to a specific staffing plan for contract tracing? | Yes. The State will provide the number of staff required per week. The Contractor will be responsible for scheduling contact tracers. |
| 263. | Section C, number 5 | 29 | "If the Contractor is utilizing telework..." Question 1: Is a softphone acceptable? Question 2: If the contract starts as telework, does the bidder expect to require a move to an on-site model at any time in the future? Question 3: Does the bidder anticipate door to door (in person) contact tracing to be a requirement of this contract? | Yes. No. No. |
| 264. | Section C, number 5 | 29 | The section also states "may include but not be limited to ...additional monitor." Question 1: Is an additional monitor recommended? Question 2: Does the State require the vendor to provide a CRM, or will entering directly into the State's system be sufficient? Question 3: Is it expected that the vendor will provide laptops or tablets for some or all of the contact tracers. Question 4: Is it expected that the vendor will provide "hot spots" or other means of internet access to any of the contact tracing staff? | An additional monitor is recommend but not required. The Contractor will use the State's cloud based system. The Contractor must provide all equipment for its contact tracers. The Contractor must provide all equipment for its contact tracers. |
| 265. | Section C, number 7 | 29 | The section states "Caller ID must be identified as coming from the 'Nebraska COVID Response Team...' Question: Can inbound/return calls be answered by a contact tracer that is different than the agent who placed the original call? | Yes. |
| 266. | Section D, number 1 | 29 | The section states "...equivalent of 25 contact tracers ... up to a maximum of 40 hours per week." Question 1: Does the State recognize holiday pay for state recognized holidays, and if so, what are those are the designated holidays. | No, the State does not pay holiday pay. |
| 267. | Section D, number 2 | 29 | The section states "If the State requires additional contact tracers, the State will notify Contractor, in writing, how many contact tracers it requires..... begin | See Attachment A. |

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| | | | training no later than one week after receipt of request from the State." Question: If the State determines to reduce the number of contact tracers, what advance notification will the State provide? | |
| 268. | Section D, number 4 | 29 | The section states "Each contact tracer must work on average a minimum of 15 (fifteen) hours per week. Question: For clarification purposes If an individual is scheduled a minimum of 15 hours and is sick or otherwise absent in a given week that causes that actual work to be lower than 15, as long as the overall average is 15 or more, that employee qualifies for the contract, correct?" | Yes. |
| 269. | Section E, c | 30 | The section states "The DHHS Contract Manager shall receive the weekly reports from the Contractor, as well as monitor the work being performed under this contract..." Question: In addition to reviewing input into the State's system, the vendor's weekly and ad hoc reports, what other pieces of information will the bidder need to monitor work performed?" | The Contractor will be responsible for monitoring Quality Control metrics and telephony reports. |
| 270. | Section G, number 1 | 30 | The section states "Contractor shall make at least 5 subsequent attempts to call the individual as stipulated by the State training guide." Question: Does the State training guide also require texts or emails either in addition to or in place of the calls? If so, is this functionality built into the State's system, or should the vendor provide?" | No. |
| 271. | Section H, number 1 | 30 | The section states "Designate and maintain the System and provide Contractor access to it." Question 1: What System does the State currently use? Question 2: Will vendor's supervisor have the ability to review contact tracer documentation in the State's System for QA purposes? Question 3: Will vendor have the ability to create login credentials for the contact tracers and management users for the State's System? | Salesforce. Contractor Supervisors will have additional access to the contact tracing system for performance evaluation purposes, such as reporting. No, the State will perform this function. |
| 272. | Section I, number 9 | 31 | Question: Is there a preference for hiring contact tracers who live in the State of Nebraska? If so, are there geographic requirements for said hires? (Example: Rural, Urban, or specific percentage mix)? | No. |
| 273. | Section J | 32 | How long are the recordings required to be saved and available for the State? | See response to questions #22 and #154. |
| 274. | Section J | 32 | What are the agent desk top and internet requirements for utilization of the State's scheduling and contract tracing systems? | This is unknown, but the State's scheduling and contact tracing system and can be accessed with a standard internet connection. |
| 275. | Section VI | 35 | Question: Will special consideration be given to woman-owned businesses or small businesses? | No preference will be given to woman-owned businesses or small businesses. |

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| 276. | Section K | 36 | The section states "The State is not allowing subcontractors." Question: If we submit a contract under Option 3, can two organizations jointly submit the response with one organization focusing on contact tracing and other on the vaccine, if one of the entities serves as the primary bidder. Both would use W2 staff of their respective organizations. | No, each entity would need to submit a separate proposal. |
| 277. | Procurement Procedures | 4 | As the submission of the response is through the online portal, can the signature on the RFP response be a scan of an ink signature? | Yes. |

This addendum will become part of the Request for Proposal and should be acknowledged with the Request for Proposal response

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ADDENDUM SEVEN QUESTIONS and ANSWERS

Date: April 23, 2021

To: All Bidders

From: Connie Heinrichs/Annette Walton, Buyers
AS Materiel State Purchasing Bureau (SPB)

RE: Addendum for Request for Proposal Number 6499 Z1 to be opened April 26, 2021 at 2:00 p.m. Central Time

Questions and Answers

Following are the questions submitted and answers provided for the above-mentioned Request for Proposal. The questions and answers are to be considered as part of the Request for Proposal. It is the Bidder's responsibility to check the State Purchasing Bureau website for all addenda or amendments.

