



BUNKER HILL COMMUNITY COLLEGE

Request For Proposal

RFP # 673

RFP Description Name:

BHCC Call Center and Default Prevention Services

All Proposals must be delivered to online through a secured link provided after the bid submission registration.

Name of Respondent: _____

Primary Contact: _____

Phone: _____

Email: _____

Fax: _____

Web Address: _____

Mailing Address: _____

Signature of Authorized Agent: _____

Date: _____

ABBREVIATIONS

RFP	Request for Proposal
HEOA	Higher Education Opportunity Act
EIN	Employer Identification Number
PMT	Procurement Management Team

I. GENERAL INFORMATION AND PROPOSAL SUBMISSION REQUIREMENTS

The purpose of this request is to receive proposals for the BHCC call center and default management services. The successful proposer will be responsible for all phases of Call Center and Default Prevention Services/#673 within Bunker Hill Community College. The successful proposer must have its primary business function as higher education support services in enrollment, student counseling and federal financial aid.

Proposal Delivery

All Proposals must be submitted electronically by registering to submit the bid by visiting <https://www.bhcc.edu/news/>. Proposer must pre-register using the online registration form. The proposal submission link will be provided after registration. All submitted electronic file names must start with the company name. All documents must have the header as: **RFP#673 BHCC Call Center and Default Prevention Services**. The Deadline for submission is on 05/17/2023 by 1 PM.

All proposals must include a Non-Collusion Form, a Reference Form, a Contractor Authorized Signature Verification Form and a Tax Compliance Form.

Upon evaluation, Massachusetts Standard Contract Form with Terms and Conditions Form will be used to enter into the contract with a successful bidder.

Proposal Signature

A proposal must be signed as follows: 1) if the proposer is an individual, by her/him personally; 2) if the proposer is a partnership, with the signature of at least one general partner; and 3) if the proposer is a corporation, by the authorized officer, whose signature must be attested to by the clerk/secretary of the corporation, and with an affixed corporate seal affixed.

Time for Proposal Acceptance

The contract will be awarded within 45 Days after the proposal opening. The time for award may be extended for up to 45 additional days by mutual agreement between Bunker Hill Community College and the apparent highest responsive and responsible proposer that offers the best value to the College. The college reserves right to reject all proposals without a cause if it is in the college's best interests to do so. This proposal is a revenue generating contract for the College.

Changes and Addenda

If any changes are made to this RFP, an addendum will be issued to all proposers on record as having picked up the RFP. Proposer may not alter the RFP language, specifications, terms & conditions or RFP component; Proposer modifications to the RFP are prohibited; any such modifications will disqualify a proposer.

Questions about the RFP

Questions are sent written via email to purchasedoc@bhcc.edu referencing **the proposal number and title in email's subject line**, with any question. All questions and answers will be distributed to all registered proposers on record as having picked up the RFP.

Proposers are prohibited from communicating directly with any employee of the procuring committee except as specified in this RFP, and no other individual, or representative of the College is authorized to provide any information or respond to any question or inquiry concerning this RFP. The contact for this RFP: Melissa Holster – purchasedoc@bhcc.edu .

Modification or Withdrawal of Proposals, Mistakes, and Minor Informalities

A proposer may correct, modify, or withdraw a proposal by written notice received by the Bunker Hill Community College prior to the time and date set for the deadline of proposal submission. Each modification must be numbered in sequence, and must reference the original RFP. A proposer's alteration to this RFP will disqualify the proposer from the proposal process.

Proposer Responsibility

The RFP is available to download from the college's website. The College accepts no liability and will not provide any accommodation to proposers who submit a response based upon unsolicited and an out-of-date solicitation document.

Right to Cancel/Reject Proposals

Bunker Hill Community College may cancel this RFP, or reject in whole or in part, any and all proposals, if the College determines that cancellation or rejection serves the best interests of the College. The College will not acknowledge a proposer's Terms & Conditions throughout the award. Terms & Conditions are negotiable by mutual agreement/contract; final Terms & Conditions are at the sole discretion of the College. The College makes no guarantee that any service will be purchased resulting from this RFP.

Proposal Prices to Remain Firm

All proposal Commission Rates of Return submitted in response to this RFP must remain firm for 120 days following the proposal opening through the award date of the contract execution.

Contract Term Length and Renewal Options

The contract period will run for an initial three (3) year period from 7/1/2023 through 6/30/2026; with two (2) one (1)-year options to renew or extend at the sole discretion of the College from 7/1/2026 to 6/30/2027; and from 7/1/2027 to 6/30/2028. Options to renew the contract will be determined at least 90 days prior to the end of the three (3) year period.

