



Fulton County, GA

# Department of Purchasing & Contract Compliance

July 21, 2015

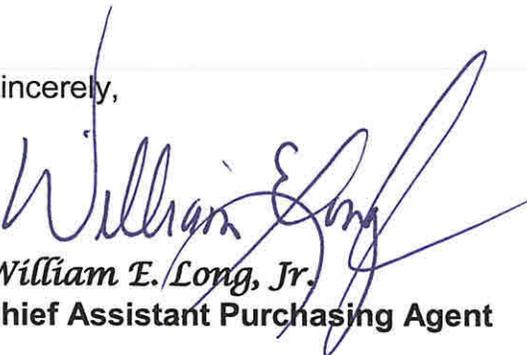
**Re: Request for Proposal #15RFP40022015B-WL, Customer Service Services**

Dear *Proposer*:

Attached is one (1) copy of Addendum 1, hereby made a part of the above referenced **Request for Proposal #15RFP40022015B-WL, Customer Service Services..**

Except as provided herein, all terms and conditions in the *RFP* referenced above remain unchanged and in full force and effect.

Sincerely,



*William E. Long, Jr.*  
**William E. Long, Jr.**  
**Chief Assistant Purchasing Agent**

Winner 2000 - 2009 Achievement of Excellence in Procurement Award • National Purchasing Institute



This Addendum forms a part of the contract documents and **modifies** the original RFP documents as noted below:

**\*\*\*E-Verify Number:** Your firm's E-Verify number may be shown on the envelope/package that houses your Technical Proposal submittal. Failure to place on the envelope/package that contains your Technical Proposal may be cause to be deemed non-responsive.

SECTION 3 – Proposal Requirements: 3.1.2 Number of Copies. Proposer shall submit the following:

Technical Proposal, one (1) original and five (5) copies on CD media in PDF format

***Revised to read: Technical Proposal, one (1) original and five (5) Jump Drives with the Technical Proposal only on the drives.***

### Questions and **Responses**

1. Question: Can you provide the specific evaluation weighting for the provision of a CRM (Customer Relationship Management) solution?  
**Response: The evaluation weighting is described in Section 4 of the Request for Proposal.**
2. Question: Can you provide the present ERP package (Oracle, SAP, other)?  
**Response: CGI Advantage**
3. Question: Would the County consider a proposal that did not include the ERM package selection and implementation?  
**Response: Are you referring to the Customer Relationship Manager (CRM) solution requested? If so, no. However, please keep in mind that the County is simply asking support from your firm in developing the RFP, and selecting the best provider. The County would be responsible for purchasing the solution.**
4. Question: Does the County have any local minority or small businesses that are specialists in ERM package selection and implementation?  
**Response: A listing of minority/small businesses may be found by following this internet link: <http://www.fultoncountyga.gov/fcpcdd-home>, then open MFBE Directory.**
5. Question: Scope of Work – Please clarify the number of employees and departments in the customer-facing organizations vs. the entire workforce, and what series should be provided to the former as opposed to the latter.  
**Response: We went back to our database and there are a total of 1400 employees and supervisors that, based on their job specification are the**

***forward face of the County. The current workforce is about 5,300. We have attached a listing of the 62 classification that exist in 32 different departments.***

6. Question: Cost Proposal – Should the cost of purchasing and implementing the CRM (Customer Relationship Management) be included in the respondent’s cost proposal?

***Response: See response to question # 3***

7. Question: Section 4 – Relevant Project Experience – This section calls for at least three relevant projects @ one page. Is there a page limit for the entire proposal – if yes, what is included and what is excluded?

***Response: No.***

8. Question: Did the County receive any external support in developing the RFP? Is, who provided the support and (if applicable) what role will they play in the procurement and/or implementation?

***Response: No.***

9. Question: Has a budget been specifically set aside for this project? If so, what is the budget? Does that include travel expenses?

***Response: The Board identified and set aside funding for a customer service initiative in the 2015 budget. However, that set-aside included other initiatives as well. Therefore, we will rely on cost proposals to assist with guiding the appropriate allocation for this project. The budget would NOT include travel expenses.***

10. Question: Has an internal project manager Fulton County assigned to this project what percentage of time will they commit to the project?

***Response: The selected firm will have as clients the Chief Strategy officer, Chief Operating Officer, and the Director of Personnel***

11. Question: Which municipalities, if any, did Fulton County talk to collect materials that were utilized in developing the RFP?

***Response: none***

12. Question: From a benchmarking perspective, are there specific communities that Fulton County like to utilize?

***Response: Fulton aspires to be “first in 3: impact, service and efficiency,” and hopes to use the selected firm to assist us in achieving that goal and leading, rather than following in the area of customer service.***

13. Question: Please confirm that in Section 2.5, Term of Contract, the following requirement will be removed or amended, as per the pre-bid conference: The Draft Report shall be due 75 days after the NTP issued. The Final Report shall be due 90 days after the NTP is issued. In no event shall the contract exceed 180 days from the issuance of the NTP.

**Response: The county believes the periods identified for presenting the Draft report after issuance of the NTP and Final Report is appropriate.**

14. Question: Please confirm the level of involvement that is expected from the chosen vendor in providing recommendations for the CRM system (i.e., is it a matter of just writing requirements or does the RFP itself need to be written; will the vendor actually be managing the selection process, etc.).

**Response: See response # 3**

15. Question: What criteria was used to prioritize a department as customer facing and included in the 1,100 employees included in the first wave of training?

**Response: We looked at the positions, that based on job specification, provide customer service directly to our citizens.**

16. Question: Please clarify the number of department that are viewed as customer facing.

**Response: Based on our research, the customer service population exist in 32 departments within the County.**

17. Question: In addition to the technology updates outlined in the RFP, are there other technology enhancements or changes planned that will impact the customer service RFP?

