



**STATE OF MICHIGAN
ENTERPRISE PROCUREMENT**

Department of Technology, Management, and Budget
525 W. ALLEGAN ST., LANSING, MICHIGAN 48913
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CONTRACT CHANGE NOTICE

Change Notice Number **003**
to
Contract Number **071B2200168**

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CONTRACT SUMMARY				
DESCRIPTION: CONTACT CENTER SUPPORT				
INITIAL EFFECTIVE DATE	INITIAL EXPIRATION DATE	INITIAL AVAILABLE OPTIONS	EXPIRATION DATE BEFORE CHANGE(S) NOTED BELOW	
May 1, 2012	April 30, 2017	5 - 1 Year	April 30, 2017	
PAYMENT TERMS		DELIVERY TIMEFRAME		
ALTERNATE PAYMENT OPTIONS			EXTENDED PURCHASING	
<input type="checkbox"/> P-card <input type="checkbox"/> Direct Voucher (DV) <input type="checkbox"/> Other			<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
MINIMUM DELIVERY REQUIREMENTS				
DESCRIPTION OF CHANGE NOTICE				
OPTION	LENGTH OF OPTION	EXTENSION	LENGTH OF EXTENSION	REVISED EXP. DATE
<input type="checkbox"/>		<input type="checkbox"/>		April 30, 2019
CURRENT VALUE		VALUE OF CHANGE NOTICE	ESTIMATED AGGREGATE CONTRACT VALUE	
\$20,731,375.40		\$ 7,048,355.11	\$27,779,730.51	
DESCRIPTION: MIECC to exercise two one year options and add funding for base support and future statements of work, and add Salesforce capability via a rate card for Contact Call Centers. All other terms and conditions remain the same.				

NATURE OF CHANGE(S):

CHANGE 1- EFFECTIVE JUNE 7, 2016

Change 1.1, the following paragraph of Section 1.002 is hereby edited/clarified with the below:

Replace with:

Today, MiECC supports contact centers at six (6) agencies (with respective subsets within agencies as applicable) -

1. Civil Service Commission (MCSC)
2. DTMB-Client Service Center (CSC)
3. DTMB-Office of Retirement Services (ORS)
4. Department of Health and Human Services (DHHS) – MI Bridges IVR
5. Department of Health and Human Services (DHHS) - Office of Child Support (OCS)
6. Department of Health and Human Services (DHHS) – Michigan Statewide Automated Child Welfare Information System (MISACWIS)
7. Talent & Economic Development (TED) – Unemployment Insurance Agency (UIA)
8. Michigan Department of State (MDOS)
9. Treasury – Collections
10. Treasury – Tax Processing Bureau
11. Treasury – Michigan Guaranty Agency

Change 1.2 Update Section 1.101 In Scope is hereby clarified:

1.101 In Scope

The contractor shall provide a team to support and enhance the identified 11 contact centers. The contractor shall provide the following services:

1. Knowledge transfer from existing contractor.
2. Base Support
3. Major Enhancements (including new functionality or new contact centers)
4. Optional: Software Licenses

The State reserves the right to add contact centers, under this Contract through Contract amendment.

The scope of the agreement will consist of support of the following software components:

- i. Siebel
- ii. Siebel Interfaces
- iii. Salesforce.com* (replacement component for retiring Siebel)
- iv. Salesforce.com Interfaces
- v. Scheduled/Ad-hoc reports (SQL).
- vi. Batch (from Oracle legacy extract to Siebel Base)
- vii. Batch (from Oracle legacy extract to Salesforce.com)
- viii. Genesys (CIM Platform, GVP, CTI - Gplus Adapter, WFM, Genesys reporting, Interaction Workspace etc.)
- ix. NUANCE Speech technologies
- x. Siebel to FileNet P8 Connector Siebel Event Action Handler (SEAH)
- xi. New implementation of existing in scope technologies that are implemented under this Contract which shall be agreed upon through SOW.
- xii. Virtual Hold Technology , only for DTMB/ORS (other Agency VHT deployment would be considered Major Enhancement, and the base cost for that agency may increase)
- xiii. NICE recording and monitoring platforms, only for DTMB/ORS
- xiv. Integration with peripheral software, such as SYMON and Emprlix

xv. New technologies that are implemented under this Contract

Change 1.3, Attachment 9: Agency Environment Information is clarified as per this CCN:

FOR THE CONTRACTOR:	FOR THE STATE:
Accenture LLP Firm Name	Signature William Famble, IT Division Director
Authorized Agent Signature Jamie D. Walker	Name/Title DTMB Procurement
Authorized Agent (Print or Type)	Division
Date	Date

Attachment 9: Agency Environment Information

Contact Centers IT Technical Description – in alphabetical order

The descriptions represent the applications as they are at Contract execution.

1. Civil Service Commission

Overview

The MIHR contact center could be described as a mostly "out-of-the-box" Siebel Contact center 7.8 configuration. There is a custom-coded Websphere Application Server (WAS) knowledge base. There are 30 Customer Service Representatives on the phones, receiving approximately 500 calls per day, and up to 5 staff who act as tier 2 agents dealing with service requests. In 2015, the Civil Service Commission and DTMB implemented an IP based IVR and contact center. The contact center solution was implemented on the DTMB MIECC Enterprise Contact Center environment in the State of Michigan hosting center. The technology platform used was a Session Initiated Protocol (SIP) based Genesys Contact Center. MIECC services to the Civil Service Commission is supporting the on premise Genesys platform.

Siebel

Currently, the Siebel base tables are updated via a series of custom programs on a nightly basis with key data provided by output files from the HRMN system. This process updates the Siebel Enterprise Integration Manager (EIM) tables using Perl and Java script programs. The Operational Data Mart (ODM) Enterprise Application is used to store employee, company, location, translation, department and job code in ODM Database and also used to upload data to the EIM tables in the Siebel Database. These programs allow only changes made to the employee data in the past day to be passed through to the Siebel EIM tables. However, once a month, a program completely refreshes all employee data in Siebel. This process also includes a direct insert into a Siebel base table.

Knowledge base

The content owners enter content into a Vignette 6 project. Content changes are migrated through a two-step process to the WAS application server that stores the content in XML format. Content is accessed through the Internet by State employees. Access credentials are captured by the login page and passed to a Lightweight Directory Access Protocol (LDAP) directory for authentication.

Telephony

Employees calling into the contact center are initially presented with several telephone menu choices. The contact center uses computer telephone integration (CTI) wherein employees may enter their employee ID or social security number and using Genesys the information is passed as a screen pop to the CSR in Siebel with the employee information contact log auto populated. Incoming callers who identify themselves as wanting employment verification, are in need of self service support, or are retirees of the State of Michigan will select those options and that will auto populate in Siebel with a predefined customer contact number.

eMail

The MI HR Service Center processes approximately 500 emails from three email sites. Auto acknowledgements are sent and then emails are captured and worked through the Siebel application using a series of predefined responses. Contact logs are generated in Siebel for each email sent and received.

Hardware

There are 3 hardware environments: production, test and development.

Reports

Management use reports from Qwest, the Avaya CMS system NICE QA reports, Access and Excel tracking reports and customized reports from Siebel.

2. DTMB-Client Service Center (CSC)

Overview

Avaya

The inbound 1-800 and local calls terminate on the Capital switch. They are routed to Genesys for processing. As an emergency provision, vectors have been written that, if Genesys is not working, the calls are routed to agents using a set of Avaya vectors.

Genesys

Genesys provides the IVR, screen pop and call routing functionality.

The IVR takes calls from the switch and routes via various menu options. The caller is asked for his/her employee id which forms the basis for the screen pop. In one scenario, the caller may choose to perform an automated network password re-set. In all other scenarios, the call is routed using skills-based routing to the most appropriately skilled agent. At the same time, the employee id lookup occurs in Microsoft Active Directory for the State of Michigan Domain. If a valid employee id has been provided, then information pertinent to the ID (identifying the caller) is provided in a screen pop to the agent. This information is used by the agent to search Remedy for caller information, existing cases or to start a new case.

