

# **98001-Request for Information (RFI)**

Work Force Optimization Solution



# TABLE OF CONTENTS

<b>1</b>	<b>INTRODUCTION AND PURPOSE OF THE RFI .....</b>	<b>3</b>
<b>2</b>	<b>BACKGROUND, SCOPE, AND SOLUTION OPTIONS .....</b>	<b>4</b>
2.1	BACKGROUND.....	4
2.2	SCOPE .....	4
2.3	SOLUTION OPTION .....	4
<b>3</b>	<b>GENERAL INSTRUCTIONS .....</b>	<b>4</b>
3.1	RESPONSE INSTRUCTIONS .....	4
3.1.1	<i>Response Submission</i> .....	4
3.1.2	<i>Response Content</i> .....	4
3.1.3	<i>Response Format</i> .....	5
3.2	CONTACTS .....	5
3.2.1	<i>Questions</i> .....	5
3.2.2	<i>Contact Information</i> .....	5
3.3	TIMEFRAME .....	5
<b>4</b>	<b>ADDITIONAL INFORMATION.....</b>	<b>5</b>
4.1	REQUESTS FOR ADDITIONAL INFORMATION.....	5
4.2	COST INCURRED.....	5
4.3	REVIEW RIGHTS .....	5
4.4	PUBLIC RECORD.....	5
<b>5</b>	<b>QUESTIONS AND VENDOR RESPONSES .....</b>	<b>5</b>
5.1	QUESTIONS / VENDOR RESPONSES .....	6
5.1.1	<i>Company Information</i> .....	6
5.1.2	<i>Overview of Customer Base</i> .....	6
5.1.3	<i>Business Model Overview</i> .....	6
5.1.4	<i>Business Process, Integration, and Functionality</i> .....	6
5.1.5	<i>Training, Documentation, and Support</i> .....	7
5.2	BUDGETARY COST ESTIMATES .....	7

## **1 INTRODUCTION AND PURPOSE OF THE RFI**

With this RFI we request information regarding your company and your products/services. The same information will be gathered from different companies to learn available service delivery options for a Work Force Optimization Solution. **This RFI is for informational and planning purposes and is not to be construed as solicitation or a commitment to issue a solicitation.**

### **General**

Article I, Section 24, Florida Constitution, guarantees every person access to all public records and Chapter 119, Florida Statutes, provide a broad definition of public records. JEA is a body politic, corporate, and subject to these laws and related statutes ("Florida's Public Records Laws"). All responses to this RFI are public records and available for public inspection unless specifically exempt by law.

**IF A PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTORS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

**JEA**

**Attn: Public Records**

**21 West Church Street**

**Jacksonville, Florida 32202**

**Ph: 904-665-8606**

**[publicrecords@jea.com](mailto:publicrecords@jea.com)**

### **Redacted Submissions**

If a Proposer believes that any portion of the documents, data or records submitted in response to this RFI are exempt from Florida's Public Records Law, Proposer must (1) clearly segregate and mark the specific sections of the document, data or records as "Confidential," (2) cite the specific Florida Statute or other legal authority for the asserted exemption, and (3) provide JEA with a separate redacted copy of its response (the "Redacted Copy"). The cover of the Redacted Copy shall contain JEA's title and number for this RFI and Respondent's name, and shall be clearly titled "Redacted Copy." Respondent should only redact those portions of records that Proposer claims are specifically exempt from disclosure under Florida's Public Records Laws. If Respondent fails to submit a redacted copy of information it claims is confidential, JEA is authorized to produce all documents, data and other records submitted to JEA in answer to a public records request for such information.

In the event of a request for public records to which documents that are marked as confidential are responsive, JEA will provide the Redacted Copy to the requestor. If a requestor asserts a right to any redacted information, JEA will notify Respondent that such an assertion has been made. It is Respondent's responsibility to respond to the requestor to assert that the information in question is exempt from disclosure under applicable law. If JEA becomes subject to a demand for discovery or disclosure of Respondent's redacted information under legal process, JEA shall give Respondent prompt notice of the demand prior to releasing the information (unless otherwise prohibited by applicable law.) Respondent shall be responsible for defending its determination that the redacted portions of its response are not subject to disclosure.

By submitting a response to this RFI, Respondent agrees to protect, defend and indemnify JEA from and against all claims, demands, actions, suits, damages, liabilities, losses, settlements,

costs and expenses (including but not limited to reasonable attorney fees and costs) arising from or relating to Respondent's determination that the redacted portions of its response to this Solicitation are not subject to disclosure.