**Response: Not at this time**

18. Question: In addition to the transformation initiative outlined in the RFP, are there other initiatives being developed?

**Response: There are other assessments being conducted. However, the only transformational initiative at this juncture is the securing of a "long-term strategic partner".**

19. Question: I am so sorry to have to ask this question, but I am bidding for the first time with Fulton County. I have a question about the bid, however, I don't see where to upload the question on the bid. If in fact, I am to email the question to you. Here goes: Regarding web-based training, does Fulton County have an existing online learning platform? If yes, is it expandable and flexible to material from other vendors?

**Response: The county does not have any online learning platform.**

20. Question: Who will create the "excellent customer service experience

**Response: I am not sure I understand this question.**

21. Question: What is prompting this RFP/initiative?

**Response: During adoption of the 2015 budget, the Fulton County Board of Commissioners made a commitment to improve the quality and level of customer service provided by County employees to citizens and visitors of the county**

22. Question: The CRM is to encompass what? What will Fulton County use the tool to manage? County employees or County residents?  
**Response: The County is asking support from your firm in developing the RFP, and selecting the best provider of a customer relationship management solution. The County would be responsible ultimately for purchasing the solution, but would look for your guidance in light of the fact that you would have assessed out employee satisfaction and customer service environment as a part of the customer service engagement.**
23. Question: How does Fulton County currently measure customer experience? Are there benchmarks available for review?  
**Response: We do not currently have a consistent, comprehensive method for evaluating or measuring the customer service experience**
24. Question: How will Fulton County measure the success of this initiative?  
**Response: Three key areas would be ease of implementation; improved customer service feedback; increased employee engagement.**
25. Question: What is the term for this, one year or on-going?  
**Response: Proposal responses should outline how long it would take to achieve the goals outlined in the RFP.**
26. Question: Is there a timeline for completion?  
**Response: Proposal responses should outline how long it would take to achieve the goals outlined in the RFP.**
27. Question: Is there a budget for this? Is there a 'not to exceed' amount?  
**Response: The Board identified and set aside funding for a customer service initiative in the 2015 budget. However, that set-aside included other initiatives as well. Therefore, we will rely on cost proposals to assist with guiding the appropriate allocation for this project. The budget would NOT include travel expenses.**
28. Question: Who from Fulton County is driving this? Is there a council?  
**Response: During adoption of the 2015 budget, the Fulton County Board of Commissioners made a commitment to improve the quality and level of customer service provided by County employees to citizens and visitors of the county**
29. Question: In the re-branding of Fulton County, what role would the proposer play in terms of marrying that with a new customer service culture initiative.  
**Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP.**

30. Question: Would this Customer Service Initiative be a major cog in the rebranding wheel?  
**Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP.**
31. Question: Does this initiative need to include the proposer developing new logos, names, marketing, web sites et al?  
**Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP.**
32. Question: Does this initiative need to include the proposer developing new logos, names, marketing, web sites et al?  
**Response: No. At this juncture, a formal rebranding effort is not contemplated as a part of this RFP.**
33. Question: The number of employees is indicated at 5,300 and 5,000. These numbers appear through-out the RFP but latest county numbers reflect lower numbers, thus looking for a more definitive number of individuals who will participate in this initiative if possible.  
**Response: The workforce currently is about 5,300 employees**
34. Question: Clarification on the correct RFP number: The title page and delivery instructions page says 15RFP40022015BL-B but within the RFP section on sending the questions, the RFP is mentioned as 15RFP40022015B-WL.  
**Response: 15RFP40022015B-WL.**
35. Question: Forms D,H and I are asked as part of the section questions and are to be included along with the response to those questions. Where should forms A,B,C,E,F be included – at the beginning of the technical proposal?  
**Response: Insert at the end of the Technical Proposal Submission. Identify them as Purchasing Proposal Forms.**
36. Question: What are your expectations for tasks that will be completed in 90 days?  
**Response: To be provide a Draft Report detailing what is to be accomplished.**

Question: H says “the following: employee accountability, communications plan, recommendations implemented, ability to report customer service standards. Please explain what is required here. For example, how do you measure/evaluate a communications plan?  
**Response: The Communication plan will be measured based on its content and approach. We want to ensure that the recommendation/solution offered provides us with measure able goals per position, unit, department. The plan should include elements that takes advantage of all media in this instance is not will be measured. We want to ensure that whatever system.**

37. Question: Please define what the county means by a “transformation framework”  
**Response: I am not sure the context of this question. Where is this phrase located in the RFP?**
38. Question: Section 3.5 requests a project timeline with all major tasks/milestones. Does the county have a preference for the format for submission (e.g. Excel , MS Project, etc).  
**Response: No.**
39. Question: Can you please confirm the scope of work related to CRM selection and implementation? It’s our understanding that implementation is out of scope and that the awarded vendor will develop a scorecard, ranking and recommendation for a CRM solution / vendor?  
**Response: The County is asking support from your firm in developing the RFP, and selecting the best provider of a customer relationship management solution. The County would be responsible ultimately for purchasing the solution, but would look for your guidance in light of the fact that you would have assessed out employee satisfaction and customer service environment as a part of the customer service engagement.**
40. Question: What is the scope of the training framework? How many days of training for each employee is available? What existing training content is available to support the vendor?  
**Response: We will be guided by the recommended approach suggested by the Vendor to achieve the goal of improving customer service delivery to our citizens. Personnel has training content currently available that could be modified by the vendor.**
41. Question: Is there an expectation to develop and operationalize a dashboard and reports (e.g. Tableau, CRM reports) from the identified KPIs?  
**Response: The County is asking support from your firm in developing the RFP, and selecting the best provider of a customer relationship management solution. The County would be responsible ultimately for purchasing the solution, but would look for your guidance in light of the fact that you would have assessed out employee satisfaction and customer service environment as a part of the customer service engagement.**
42. Question: Regarding Section 3.3 Scope of Work Item F, is it the County’s intent that the proposer will be assisting the County in development of an RFP to procure a CRM vendor or is the County looking for the winning bidder to provide a CRM solution?  
**Response: The County is asking support from your firm in developing the RFP, and selecting the best provider of a customer relationship management solution. The County would be responsible ultimately for purchasing the solution, but would look for your guidance in light of the fact that you would**

