Ohio Department of Education - Call Center Scope of Work
This document describes the Scope of Work for the call center services that Cleveland Sight Center (CSC) will provide to the Ohio Department of Education. The Scope of Work includes four areas: I. Contact Center Services; II. Key Performance Indicators; III. Back Office; and IV: Designated Representatives. This Scope of Work does not replace the Department of Administrative Services Office of Procurement from Community Rehabilitation Program’s Standard or Special Terms and Conditions.

I. Call Center Services
CSC will provide the following call center services to the Ohio Department of Education for the time period covered by the contract:

1. Handle up to 20,000 interactions (phone calls or emails) each month at the required service levels defined in the Key Performance Indicators.

2. Recruit, train, and supervise high-quality staff to work in the Contact Center.

3. Utilize automated functions and a live call center to respond efficiently, effectively, and with a high level of customer service to the calls placed to 877-644-6338, as well as emails to contact.center@education.ohio.gov and profile.help@education.ohio.gov.

4. Provide warm and cold transfers according to Ohio Department of Education-approved procedures.

5. Provide service to callers who are Limited English Proficient through the use of bilingual customer service representatives or an operator-assisted translation service.

6. Provide Level 1 support to Ohio Department of Education offices. The issues and call handling defined as Level 1 will be approved by the Ohio Department of Education. Level 1 handling includes: Keyword Transfers, Transfer by Name, Licensure, OH|ID and Educational Options (scholarship).

7. Operate a Central Message Desk according to the business rules and procedures approved by the Ohio Department of Education. The specifications for the Central Message Desk are as follows:

   a) Operates during call center hours.

   b) Centralizes issues that cannot be resolved in the call center and when Ohio Department of Education staff are not available.

   c) Customer service representatives will capture caller information (name, phone number, best time to call back, and a summary of the issue) and transmit the message via email to the appropriate staff or office.

   d) The specifications of the Central Message Desk may be customized to meet the needs of individual offices.

8. Provide an automated customer satisfaction survey. CSC will configure and deploy a phone-
based survey that will allow the caller's to self-report their satisfaction using an interactive voice response system. Survey results will be reported to the Ohio Department of Education as a measure of customer satisfaction.

9. Operate the OH|ID Helpdesk by performing general troubleshooting for OH|ID accounts, as well as using SAFE Admin Lite to troubleshoot account creation.

10. Manage the keyword lists used for transferring callers to offices, staff as well as directing emails. CSC will coordinate with Ohio Department of Education staff to regularly review and adjust their keywords. Ohio Department of Education staff will approve adjustments to the keywords, but the data entry will be performed by CSC.

11. Maintain strict confidentiality when handling Ohio Department of Education calls and emails. Unless required by legal order or with written approval from authorized Ohio Department of Education personnel, CSC will not transmit any personally identifiable information, recordings, or data collected during the course of providing services to Ohio Department of Education customers to any third parties.

12. The Contact Center will be available 7 a.m. to 7 p.m. weekdays except for observed government holidays and weather emergencies declared by the Director of the Ohio Department of Public Safety, Governor of Ohio or Mayor of Cleveland. Observed government holidays are those listed at Ohio.Gov and currently include: New Year's Day, Martin Luther King Day, President's Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veteran's Day, Thanksgiving, and Christmas.

13. The Interactive Voice Response (IVR) system will be available to provide information to callers outside of business hours. Each 12 month period, CSC will allow up to six changes to the IVR script at no additional charge.

14. The hours of operation can be modified by mutual consent of CSC and the Ohio Department of Education (i.e., during peak seasons or campaigns).

15. In order to meet the requirements in this scope of work, CSC may make use of a subcontractor. If a subcontractor is used, CSC will assure that service is provided at a comparable level of quality and performance. If subcontracting is implemented, CSC will train and manage the subcontractor.

16. CSC assumes responsibility for all work, in whole or in part, by CSC or a subcontractor. CSC will be the sole point of contact with regard to contractual matters, including payment of all charges resulting from the Scope of Work. CSC will be fully responsible for any default by the subcontractor just as if CSC itself had defaulted. CSC may remove the subcontractor if doing so is necessary for legal or disciplinary reasons. However, CSC must make a reasonable effort to give the Ohio Department of Education 30 calendar day's prior written notice of the removal.