Genesys creates the virtual call center. Genesys Interaction Workspace (IW) is used as the client application for the agents. CSC tier 1 agents are located primarily in Lansing and Detroit. Additional Field Service agents use IP Soft phone technology to access the Genesys system through the Capital switch. Tier 2 staff is located at the Operations Center in Dimondale, MI.

Interfaces

Automated network password re-sets

When a caller chooses to use the automated network password re-set option, he/she has 3 chances to do so successfully before being routed to an agent. If routed to an agent, then the agent accesses an existing Challenge Response System (CRS) database for questions and answers specific to the individual whom the caller purports to be. If the caller answers the questions accurately, then the agent uses adequate credentials to change the password on the associated account. A ticket is generated and closed to document the

transaction. If any complications occur, such as no data is available in the CRS, then the agent will refer the caller to an authorized requestor for validation.

If a caller has previously registered a PIN in CRS, then automated re-set can be successful. In this case, the caller is asked to enter the numeric 4 digit PIN. The HRMN ID and PIN are validated in CRS. If valid, then the process continues with a Positive status being sent with the HRMN ID to Active Directory. The network account associated with that HRMN ID has its password re-set. The caller is told of the successful transaction and a new password. Additionally, data is sent to Remedy to document the re-set. Based on the HRMN ID, also stored in Remedy, the case is opened, documented as a successful network password re-set and resolved. The Remedy system automatically generates an email to the associated email of the account of the re-set.

The Genesys system integrates with the Symon Wallboard for displaying of contact center statistics that includes queue level statistics.

Hardware

There are 2 hardware environments: production and test.

Reports

Genesys CCPulse will be used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAnalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Avaya CMS, CRS and Remedy queries.

3. DTMB-Office of Retirement Services (ORS)

Overview:

The ORS contact center has Siebel as the core product with significant functionality also supplied by Genesys and Avaya components. At peak, there are over 50 customer service agents on the phone with another set of agents answering non-real time work items on Siebel. The current estimate of daily call volume that will use the 1-800 numbers is in excess of 3000 calls.

Siebel

The Siebel application uses mostly the out-of-the-box functionality from the Siebel Enterprise Contact center 7.8.2.16 product. Contact and Organization information in Siebel, refreshed from the Clarety every night, is used as the main person identifier and forms the basis for the screen pop at the CSRs desktop when they receive a call. Clarety is the Line of Business (LOB) Web application used by ORS to support Membership and Retirement processing. Siebel is used by staff to track communications with Members and Organizations, as well as to create and track Interactions/Service Requests (Activities/Tickets). Calls that cannot be answered by a tier 1 agent are transferred to a tier 2 agent.

Siebel-Clarety GUI Links

Siebel has secure connections to view the backend Clarety system for contact center agents. The type of information Siebel can query in Clarety is related to FileNet images, benefit information, demographic and worksite information.

As a front-end CRM system, service request may be created in Siebel. If the work requires transactions to be completed in Clarety, these requests are created in Siebel. The work originated in Siebel may also be enforced with Service Level Agreements, Prioritization Criteria, and/or Assignment and Due dates prior to being passed to Clarety. Updates to work statuses are passed back from Clarety to Siebel in real-time.

Siebel Virtual Business Components

Additional data elements originated and owned by Clarety are readily available to agents working in Siebel. This is accomplished by using a number of mechanisms including Virtual Business Components and Smart (context-aware) Links. The purpose is not to replicate all data, but to make it readily available in both systems. Virtual Business Components are read-only views providing access to real-time Clarety data using Siebel.

Telephony Call Flow:

Calls coming from the 1-800 Qwest T1 lines terminate on the General Office Building (GOB) switch. Avaya PBX directs customer calls to the Genesys IVR where callers are provided with self-service opportunities such as the Member Application Status transactions. Callers wishing to talk to an agent can opt out of the IVR and are asked for their ID, which is used to screen-pop the customer's information on the CSRs desktop when the call is answered.

Genesys: Computer Telephony Integration (CTI)

ORS' telecommunications applications improve Agent efficiency through the use of the Siebel-integrated Genesys CTI and Genesys GVP (Genesys Voice Portal). When ORS customers call, they are routed through the IVR and prompted to enter identifying information. This information is then processed by Genesys (CTI application) and produces a "screen pop" within Siebel, which assist the Agent in identifying the customer. Agents are also provided with Genesys soft phone toolbar capabilities in order to control call activity from their PC desktop.

ORS employs the Genesys 7.6 ERS Framework components in combination with AES, Gplus Adapter, and Siebel Communications Server in order to deliver "screen-pops" to Contact center agents using Siebel. This set of functions draws data from the Genesys GVP (Genesys Voice Portal) 48 Port IVR units connected to the existing ORS distributed Avaya Definity PBX/ACD switch.

VHT

ORS is currently implementing VHT for the contact center operations.

NICE System: (Monitoring and Recording System)

ORS uses the NICE Perform 3.1 Application Suite as its digital multimedia monitoring and recording solution. This hardware includes a NICE Logger for Voice Storage; Screen Capture and Logger for navigation recording; and the NICE Call Logging System (CLS) for storage of call details. The software components include NICE Universe, Scheduler, Forms Designer & List Editor, Evaluator, Monitor, Web Reporter, and Record on Demand.

In order to gather business call details that are not provided by the switch, the NICE Systems are integrated with Genesys TServer to obtain the data from the IVR.

Avaya

The inbound 1-800 calls terminate on the Avaya PBX switch. They are routed depending on the Dialed Number Identification Switch (DNIS) number to different vectors and then, where appropriate, adjunct routed to Genesys. However, the vectors have been written that, if Genesys does not pick up the calls in a certain period of time, the calls are routed to agents using a set of Avaya vectors.

Legacy Interface:

Siebel EIM- Enterprise Integration Manager: EIM is used to bring data from Legacy systems (Clarety) and other sources into temporary staging tables, where business rules are applied before the data uploads or updates Siebel-resident data.

EAI – Enterprise Application Integration: EAI is used with Siebel to send or receive real-time updates from other applications. At ORS, EAI is used to send and receive real-time updates between Siebel and Clarety.

Microsoft SQL Server Transactional Replication: A subscriber database uses this mechanism to receive synchronized data from Clarety, and the data is then normalized or de-normalized to Siebel's required format.

Siebel Workflow/Business Services/HTTP Post Method: The combination of these mechanisms is currently used to send information inserts and updates from Siebel to Clarety.

Security Integration: ORS currently uses authentication mechanisms external to "The System" (Clarety and Siebel). Both applications are setup to use a common LDAP (ADSI) server, allowing for common authentication. Transactions between these applications use header authorization acquired from the LDAP server.

Other Data Source

Virtual Business Components are read-only views providing access to real-time Clarety data using Siebel. VBC views in the contacts business object pull information from an outside source (Clarety) using a VBC connection. VBC connections are to a SQL Server database that stores Member information created by the Clarety System.

Hardware

There are 3 hardware environments: production, DR/test and UAT/development.

Reports

Genesys CCPulse is used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics. Genesys VAR is used for IVR reporting.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Qwest, Avaya CMS, Siebel Actuate, and SQL Queries.

Workforce Management System

ORS uses the Genesys Workforce Management Application Suite to forecasting, employee scheduling, monitoring of real-time agent-adherence and intra-day contact-center performance. The software components include Genesys Web/Supervisor module and WFM Configuration Utility.

4. Department of Health and Human Services (DHHS)- MI Bridges IVR

Overview

The architecture of the MI Bridges / IVR system is an n-tier design that separates the application into tiers or layers that are architecturally independent of the other. The MI Bridges / IVR system consists of a presentation tier, business logic tier and a persistence tier.