## **2 BACKGROUND, SCOPE, AND SOLUTION OPTIONS**

### **2.1 Background**

JEA owns, operates and manages the electric system established by the City of Jacksonville, Florida in 1895. In June 1997, JEA also assumed operation of the water and sewer system previously managed by the City. JEA is Florida's largest municipally owned utility and the seventh largest municipal in the United States.

### **2.2 Scope**

JEA is researching costs and functionality for a Cloud Based Workforce Optimization Suite that will perform the following functionality; call recording, quality management, workforce management, performance management and reporting. As part of the solution, JEA desires for the proposed vendor to provide cost and plans for professional services to implement said solution into JEA's UCCE platform while reducing maintenance and end-user training costs. The solution shall also include system testing, administrative end user training onsite at JEA, and five (5) years of annual maintenance and support starting following implementation and JEA Acceptance.

The solution shall be a Cisco Solutions+ cloud solution product. A Service Level Agreement component of 99.99% to ensure minimal downtime is required. In addition, JEA does not intend to migrate the existing data and will require consultative services to design and implement the solution.

### **2.3 Solution Option**

JEA is interested in understanding the available software solution options to accomplish (at a minimum) the business functionalities contained stated above and further defined in Appendix A attached hereto . Please complete the attached Appendix A to detail the proposed Solution's functionality capabilities.

## **3 GENERAL INSTRUCTIONS**

Please note that this RFI is issued solely for the purpose of obtaining information. Nothing in this RFI shall be interpreted as a commitment on the part of JEA to enter into a contract with any respondent thereof to make any procurement. JEA reserves the right to invite any of the RFI respondents to do a follow up presentation as part of the RFI process.

### **3.1 Response Instructions**

#### **3.1.1 Response Submission**

All responses to this RFI are due no later than 12:00 p.m. EST on, Friday September 13<sup>th</sup>, 2019. Respondents should submit an electronic copy via e-mail to Nickolas Dambrose at: [dambnc@jea.com](mailto:dambnc@jea.com). All responses must include on the first page the official name of the firm or entity submitting the response. Please consecutively number all pages of the response.

#### **3.1.2 Response Content**

Vendors shall include a response to Appendix A, and to each of the questions set forth under Question and Vendor Responses (Section 5) of this RFI. Vendors should elaborate how or why they meet the functionalities in which measurement or quantifiable in the comment section next to each requirement.

3.1.3 Response Format

JEA requests that all responses be submitted with a point-by-point response to each question in every section. If a respondent opts not to respond to any item(s) please include an explanation for the lack of response.

**3.2 Contacts**

3.2.1 Questions

Potential respondents who have questions regarding this RFI may e-mail them to the contact listed below by September 6, 2019. Respondents may only make inquiries and request clarification concerning this RFI by written questions via e-mail. Responses to inquiries and clarification questions will be provided electronically to all interested parties. **Note:** There will be no informational sessions associated with this RFI.

3.2.2 Contact Information

Please direct all communications, questions, and responses to the following contact:  
Nickolas Dambrose, Procurement Senior Buyer  
JEA  
21 West Church Street  
Jacksonville, FL 32202  
904.665.7217  
E-mail: Nickolas Dambrose at: [dambnc@jea.com](mailto:dambnc@jea.com)

**3.3 Timeframe**

CALENDAR EVENT	DATE	TIME
RFI Posting and Release	August 30 <sup>th</sup> , 2019	5:00 PM EST
Questions Due	September 6, 2019	12:00 PM EST
RFI Responses Due	September 13, 2019	12:00 PM EST

**4 ADDITIONAL INFORMATION**

**4.1 Requests for Additional Information**

JEA retains the right to request additional information from respondents.

**4.2 Cost Incurred**

By submitting a response, respondents agree that any cost incurred in responding to this RFI, or in support of activities associated with this RFI, shall be the sole responsibility of respondent. JEA shall not be held responsible for any costs incurred by respondents in preparing their respective responses to this RFI.

**4.3 Review Rights**

Responses to this RFI may be reviewed and evaluated by any person(s) at the discretion of the JEA, including independent consultants retained now or in the future. JEA reserves the right to request a demonstration from one or more companies.

**4.4 Public Record**

All responses to this RFI will be public record under the State of Florida's Sunshine Law regardless of confidentiality notices set forth on such writings to the contrary.