***have assessed out employee satisfaction and customer service environment as a part of the customer service engagement.***

43. Question: In Section 3.4 Project Deliverables regarding “selection and implementation of a customer relationship management system”, is the County intending that the winning bidder assist with the process of selecting and overseeing the implementation of a CRM vendor’s solution or does the County intend that the winning bidder implement the CRM solution?

***Response: Yes. The County is asking support from your firm in developing the RFP, and selecting the best provider of a customer relationship management solution. The County would be responsible ultimately for purchasing the solution, but would look for your guidance in light of the fact that you would have assessed out employee satisfaction and customer service environment as a part of the customer service engagement.***

44. Question: In Section 3.5 Project Timeline regarding “all major tasks/milestones to be completed by the projected completion date provided”, does the County have a specific completion date in mind? If so, can you please provide the preferred completion date?

***Response: Proposal responses should outline how long it would take to achieve goals to which the County aspires as outlined in the RFP***

45. Question: Is the Evaluation Criteria from Section 4.1 used as the basis for determining responsibility in Section 9 Cost of the Technical Proposal (Section 3.6)?

***Response: No.***

46. Question: Will the Government please define “rebranding of Fulton County”. What specifically will this look like once it is accomplished. What are your outcomes for “rebranding of Fulton County”?

***Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP. However, the County definitely seeks to develop a better “impression” by citizens about the service quality and level provided.***

47. Question: In no event shall the contract exceed 180 days from the issuance of the NTP.

***Response: That is correct.***

48. Question: Please define CRM and the specific capabilities and features you are looking for. Due to the refocus of the solution, please provide a description of the the recommendation of the requirements of a CRM solution.

***Response: We are looking to the vendor to recommend a CRM that they are familiar with or that consider best in class, that would allow the County to track the performance metrics in a manner that can be easily maintained and reported to management.***

49. Question: How many employees does the County anticipate training during the term of the contract? Please provide clarify on the 1100 audience to be targeted. What levels and functional areas will comprise the 1100? Are these all customer facing? Please define your requirements for a training framework for the remaining 4,200 employees.

**Response: It's anticipated that in the initial phase of the contract, the vendor would be required to train the initial group of 1,400 employees and supervisors, with Personnel working in a train the trainer format. The employees levels and functions differ by department. See attached listing of positions. The 1,400 employees and supervisors are all customer facing. The training model for the balance of the 4,200 employees will shift to personnel taking the lead on delivery with the vendor review of the process to ensure that the material is being communicated appropriately to the employees.**

50. Question: Is this a firm fixed price contract? In the Cost Proposal, do you require line item cost for services, materials, project management , travel , printing, shipping, etc. specific to TASKS 1-6 or is a bundled cost for each TASKS acceptable?

**Response: Please present cost as outlined on the Cost Proposal Form.**

51. Question: It is understood that neither failure to comply nor full compliance with the foregoing insurance requirements shall limit or relieve the Contractor/Vendor from any liability incurred as a result of their activities/operations in conjunction with the Contract and/or

**Response:**

52. Question: At the pre proposal meeting it was communicated that the response to the questions would be provided on July 21. Given the timeframe for proposers to modify any sections due to the responses, request is made to extend the due date to July 30 at 11 am.

**Response: It is the county's goal to uploaded the responses to questions to the website as close to that target date as possible. However, should the county determine that an extension for submitting proposals is necessary, it will be considered.**

<b>CRM</b>
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53. Question: When you say "centralized", can you provide a picture of how you want the information to be routed?

**Response: Currently, different departments approach and implement customer services initiatives using their own models. We are asking proposers to develop a "centralized" solution for the way we provide, evaluate and manage customer service interactions.**

54. Question: How many users do you anticipate being on at one time, and what level of security is expected?

**Response: At this time we don't have an anticipated user volume. The vendor should identify any limitation that their proposed CRM may have.**

#### **WEB BASED TRAINING**

55. Question: Can you share the outcomes you want for the web based training?  
**Response: The web based training should serve as a tool to allow employees to refresh themselves to the County's customer service principles as well as serve as a tool for manager to improve performance.**
56. Question: Whose it for? New recruits? Refresher or Reinforcement training?  
**Response: It's currently envisioned that this tool will be used for refreshing and reinforcing the customer service principles.**
57. Question: Do you have a preference regarding "self-paced" vs "instructor lead"?  
**Response: At this time we have no preference, but would like the vendor to articulate the pros and cons associated with the two options and identify any cost difference.**

#### **Transformation initiative**

58. Question: Are you planning to deliver a marketing campaign to rebrand the county (to citizens or internal departments)?  
**Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP. However, the County definitely seeks to develop a better "impression" by citizens about the service quality and level provided.**
59. Question: What do you want the new Fulton County brand to look like?  
**Response: At this juncture, a formal rebranding effort is not contemplated as a part of this RFP. However, the County definitely seeks to develop a better "impression" by citizens about the service quality and level provided.**

60. Question: To employ Six Sigma for large organizations, sometimes it's a 5+ year buy-in, is this something Fulton County is ready for? What about something more new-age like Fusion Management?  
**Response: I am not sure I understand this question**

#### **EXECUTIVE PHASE**

61. Question: What is the county willing to do to ensure we're able to deliver a comprehensive Initial Assessment within the first 30 days? Need access to departments, personnel, leadership, etc...  
**Response: The selected vendor will have access to departments, personnel and leadership as necessary.**
62. Question: The Term of Contract states this contract must be complete within 180 days, is it your full expectation that the implementation of a CRM system,

Performance Management system, Customer Training for 30+ varied departments, Initial Assessments and Measurement Outcomes, along with the rebranding of Fulton County to be completed within 6 months?