Presentation (Web) Tier

Also known as the Web tier, or presentation layer, this governs what the users see at their workstation, but in case of the IVR it governs what users experience on the telephone. A HTTP server hosts the display interface. The developed Graphical User Interface (GUI) must be compliant with the Americans with Disabilities Act (ADA) and is geared to those of varying backgrounds, languages and skill levels. The Web tier for MI Bridges and IVR is specifically developed to capture information, not process it. It allows information to pass through it to the Business Tier, or application layer, where multiple processors stacks route the data and link to data.

Business Tier

The Business Tier is the layer where business logic is run. The processing for check my benefits, apply for benefits and report my changes is performed within the Business Tier.

This layer is the most critical to the solution and is broken apart from the Web tier to allow the State to grow the application component of the solution as needed without interfering with, or having to rebuild, the front end—the Web tier.

Developer tools, such as IBM Rational Software Architect/Modeler in combination with J2EE executing on IBM WebSphere Application Server provide ready-to-use application components that would otherwise have to be custom built for integration. Isolation and integration are key elements of the overall solution.

Persistence (Database) Tier

The first two layers of the solution act like separate components of the overall solution that enable specific activities to occur before allowing the user to access the database where sensitive data resides. The Database Tier is designed to provide the State added security. It uses port 1521 for Oracle or as defined by the technical requirements and is hosted in Zone 3 a very highly secured environment. Roles providing access to the application are built into the MI Bridges system. The database environment, where data is read, updated and processed according to the business rules configured for operations, is accessed after a series of approvals and processing functions occur within the previous two layers of the system. Stored procedures and triggers within the Database Tier enable mass updates, deletes and other operations to occur quickly within this layer. These

are defined as a component of the application logic. The Oracle database component is necessary to provide the premium processing capabilities required by the State.

MI Bridges IVR Software Architecture:

The MI Bridges IVR application includes software that resides on standard desktops and servers. Examples of the desktop components include:

- Microsoft Windows XP,
- Microsoft Internet Explorer v5.5 or later (Secure Socket Layer (SSL) enabled with 128-bit encryption)
- Compatible with Firefox, Chrome and Safari browsers
- Adobe Acrobat Reader 8.1

Server-side software components include:

- Sun Solaris 10 Operating System
- Microsoft Windows 2003 Server Enterprise Edition Operating System
- MI Bridges IVR application
- Genesys GVP application
- Oracle Database 11.2g Enterprise Edition
- IBM WebSphere Application Server, v 7.0
- IBM HTTP Server, v 6.0.2.31
- IBM WebSphere Business Integration Software, v 7.5.0
- Novell eDirectory, v 8.8.2
- Informatica Power Center v 8.1.1
- SAP DQ XI (for address verification)

Tool Support Servers

Tool support servers that are Windows based have dual 3.4 GHz/2MB Cache Xeon processors and 70 GB hard drives. The following servers in the indicated environments require 2 GB memory:

- FAST4J Tool Server for Development
- Rational Tool Server for Development

The following servers in the indicated environments require 8 GB memory.

- Build Workstation attached to the SAN

The Rational data server resides in the Development environment and is a Sun Fire V240 with dual SPARC Ultra III processors and 32 GB memory.

Servers

DTMB and DHS utilize both Dell and the Sun family of servers for MI Bridges IVR project. For each server, different configurations of processors and memory are required depending on the environment in which it resides. All servers are updated to the most recent patch level required by the hardware contractor and contain the necessary anti-virus software as defined by the State. The Sun Fire servers, with the exception of the X4100, run the Solaris 10 operating system. The X4100 run the Windows operating system.

Virtualization

- State's Virtual server farm is used to host Virtual Machines (VM's) for MI Bridges Web servers and MI Bridges Application servers.
- Capacity of VM's in the Virtual Server farm is fed by multiple physical servers.
- SUSE Linux 10.2 Enterprise is the OS used in the VM's.
- VM's for Web/Application servers reside in Application DMZ Zone 1.49.
- Browser requests for MI Bridges are routed to a CISCO Load Balancer which resides in DMZ Zone 1 for Internet Access.
- Multiple VM's used by Web and Application servers for both Production and DR to achieve Load Balancing/Failover/Disaster Recovery.
- System upgrades/maintenance done on the feeding physical servers one by one in the virtual server farm. No downtime due to VM Motion.
- Compuware Vantage is used to monitor VM's in addition to other MI Bridges and IVR servers.

- Each of the Web server VMs has 1 GB of RAM and 1 vCPU (1 Virtual CPU Core); this can be increased based on stress testing and capacity planning.
- Each of the Application server VM has 4 GB of RAM and 2 vCPU (2 Virtual CPU Core).

Self-Service and IVR Networking Infrastructure:

The MI Bridges and IVR application is accessed via a wide-area TCP/IP compliant network infrastructure that is provided and maintained by the State. The infrastructure includes firewalls, fiber connections, telephony ports, SAN connections, workstation LANs, project file systems, etc.

MI Bridges and IVR physical environments housed within State facilities and use the existing State network infrastructure. Thus the architecture depends on this infrastructure to be the primary channel to deliver the MI Bridges and IVR application to users throughout the State.

Network monitoring services for the MI Bridges solution is provided by the State and includes trouble shooting assistance and reporting as needed by the project.

Telephony Gateway Infrastructure:

The Telephony Gateway Infrastructure consists of:

- Telephony Provider (Qwest)
- Gateway
- IVR Servers
- IVR Management Server
- IVR Reporting Server

A call flows from the Telephony Provider (Qwest) to the IVR Server through the Gateway. IVR servers are controlled by the Management server. Reporting server takes inputs from the IVR application and the IVR servers and reports the same in a user readable format.

The MIECC service to DHHS is limited to maintaining the IVR software (Genesys) architecture and support - the IVR application and the web application are maintained by DTMB with another partner contractor.

5. Department of Health and Human Services (DHHS)- Office of Child Support (OCS):

In 2014, the Office of Child Support and DTMB implemented an IP based IVR and contact center. The contact center solution was implemented on the DTMB MIECC Enterprise Contact Center environment in the State of Michigan hosting center. The technology platform used was Nuance Speech Recognition and Genesys Contact Center. The Office of Child support agents are mostly remote agents connected to the State of Michigan virtual private network. MIECC services to the Office of Child Support is supporting the on premise Nuance and Genesys platform.

6. Department of Health and Human Services (DHHS) – Michigan Statewide Automated Child Welfare Information System (MISACWIS)

This solution is an IVR being deployed for the DHS SACWIS project. The MISACWIS IVR is a Nuance developed IVR application deployed on the Genesys Voice Platform. Additionally, Nuance Vocalizer (TTS) will be deployed for playback of dynamic caller data (i.e. names). The existing GVP components within the enterprise platform will be expanded to handle the new call volume into the platform. The SACWIS IVR project will provide a self-service IVR application for the foster parents to verify the dates when foster children were in their care and trigger payment for these services.

7. Talent & Economic Development (TED) – Unemployment Insurance Agency (UIA)

Overview

In 2013, TED--UIA and DTMB implemented a contact center on the MIECC Genesys enterprise platform hosted in the State of Michigan DTMB hosting centers.

Genesys

The Genesys platform provides interactive voice response (IVR) configured to utilize prompts and rules to allow backend data dip integration for self-service. IVR error handling and global functionality, utilizing standard numeric operations (press 0, or press 9 to go back) is incorporated into processing. The Genesys platform is also integrated to the TED-UIA Fast system for case creation and account screen pops.

Hardware

There are three hardware environments: production, test and development.

Reports

TED-UIA use the MIECC enterprise environment for reporting on contact center data. Data such as real time and historical call reports are provided by the MIECC Enterprise environment.

