

## **Request for Information**

Issued by:

The Ohio Department of Commerce  
Division of Administration

**Issue Date: 10/6/2014**

**Closing Date: 10/17/2014**

### **Customer Satisfaction Survey and Metrics Solutions**

**RFI Number: COM2014-ADM002**

The Ohio Department of Commerce (ODOC), Division of Administration is requesting information on behalf of the Exceptional Customer Quality Assurance Initiative, for customer quality assurance feedback survey and metric solutions. The Exceptional Customer Quality Assurance Initiative will be introduced to the Ohio Department of Commerce in 2014. The initiative will serve as a platform to develop strategies designed to enrich the employee-customer service experience. A restructured approach to professionalism and resolution will lead this process.

#### **Background**

The Ohio Department of Commerce is committed to providing exceptional service, while safeguarding Ohioans and visitors, and promoting a conducive marketplace for business growth and prosperity. Commerce is also committed to increasing the utilization of Ohio certified Minority Business Enterprise (MBE) and Encouraging Diversity, Growth and Equity (EDGE) businesses. In addition to the Division of Administration, the department regulates other areas which include real estate, liquor control, industrial compliance, unclaimed funds, security investments, financial institutions, fire safety/ prevention, and cable.

#### **Scope of Work**

The Division of Administration is seeking a specialized customer service research group to create a streamlined approach to gathering and monitoring customer feedback. There are multiple phases to this initiative that will require an array of feedback services. The division is in search of contractor services for the initial phase, which will include collecting a large sample size of the over 800,000 customer interactions per year. The contractor will have the capability to customize a system that will create and disperse unbiased survey questions to the members of the public that use Commerce's regulatory services to monitor the quality of service. The system will serve as a communication and metrics tool that will supply the department with customer service benchmarks that will highlight the departmental strengths and uncover areas of opportunity. Through monthly divisional and quarterly departmental surveying and feedback collection the agency will use the data to further tailor a culture of service that reflects uniformity and cohesiveness. The contractor will be responsible for providing Phase 1 of the mentioned services with a budget of less than \$50,000.

#### **Contractor Requirements for the Exceptional Customer Quality Assurance Initiative**

- The contractor will be required to create and customize survey questions specific to the Ohio Department of Commerce.
- The contractor will customize survey questions specific to each of the 7 divisions' regulatory functions, as well as the department's key exceptional customer service drivers.
- Develop multiple avenues to survey clients, which will include but not limited to email, online, phone, carrier mail, and in-person surveys.

- Customer satisfaction measurements will be reflective of specific standards focused around professionalism, empathy, efficiency, and resolution
- Create a summary report of all responses collected.
- Provide a clear explanation of results from divisional feedback and quarterly agency wide feedback.
- Create statistical and graphical data as it relates to departmental standards for interpretation.
- Provide customer service survey results that are unbiased, and statistically valid.
- The contractor will need to be prepared to be a part of a joint venture developing an in-state/ out-state partnership. For example, creating a partnership with an Ohio and/or Ohio Certified MBE/EDGE contractor.
- Provide a primary contact person to address all concerns.

### **Contractor Qualifications**

Administration is seeking a vendor with the following qualifications.

- 10+ years' experience in the customer service analytics industry.
- Expert knowledge of customer satisfaction surveying.
- Federal or State Government knowledge and experience preferred.
- Provide 2-3 professional recommendations.

### **Timeline**

The dates below are tentative and should be considered as such. Adjustments could be made in accordance with the Division of Administration needs. The estimated start date is within the next 3 months.

#### **Phase 1a**

- 2014- 2015 – Development of departmental and divisional surveys
- 2014- 2015 – Completion of survey development

#### **Phase 1b**

- 2014- 2015 – Pilot run of surveys
- 2014- 2015 – Revisions

#### **Phase 1c**

- 2015 – Survey rollout to customers and stakeholders
- 2015 – Data collection and interpretation

#### **Phase 2**

- 2015 – Customer Service Feedback Escalation Loop development

There will be monthly departmental and quarterly divisional survey result submissions.

**\*All equipment, software, and networking solutions must meet Department and State standards for compatibility, security, and regulations as evaluated by the Commerce's Information Technology Group and Chief Legal Counsel.**

## **General Instructions**

Provide documents of interest using the following format.