**5 QUESTIONS AND VENDOR RESPONSES**

See General Instructions in Section 3 for information on response format and submission. **Note:** Please describe any assumptions you make in answering these questions as part of each response.

## **5.1 Questions / Vendor Responses**

### **5.1.1 Company Information**

1. Company name, mailing address, phone number, fax number, and phone/e-mail of designated point of contact for RFI.
2. Corporate web site address.
3. Number years on the market.
4. Company location(s).

### **5.1.2 Overview of Customer Base**

1. Identify one (1) client reference based on similar solution(s). Include the client name, point of contact information, and government contract number (if applicable).

### **5.1.3 Business Model Overview**

1. Please explain the business model(s) you use for your business. In other words, describe the companies you may partner with, what types of customers you support (e.g. small, medium, large, e-businesses, etc.), Include any companies similar to JEA (including both electric and water/sewer service).
2. Please provide the percentage of revenue that is generated from Work Force Optimization.
3. Please provide an indication of the size of your company in terms of revenues, number of employees, regions of the country you serve, etc.

### **5.1.4 Business Process, Integration, and Functionality**

1. Complete Appendix A to detail the functional capabilities of the proposed Solution.
2. Describe the general ability of the proposed solution to complete the following tasks:
  - Forecasting:
  - Staff Planning:
  - Scheduling:
  - Exception Activities:
  - Schedule Modification:
  - Vacation/Leave Management:
  - Intraday Management:
  - Schedule Adherence:
  - Agent Empowerment and Communication:
  - Real Time Monitoring:
  - Contact Audio Recording:
  - Screen Capture Review and Management:
  - Audio Review and Management:
  - Contact Quality Evaluation Forms:
  - Evaluation Process:
  - Scorecards
  - Reporting
3. If your product is a suite of products with additional modules that by default and at no extra cost would be included / activated if all the above functions are provided, please provide a description of these additional modules and their functionality.

### **5.1.5 Implementation**

1. Describe your deployment methodology (Waterfall, Agile, etc.)
2. Describe the integration points to the Cisco UCCE environment. (i.e. Gateways, Databases, SIP/PRIs, etc.)
3. Describe your experience with a XenApp deployment and Cisco IP Communicator/Jabber phones

### **5.1.6 Maintenance Support & Consulting**

1. Explain the typical tools used to monitor performance of the WFO system within a High Availability deployment (i.e. SPLUNK)

2. Describe the support process post implementation including the Ticketing and Escalation process
3. Describe the maintenance process post implementation that is required for the system
4. Describe any additional creative opportunities and abilities

#### **5.1.7 Training**

1. Discuss the training methods you will use to provide training
2. Discuss the process of training new users and managers post implementation (CBTs, train the trainer, web courses, etc)
4. Describe any additional creative opportunities and abilities

#### **5.1.8 Solution Security**

1. All cloud based solution shall require documentation that demonstrates SOC Type 2, ISO 27001, or other relevant security related assessment compliance. (An auditor's report or independent third party assessment report will be required annually). Will the company be able to provide this if request during a bid process?
2. For your cloud based solution, a declaration that Company data shall only be stored within the Continental United States will be required. Will the company be able to provide this if request during a bid process?
3. For your cloud based solution, documentation on how you protect PII gathered during call recording.

#### **5.1.9 Training, Documentation, and Support**

1. Please describe the training you provide and any available options – i.e. on-site training, webinars, etc.
2. Explain the type of documentation/user guides you provide.
3. Please explain the available customer support and implementation options. JEA's call center business hours are:  
Monday – Friday 7:00 am. – 7:00 pm.

#### **5.2 Budgetary Cost Estimates**

Cost estimates have been requested for budgetary purposes only and should be based upon the parameters defined within this document.

1. Please provide an estimated price for the product/application. Approximately 150 users are expected to use the proposed solution.
2. Please provide the type of licenses required (End User, Support, etc.), and aggregated cost for each license
3. Please provide the estimated price for the licensing (annual costs as well as estimated renewal costs over a five (5) year period)
4. Please provide a cost estimate for your implementation services – identifying both required and optional services with pricing. Estimates should be categorized (planning, analysis, design, construction, testing, production deployment, post go live support, travel, training, etc.) and include all potential charges. If price ranges are used please specify what is provided at each end of the range.
5. Include the time to implement your services as well as the roles and responsibilities of the human resources who will be a part of the implementation team.
6. Please provide a cost estimate for annual support and maintenance