MIECC services to TED-UIA is supporting the on premise Genesys platform.

8. Michigan Department of State (MDOS)

Overview

The MDOS contact center has Siebel as the core product with significant functionality also supplied by Genesys and Avaya components. At peak, there are over 70 customer service agents on the phone with another 10-15 agents answering non-real time work items on Siebel. The current estimate of daily call volume that will use the 1-888 number is in excess of 10,300 calls. There may be up to 10 concurrent eService users from the branch offices using the system to create or review service requests.

Siebel

The Siebel application uses mostly the out-of-the-box functionality from the Public Sector Contact center 7.5.3 product. Driver and vehicle information in Siebel, refreshed from the mainframe every night, is used as the main account identifier and forms the basis for the screen pop at the CSRs desktop when they receive a call. Calls that cannot be answered by a tier 1 agent are transferred to a tier 2 agent and, if the call can still not be answered satisfactorily, a service request is created. Service requests are worked by non-phone staff and, after completion, the tier 2 agent calls the citizen back with the resolution.

There is an eService application that allows branch office staff and other work units in MDOS to login to Siebel and create a service request. Subsequently they can also use the application to review the status of their service request.

Telephone Call Flow

Calls coming from the 1-888 Qwest T1 lines terminate on the General Office Building (GOB) switch. There are two types of calls: one coming from a citizen and the other from branch office MDOS staff. Branch office staffs use a 1-877 number and this allows Avaya to differentiate the callers.

An Avaya vector directs citizen calls to the Genesys IVR where callers are provided with various self-service opportunities. Callers wishing to talk to an agent can opt out of the IVR and are asked for their Drivers License Number, which is used to screen-pop the citizen's information on the CSRs desktop when the call is answered. Note: A similar functionality exists for vehicle registration number; however this functionality is currently turned off in the IVR due to the systems inability to accurately recognize alpha characters.

Calls coming from branch office staff are directly routed to tier 3 agents after using a vector to capture the employee ID number and a branch identifier which is used to create a screen-pop on to an agent's desktop.

Genesys

Genesys provides the IVR, screen pop and call routing functionality.

The IVR takes citizen calls from the switch and routes the citizen through various self-service options. There are many points where the caller can opt out to speak to an agent. If the caller chooses to opt out, Genesys captures where opt out takes place and makes a determination, based on a series of business rules, which tier 1 agent skill level is required to answer the call. The call is routed using skills-based routing to the most appropriately skilled agent. In the process, the caller is asked for their Drivers License Number which forms the basis for the screen pop. Scansoft speech recognition software allows the caller to speak this number. At the

same time, a data dip takes place into the Siebel database to determine if the caller already has an open service request. If one exists, Genesys routes the caller past the tier 1 agent straight to a tier 2 agent queue.

Genesys also picks up the branch office staff calls from a vector along with the collected employee ID number and routes these to a tier 3 agent queue. Tier 3 agents receiving the call get a screen pop of information related to that branch office employee.

Genesys creates the virtual call center. CSR tier 1 agents are located in both Lansing (GOB switch) and Detroit (Detroit Cadillac Place switch).

Avaya

The inbound 1-888 calls terminate on the GOB switch. They are routed depending on the Dialed Number Identification Switch (DNIS) number to different vectors and then, where appropriate, adjunct routed to Genesys. However, the vectors have been written that, if Genesys does not pick up the calls in a certain period of time, the calls are routed to agents using a set of Avaya vectors.

Legacy Interfaces

Mainframe

The MDOS mainframe interface is similar to that used by Treasury. The Databridge product is used to extract audit files from the mainframe and place the data into Oracle tables. PL/SQL statements are used to populate Siebel Enterprise Integration Manager (EIM) tables. Finally a Siebel EIM configuration file .lib file runs and populates the Siebel base tables.

A series of "hot keys" have been created to import specific information from the mainframe into a Siebel applet using a .Net connector. The information coming through the connector is not stored in Siebel.

Other Data Sources

Some views in the contacts business object pull information from an outside source using a VBC connection. One VBC connection is to a Microsoft Access database that stores a record of letter correspondence generated in MDOS and sent to citizens.

Hardware

There are 3 hardware environments: production, test and development.

Reports

Genesys CCPulse will be used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAnalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Qwest, Avaya CMS, Siebel Actuate, and SQL Queries.

9. Treasury -- Collections, Tax Processing Bureau and Michigan Guaranty Agency

Overview

The Treasury contact center has Siebel Contact center 7.8 as the core product, but significant functionality is also supplied by Genesys, Avaya, NICE, FileNet, Tidal, Opalis and Xenos components. Although CSRs are only on the phones between 8:00 am and 4:45 pm, Monday through Friday, the IVR and Siebel eService for taxpayers is available 24 x 7. At peak, there are over 40 customer service representatives on the phone with another 180 staff working non-real time work items on Siebel. The annual contact volume (all channels) is in excess of 2.2 million contacts.

The support team provides break/fix response and more formal major scheduled release updates. The business user maintains some administrative functions within Siebel.

Siebel

Contacts in all channels (phone, IVR, web, email, white mail and walk-ins) are recorded in Siebel Contact center 7.8. Most telephone contact logs are created automatically by the system with agents choosing a reason and

resolution code combination from a drop down list. Siebel populates the reason and resolution codes for IVR and self-service web contacts.

Non-real time work items are created automatically through the inbound correspondence channel or via the Siebel eService access by the taxpayer. Manual service requests can be created by any agent. The Siebel Communication tool bar controls the agent's access to real time work items.

Taxpayers can sign into Siebel eService from the web to view account status information and create a service request. A security adapter has been built with the help of Siebel to facilitate the authentication process. The Siebel eService application also has front-end tables built in that allow business user analysts to change certain responses such as the estimated date when a specific taxpayer's refund will be issued.

The contractor is responsible for monitoring Siebel e-service site functionality 24/7.

FileNet

Xenos is used to capture print files and enable outbound correspondence to be stored in FileNet. Images are created for various classes of documents: inbound correspondence, outbound correspondence, tax returns and registration forms. Treasury staff access FileNet through Siebel or directly through FileNet. Each document class is treated differently for creation and routing of service requests in CRM.

a. Inbound Correspondence

Inbound correspondence is batched for different Treasury work groups and scanned. Images are indexed manually with the account number that is verified with a look ahead into the Siebel database to insure the account exists in Treasury's CRM database. Documents that are difficult to code are held open in FileNet and routed for indexing to separate groups of Subject Matter Experts. Once all documents in a batch are indexed, the images are then committed to FileNet Image services. A list of the images goes to the Siebel Event Action Handler (SEAH) component that has been configured to create an inbound Siebel contact log and, when appropriate, an open Siebel service request. The Treasury legacy system requires notification of the receipt of certain classes of inbound mail and, therefore, a file is created in FileNet and sent directly to that system. Once inbound correspondence service requests are completed, Siebel creates a daily feedback to several legacy systems including TREAS, MARCS (the collection system) and SAP.

b. Outbound Correspondence

There are two routes for importing outbound correspondence into Siebel.

- i. Outbound correspondence that is produced by the tax legacy systems including SAP has been identified by the business to be stored in FileNet and attached to Siebel as an outbound contact. Xenos is used for this route and it captures the print file for each type of outbound correspondence and, based on pre-built templates, parses out some key data to create an index and stores the document image as a tiff file. Siebel Event Action Handler (SEAH) component links the image to the Siebel account and creates a closed contact log.
- ii. Outbound correspondence that is in the form of a Word document (not generated by legacy systems) can be attached to the contact log/service request on an individual basis.

c. Tax Returns

The indexes of tax returns are stored in FileNet and made available to staff desktops via a FileNet Images Services look up or through Siebel CRM.

d. Historically Scanned Documents

Other documents (usually those with priority handling) are worked by CSR's and then imaged as historical documents in FileNet. Siebel workflow creates a closed contact log linked to the related CRM account with the appropriate reason and resolution codes for historical images.