1. Cover Letter
  - a. Present the cover letter in the form of a standard business letter.
  - b. The letter should include a summary of the contractor's services.
  - c. If the contractor is recognized as an MBE, in addition to the mentioned documents, please provide a State of Ohio MBE certification letter.
2. Questionnaire
  - a. Completed Ohio Department of Commerce, Division of Administration questionnaire, which is attached.
3. Submission Deadlines and Restrictions
  - a. Submit all RFI's by 5:00 pm on **October 17, 2014**. The Department of Commerce may reject any submittal responses that are received after the deadline. The Department may reject submittal responses regardless of the cause for the delay.

Completed RFI's should be submitted electronically in a current PDF format to:

<u>Contract Administrator:</u>	Joy McKee
<u>Phone Number:</u>	(614) 644-2005
<u>Email Address:</u>	<a href="mailto:Joy.McKee@com.ohio.gov">Joy.McKee@com.ohio.gov</a>

## **Evaluation of Request for Information Responses**

The evaluation of the Request for Information responses will be completed in a two-step process.

Step 1: The Department of Commerce will confirm contractors and responses have met the minimum qualifications required within the "Vendor Qualifications" section of the RFI as well as the items listed in the "General Instructions".

Step 2: Of those responses that meet the minimum qualifications specified in Step 1, the contractor(s) will have the opportunity to attend an Informational Contractor Meeting which is defined below.

## **Informational Contractor Meeting**

The purpose of the Informational Contractor Meetings will be to provide the contractor(s) with the opportunity to present to the prospective offerers a detailed overview of the services they will offer; explaining the scope, objectives, and techniques expected as part of the proposed purchase of services.

After all submittals have been reviewed and have met the minimum qualifications, the Contracts Administrator, Joy McKee, will notify the selected contractor(s) to schedule their meeting.

The Ohio Department of Commerce reserves the right to utilize the information that will be discussed during the meeting in the best interest of the Department not limited to using specifications for future request for bid or proposals. The Ohio Department of Commerce is aware some information may be

propriety in nature and will protect the information to the limits of the law. It is the intent of the Ohio Department of Commerce to proceed with an Invitation to Bid or Request for Proposal, after the Division of Administration makes an official recommendation at some point in the future.

**Contractor(s) Information**

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Service Industry: \_\_\_\_\_

Company Years of Service: \_\_\_\_\_

Representative: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

**The Ohio Department of Commerce reserves the right to utilize the information contained in this document as well as the information obtained from the Informational Contractor meeting in the best interest of the department not limited to using specifications for future request for bid or proposals. The Ohio Department of Commerce is aware some information maybe propriety in nature and will protect the information to the limits of the law. It is the intent of the Ohio Department of Commerce on behalf of the Division of Administration to proceed with an Invitation to Bid or Request for Proposal after the Division of Administration makes an official recommendation at some point in the future.**

Signature: \_\_\_\_\_

**Content of Response Questionnaire**

Please answer the following questions.

1. Is the company's primary business customer satisfaction surveying and analytics?

If yes, please provide an explanation of your experience.

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2. Does the company have a minimum of 10+ years of experience in the customer service analytics industry?

If so, please provide a high-level overview of your two most successful projects.

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3. Is the company licensed in and based out of the State of Ohio?

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4. Is the company an Ohio MBE? If the answer is yes, are you able to provide proof of certification?

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5. What software and programs does the company use when developing customer satisfaction surveys and collecting feedback?

Please provide the software name, capabilities, and benefits.

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6. What process would the company use in customizing surveys and metrics tools for the Ohio Department of Commerce?

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7. How does the company interpret customer service results?

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8. What forms of communication does the company provide in distributing surveys to customers?

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9. How does the company ensure unbiased statistically valid data?

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10. How quickly can the company begin developing a customized customer service survey and measurements?

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Questions for the Ohio Department of Commerce, Division of Administration

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## **Standard Terms and Conditions**

By submitting a bid to the Ohio Department of Commerce (“Commerce”), each Contractor agreeing to the following terms and conditions. Nothing herein guarantees that the Vendor’s bid or proposal will be accepted by Commerce. Nothing provided by Contractor and/or Commerce shall amend, modify, or rescind the following terms and conditions.