17. CSC recognizes that certain services under this Scope are vital to the Ohio Department of Education and must be continued without interruption. CSC shall be prepared to continue providing such services identified by the Ohio Department of Education, during periods of disaster, crisis, or
other unexpected break in services based upon a Business Continuity Plan (Plan). CSC is required to implement and maintain a Plan throughout the term of this contract and provide the Plan to the Ohio Department of Education upon request. The Plan will, at a minimum:

i. Enable performance under this Scope in the event of a disaster or other unexpected break in services; and

ii. Ensure the continuity for identified vital services and supporting facilities.

For purposes of this section, the term "disaster" means an unanticipated incident or event, including, but not limited to, force majeure events, technological accidents or human-caused events that may cause a material service or critical application to be unavailable without any reasonable prediction for resumption; or causes data loss, property damage or other business interruption without any prediction for recovery within a commercially reasonable time period.

II. Key Performance Indicators

Each month, CSC will achieve, at a minimum, the following Key Performance Indicators when the number of interactions handled is below 20,000:

1. **Average Abandon Rate < 5%**
   CSC will sufficiently staff the Contact Center so that less than 5% of callers will hang up after requesting to speak to a live agent and are not served. CSC and the Ohio Department of Education mutually agree that a caller who waits on hold for 24 seconds or less (approximately four rings) and then hangs up will be considered a Short Call and will not be counted as an Abandon, as the caller did not wait a reasonable amount of time to be served or may have misdialed.

2. **Average Hold Time < 60 seconds**
   CSC will sufficiently staff the Contact Center so that the average caller waits on hold less than 60 seconds after requesting to speak to a live agent before the call is answered.

3. **Average E-mail Response Time < 2 business day**
   CSC will sufficiently staff the Contact Center so that the average emailer receives a response within two business days.

4. **Quality Scores > 90%**
   CSC will achieve an average monthly score of greater than 90% on the approved quality scorecard. CSC and the Ohio Department of Education will mutually develop the scoring methods and procedures.

5. CSC will comply with performance standards when providing services. Upon evidence that CSC has not met one or more of the standards, CSC agrees to work with the Ohio Department of Education to meet the standard(s). If, during the course of performance of this Scope, a dispute relating to the scope of work, service delivery, or standards arises between the Ohio Department of Education or CSC, the Ohio Department of Education and CSC will first attempt to resolve the dispute through the following informal process:

   - Either the Ohio Department of Education or CSC, through its Designated Representative, may initiate the process by notifying the other party that it wishes to confer in an attempt to resolve the dispute. Once the process has been initiated, the Designated Representatives will arrange a meeting. The meeting will take place as soon as practicable, either by phone or in person at a mutually agreeable location. At the meeting, the Designated
Representatives will discuss, and attempt informally to resolve, the dispute. If it cannot be resolved within five business days, the Designated Representatives may take any other steps that are authorized under the Scope or if necessary, the provisions in the Standard and Special Terms and Conditions for the State of Ohio Community Rehabilitation Program contracts.

III. Back Office

CSC will make available or perform the following to enable the Ohio Department of Education to have effective oversight of the performance of this scope of work:

1. Collect and report data from all interactions with the Interactive Voice Response, Automatic Call Distribution System, as well as emails including but not limited to (caller automatic number identification, caller name, caller address, caller phone number, issue, resolution of issue, transfer location, length of call, calls offered, calls handled, abandon rate, deflection rate, average hold time, email handle time, etc.). Data will be generated automatically by the automatic call distribution system, the interactive voice response system, as well as information collected by customer service representatives and the final dispositions of calls. Summary reports, as well as drill-down detail will be made available. All reports can be exported to a variety of formats including Word, PDF, and Excel.

2. Provide a cost center breakdown report at the time of invoicing that will identify the Ohio Department of Education cost center, based on the employee and cost center information provided by the Ohio Department of Education fiscal department, for calls.

