



2018 RFP for Data Management and Call Center Services

Q&A Responses

April 16, 2018

Peninsula Clean Energy is San Mateo County's locally-controlled electricity provider. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.

Offers due Wednesday, April 25, 2018 at 5:00 pm PDT

| # | Question | Response |
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| 1 | Will local proposers be given preference? | PCE does have a Sustainable Workforce Policy that outlines PCE's intent to support local business and economic/workforce development when appropriate and possible. This does not preclude PCE from contracting or doing business with companies located in other areas though. |
| 2 | What are your current overall inbound call volume(s)? | Current weekday call volumes are averaging from 30-50 calls/day |
| 3 | What current volume(s) of escalated calls are you experiencing? | Most calls are handled by call center staff. Escalated calls consist primarily of large commercial and/or high profile accounts needing more specialized service. Currently we receive 1-5 calls like this per week. |
| 4 | In order to anticipate the required foreign language service levels, can you provide the current and/or anticipated call volumes for Cantonese/Spanish/Tagalog/Mandarin? | <p>Approximately 15% of all incoming calls to PCE's IVR system select a preference to continue in Spanish and 5% select Mandarin.</p> <p>Of calls that progressed on to a live agent during the first three months of 2018, 202 calls required a Spanish translator, 5 required Mandarin translator, and 2 required a Cantonese translator.</p> |
| 5 | In section II.A.d.xx, you reference a script developed by PCEA. Does the scope of work for this RFP include development of knowledge materials including training materials, process and procedures documents, and IVR menus and call routing work flows? Or, does PCEA own this material and plan to share it with the winning bidder? | Each proposer is responsible for programming and training for their own Call Center staff and IVR provider. PCE does have an IVR script that was co-developed with our current provider, but we do not facilitate the training of Call Center staff or manage the programming of the existing IVR system, these items are under the purview of our current provider. Any new provider would be expected to provide these items for their staff and or partner agencies |
| 6 | Do you have a formula/methodology for measuring First Call resolution? Is it through customer feedback survey? Or is it through historical call transactions? If neither, can you share your formula/methodology? | Currently through historical call transactions tracked via CRM. |
| 7 | Can you share a current copy of the weekly and monthly status reports? | PCE prefers to see potential vendors share their proposed reports vs sharing a heavily redacted version of our current status report. Our reports have evolved over time as information needs have changed and we |

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| | | <p>expect them to evolve further as time goes on. The type of information currently contained in the weekly reports include number of total calls received by the IVR system and # of calls handled by CSR Agents. Weekly opt outs and method (CSR, IVR or Web). Running monthly totals of % calls answered within 20 seconds, 60 seconds and 180 seconds. Number of calls abandoned and abandoned percentage (running monthly total). NEM opt-outs broken out from total opt-outs. Breakdown of all customers by rate schedule and opt-out per rate. Opt-outs broken out into ToT along with total opt-out percentage and a weekly delta of opt-outs per ToT, and opt-out reasons (as indicated by customer).</p> <p>Monthly reports include a summary of above items along with information about bad debts returned from PG&E and some additional call center analytics (propriety to current vendor)</p> |
| 8 | <p>Section IV.D states that one criteria used as a guideline in the evaluation includes, "Cost to PCE for the primary services described by this RFP". Does "primary services" refer to all scope excluding that listed in II.B Value Added Services? If not, can you please clarify the meaning of primary services for this RFP?</p> | <p>Correct, primary services do not necessarily include the Value Added Services. PCE is very interested in contracting with a provider who will offer some or all of the Value Added Services as part of their standard offer, however these items or tools can be built out over time if needed.</p> |
| 9 | <p>In Section V.D.Tab 6, you request two types of references: "business" and "client". Can you clarify the difference between business and client references for this RFP?</p> | <p>References do not need to be divided into different categories, we apologize for this error.</p> |
| 10 | <p>If the winning bidder is a new vendor for PCEA, what is your expected transition plan and how long is the expected transition period?</p> | <p>If a new vendor is selected PCE would negotiate an appropriate transition period with our current provider. A timeline would be agreed to by all parties but would likely be 60-90 days.</p> |
| 11 | <p>The RFP states that all material submitted in response to the RFP is a public record in its entirety. Government Code sections 6250 et seq. allows for a number of exemptions to disclosure assuming the material is clearly marked as exempt and the reason for exemption is provided by the submitting entity. Sections of this RFP would be best answered with responses that includes confidential, proprietary and/or intellectual property, however, without the</p> | <p>PCE cannot represent or guarantee that any information submitted in response to the RFP will be kept confidential. If the PCE receives a request for any document submitted in response to this RFP, it will not assert any privileges that may exist on behalf of the person or business submitting the proposal. However, if a proposer believes that a portion of its proposal is confidential, clearly marks that portion as CONFIDENTIAL and notifies PCE of such in writing, the PCE will make reasonable efforts to notify the Proposer</p> |

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| <p>ability to ensure these elements are protected from disclosure, it may be hard to comprehensively answer the RFP. Will Peninsula Clean Energy allow companies responding to the RFP to clearly identify specific elements of their response that contains information that qualifies for exemption from disclosure so long as justification is provided and exemptions are specific (for example, specific sentences, paragraphs, charts, graphics, etc)?</p> | <p>of any request for the proposal and provide it a reasonable period of time, in which to take action. However, it will be the sole responsibility of that proposer to assert any applicable privileges or reasons why the document should not be produced, and to obtain a court order prohibiting disclosure. The Proposer understands that PCE is not responsible under any circumstances for any harm caused by production of a confidential proposal.</p> |
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