SAN FRANCISCO
HEALTH SERVICE SYSTEM
Affordable, Quality Benefits & Well-Being

ADDENDUM NO. 2

RFP for As-needed Off-site Employee Benefits Call Center Services (RFPQHSS2023.O1)

June 13, 2023

REQUEST FOR PROPOSALS FOR

As-needed Off-site Employee Benefits Call Center Services for the San Francisco Health Service System

RFPQHSS2023.O1

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This Addendum is being issued to modify the requirements in the above-referenced Request for Proposals (RFP) and to respond to questions and requests for clarification received by or before Thursday, June 8, 2023 at 12:00 PM (PDT) (the "Deadline for RFP Questions").

Please review the terms of the RFP and this Addendum carefully. If there are any inconsistencies between the RFP or Addendum No. 1 (issued June 6, 2023) and the terms of this Addendum No. 2, then the terms of this Addendum No. 2 shall prevail.

Section references below are to the RFP and are provided for convenience of reference only.

A. Questions & Answers

1. **Will the selected Vendor's team have an identical desktop setup to mirror that of SFHSS's call center staff, including connection to the City's Knowledge Management, Policy Browser, and Customer Fulfillment Application? If not, will the selected Vendor have access to the City's Knowledge Management system?**

   SFHSS Response:

   The selected Vendor will be granted access to selected City systems. SFHSS utilizes Salesforce as the knowledge base system, and the selected Respondent's team will be granted access upon the City acquiring the number of additional licenses needed and as stated in the selected Respondent's Proposal.

2. **Is previous experience with any specific customer information systems, phone systems, or software required?**

   SFHSS Response:

   Yes. Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 8 as it relates to the selected Respondent's previous experience.

3. **Question 8 in Addendum #1 lists systems and software that the selected Respondent must have experience with.[1] Please clarify:**

   a. **Which software and/or systems the vendor is expected to include and/or provide in delivering services?**

   b. **Which, if any, software and/or systems would be supplied by SFHSS to the Contractor?**

   SFHSS Response:

   The selected Vendor will be required to provide the following software and/or systems to deliver the scope of services in this RFP:
   - Windows-based systems with endpoint technology;
   - Chrome internet browser; and
   - A robust network to prevent a lag in accessing the City's systems.

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[1] https://sfhss.org/sites/default/files/2023-06/Call%20Center%20RFP%20-%20Addendum%20No%201_6.06.23%20.pdf

SFHSS will provide the selected Vendor access to the following software and/or City systems:

- PeopleSoft access via Chrome internet browser;
- Salesforce access via Chrome internet browser;
- Content management system, including the installation of a thin client;
- Cisco Contact Center via Chrome internet browser in the event that dedicated access is required.

4. Please provide additional information on SFHSS's training program:

a. Does SFHSS have a written training program? If so, what is the program's duration?

b. Will SFHSS perform exams during training to assess the selected Vendor's staff? Do the exams determine if the vendor can offer that agent a support role?

c. Is there a formal Nesting period post-training? If so, for how long? Are SFHSS-experienced agents available for that nesting period?

<u>SFHSS Response:</u>

No. SFHSS does not have a formal written training program, but will provide training to the selected Vendor on the following tasks and duties:

- Benefits eligibility for its Members per the SFHSS Member Rules and the Section 125 Cafeteria Plan;[2]

- Performing a system information look up in PeopleSoft Human Capital Management (HCM) 9.2;

- Data entry in Salesforce; and

- Provider-specific information about the plans that are offered to SFHSS Members.

Since the services under this contract will be performed remotely, whereby the selected Respondent's staff will not be onsite, SFHSS will not be able to accommodate in-person "Nesting" into its training. SFHSS does not administer tests and will use Quality Assurance (QA) phone call reviews to assess the quality of the information provided to the members by the selected Respondent.

Please also refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 6 and 7.

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[2] https://sfhss.org/san-francisco-health-service-system-member-rules

5. **If current training is side-by-side, would experienced agents act as Subject Matter Experts and be available to assist the selected Vendor in creating training documentation during our first two post-training classes? Will SFHSS provide call flow templates or leave this up to the selected Vendor?**

    SFHSS Response:

    Because the services under this contract will be performed remotely, training for the selected Respondent's staff will not be delivered side-by-side. However, SFHSS will have subject matter experts (SME) available to provide additional information when needed. SFHSS will work with the selected Respondent to develop all documentation, such as call flow templates, necessary to support the successful onboarding of staff and to ensure their ability to effectively provide the Level 1 services described in the RFP (Sec. 2.2.1, Level 1 Services).