II. PERFORMANCE STANDARDS

Vendor Experience

Vendor must have a minimum of five (5) years of direct experience in Call Center Services (both inbound and outbound) and Default Prevention.

IV. INFORMATION TO BE SUBMITTED

- Please provide the location of corporate office and any service centers that will support this contract. Please note, according to Dear Colleague Gen 15-01, "To protect the interest of institutions, taxpayers, and students, an institution may not contract with a third-party servicer to perform any aspect of the institution's participation in a Title IV program if the servicer (or its subcontractors) is located outside of the United States and/or is owned or operated by an individual who is not a U.S. citizen or national, or a lawful U.S. permanent resident. This prohibition applies to both foreign and domestic institutions."

Staffing

- Please describe your hiring process. Include employee screening, background checks, and minimum qualifications.
- Provide narrative description of the proposed project team, its organizational structure, and members

Quality Assurance and Training

- Describe quality assurance program, its quality requirements, and how they are measured.
- How is your staff evaluated for knowledge of:
 - Financial aid processes and regulations, both state and federal?
 - Ellucian Colleague system knowledge?
 - FERPA?
- Provide evidence of customer service training of the vendor's staff to include policy, amount of training and how training is evaluated.
- Provide a detailed description of how training will be provided for your product and services. Specifically describe the training location, what training is required for college staff, and how training will be conducted. Also describe what training will be necessary for your personnel with regard to BHCC policies and procedures.
- Describe vendor set-up training.
- What is the availability of reasonable follow-up training after set-up either on-site or remotely at no cost?
- Training provided annually which will include Federal, State, and Institutional updates. How is BHCC updated and how is vendor updated? Describe any additional cost for annual update training, if applicable.

Call Center Support:

General Questions

- Length of time vendor has provided call center support for financial aid, admissions, registrar/records office for institutions of higher education.
- Do you have bi-lingual operators available?
- Average student wait time. What is your abandoned call rate?
- Average escalation rate. What are your escalation procedures?

Services

- Call Center operators must be available during regular hours – BHCC’s current hours are below, but are subject to change. Monday – Friday 8:30a.m – 5:30 p.m.
- When a mistake is discovered on a student’s record by an operator how it is communicated to BHCC?

System Support

- Provide a detailed list of BHCC’s system access requirements to provide call center service.
- Provide Colleague System experience and documentation of current clients that are using Colleague System.

Reporting Requirements

- Provide detailed usage reports with the option for data on a daily, weekly, and monthly basis. Vendor needs to submit examples of possible reports that can be provided.

Please provide any additional details that have not previously addressed that may allow BHCC to make an informed decision.

Default Management Services

General Questions

- How long has your company been providing student loan default prevention services to higher education institutions?
- How many higher education institutions does your company provide student loan default prevention services to?
- How many borrowers are currently being serviced through your student loan default prevention services?
- Describe your company’s approach to student loan default aversion and repayment management.
- Provide a summary of how your company uses the following mediums in its default prevention and repayment efforts (telephonic, letter, e-mail, skip-tracing, social media, other).
- What statistics can your company provide that would reflect the success of your efforts with delinquent borrowers and bringing them back into good standing?

Reporting Requirements

- Provide detailed monthly borrower delinquency reports; delinquency reports that contain servicer information, borrower demographics and to-date outreach activities performed.

System Support

- How much IT support will the institution be required to provide in transferring data to your company? Are you able to pull student loan information delinquency records directly from NSLDS, given institutional and Department of Education permission?
- What is the average timeline for implementation?

Please provide any additional details that have not previously addressed that may allow BHCC to make an informed decision.

Other Call Center Services that Support Recruitment, Retention and Completion

General Questions

- Describe any call center initiatives that support college recruitment, retention, and completion goals. Explain how the service will impact the College and our students.
- Provide length of time vendor has provided these initiatives for higher education institutions.
- Demonstrate knowledge of the community college sector and issues faced by students served by community colleges.

Services

- Does the vendor's service provide any value-added benefits for the College?
- Please provide examples that illustrate your company's success with any related initiatives.

Reporting Requirements

- Describe the reporting that will be provided with your service.

Please provide any additional details that have not previously addressed that may allow BHCC to make an informed decision.

Compliance and Security

- Compliance and data security – Please describe in detail the level of compliance with each of these standards:
 - FERPA
 - Gramm-Leach-Bliley Act
 - NIST 800-171
- Must be compliant with all Third-Party Servicer requirements as stipulated by the U.S. Department of Education Office of Federal Student Aid. <https://fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2015-01-09/third-party-servicer-institutional-requirements-and-responsibilities>
- Provide documentation outlining your overall data security and access practices. Include your Personal Identifiable Information (PII) access management policy, process, and practice.
- Does your company allow home based call center staff?
 - How are home based agents monitored for data security purposes?