The State is not accepting any additional questions to this RFP.

| Question Number | RFP Section Reference | RFP Page Number | Question | State Response |
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| 1. | | | As the call volumes and average handle times for the Vaccine Helpline as stated in the QA vary significantly from those disclosed in the RFP, which volumes should a bidder utilize as a baseline volume for establishing its proposed fixed monthly rate and from which the 25% variance would be based? | <p>Please refer to question 37 response in Addendum Six.</p> <p>Because call volume varies based on the case prevalence in the State of Nebraska and new information from the CDC regarding vaccination, the Page 5 information in this response may conflict with Section V.B of the RFP. The information in this response is current as of April 5, 2021.</p> |
| 2. | | | <p>We were reviewing the Vaccine Helpline daily call numbers and length of calls and there is a dramatic difference from the RFP to Q&A. There remains a potential conflict within the Q&A</p> <p>Vaccine Helpline Quantities:</p> <ul style="list-style-type: none"> • RFP – page 28 it cites 1,000 calls per day and 85 per hour. • Q.37 – states 15,000 calls per month – which would be 500/day • Q.59 – addresses the specific purpose of vaccine and registration at 500/day <ul style="list-style-type: none"> ○ Q - Will the helpline staff be performing the registration and | <p>Please refer to question 37 response in Addendum Six.</p> <p>Because call volume varies based on the case prevalence in the State of Nebraska and new information from the CDC regarding vaccination, the Page 5 information in this response may conflict with Section V.B of the RFP. The information in this response is current as of April 5, 2021.</p> |

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| | | | <p>scheduling of the patient for the vaccine? If so is there an estimate of the inbound call volume for this purpose?</p> <ul style="list-style-type: none"> ○ A = Yes the current average is 500 calls per day. ○ We read this as there are other calls outside of these like questions, how to prevent infection, case numbers, phase verification, travel guidance, etc. thus more than 500 total per day. <p>We had 1,000 per day in the original RFP, now have 500 per day in answer to Q.37 and 500 for registration and scheduling only in Q.59. What volume of calls would you like for the pricing?</p> <p>Vaccine Helpline Call Lengths:</p> <ul style="list-style-type: none"> • RFP page 28 cites an average call length of 15-20 minutes • Q.37 of the Addendum six Q&A mentions 6 minutes as the average length. <p>There is a substantial difference in call length (30-40% of the length), should we be using the latest number cited in the Q&A?</p> | |
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This addendum will become part of the Request for Proposal and should be acknowledged with the Request for Proposal response

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APPENDIX E

REQUEST FOR PROPOSAL FOR CONTRACTUAL SERVICES FORM

By signing this Request for Proposal for Contractual Services form, the bidder guarantees compliance

BIDDER MUST COMPLETE THE FOLLOWING

with the procedures stated in this Solicitation, and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder maintains a drug free work place.

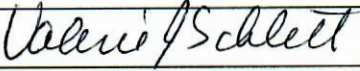
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603 DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Contractors. This information is for statistical purposes only and will not be considered for contract award purposes.

_____ NEBRASKA CONTRACTOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Contractor. "Nebraska Contractor" 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.

_____ 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.

FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

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| FIRM: | Public Safety and Economic Growth (PubSEG) – a registered trade name in the State of New Jersey for Valerie Schlitt Associates Incorporated |
| COMPLETE ADDRESS: | 441 Station Avenue, Haddonfield, NJ 08033 |
| TELEPHONE NUMBER: | 856.240.8117 |
| FAX NUMBER: | 856.858.2808 |
| DATE: | 4/25/2021 |
| SIGNATURE: |  |
| TYPED NAME & TITLE OF SIGNER: | Valerie J. Schlitt, Founder |

Form A
Bidder Point of Contact
Request for Proposal Number 6499 Z1

Form A should be completed and submitted with each response to this solicitation. This is intended to provide the State with information on the bidder's name and address, and the specific person(s) who are responsible for preparation of the bidder's response.

| Preparation of Response Contact Information | |
|--|--|
| Bidder Name: | Public Safety and Economic Growth is a registered dba in the State of New Jersey for Valerie Schlitt Associates Incorporated |
| Bidder Address: | 441 Station Avenue Haddonfield, NJ 08033 |
| Contact Person & Title: | Valerie J. Schlitt, Founder |
| E-mail Address: | Valerie.Schlitt@PubSEG.com |
| Telephone Number (Office): | 856.240.8117 |
| Telephone Number (Cellular): | 856.266.0112 |
| Fax Number: | 856.858.2808 |

Each bidder should also designate a specific contact person who will be responsible for responding to the State if any clarifications of the bidder's response should become necessary. This will also be the person who the State contacts to set up a presentation/demonstration, if required.

| Communication with the State Contact Information | |
|---|--|
| Bidder Name: | Public Safety and Economic Growth is a registered dba in the State of New Jersey for Valerie Schlitt Associates Incorporated |
| Bidder Address: | 441 Station Avenue Haddonfield, NJ 08033 |
| Contact Person & Title: | Valerie J. Schlitt, Founder |
| E-mail Address: | Valerie.Schlitt@PubSEG.com |
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