Telephone Call Flow

Treasury has two main telephone contact center groups: Individual Income Tax (IIT) and Business Tax. The call flow includes 24 x7 access to the Genesys IVR. Several Genesys virtual call queues are created in front of the agents to allow specialized customer service. The Genesys configuration is done by the contractor. The Avaya ACD vectoring and programming is done by DTMB Telecom. The Avaya ACD messages for these vectors and the IVR are developed and recorded by Treasury business users.

MGA has one telephone call center group. The Genesys IVR for MGA has restricted hours due to the need to access Sallie Mae. MGA's IVR application is available Monday through Friday 7:30 AM -9:00 PM and Saturday 9:00 AM - 1:00 PM.

Genesys Screen Pop, Routing and Universal Queuing

Genesys Computer Telephony Integration (CTI) is used to provide basic screen pops for incoming and transferred telephone calls, and manage call waiting queues (on the switch) for Income Tax and the Business Tax lines. Account identifying data is captured in the IVR, and is passed to Genesys CTI, which queries the Siebel database to determine some pertinent characteristics of the caller. Genesys CTI then routes the call through various call treatments and ultimately to the most appropriate skilled agent. The Genesys Gplus adapter to Siebel allows the CSR to get the taxpayer account information on their screen in a screen pop when they answer the call. If Genesys IVR and CTI are not available the default Avaya vectors have been designed to provide an alternative routing to the agent.

Genesys has been configured to route non-real time items, although this functionality has currently been turned off. For example, Siebel service requests would be sent to Genesys and would effectively route them in much the same way as telephone calls are routed. Agents would have a work state that would make them available for either real time items (phone calls) or non-real time (service requests). To get non-real time items today, CSRs sign into an AUX code to work correspondence and pick service requests from their group's list of items.

Genesys Interactive Voice Response (IVR)

The IVR application has 5 production servers including two GVP servers, Eight T1 circuits behind the Avaya G3 switch. The test system includes two servers and one T1.

The IVR provides the taxpayer with self-service options that require authentication using shared secrets from the related account's CRM data. Credentials are collected in the IVR and passed to Siebel for verification. This connection is through an XML request over an HTTP connection to the Siebel application server. An approval returns taxpayer information in XML format to the IVR, which parses out the necessary data for the response to the taxpayer. Similarly, the MGA IVR collects credentials and passes the data to Sallie Mae for verification via web services. The web service passes back data from Sallie Mae necessary to complete the call. Data is exchanged in an XML format. Text-to-speech response functionality exists only for playing back. Many system responses requires messages, in which case the system picks from a number of pre-recorded messages that are played as required. The IVR application also has front-end tables built in that allow the business user analysts to change certain responses such as the estimated date when a specific taxpayer's refund will be issued.

Finally at the end of the call, when the taxpayer hangs up or pushes out to the agent call flow, a Siebel contact record is put into the Activity log.

Empirix services are used to monitor IVR functionality 24/7. This service is covered under a separate contract.

NICE Call Monitoring and Recording

The NICE Perform 3.X application has been configured to provide quality assurance and record on demand functionality. It monitors and records agent calls, forming an integral part of Treasury's quality system. The NICE window displays agent and channels, including real time information. Calls recorded contain voice and screen. Screens can be monitored/recorded/played.

Currently any changes or upgrades to this system are provided directly through NICE systems. NICE must connect to the Genesys T server via a pre-built connector installed by NICE.

Interfaces

a. Legacy

Siebel receives data each night from the Unisys mainframe. The Databridge product is used to extract audit files from the mainframe and place the data into Oracle tables. PL/SQL statements are used to populate Siebel EIM tables. Finally, an IFB process runs and populates the Siebel base tables.

- b. **SAP**
Siebel receives data each night from SAP-XI which is initially loaded into temporary Oracle holding tables. PL/SQL statements are then used to populate Siebel EIM tables from there. Finally, an IFB process runs and populates the Siebel base tables.
- c. **Inbound Correspondence**
Legacy system and SAP processes require immediate notification when a taxpayer responds to a Treasury request by submitting a letter or returning a completed form. To facilitate this requirement, a file is generated in FileNet from the imaged and indexed correspondence and sent to a legacy host.
- d. **Security Adapter**
A detailed program has been created to capture credentials and authenticate taxpayers accessing the Siebel system through the web. This adapter has been approved and validated by Siebel.
- e. **Genesys**
The Genesys Gplus adapter for Siebel is used to support communication between Genesys and Siebel. This supports many functions including screen pops and the Siebel communications tool bar that provides telephony control to agents at their desktop. Genesys does access Siebel directly to provide the data for routing decisions.
- f. **MARCS**
Information about inbound correspondence received in the Collections/MARCS system is loaded into Siebel using the EIM process, creating Siebel service requests. A daily extract file is also created within Siebel containing updates on completed MARCS correspondence. This extract file is taken as an input into MARCS.
- g. **FileNet CIS**
This product facilitates the communication between FileNet and Siebel. It allows service requests and contact logs to be created in Siebel and allows CSRs to access FileNet attachments by clicking on an icon within a Siebel window.
- h. **Scheduling Software**
Tidal and Opalis are currently used to schedule interface data transfer. In the daily Treasury CSIP Refresh process, the data is extracted from the legacy and SAP systems and sent to the Siebel EIM tables. Scripts are used to load data from EIM tables to the Siebel Base tables. All scripts and processes necessary to refresh the Treasury data through to the Siebel Base tables, and all other automated scripts or reports will be automated to Opalis/Tidal job scheduler. DTMB supports the job scheduling programs.
- i. **Sallie Mae**
The MGA IVR authenticates the caller and reads information back from the Sallie Mae system via web services. DTMB supports the web service for Sallie Mae.
- j. **Treasury Centralized Correspondence system (a.k.a. "the letter writer")**
The MGA IVR offers the caller several options to receive correspondence (ex, paid in full letter, payoff quote, etc.). When the caller opts to receive correspondence the IVR generates a request to the Treasury Centralized Correspondence system via web services. DTMB supports this web service.
- k. **Centralized Electronic Payment Authorization System (CEPAS)**
Beginning in August 2011, the MGA IVR will transfer callers who wish to make a payment to a new CEPAS IVR offered by vendor First Data Government Solutions (FDGS). This is a straightforward call transfer to a 1-800 number

Hardware

There are 3 hardware environments: production, test and development.

Reporting

Genesys CCPulse

Treasury utilizes the Genesys CCPulse application for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts.

Genesys CCAAnalyzer

Treasury utilizes the Genesys CCAAnalyzer application for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Genesys Voice Application Reporter (VAR)

Some business users obtain historical and real time IVR reporting information from the VAR application. This system provides information on customer call path utilization within the IVR and success rates for calls serviced within the IVR.

Avaya CMS (Call Management System)

Some business users still rely on CMS reports. CMS is supported and maintained by DTMB Telecom. If for some reason Genesys reporting is lost, CMS can provide some level of back up.

Other Reports

There are other sources used to supply management with operational and strategic data about the contact center. These include Avaya CMS, and Siebel and Oracle SQL Queries.

Development & Testing

Siebel CRM and eService, Genesys and FileNet component and system testing is performed by the contractor. There are CRM and Genesys development environments and a FileNet development/test environment. DTMB supports the related servers and applications for CRM, Oracle databases and security access controls for each environment.

Avaya ACD vectoring, programming and message assignment are supported by DTMB Telecom.

Dedicated business user teams of 2 to 4 analysts identify new enhancements, work with the contractor to develop business requirements, create wording for messages, and menus in the Avaya ACD, Genesys IVR and eService web screens. The business user creates test scripts with the assistance of the contractor, maintain the various channels test script libraries, assist in identifying new test data requirements and lead the user acceptance test teams for Siebel CRM, Siebel eService, Genesys, Avaya ACD, Genesys IVR, and FileNet. This user team also maintains the CRM administrative tables and selected Genesys administrative tables.