- How are home based agents secured to the internet and your applications?
- Describe contingency plan or disaster recovery plan in the event of a disaster.

Vendor Qualifications

The purpose of the Vendor qualifications section is to determine the ability of the Vendor to respond to this Request for Proposal. Vendors must describe and offer evidence of their ability to meet each of the qualifications listed below.

- Provide a brief narrative describing the history of your company. Identify the number of employees in your company, the ownership and if the company has ever filed for bankruptcy, been in loan default, or if there are any pending liens, claims or lawsuits against the company. Also provide a list of prior names of business if changes have been made.
- Indicate if Vendor's company is for sale or is involved in any transaction to expand or to become acquired by another business entity. If yes, explain the expected impact, both in organizational and directional terms.

Services Defined

The following list specifies the items to be addressed in this section of your proposal. Please read it carefully and address it completely and in the order listed to facilitate BHCC's review of your proposal.

- Provide a discussion (no more than two pages) of the company's financial resources, personnel resources, and ability to provide services and meet specification requirements.
- Describe service support philosophy, how it is implemented, and how Vendor measures its success in maintaining this philosophy.

Implementation

- Provide a detailed plan and schedule for the implementation of the call center, default prevention, and outbound initiatives. This schedule shall be complete with a listing of the specific tasks and milestones required for the successful implementation of services.

Other Services

Vendors are encouraged to propose other services, particularly those that may benefit BHCC.

- Provide a list of any additional services or benefits, not otherwise identified in this RFP, that Vendor would propose to provide to BHCC. Additional services or benefits must be directly related to the goods and services solicited under this RFP.
Provide details describing any unique services or benefits offered or advantages to be gained by BHCC from doing business with Vendor. Additional services or benefits must be directly related to the goods and services so

V. BUSINESS CONTINUITY PLAN

To be submitted as an element of the proposer's proposal. In case of an emergency, the awarded proposer may be asked the following:

Indicate whether there is a written Business Continuity Plan that describes how your company will continue to do business in case of an emergency: such as a natural disaster, fire, etc. to the awarded proposer's physical business structures.

Specify work recovery measures, and the means to re-establish physical records while maintaining Service at the College

VI. PRICING POLICY

Cost Evaluation

- Provide cost breakdown (per transaction) details for call center support.
- Provide cost breakdown (per transaction) details for default prevention services.
- Provide cost breakdown (per transaction) details for any other services or initiatives that support student recruitment, retention, and completion.
- Provide cost information for set-up for each service (whether one-time or annual) or any other associated fees.

VII. SCOPE OF SERVICES

The successful contractor must provide the following services as an operational.

- **Inbound phone support** – providing information on college admission, federal and state financial aid, student payment, registration services and general college information
- **Technology** – provide 100% call recording, a ticket tracking system and flexible reporting options
- **Default Prevention services** – provide informative outreach to borrowers, target outreach plans, new borrower counseling and defaulted borrower assistance

VIII. REFERENCES

Business references are required from customers with whom there is a standing business relationship of one year or greater duration. Reference form is to be Submitted under separate cover with Reference Letterhead and Envelope via the U S Postal Service to the College's RFP Contract Person prior to the close date of the RFP. Full mailing address is provided below.

References are important elements of the proposal process. Values are averaged from references supplied to PMT by RFP due date. Please use the form **Exhibit A** to submit the

information.

Financial References

Proposer must include their past two (2) years of audited Financial Statements. These statement will be held as confidential and proprietary and will not be returned.

Rule of Award

The Procurement Team will Award this contract to the Highest Responsible and Responsive Proposer that offers the Best Value to the College. The COLLEGE reserves the right to request best and final offers from firms that are determined to be susceptible for contract award.

The Proposals will be evaluated using the following approach and scoring system:

Mandatory Requirements	Total Points Available	Comments by Reviewer and/or Team	Score
Business Experience/Qualifications	15 Points		
Overall ability to provide defined scope of services	25 Points		
Quality Assurance/Training/Support services	10 Points		
Implementation plan	10 Points		
Professional References	10 Points		
Financial Package	30 Points		
	100 Points	Final Score	

IX. COLLEGE CONDITIONS

Bunker Hill Community College will not be liable for any costs incurred by respondents in the preparation and production of a proposal or the costs of any services performed prior to receiving approval of the agreement. All proposals and materials submitted in conjunction with the

proposals shall become the property of Bunker Hill Community College for use as deemed appropriate, respecting all copyrights. Upon award of the contract, a standard commonwealth terms and conditions must be incorporated. That form is attached with the RFP. Please sign and include the condition form included in Exhibit B with your response.