**Response: Proposal responses should outline how long it would take to achieve goals to which the County aspires as outlined in the RFP**

#### **TRAINING**

63. Question: What is meant by the statement "all employees" will be trained? Does that include police officers, waste collectors and senior county officials?

64. **Response: Yes, all employees, to include elected officials, executive management and staff will be trained on the customer service principles adopted by the county.**

65. Question: How many employees are expected to be trained overall?

**Response:**

66. Question: How quickly would you like all employees to receive initial customer service training?

**Response: The initial focus will be on the front facing employees and Sr. Management with a goal of completing within 3-4 months.**

67. Question: Do you foresee training to be half days, full days or multiple days?

**Response: We will be guided by the vendor's recommended approach to the delivery methodology that balances**

68. Question: Are Training Retreats desired for any level of management?

**Response: We do not see a need for any off-site retreats to get senior management trained.**

69. Question: Will our trainers be required to work with Fulton County trainers in any way? If so, how do you see this working effectively?

**Response: Yes, We see this working from a train the trainer approach in the begin so that County training staff becomes familiar with the new content and delivery methods.**

70. Question: Regarding Curriculum, how do you want this to be handled, lease / purchase, etc...?

**Response: The County desires to either own or have access to content and future content updates that does not require the county to pay any fees for continued use.**

#### **BUDGET**

71. Question: Many Governmental Agencies will offer an approximate contract value, will that occur in this instance? If so, please state approximate overall value, and please state approximate values for any element of this contract being managed as a separate Requirement (like e-learning or the CRM).

**Response: The Board identified and set aside funding for a customer service initiative in the 2015 budget. However, that set-aside included other initiatives**

***as well. Therefore, we will rely on cost proposals to assist with guiding the appropriate allocation for this project. The budget would NOT include travel expenses***

ACKNOWLEDGEMENT OF ADDENDUM NO. 1

The undersigned proposer acknowledges receipt of this addendum by returning one (1) copy of this form with the proposal package to the Department of Purchasing & Contract Compliance, Fulton County Public Safety Building, 130 Peachtree Street, Suite 1168, Atlanta, Georgia 30303 by the RFP due date and time **Tuesday, July 28, 2015 @ 11:00 A.M.**

This is to acknowledge receipt of Addendum No. 1, \_\_\_\_\_ day of \_\_\_\_\_, 2015.

\_\_\_\_\_  
Legal Name of Bidder

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Title

**SECTION 1  
INTRODUCTION  
(Revised July 8, 2015)**

**1.1 PROJECT DESCRIPTION**

Fulton County, Georgia (“County”) is seeking qualified firms with the expertise and capacity necessary to provide customer service services in several areas that include but are not limited to the following: an assessment of the current customer service environment; recommendations for improvements; development and implementation of a customer service culture transformation; develop a comprehensive customer service training program for all County employees and selected service partners; the implementation of a centralized customer service management system; and, develop performance measures and evaluation tools.

Through the issuance of this Request for Proposal (“RFP” and/or “Proposals”), the County is soliciting Proposals from qualified Proposers for Customer Service Services.

Proposals provided in response to this RFP that comply with the submittal requirements set forth in Section 4.0, including all forms and certifications, will be evaluated in accordance with the criteria and procedures described in Section 5.0. Based on the results of the evaluation, the County will award the [insert project description here] to the most advantageous Proposer based on the cost and the evaluation factors set forth in the RFP.

**1.2 METHOD OF SOURCE SELECTION**

This procurement is being conducted in accordance with all applicable provisions of the Fulton County Code of Ordinances and the specific method of source selection for the services required in this Proposal is Code Section 102-375, Competitive Selection Procedures for Professional and Consultant Services.

**1.3 BACKGROUND**

Fulton County is the state’s most populous county with nearly 1 million residents. It is located in the center of the Atlanta Metropolitan area.

The County is governed by a seven-member Board of Commissioners which operates under the Commission-County Manager form of government. This system combines the policy leadership of elected officials with the administrative abilities of a County Manager.

The County Manager implements Board policy, administers the county government, appoints department heads, and is responsible for the overall administration of all County departments. The County has approximately 5,000 employees.

The County encompasses 528.7 square miles and stretches more than 70 miles from one to the other. It is geographically a dynamic and diverse County comprising 14 municipalities. They include: Alpharetta, Atlanta, Chattahoochee Hills, College Park, East Point, Fairburn, Hapeville, Johns Creek, Milton, Mountain Park, Palmetto, Roswell, Sandy Springs and Union City.

The ratio of full-time employees to the population of the County has decreased each year over the last six years. As the County has consolidated services and implemented cost-savings measures and efficiencies, the number of employees per 1,000 residents has steadily declined. Currently, the County employs 5300 full-time employees to serve about one million residents.