The heaviest development period occurs during June through December. Other Treasury CRM point releases occur during the rest of the year. Addition of new teams, classes and document types to FileNet occur throughout the year. Business owner signs off on enhancements / changes in all channels before they are moved to production.

Security

The contractor shall treat and handle Department of Treasury personal, confidential or sensitive data it receives in accordance with the terms of this Agreement, State of Michigan policies and the laws of the State of Michigan and the United states.

Future Development

- Treasury has started plans for development of replacement systems for Business Registration and combined Sales, Use and Withholding over the next few years. These replacement systems will require the rebuild of daily EIM refresh processes from these legacy systems and expansion of business account data elements in CRM.
- Consideration for the development of live chat and other "social media" contact methods such as text messaging is in the future. Security considerations are paramount, but infrastructure is not currently in place for these channels.

- Ability to add additional taxes and interface with COTS/ERP systems such as SAP. For the new Corporate Income Tax (CIT) and Flow Through Withholding, using the XI component to query the SAP production data real-time via Siebel/CRM
- Ability to add new taxes to IVR systems and provide enhanced information.
- Ability to interface with other telephony systems, including VOIP.
- Replace existing scheduling tool from OPALIS to TIDAL.
- Measurement of first contact resolution is also a desired outcome of any system enhancements.
- Ability to accept and log electronic documents sent from customers into FileNet such as electronic faxes and attachments to eService service requests.

ATTACHMENT A

Pricing Schedule

Staffing Category	Onsite in Lansing Rate	Accenture Delivery Center Rate	Accenture Off Shore Rate
Delivery Lead/Account Lead	\$ 220.00	N/A	N/A
Project Manager	\$ 195.00	\$ 175.00	\$ 123.00
Functional Lead -Senior	\$ 195.00	\$ 165.00	\$ 64.00
Functional Lead -Junior	\$ 180.00	\$ 150.00	\$ 53.00
Application Lead / System Architect	\$ 195.00	\$ 165.00	\$ 64.00
Technical Architect	\$ 270.00	\$ 240.00	\$ 131.00
Technical Lead	\$ 170.00	\$ 135.00	\$ 53.00
Business Analyst	\$ 170.00	\$ 135.00	\$ 53.00
Developer - Senior	\$ 175.00	\$ 120.00	\$ 32.00
Developer - Junior	\$ 140.00	\$ 100.00	\$ 27.00
Tester - Senior (Lead)	\$ 150.00	\$ 110.00	\$ 32.00
Tester - Junior	\$ 135.00	\$ 100.00	\$ 27.00
Trainer - Senior	\$ 180.00	\$ 135.00	\$ 32.00
Trainer - Junior	\$ 110.00	\$ 90.00	\$ 27.00
Technical Writer	\$ 105.00	\$ 80.00	\$ 32.00

STATE OF MICHIGAN
 DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET
 PROCUREMENT
 P.O. BOX 30026, LANSING, MI 48909
 OR
 530 W. ALLEGAN, LANSING, MI 48933

May 8, 2014

CHANGE NOTICE NO. 2
 to
CONTRACT NO. 071B2200168
 between
THE STATE OF MICHIGAN
 and

NAME & ADDRESS OF CONTRACTOR:	PRIMARY CONTACT	EMAIL
Accenture LLP 3000 Town Center, Suite 2400 South Field, MI 48075	Jamie Walker	Jamie.D.Walker@accenture.com
	TELEPHONE	CONTRACTOR #, MAIL CODE
	(517) 241-1640	

STATE CONTACTS	AGENCY	NAME	PHONE	EMAIL
CONTRACT COMPLIANCE INSPECTOR	DTMB	Mark Lawrence	(517) 241-1640	lawrencem1@michigan.gov
BUYER	DTMB	Jarrod Barron	(517)284-7045	barronj@michigan.gov

CONTRACT SUMMARY:			
DESCRIPTION: Contact Center Support			
INITIAL EFFECTIVE DATE	INITIAL EXPIRATION DATE	INITIAL AVAILABLE OPTIONS	EXPIRATION DATE BEFORE CHANGE(S) NOTED BELOW
May 1, 2012	April 30, 2017	5, one year	April 30, 2017
PAYMENT TERMS	F.O.B	SHIPPED	SHIPPED FROM
N/A	N/A	N/A	N/A
ALTERNATE PAYMENT OPTIONS:			AVAILABLE TO MiDEAL PARTICIPANTS
<input type="checkbox"/> P-card <input type="checkbox"/> Direct Voucher (DV) <input type="checkbox"/> Other			<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
MINIMUM DELIVERY REQUIREMENTS:			
N/A			

DESCRIPTION OF CHANGE NOTICE:				
EXTEND CONTRACT EXPIRATION DATE	EXERCISE CONTRACT OPTION YEAR(S)	EXTENSION BEYOND CONTRACT OPTION YEARS	LENGTH OF OPTION/EXTENSION	EXPIRATION DATE AFTER CHANGE
<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/>	<input type="checkbox"/>		
VALUE/COST OF CHANGE NOTICE:		ESTIMATED REVISED AGGREGATE CONTRACT VALUE:		
\$6,482,560.00		\$20,731,375.40		
Effective immediately, the Estimated Revised Aggregate Contract Value is INCREASED by \$6,482,560.00, to allow for \$1,482,560.00 additional funding for Base Support (outlined in attached Addendum to Attachment 3, Tables 1 and 3) and \$5,000,000.00 additional funding for Major Enhancements (outlined in attached Addendum to Attachment 3, Table 4). This reduces the remaining balance of funding available in Table 4 of Attachment 3 for Major Enhancements to \$2,751,184.60. Updated Cost Tables are attached. All future Statements of Work related to Major Enhancements shall be memorialized in a corresponding future Contract Change Notice prior to the issuance of any purchase orders for said enhancements. All other pricing, terms and conditions remain the same. Per Original Contract Ad Board Approval on 4/3/2012.				

**ADDENDUM TO
Contract 071B2200168, Attachment 3: Cost Tables**

Pursuant to CCN # 3 Revisions

Addendum to Table 1: Summary of the Project Cost

No.	Project Cost(s)	Cost (\$)	Comments
A.	Knowledge Transfer cost Give breakdown in Table 2		0) 1) Accenture is supporting all of the Contact centers in scope. No KT costs are charged to the State for these contact centers.
B.	Base Service Cost Breakdown provided in Table 3	\$ 11,731,375.40	2) Per request, removed NICE support and IVR discretionary enhancement from scope. This is consistent with the level of support on the current contract. 3) Accenture had absorbed expense increases internally and has offered this price. 4) Process efficiencies are incorporated in Y2 onwards of the term, to provide net reduction of base support costs to the State
C.	Major Enhancements cost Breakdown provided in Table 4	\$11,751,184.60	5) This is only the provisional 'spend' budget for the nearly 84,000 hours of SoW work sought by the State 6) Assumed equal spending of this effort over all 5 years of contract term 7) Price absorbs COLA increases so that State is insulated from these variations
	Total Project Cost	\$23,482,560.00	

Provisions:

1. If, after the Contract is signed, it is determined that information provided by the State of Michigan to the bidders is inaccurate or incomplete in any material manner, the parties will negotiate an adjustment in the project schedule and the fees and expenses, as applicable, per the Contract's change order process.
2. Contractor's fixed price is based on delivery of the fixed scope of services in Contract. The scope of the services as documented will remain unchanged, except as the parties may agree in writing. All other work, including schedule extensions not approved by Contractor (or within Contractor's responsibility per the Contract), will require the parties to agree upon a change order to the Contract.
3. Contractor's performance of the Contract is dependent on the State of Michigan's prompt and effective performance of its responsibilities, including timely decisions and approvals.
4. The State of Michigan will commit resources and management involvement as described in the Contract or as required by the work effort in order to support Contractor's delivery of the services and to perform the agreed upon acceptance procedures in a timely manner.
5. The State of Michigan will be responsible for its operation and use of Contractor's deliverables upon acceptance, subject to applicable warranties and indemnities, if any, and for determining whether the services and deliverables provided by Contractor under the Contract, including any revised business processes implemented pursuant to the Contract, meet the State of Michigan's business requirements and applicable internal guidelines.
6. The State of Michigan will obtain all consents necessary from its third parties (*i.e.*, those not under contract with Contractor) required for Contractor to perform its obligations under this Contract. The State of Michigan will be responsible for the contractual relationship with such third parties and for facilitating their cooperation with Contractor. Contractor will not have any responsibility for the performance of other contractors or vendors engaged by the State of Michigan (other than Contractor's subcontractors) or delays caused by them. There are no third party beneficiaries to this Contract.
7. The State of Michigan will be responsible for obtaining, at no cost to Contractor, consents for Contractor's use of any State of Michigan Furnished Property necessary to perform its obligations hereunder. Unless otherwise agreed to by the parties in writing, the State of Michigan will provide all software and hardware necessary for Contractor to perform its obligations under the Contract.
8. Each party will retain responsibility for its compliance with any laws, regulations, or other authorities, in effect on the date of submission of our proposal, including those areas on which it relies on the other party's performance under the Contract.
9. Use of the term "ensure" is defined to mean that both parties will use all reasonable and commercial efforts to accomplish their legal responsibilities under the terms of the Contract.

Addendum to Table 2: Knowledge Transfer Cost – RESERVED.

There was never any knowledge transfer cost because Contractor was already supporting the Contact Centers prior to the execution of this contract.

Addendum to Table 3: Base Service Cost

No.	Agency	Year 1 (12 months)	Year 2 (12 months)	Year 3 (12 months)	Year 4 (12 months)	Year 5 (12 months)	Total 5 year cost by agency
	Costs per year	2,049,763.08	2,260,696.41	2,453,549.75	2,483,683.08	2,483,683.08	
	Number of months in that year	12	12	12	12	12	
	Cost per month	170,813.59	188,391.37	204,462.48	206,973.59	206,973.59	
	Total Base Service Cost (sum of total 5 year cost by agency						11,731,375.40

Notes:

1. Base Support is provided at the above-listed fixed fees to the following eleven (11) MiECC contact centers:
 - Civil Service Commission (MCSC)
 - DHS-Michigan Statewide Automated Child Welfare Information System (MiSACWIS)
 - DHS-Office of Child Support (OCS)
 - DTMB-Client Service Center (CSC)
 - DTMB-Office of Retirement Services (ORS)
 - Environmental Quality (DEQ)
 - Human Services (DHS)
 - Licensing and Regulatory Affairs(LARA)-Bureau of Health Professions(BHP)
 - Licensing and Regulatory Affairs(LARA)-Unemployment Insurance Agency (UIA)
 - State (MDOS)
 - Treasury
2. All prices stated in US\$.

Addendum to Table 4: Rate Card

No.	Staffing Category	Firm Fixed Hourly Rate	Est. Hours (5 year total)	Extended Price (hourly rate X estimated hours)
	Project Manager	\$ 181.00	500	\$ 90,500.00
	Systems Architect	\$ 145.00	500	\$ 72,500.00
	Business Analyst	\$ 138.00	7,500	\$ 1,035,000.00
	Siebel Lead	\$ 130.00	5,000	\$ 650,000.00
	Siebel Developer	\$ 113.00	16,000	\$ 1,808,000.00
	Computer Telephony Specialist	\$ 167.00	5,500	\$ 918,500.00
	Genesys Specialist	\$ 267.00	5,000	\$ 1,335,000.00
	IVR Developer	\$ 113.00	14,000	\$ 1,582,000.00
	NICE Analyst	\$ 113.00	5,000	\$ 565,000.00
	Tester	\$ 152.00	5,000	\$ 760,000.00
	Other (Please specify) TBD	\$ 150.00	19,564.56	\$ 2,934,684.60
	Total Major Enhancement Cost			\$ 11,751,184.60

Notes:

- Hourly rates quoted are firm, fixed rates for the duration of the contract. Travel and other expenses will not be reimbursed. "Estimated Hours" and "Extended Price" are non-binding and will be used at the State's discretion to determine best value to the State. The State will utilize the fully loaded hourly rates detailed above for each staff that will be used as fixed rates for responses to separate statements of work.
- The State intends to establish funding for up to the estimated hours. Actual funding for enhancements will occur on a yearly basis, and there is no guarantee as to the level of funding, if any, available to the project. On 4/3/2012, the State of Michigan Administrative Board (Ad Board) approved \$11,751,184.60 for Major Enhancements. Of that amount, \$2,000,000.00 was placed on the original contract's rate card, leaving \$9,751,184.60 that could be added to the contract in the future. On 4/19/2013, pursuant to Change Notice # 1, an additional \$2,000,000.00 was placed on the contract's rate card, leaving \$7,751,184.60 that could be added to the contract in the future. At this time, pursuant to Change Notice # 2, an additional \$5,000,000.00 is placed on the contract's rate card, leaving \$2,751,184.60 that may be added to the contract in the future via a future Change Notice. All future Statements of Work (SOW's) related to Major Enhancements shall be memorialized in a corresponding future Contract Change Notice, regardless of whether the corresponding funding supporting such SOW(s) is being added contemporaneously to the contract or has previously been added to the contract.
- The parties agree that the Services/Deliverables to be rendered by Contractor using the future enhancements/rate card on this Contract will be defined and described in detail in separate Statements of Work. Contractor shall not be obliged or authorized to commence any work to implement a Statement of Work until authorized via a purchase order issued against this Contract.
- Other skills/roles suggested by the bidder should also show the hourly rate. The bidder can assume 0 hours for these skills for the purpose of computation.

STATE OF MICHIGAN
 DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET
 PROCUREMENT
 P.O. BOX 30026, LANSING, MI 48909
 OR
 530 W. ALLEGAN, LANSING, MI 48933

April 19, 2013

CHANGE NOTICE NO. 1
 to
CONTRACT NO. 071B2200168
 between
THE STATE OF MICHIGAN
 and

NAME & ADDRESS OF CONTRACTOR:	PRIMARY CONTACT	EMAIL
Accenture LLP 3000 Town Center, Suite 2400 South Field, MI 48075	Jamie Walker	Jamie.D.Walker@accenture.com
	TELEPHONE	CONTRACTOR #, MAIL CODE
	(517) 241-1640	

STATE CONTACTS	AGENCY	NAME	PHONE	EMAIL
CONTRACT COMPLIANCE INSPECTOR:	DTMB	Mark Lawrence	(517) 241-1640	lawrencem1@michigan.gov
BUYER:	DTMB	Steve Motz	(517) 241-3215	motzs@michigan.gov

CONTRACT SUMMARY:			
DESCRIPTION: Contact Center Support			
INITIAL EFFECTIVE DATE	INITIAL EXPIRATION DATE	INITIAL OPTIONS INCLUDED	CURRENT EXPIRATION DATE
May 1, 2002	April 30, 2017	5, One-Year	April 30, 2017
PAYMENT TERMS	F.O.B	SHIPPED	SHIPPED FROM
N/A	N/A	N/A	N/A
ALTERNATE PAYMENT OPTIONS:			AVAILABLE TO MiDEAL PARTICIPANTS
<input type="checkbox"/> P-card <input type="checkbox"/> Direct Voucher (DV) <input type="checkbox"/> Other			<input type="checkbox"/> YES <input type="checkbox"/> NO
MINIMUM DELIVERY REQUIREMENTS: N/A			