6. **Are there levels to the training to allow agents to progress and develop their skills? Beyond tenure, is there training offered that provides personal development (e.g., Subject Matter Experts, Escalation Specialists, Leads, Badging, or Reward assessments)?**

    SFHSS Response:

    Please reference Question 4 above. SFHSS will provide training on all topics and area which enable the selected Respondent's staff to effectively provide the scope of services in the RFP.

    Please also refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 10 as it relates to training.

7. **Please provide additional information if there are end-of-call surveys or bounce-back emails that you use to collect customer satisfaction (CSAT) data? If you complete the Quality Assurance (QA) & CSAT process with the current team, does SFHSS have standards they would share as we build our program?**

    SFHSS Response:

    Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 7 and 12 as it relates to Member feedback.

8. **Does SFHSS have a standardized (written) Quality Program? If yes, does SFHSS expect us to use that program or provide a QA program of our own? If SFHSS expects us to use their program, is the program/software able to be purchased online? If you have created a program, is this accessible online?**

<u>**SFHSS Response:**</u>

Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 7 as it relates to Quality Assurance (QA) and collaboration with the selected Respondent.

9. **What is SFHSS current overall Quality Assurance (QA) rating for the current team?**

<u>**SFHSS Response:**</u>

Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 12 as it relates to Quality Assurance (QA).

10. **If SFHSS will handle all QA's internally, who, how, and when will agent scores be communicated to our leaders to discuss with our agents?**

<u>**SFHSS Response:**</u>

Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 6, 7, and 11 as it relates to collaborations between the City and the selected Respondent.

11. **What time of day and days of the week do calls peak during peak months?**

<u>**SFHSS Response:**</u>

Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 19 as it relates to available data on call characteristics and peak periods.

12. **What issues drive the longest talk time?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at
   https://sfhss.org/RFPs, for the City's response to Questions 7 and 17-19 as it
   relates to call characteristics.

13. **Over the past year, what is the percentage of calls received in English versus
   non-English calls? Over the past year, what percentage of calls received
   were in Spanish?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at
   https://sfhss.org/RFPs, for the City's response to Questions 13-14 as it relates to
   language characteristics.

14. **Does SFHSS have a preferred pricing model?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at
   https://sfhss.org/RFPs, for the City's response to Question 1 as it relates to pricing
   for services.

15. **Is there any instance where the Contractor's agent would be required to
   download and retain files related to SFHSS Members onto their servers?**

   SFHSS Response:

   No. Please refer to Addendum No. 1, dated June 6, 2023 and available at
   https://sfhss.org/RFPs, for the City's response to Questions 2 through 7.

16. **Is the selected Respondent responsible for supporting callers' technical functions in an online application or website, such as resetting passwords?**

    SFHSS Response:

    No. Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 4 as it relates to the scope of services.

    Please also refer to RFP Section 2.2 (Call Center Support, SFHSS MBS Service Levels) for more information on Level 1 Services that the selected Respondent will provide.

17. **Would the selected Vendor's agents be responsible for helping SFHSS Members create accounts or simply entering data into existing Member accounts?**

    SFHSS Response:

    No. Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 4 as it relates to the scope of services.

    Please also refer to RFP Section 2.2 (Call Center Support, SFHSS MBS Service Levels) for more information on Level 1 Services that the selected Respondent will provide.

18. **Please confirm if the scope of services to be provided by the Contractor extend beyond handling inbound phone calls to also supporting Member questions via chat and/or e-mail?**

    SFHSS Response:

    Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 4 as it relates to the scope of services.

    Please also refer to RFP Section 2.2 (Call Center Support, SFHSS MBS Service Levels) for more information on Level 1 Services that the selected Respondent will provide.

19. **Will Vendor's call center staff be expected to return voicemails?**

   SFHSS Response:

   No. Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 4 as it relates to the scope of services.

   Please also refer to RFP Section 2.2 (Call Center Support, SFHSS MBS Service Levels) for more information on Level 1 Services that the selected Respondent will provide.