In January 2015, the Fulton County Board of Commissioners experienced the most significant turnover in recent history. The County inaugurated a newly elected Board of commissioners, three of which were new to the board of seven. Three months after being seated as the new board, the seven commissioners appointed a new County Manager, and within four months, the board participated in an off-site strategic planning retreat to identify priorities for the upcoming strategic cycle.

At the strategic planning session, the Fulton County Board of Commissioners adopted the following six, strategic priority areas:

- All People are Healthy;
- All People are Safe;
- All People are Self-Sufficient;
- All People Have Economic Opportunities;
- All People are Culturally and Recreationally Enriched;
- All People Trust Government is Efficient, Effective and Fiscally Sound

Shortly after its inauguration, the Board of Commissioners made a resounding commitment to the overall improvement of customer service, county-wide, by adopting a budget which provided funding for a comprehensive customer service training effort. The County Manager was thereafter charged to carry out the will of the Board by developing a strategic framework for the County's upcoming planning cycle, as well as reforming the customer service model for the County. As a separate effort, the County will identify a long-term strategic partner to support the development and implementation of a framework consistent with the Board's priorities. That long-term partner will also be charged with working closely with the firm identified to lead the customer service transformation effort. This will ensure that all efforts are working to the same strategic end for betterment of Fulton County.

## 1.4 COUNTY OBJECTIVES

The County's primary objective is to create an excellent customer service experience for its citizens by transforming the culture and ensuring that all employees focus on

providing excellent customer service. It is also critical that the County has the necessary systems infrastructure and interoperability to support and sustain this effort. Other key objectives for this project are:

- To develop a robust comprehensive customer service training program including a monitoring component
- Improved customer service overall
- Overall transformation of the County's customer service delivery
- Ability to report customer service standards
- Method(s) for evaluation/measuring employee accountability
- Rebranding of Fulton County

## 1.5 OBTAINING THE RFP

This document and supporting documents can be downloaded at the Fulton County Website, <http://www.fultoncountyga.gov> under "Bid Opportunities".

## 1.6 SUBCONTRACTING OPPORTUNITIES

Potential prime contractors submitting a bid on this project for Fulton County and are seeking subcontractors and/or suppliers can advertise those subcontracting opportunities on the County's website, <http://www.fultoncountyga.gov> under "Subcontracting Bid Opportunities".

## 1.7 PRE-PROPOSAL CONFERENCE

The County will hold a Pre-Proposal Conference, on **Tuesday, July 7, 2015 at 11:00 A.M.**, in the Purchasing Bid Conference Room of the Department of Purchasing, Fulton County Public Safety Building, Suite 1168, 130 Peachtree Street, S.W., Atlanta, Georgia 30303. Attendance at the Pre-Proposal Conference is voluntary for responding to this RFP, however Proposers are encouraged to attend. The purpose of the Pre-Proposal Conference is to provide information regarding the project and to address any questions and concerns regarding the services sought by the County through this RFP.

Fulton County does not discriminate on the basis of disability in the admission or access to its programs or activities. Any requests for reasonable accommodations required by individuals to fully participate in any open meeting, program or activity of Fulton County Government should be directed to Rholanda Stanberry, Contract Compliance Administrator at (404) 612-6304 or email: [rholanda.stanberry@fultoncountyga.gov](mailto:rholanda.stanberry@fultoncountyga.gov).

## 1.8 PROPOSAL DUE DATE

All proposals are due in the Department of Purchasing of Fulton County located in the Public Safety Building, Suite 1168, 130 Peachtree St, S.W., Atlanta Georgia 30303 on or before **Tuesday, July 28, 2015 at 11:00 A.M.**, legal prevailing time. All submitted proposals shall be time and date stamped according to the clock at the front desk of the

Fulton County Department of Purchasing. Any proposals received after this appointed schedule will be considered late and will be returned unopened to the Proposer. The proposal due date can be changed only by addendum.

**1.9 DELIVERY REQUIREMENTS**

It shall be the sole responsibility of the Proposer to have his/her proposal delivered to the Fulton County Department of Purchasing for receipt on or before the above stipulated due date and time. If a proposal is sent by U.S. Mail, the proposer shall be responsible for its timely delivery to the Department of Purchasing and Contract Compliance.

**1.10 CONTACT PERSON AND INQUIRIES**

Any questions or suggestions regarding this RFP shall be submitted in writing to the Purchasing Department contact person, William E. Long, Jr, Chief Assistant Purchasing Agent via fax (404) 893-6268 or email: [William.long@fultoncountyga.gov](mailto:William.long@fultoncountyga.gov) Any response made by the County shall be provided in writing to all Proposers by addendum. No verbal responses shall be authoritative.

**1.11 PROCUREMENT SCHEDULE**

The following is the procurement schedule for this project and will be strictly adhered to.

<b>TASKS</b>	<b>DATE</b>
RFP Issued	Thursday, June 25 2015
Pre-Proposal Conference	Tuesday, July 7, 2015
Last Day for Questions to be submitted	Tuesday, July 14, 2015
Due Date	Tuesday, July 28, 2015
Tentative Dates for Oral Interviews/Presentations	Week of August 17-21, 2015
Anticipated Board of Commissioners Meeting Date	Wednesday, September 2, 2015

**SECTION 3  
PROPOSAL REQUIREMENTS  
(Revised July 8, 2015)**

**3.1 SUBMISSION REQUIREMENTS**

**3.1.1 Proposal Submission Date and Submittal Format**

All Proposals, including all attachments, must be received by the County in a sealed package no later than, **Tuesday, July 28, 2015 at 11:00 A.M.** and must be addressed to:

**REQUEST FOR PROPOSALS RFP #15RFP4002215B-WL  
Fulton County Department of Purchasing  
Public Safety Building  
130 Peachtree Street S.W. Suite 1168  
Atlanta GA 30303**

The Proposal shall consist of a Technical Proposal, a Cost Proposal and all documents listed on the Required Submittal Checklist (Exhibit 1). The Technical Proposal shall include proposer information, technical information, business-related information, and any Technical Proposal forms requested. The Cost Proposal shall include the Cost Proposal Forms and any information describing the basis for pricing and must be separately, sealed, marked and packaged.