3. Provide Ohio Department of Education-designated staff with secure login credentials and training to use a secure web-based portal for access to reports and recordings of phone calls. The Ohio Department of Education shall have access to hourly, daily, weekly, monthly, and yearly reports. Reports shall include, but not be limited to, the following information:

   a) Call volume reports
   b) Average caller hold times
   c) Service level (calls answered within 20 seconds)
   d) Number of callers transferred to a specific voice mail option
   e) Number of callers answered live
   f) Number of callers answered by the autoattendant
   g) Number of calls during each hour
   h) Number of abandoned calls
   i) Length of call
   j) Digital recordings of phone calls
   k) Self-rated customer satisfaction scores

4. Data will be retained for at least 90 days. Data requiring longer storage may be transmitted to the Ohio Department of Education for the Ohio Department of Education to archive.

5. Coordinate all telecom integrations with the Ohio Department of Education's Telecom Provider (CBTS) and other vendors necessary to allow service for 877-644-6338 to be handled by CSC.
6. Screen all employees working on the project using a third-party background check service and assure that no employee associated with this project has any felonies or prior convictions for obscenity, sexual assault or child abuse/endangerment. CSC will make the background checks available to the Ohio Department of Education for review.

7. Assign a full-time staff position to serve as the liaison between the Ohio Department of Education staff and departments and the call center. The Program Coordinator will serve as the subject matter expert regarding call handling procedures and topics related to customer service. The Program Coordinator will be available during business hours for direct communication with Ohio Department of Education staff and will relay information to the full team serving Ohio Department of Education customers.

8. Provide the Ohio Department of Education timely notification of any changes to key personnel supporting the call center. Key personnel include:
   a. Designated Representative
   b. Program Coordinator

9. The Ohio Department of Education agrees to notify CSC within two business days of any actions taken on the part by the Ohio Department of Education that may alter the average daily call volume by more than a 10% increase or decrease.

IV. Invoicing and Payment

1. CSC will invoice the Ohio Department of Education monthly with payment due 30 days upon receipt of the invoice. Invoices will be emailed to fiscal.management@education.ohio.gov

2. CSC will bill the Ohio Department of Education monthly as follows:
   a. Account Maintenance - One unit will be billed each month for each system that is provisioned: Data, Reporting and Web Apps (system 1) and Automated Systems (system 2).
   b. Program Coordinator - This service will be billed on a prorated amount of 50% of the workhours rounded down to the nearest whole number of hours.
   c. Program Minute - This service will be billed on the actual usage for all time spent by a customer service representative serving a customer, including any post-call work. Each call will be rounded to 1/10th of a minute (6 seconds). Each email will be prorated to two minutes in duration. The total for each day will be rounded to a whole minute.
   d. Supervisor - This service will be billed on a prorated amount of 10% of the monthly hours of operation rounded down to the nearest whole number of hours.
   e. System Development - This service will be billed on the actual usage each month rounded to 1/10th of an hour (6 minutes).
   f. Translation Service - This service will be billed on the actual usage for all time spent by a customer service representative serving a caller using a third-party translator, including any...
3. CSC will not bill for any of the time the caller is in the hold queue.

4. CSC will not bill the Ohio Department of Education multiple rates for the same minute (i.e., one minute will only be billed at either the Program Minute rate or the Translation Service rate but not a combination or addition of the rates).

5. CSC will provide the Ohio Department of Education a detailed report of usage at the time of invoicing.

V. Designated Representatives
CSC and the Ohio Department of Education will designate representatives as the primary points of communication for scope of work, invoicing, reporting or contractual issues.

The designated representative for the Ohio Department of Education is:
Ohio Department of Education
Lacey Snoke
25 South Front Street
Columbus, Ohio 43215
Lacey.Snoke@education.ohio.gov 614-995-1855

The designated representative for CSC is:
Cleveland Sight Center
Jassen Tawil
1909 East 101st Street
Cleveland, OH 44106
jtawil@clevelandsightcenter.org
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