20. **What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 5-6 as it relates to call recording requirements.

21. **What are the recording and storage requirements for non-phone communications?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 5-6 as it relates to call recording requirements.

22. **Please provide a complete list of the means of inbound and outbound communication the call center must accommodate.**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 4 as it relates to the scope of services.

   Please also refer to RFP Section 2.2 (Call Center Support, SFHSS MBS Service Levels) for more information on Level 1 Services that the selected Respondent will provide.

23. **Is there an existing security process in place?**

SFHSS Response:

Yes. Please refer to Addendum No. 1, dated June 6, 2023 and available at
https://sfhss.org/RFPs, for the City's response to Questions 2-3 as it relates to the
City security requirements.

24. **What is the required degree of dedication for the Call Center?**

SFHSS Response:

Please refer to Addendum No. 1, dated June 6, 2023 and available at
https://sfhss.org/RFPs, for the City's response to Question 20 as it relates to the
selected Respondent's required degree of dedication.

25. **Is it possible that SFHSS will consider providing a copy of their current job description that outlines the role and current responsibilities of the internal agents?**

SFHSS Response:

As referenced in RFP Section 2.2 (Call Center Support, SFHSS MBS Service
Levels) SFHSS call center staff responsibilities are performed by Benefits
Technicians and Benefits Analysts job classifications. Their job descriptions are
available through the City's Department of Human Resources website:
  - (1209) Benefits Technician:
    https://careers.sf.gov/classifications/?classCode=1209
  - (1210) Benefits Analyst:
    https://careers.sf.gov/classifications/?classCode=1210

26. **Can you share annual attrition data regarding the agent role and the highest driver for staff attrition over the past 24 months? For example, what was the average number of call center employees working during the years 2019–2022?**

SFHSS Response:

Based on available data, SFHSS's Member Services Division (MBS) saw a decrease from
nineteen (19) staff in 2021 to twelve (12) in 2023. MBS personnel that transitioned out of
SFHSS either retired, retired early, or accepted promotional opportunities in other city
agencies.

27. **Please provide any additional historical data on SFHSS's use of overtime in the prior year. For example, what amount of overtime do SFHSS staff work on a weekly basis? Would SFHSS request the selected Respondent to provide services during those hours? If so, how much advanced notice will the vendor receive to consider the request?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 11 and 19 as it relates to current overtime requirements for internal City staff and collaborating with the selected Respondent on determining future staffing levels.

28. **Is there a preferred supervisor-to-agent ratio? Is there a minimum or maximum number of operators and supervisors?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 11 as it relates to the staffing requirements.

29. **Does SFHSS have any limitation on the composition of full or part-time staff?**

   SFHSS Response:

   No. Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 11 as it relates to the staffing requirements.

30. **Please specify any service requirements related to the following:**
   a. **What is the minimum simultaneous inbound call capacity?**
   b. **What percentage of inbound calls must be answered by a live operator?**
   c. **What percentage of calls must be resolved without a transfer, second call, or a return call?**

   SFHSS Response:

   Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 4 and 15 as it relates to service requirements for the selected Respondent.

31. **What is the suggested communication process between the SFHSS leadership and vendor management? For example how will Vendors be notified of concerns, changes, technical issues or requested overtime by SFHSS? How will our management team be notified of any schedule changes or system outages?**

    <u>**SFHSS Response:**</u>

    Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Questions 6, 7, and 11 as it relates to collaborations between the City and the selected Respondent.

32. **Is there a definitive go-live date? If not, may the Vendor begin services prior to October 1, 2023?**

    <u>**SFHSS Response:**</u>

    The start date for any contract resulting from this RFP will depend on the overall implementation timeline, including, but not limited to, the selection of a vendor as a result of this RFP, compliance with City Approved Supplier requirements, execution of an agreement, and training of the selected Respondent's staff.

33. **Please describe your level of satisfaction with your current or recent vendors for the same purchasing activity (if applicable). How are fees being billed to incumbent(s)? What estimated or actual dollars were paid last year to any incumbent(s)?**

    <u>**SFHSS Response:**</u>

    Please refer to Addendum No. 1, dated June 6, 2023 and available at https://sfhss.org/RFPs, for the City's response to Question 21 as it relates to an existing agreement or incumbent vendor providing the services described in this RFP.