The required content of the Technical Proposal and Cost Proposal is further specified in this section of the RFP. The Proposal must be signed and acknowledged by the Proposer, including certain information to be provided under oath as required under applicable law, in accordance with the instructions herein and the various proposal forms.

**THE TECHNICAL PROPOSAL, THE COST PROPOSAL AND CONTRACT COMPLIANCE EXHIBITS SHALL BE SUBMITTED IN SEPARATE, SEALED ENVELOPES OR PACKAGES. THE INCLUSION OF ANY COST INFORMATION IN THE TECHNICAL PROPOSAL MAY RESULT IN SUCH PROPOSAL BEING REJECTED BY THE COUNTY.**

Each envelope or package shall be clearly marked as follows:

**REQUEST FOR PROPOSALS (RFP)  
15RFP4002215B-WL  
[Technical or Cost Proposal]  
Proposer's Name and Address**

**3.1.2 Number of Copies**

Proposers shall submit the following:

Technical Proposal, one (1) original copy and five (5) Flash Drive copies on format.

Contract Compliance Exhibits, one (1) original with the Technical Proposal marked "Original" and one (1) copy in a separate sealed envelope.

Financial Information, one (1) original with the Technical Proposal marked "Original" and one (1) copy in a separate sealed envelope.

Cost Proposal, one (1) original and one (1) copy in a separate sealed envelope.

All Proposals must be complete with all requested information.

### **3.2 OVERVIEW OF PROPOSAL REQUIREMENTS**

Proposers shall submit Proposals in accordance with the content and format requirements set forth in this RFP. Proposals should be clearly organized and structured in a manner that allows materials included in the document to be located easily.

Each of the instructions set forth in this section must be followed for a Proposal to be deemed responsive to this RFP. In all cases, the County reserves the right to determine, at its sole discretion, whether any aspect of the Proposal meets the requirements set forth in this section. The County reserves the right to reject any Proposal, which in its judgment, does not comply with these Proposal submission requirements.

### **3.3 SCOPE OF WORK**

The primary objective of this project is to create an excellent customer service experience for Fulton County citizens by transforming the culture and ensuring that all employees focus on providing excellent customer service. The scope of work includes:

- A. The Proposer shall assess the current environment and standards of service, recommend changes, establish the baseline for current service delivery practices, and assist in developing a training framework to incorporate the customer service philosophy into all areas of the County's daily operations.
- B. The Proposer must detail their approach for the County's customer service transformation initiative.
- C. The Proposer shall develop, assist and /or facilitate training programs that are intended to enhance employee understanding and implementation of excellent customer service.

- D. The Proposer must develop training workshops and web-based training resources which will meet the County's objectives. Emphasis must be on departments that provide service delivery to citizens.
- E. The Proposer must provide the framework for the continue sustainability of the customer service initiative and employee development program and ensure that service excellence is woven into the County's internal and external messaging.
- F. The Proposer must propose a centralized Customer Relationship Management (CRM) solution. The solution must include the purchase of a software system and implementation services required to deliver an effective solution for the County.
- G. The Proposer must design and implement a communication plan that will help communicate the need for improvement to the employees who will be required to make the changes; include an ongoing customer feedback mechanism which includes analysis/interpretation assistance to make it actionable and communication strategies that support the integration of customer service excellence through the County's internal and external messaging and company ideals.
- H. The Proposer must propose recommendations to measure/evaluate the following
  - a. Employee accountability
  - b. Communication Plan
  - c. Recommendations implemented
  - d. Ability to report customer service standards
- I. The Proposer must provide a plan to transfer knowledge and materials to the County's Employee Development Division in order to ensure a seamless integration and sustainability.

### **3.4 PROJECT DELIVERABLES**

The project deliverables shall include:

- Recommendation Report from the Initial Assessment due 30 days from the issuance of the Notice to Proceed.
- Identification of recommended approaches for customer service transformation.
- Development of a training framework for training of all employees.
- Implementation of a transformation framework, including employee training.
- Selection and implementation of a customer relationship management system.

- Development of key performance indicators and performance metrics at the program level and tracking methodologies.

### **3.5 PROJECT TIMELINE**

Provide a Project Timeline which includes all major task/milestones to be completed by the projected completion date provided.

### **3.6 TECHNICAL PROPOSAL FORMAT AND CONTENT**

The Technical Proposal shall include the appropriate and requested information in sufficient detail to demonstrate the Proposer's knowledge, skills and abilities to provide requested services and will be reviewed and evaluated based on each Proposer's responses to the criteria described below.

The Technical Proposal shall be arranged and include content as described below:

#### ***Section 1 - Executive Summary***

The executive summary shall include the following information:

1. Provide the legal name of the entity responding to this proposal.
2. Provide the business type of the entity responding to this proposal (i.e. Joint Venture, Partnership, etc.).
3. Include a brief statement of the project approach to perform a Global Level Departmental Assessment, understanding of the project's goals and objectives and demonstrated understanding of the project's potential problems and concerns.
4. Name, address and telephone number of one (1) individual to whom all future correspondence and/or communications will be directed.