Bids and Proposals are Firm for 90 days. Unless stated otherwise, once opened all bids or proposals are irrevocable for ninety (90) days. Beyond ninety (90) days, Contractor will have the option to honor its bid or proposal or make a written request to withdraw its bid or proposal from consideration.

Secretary of State. The contractor is properly registered with the Ohio Secretary of State pursuant to Ohio Revised Code §§ 1703.01 to 1703.31 as applicable.

Bids and Proposals are Public Record. After a bid or proposal is opened, it is a public record as defined in Ohio Revised Code §149.43 and therefore, a Contractor should not include trade secret or proprietary information in its bid or proposal.

OBM Certification of Funds. All purchases for goods or services by Commerce are contingent upon approval by OBM that all statutory provisions under Ohio Revised Code §126.07 have been met and that the Controlling Board has approved the purchase or service when applicable.

Non-appropriation. Commerce’s funds are contingent upon the availability of lawful appropriations by the Ohio General Assembly. If the General Assembly fails at any time to continue funding for the payments or any other obligation due by Commerce, then Commerce will be released from its obligations on the date the funding expires.

The current General Assembly cannot commit a future General Assembly to expenditure. Any agreement between the Contractor and Commerce will expire at the end of the next biennium if not sooner by agreement of the parties.

Taxes. Commerce is exempt from federal excise taxes and all state and local taxes, unless otherwise provided herein. Commerce does not agree to pay any taxes on commodities, goods, or services acquired from any Vendor.

Payments, Invoices and Interest. Any payments will be due on the 30th calendar day after the later of: (1) the date of actual receipt of a proper invoice by Commerce’s Fiscal Office, or (2) the date the Deliverable(s) is/are accepted in accordance with the terms of the purchase. The date of the warrant issued in payment will be considered the date payment is made. Section 126.30 of the Ohio Revised Code may be applicable and, if so, requires payment of interest on overdue payments for proper invoices. The interest charge shall be at a rate per calendar month, which equals one-twelfth of the rate per annum prescribed by Section 5703.47 of the Ohio Revised Code.

Insurance. The State of Ohio is self-insured.

Ohio Election Law. Contractor affirms that it is compliant with Section 3517.13 of the Ohio Revised Code.

Ohio Ethics Law. Contractor affirms that it is currently in compliance and will continue to adhere to the requirements of Ohio Ethics law as provided by Section 102.03 and 102.04 of the Ohio Revised Code.

Drug-Free Workplace. Contractor agrees to comply with all applicable Ohio laws regarding maintaining a drug-free workplace. Contractor will make a good faith effort to ensure that all Vendor's employees, while working on State property, will not have or be under the influence of illegal drugs or alcohol or abuse prescription drugs in any way.

Equal Employment Opportunity. Contractor agrees that it complies with the requirements of Section 125.111 of the Ohio Revised Code and that it will comply with all state and federal laws regarding equal employment opportunity and fair labor and employment practices.

Workers' Compensation. Contractor shall provide its own workers' compensation coverage for the entire duration of all work performed. Commerce is hereby released from any and all liability for injury received by the Vendor, its employees, agents, or subcontractors, while performing tasks, duties, work, or responsibilities for Commerce.

Prohibiting the Expenditure of Public Funds on Offshore Services. The Contractor affirms to have read, understands Executive Order-12 K, and shall abide by those requirements in the performance of any work for Commerce. Commerce reserves the right to recover any funds paid for services the Contractor performs outside of the United States for which it did not receive a waiver. The State does not waive any other rights and remedies provided herein.

State Audit Findings. Contractor affirmatively represents to Commerce that it is not subject to a finding for recovery under R.C. 9.24 or that it has taken the appropriate remedial steps required under R.C. 9.24 or otherwise qualifies under that section. Contractor agrees that if this representation is deemed to be false, any Agreement between Contractor and Commerce shall be void *ab initio* and any funds paid by Commerce hereunder shall be immediately repaid to Commerce, or an action for recovery may be immediately commenced by Commerce for recovery of said funds.

Indemnification, Hold Harmless, Attorney's Fees and Representation. Any provisions requiring Commerce to indemnify, hold harmless or pay attorney's fees to Vendor, do not meet the requirements of state law and shall be considered stricken from any agreement made between the parties.. Any requirement that Contractor defend a lawsuit where Commerce has been named as a party is subject to Section 109.02 of the Ohio Revised Code.