Non Collusion form and Tax Compliance Form

These forms are included with the RFP in the Exhibit **C and D**. These forms must be completed and submitted with the proposal.

X. BASIC COLLEGE DATA

Built in 1973, Bunker Hill Community College's Charlestown Campus is situated on approximately 32+ acres in the historic Charlestown neighborhood of Boston. The campus consists of six buildings (A, B, C, D, E and G) in Charlestown, the Chelsea campus in Chelsea, and other satellite campuses in nearby cities.

The college runs classes in various schedules. For more information, please visit the college's website: www.bhcc.edu/about/

EXHIBIT A

**BUNKER HILL COMMUNITY COLLEGE
RFP REFERENCE FORM
(To be completed and sealed by customers)**

Bidder Name: _____

Question 1. Bidder's willingness and ability to provide contracted services - likeliness of your future use:

Excellent Good Fair Poor

Question 2. Bidder's ethical approach, integrity, responsiveness and effectiveness in resolving problems

Excellent Good Fair Poor

Question 3. Bidder's communication, leadership, thoroughness and the availability of key personnel:

Excellent Good Fair Poor

Question 4. Bidder's organizational approach to reporting, internal controls, & meeting emergency needs:

Excellent Good Fair Poor

Question 5. Your overall ranking for bidder's service performance with your organization

Excellent Good Fair Poor

Customer's Organization: _____

Authorized Signature and Date: _____

Exhibit B

College Condition Form

Bunker Hill Community College will not be liable for any costs incurred by respondents in the preparation and production of a Proposal or the costs of any services performed prior to receiving approval of the agreement. All Proposals and materials submitted in conjunction with the Proposals shall become the property of Bunker Hill Community College for use as deemed appropriate, respecting all copyrights.

1. Bunker Hill Community College reserves the right to modify the requirements of this proposal after its release. All Proposers will be notified of any modifications to the requirements of this proposal. Wherever the College is referred to herein, such reference will be to the President or his/her designee, as stated periodically in writing during the term of the contract.
2. Proposers who submit a response may be required to give an oral presentation to Bunker Hill Community College. This shall provide an opportunity for a Proposer to clarify or elaborate on the Proposal, but shall in no way change the original Proposal. The College shall schedule the time and location, if needed.
3. By submitting a Proposal, the Proposer agrees that it will not make any claims or have any right to damages because of any misinterpretation or misunderstanding of the specifications or because of any misinformation or lack of information.
4. The successful Proposer will be notified in writing by letter.
5. Omissions, inaccuracy or misstatements is sufficient cause for rejection of the Proposal.
6. The Agreement, if awarded, shall be governed and construed in accordance with the laws of Massachusetts.
7. The College reserves the right to conduct regular inspections and examinations of all Service Areas for the purpose of checking equipment and verifying compliance with all of the appropriate sanitation and health codes.
8. The Contractor agrees that the College's invoice payment can be made by use of Accounts Payable Credit Card.

Signature of individual submitting bid or proposal

Name of business

Exhibit C

Certificate of Non-Collusion

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of individual submitting bid or proposal

Name of business

Exhibit D

Tax Compliance Certification

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of person submitting bid or proposal

Name of business

EXHIBIT E

BUNKER HILL COMMUNITY COLLEGE
RFP EVALUATION WORKSHEET

Name of Bidder _____

Name of Reviewer (PMT Member) _____

Date _____

Final Score _____

Instructions: The PMT will score the evaluation through a point (100) value system. There is extra 10 points allocated for Oral Presentations. All Bidders will receive an average of all the reviews done by PMT members. The contract award will be given to the best candidates overall and not just based on price. The Procurement Manager is able to compare prices among all bidders and provide points accordingly. These points will be added to the points that each PMT member assigns during the evaluation. Bidder submissions will receive points based on the following:

Mandatory Requirements	Total Points Available	Comments by Reviewer and/or Team	Score
Business Experience/Qualifications	15 Points		
Overall ability to provide defined scope of services	25 Points		
Quality Assurance/Training/Support services	10 Points		
Implementation plan	10 Points		
Professional References	10 Points		
Financial Package	30 Points		
	100 Points	Final Score	

PROCUREMENT CALENDER

EVENT	DATE
Solicitation: Announcement of Intent to Procure (Local Newspaper & Goods/Services Bulletin)	APRIL 17, 2023
Solicitation: Release Date	APRIL 17, 2023
Solicitation: Close Date / Submission Deadline	MAY 17, 2023
Proposal Award: Notification in writing	JUNE 15, 2023
Signatures are to be on file by (electronic signature accepted):	JUNE 30, 2023
Contract: Estimated Contract Start Date	JULY 01, 2023

END