#### ***Section 2 – Project Approach and Project Plan***

1. Describe your firm's experience in performing IT reviews, audits or assessments for governmental entities similar in size and scope to Fulton County or a organization with \$1B in revenues with multiple locations and multiple lines of business.
2. Provide a clear and detailed description of the proposed approach of how the initial assessment will be conducted to accomplish the County's objectives. The County will consider the comprehensiveness of the approach, understanding of the project, strategies and methodology to be used.
3. Provide a detailed Project Plan that outlines the methods and means to be used to implement the scope of services as outlined in Section 3.3. The Project Plan must

define the necessary steps to implement and accomplish the County's objectives. The Project Plan should demonstrate the processes that will be utilized to develop the Final Report.

4. The Project Plan must at a minimum, identify all major tasks, when the major tasks will start and finish, planned reviews of work associated with each major task, task complete date and any other information that will assist in the planning and tracking of this project.

### ***Section 3 – Qualifications of Key Personnel***

1. Provide an organizational chart which includes the key personnel and their role(s) proposed for this project. Identify whether their roles are managerial, technical, support staff, etc. Provide a job description for each position proposed.

Provide all proposed key personnel to be assigned to this project including their relevant experience related to this project, their qualifications to provide customer service and/or business transformation, customer service instructional design or training delivery services.

The Project Manager should be the Lead Person and must have a minimum of five (5) years of work experience related to this project, qualifications to provide customer service and/or business transformation, customer service instructional design or training delivery services.

2. Each resume should be limited to no more than three (3) pages per person and be organized according to the following:
  - Name and Title
  - Professional Background
  - Professional Qualifications and Certifications
  - Current and Past Relevant Work Experience
  - Include two (2) references for each key personnel member on similar projects.

### ***Section 4 – Relevant Project Experience***

Identify at least three (3) projects where the Proposer has performed customer service and/or business transformation services, for governmental entities similar in size and scope to Fulton County or an organization with \$1B in revenues with multiple locations and multiple lines of business within the past five (5) years. Limit your response to one (1) page per project; please provide the following information for each project:

- The name of the project, the owner, year performed and the project location.
- A description of the project.
- A reference, including a contact name, addresses and phone number. This reference should be the owner's staff member who was in charge of the project for the owner.

### **Section 5 - Availability of Key Personnel**

Based on the project time schedule, state percentage of time key personnel will spend on this project.

### **Section 6 – Project Schedule**

Based on the contract term, provide a schedule that includes major tasks/milestones with time duration for each task/milestone which outlines the total project time.

### **Section 7 – Local Preference**

Local Preference is given to businesses that have a business location within the geographic boundaries of Fulton County. The term business location means that the business has a staffed, fixed, physical place of business located within Fulton County and has had the same for at least one (1) year prior to the date of the business' submission of its proposal or bid, as applicable and has held a valid business license from Fulton County or a city located within Fulton County for the business at a fixed, physical, place of business, for at least one (1) year prior to the date of the business' submission of its proposal or bid as applicable.

In order to receive the Local Preference points of five (5) points the Proposer must meet one (1) of the following criteria, provide supporting documentation as required and certify under oath that it is eligible to receive the local preference points by signing and submitting Form H, Local Preference Affidavit located in Section 5 of this RFP.

The Proposer must indicate which one (1) of the following criteria they will utilize in order to receive local preference:

1. Business having a business location within the geographic boundaries of Fulton County.

The following supporting documentation must be provided:

- Copy of occupational tax certificate (business license) form Fulton County or a city located within Fulton County, or;
- Copy of a lease or rental agreement, or;
- Proof of ownership interest in a location within the geographical boundaries of Fulton County.

2. Businesses where at least fifty-one percent (51%) of the owners of the business are residents of Fulton County but the business is located outside of Fulton County.

The following supporting documentation must be provided:

- Provide the residential address of the business owner(s).

3. Businesses where at least fifty-one percent (51%) of the employees of the business are residents of Fulton County but the business is located outside of Fulton County.

The following supporting documentation must be provided:

- Provide a list of all employees name and address.

Failure to provide the required supporting documentation with your proposal submittal shall result in your firm receiving a "0" (zero) for Local Preference. In the event the affidavit or other declaration under oath is determined to be false, such business shall be deemed "non-responsive" and shall not be considered for award of the applicable contract.

### ***Section 8 – Service Disabled Veterans Preference***

Service Disabled Veterans Business Enterprise Preference is given to businesses that are independent and continuing operations for profit, performing commercially useful functions, and which is 51 percent owned and controlled by one or more individuals who are disabled as a result of military service who have been honorably discharged, designated as such by the United States Department of Veterans Affairs.

In order to receive the SDVBE Preference points the Proposer must complete and submit Form I, Service Disabled Veterans Preference Affidavit located in Section 5 of this RFP certifying under oath that it is eligible to receive the SDVBE preference points. The Service Disabled Veteran Business Enterprise ("SDVBE") must be certified as such by the County's Office of Contract Compliance.

### ***Section 9 – Cost***

The respondent with the lowest total cost will receive the full 15 points. For respondents with the second, third, fourth, etc., their total costs will be divided into the lowest cost and multiplied by 15, the total points allowed for cost.

The County has established the following formula to evaluate cost proposals for Request for Proposals (RFP):

#### **Lowest cost submitted**

***Each successive cost X Points allocated for cost in RFP = Cost proposal score***

The County will determine responsibility based on the following criteria for the proposer(s) recommended by the Evaluation Committee:

### ***Section 10 – Proposer Financial Information***

It is the policy of the County to conduct a review of a firm's financial responsibility in order to determine the firm's capability to successfully perform the work.

If submitting as a Joint Venture, Partnership, Limited Liability Corporation or Limited Liability Partnership, the financials must be submitted for each entity that comprises the prime contractor.

The following documentation is required in order for the County to evaluate financial responsibility:

- a. Provide your firm's most recent balance sheets.
- b. Provide your firm's most recent Dun & Bradstreet, Value Line Reports or other credit ratings/report.
- c. Identify any evidence of access to a line or letter of credit. The evidence must be provided by a financial institution.
- d. Provide a sworn statement that your firm has not filed petition(s) for federal bankruptcy or state insolvency. The statement must be notarized.

### ***Section 11 – Disclosure Form and Questionnaire***

It is the policy of Fulton County to review the history of litigation of each Proposer that includes bankruptcy history, insolvency history, civil and criminal proceedings, judgments and termination for cause in order to determine whether a firm's business practices, legal practices and overall reputation in the industry is one that would be acceptable to perform work for Fulton County. The Disclosure Form and Questionnaire is provided in Section 5, Proposal Forms, Form D.

## **3.6 COST PROPOSAL FORMAT AND CONTENT**

The Cost Proposal shall be provided in a **separate sealed envelope**. The Cost Proposal shall include current information and shall be arranged and include content as described below:

### ***Section 1 - Introduction***

The Proposer shall include an introduction which outlines the contents of the Cost Proposal.

### ***Section 2 - Completed Cost Proposal Forms***

The Proposer is required to complete **all** of the Cost Proposal Forms provided.

**COST PROPOSAL FORM  
(SUBMIT IN SEPARATE SEALED ENVELOPE)**

The hourly rates identified on the table below will also be the rates used for subsequent Task Orders. The estimated number of hours will vary and will be determined pursuant to each subsequent Task Order issued. All position(s) that maybe required based on the Scope of Work must be identified and listed on the table below:

<b>Position Title</b>	<b>Hourly Rate</b>	<b>Estimated No. Of Hours</b>	<b>Total Fee</b>

<b>Task</b>	<b>Task</b>	<b>Cost</b>
1	Initial Assessment of Current Environment and Recommendations	
2	Development of a Training Framework	
3	Implementation of a Transformation Framework	
4	Selection and Implementation of a Customer Relationship Management (CRM) System	
5	Development of Key Performance Indicators and Performance Metrics	
<b>TOTAL NOT TO EXCEED PRICE</b>		

(If additional space is required, include a separate sheet marked as price proposal page 2, etc.)

**NOTE: Total cost shall be inclusive of all projected expenses, including but not limited to transportation, meals, lodging, long distance calls, photocopying services, etc.**



#	Class Code	Class Spec Title	#	Class Code	Class Spec Title
1	101102	Administrative Aide	47	101016	Office Administrator
2	101013	Administrative Assistant I	48	101011	Office Assistant
3	101014	Administrative Assistant II	49	505112	Permits Assistant
4	101015	Administrative Assistant III	50	505114	Permits Specialist
5	101002	Administrative Coordinator I	51	505116	Permits Supervisor
6	101004	Administrative Coordinator II	52	303172	Pharmacy Technician
7	606172	Communicaitons Officer I	53	202452	Planner I
8	606167	Communicaitons Specialist	54	202453	Planner II
9	606170	Communications Officer I (Spanish Language)	55	101032	Records and Documents Assistant
10	606042	Court Assistant	56	101037	Records and Documents Coordinator
11	606043	Court Clerk	57	101034	Records and Documents Specialist
12	606044	Court Clerk, Senior	58	101036	Records and Documents Supervisor
13	606054	Court Coordinator	59	404112	Recreations Assistant
14	606053	Court Docket Clerk	60	404122	Recreations Specialist
15	606045	Court Support Specialist	61	202121	Recruiting Coordinator
16	101058	Customer Services Coordinator	62	202129	Recruiting Coordinator, Lead
17	101053	Customer Services Representative	63	202202	Revenue Collections Officer
18	202433	Development Services Coordinator	64	202204	Revenue Collections Specialist
19	505080	Development Services Supervisor	65	202206	Revenue Collections Supervisor
20	505085	Development Services Technician	66	404044	Senior Citizen Center Coordinator
21	101020	Executive Assistant	67	202276	Tax Collections Coordinator
22	101092	Fiscal Support Specialist I	68	202274	Tax Collections Coordinator, Assistant
23	101093	Fiscal Support Specialist II	69	202262	Tax Technician I
24	101094	Fiscal Support Specialist III	70	202263	Tax Technician II
25	303122	Health Associate	71	202289	Water/Sewer Account Coordinator
26	303123	Health Associate - WIC	72	202290	Water/Sewer Account Specialist
27	303124	Health Outreach Worker	73	202291	Water/Sewer Account Specialist, Senior
28	202092	Human Resources Specialist	74	505087	Zoning Services Coordinator
29	404023	Human Services Program Coordinator	75	505086	Zoning Services Supervisor
30	404027	Human Services Program Coordinator (Spanish)	76	505082	Zoning Technician
31	404014	Human Services Specialist	77	505084	Zoning Technician, Senior
32	404016	Human Services Supervisor			
33	404020	Information & Assistant Communications Specialist			
34	606012	Legal Assistant			
35	606014	Legal Assistant Specialist			
36	101133	Legislative Assistant			
37	202355	Librarian			
38	202359	Librarian II			
39	202356	Librarian, Senior			
40	202354	Library Administrative Assistant			
41	202351	Library Assistant			
42	202352	Library Assistant, Senior			
43	202353	Library Associate			
44	202374	Library Senior Associate			
45	303022	Licenced Practical Nurse			
46	303024	Licenced Practical Nurse, Senior			