DESCRIPTION OF CHANGE NOTICE:		
OPTION EXERCISED: <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES	IF YES, EFFECTIVE DATE OF CHANGE: N/A	NEW EXPIRATION DATE: N/A
Effective immediately, the Estimated Revised Aggregate Contract Value is INCREASED by \$2,000,000.00 to allow for additional funding for Major Enhancements as outlined in Table 4 of Attachment 3. This reduces the remaining balance of funding available in Table 4 of Attachment 3 for Major Enhancements to \$7,751,184.60. All other pricing, terms and conditions remain the same. Per Original Contract Ad Board Approval on 4/3/2012.		
VALUE/COST OF CHANGE NOTICE:	\$2,000,000.00	
ESTIMATED REVISED AGGREGATE CONTRACT VALUE:	\$14,248,815.40	

STATE OF MICHIGAN
DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET
PROCUREMENT
P.O. BOX 30026, LANSING, MI 48909
 OR
530 W. ALLEGAN, LANSING, MI 48933

NOTICE
OF
CONTRACT NO. 071B2200168
between
THE STATE OF MICHIGAN
and

Accenture LLP 3000 Town Center Suite 2400 South Field, MI 48075 Email: Jamie.D.Walker@accenture.com	TELEPHONE (517) 862-0192 Jamie Walker CONTRACTOR NUMBER/MAIL CODE BUYER/CA (517) 241-1640 Mark Lawrence
Contract Compliance Inspector: Contact Center Support	
CONTRACT PERIOD: 5 yrs. + 5 one-year options From: May 1, 2012 To: April 30, 2017	
TERMS N/A	SHIPMENT N/A
F.O.B. N/A	SHIPPED FROM N/A
ALTERNATE PAYMENT OPTIONS: <input type="checkbox"/> P-card <input type="checkbox"/> Direct Voucher (DV) <input type="checkbox"/> Other	
MINIMUM DELIVERY REQUIREMENTS <p style="text-align: center;">N/A</p>	
MISCELLANEOUS INFORMATION: The terms and conditions of this Contract are those of ITB #071I2200001, this Contract Agreement and the vendor's quote dated March 27, 2012. In the event of any conflicts between the specifications, and terms and conditions, indicated by the State and those indicated by the vendor, those of the State take precedence.	
Estimated Contract Value: \$12,248,815.40	

THIS IS NOT AN ORDER: This Contract Agreement is awarded on the basis of our inquiry bearing the ITB No. 071I2200001.

All terms and conditions of the invitation to bid are made a part hereof.

STATE OF MICHIGAN
DEPARTMENT OF TECHNOLOGY, MANAGEMENT AND BUDGET
PROCUREMENT
P.O. BOX 30026, LANSING, MI 48909
 OR
530 W. ALLEGAN, LANSING, MI 48933

CONTRACT NO. 071B2200168
between
THE STATE OF MICHIGAN
and

Accenture LLP 3000 Town Center Suite 2400 South Field, MI 48075 Email: Jamie.D.Walker@accenture.com	TELEPHONE (517) 862-0192 Jamie Walker CONTRACTOR NUMBER/MAIL CODE BUYER/CA (517) 241-1640 Mark Lawrence
Contract Compliance Inspector:	
Contact Center Support	
CONTRACT PERIOD: 5 yrs. + 5 one-year options From: May 1, 2012 To: April 30, 2017	
TERMS <p style="text-align: center;">N/A</p>	SHIPMENT <p style="text-align: center;">N/A</p>
F.O.B. <p style="text-align: center;">N/A</p>	SHIPPED FROM <p style="text-align: center;">N/A</p>
ALTERNATE PAYMENT OPTIONS: <input type="checkbox"/> P-card <input type="checkbox"/> Direct Voucher (DV) <input type="checkbox"/> Other	
MINIMUM DELIVERY REQUIREMENTS <p style="text-align: center;">N/A</p>	
MISCELLANEOUS INFORMATION: The terms and conditions of this Contract are those of ITB #071I2200001, this Contract Agreement and the vendor's quote dated March 27, 2012. In the event of any conflicts between the specifications, and terms and conditions, indicated by the State and those indicated by the vendor, those of the State take precedence.	
Estimated Contract Value: \$12,248,815.40	

THIS IS NOT AN ORDER: This Contract Agreement is awarded on the basis of our inquiry bearing the ITB No. 071I2200001.

All terms and conditions of the invitation to bid are made a part hereof.

FOR THE CONTRACTOR:

FOR THE STATE:

 Firm Name

 Authorized Agent Signature

 Authorized Agent (Print or Type)

 Date

 Signature
 Jeff Brownlee, Chief Procurement Officer

 Name/Title
 DTMB Procurement

 Division

 Date



STATE OF MICHIGAN
Department of Technology, Management and Budget
Purchasing Operations

Contract # 071B2200168
Contact Center Support

Buyer Name: Mark Lawrence
Telephone Number: 517-241-1640
E-Mail Address: LawrenceM1@michigan.gov



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Article 1 – Statement of Work (SOW)

1.000 Project Identification

1.001 Project Request

The purpose of this Contract is to obtain a firm to provide shared IT services to maintain and enhance eight (and possibly more) contact centers at multiple agencies of State of Michigan. The standardized contact center technology at State of Michigan includes Siebel CRM, Oracle RDBMS, Genesys IVR, NICE, FileNet, Avaya Communication Managers PBX(s) and Avaya Application Enablement Services (AES) servers.

1.002 Background

The following background information is provided as baseline and historical reference information only.

The Michigan Department of Information Technology (MDIT) was created in October 2001 by Executive Order No. 2001-3 to achieve a unified and more cost-effective approach for managing information technology among all Executive Branch agencies. MDIT was recently merged with Department of Management and Budget and was named Department of Technology, Management and Budget (DTMB). As a state agency, DTMB is empowered to enact the enterprise use of common information technologies and provide consistent professional management of the state's Information Technology (IT) resources.

The vision, mission and goals for DTMB are -

Vision: A transformed Michigan—advanced through collaborative, transparent and results-focused services to government, citizens and business.

Mission: Providing leadership and setting the pace for customer service, resource optimization, and the innovative use of information and technology.

Goals:

1. **Customer Service Excellence:** Provide quality, cost-effective business services through a fully-integrated, information, communications and technology-infused service organization.
2. **Operational Efficiency:** Deliver value, efficiency and a “greener” approach across all lines of service, leveraging a modernized state infrastructure.
3. **Accountability & Performance:** Drive better decision-making and organizational effectiveness through open and consistent use of performance measures.
4. **Expertise & Commitment:** Attract and retain a highly-skilled and engaged workforce that is equipped with appropriate tools and training opportunities in a supportive environment.
5. **Shared Services:** Enable cost savings and better government through shared solutions and cross-boundary partnerships.
6. **Transformation & Economic Competitiveness:** Transform government service and Michigan's economic vitality through innovation and the depth, breadth and strength of DTMB.

DTMB has the following objectives for this contract:

1. To provide effective support and enhancement to the client agency contact centers.
2. To minimize the total cost of ownership of the customer contact centers.
3. To leverage the same hardware architecture across all contact centers.
4. To keep up to date with new releases of software from the COTS providers.
5. To develop DTMB staff as full partners with the Contractor staff.
6. To minimize the use of custom code and to migrate to “out of the box” functionality.
7. To provide new technology that will allow efficiency and effectiveness gains.
8. To use the same software configurations across all contact centers for the same functions.
9. To provide an entry-level Siebel configuration for new agencies with minimal requirements.
10. To assist DTMB with opportunities to leverage solutions for cross-boundary partnerships.
11. To assist DTMB in helping customer contact centers to enhance/improve their customer service.



Over the years, DTMB has established a shared IT support service center, known as Michigan Enterprise Contact Center (MiECC), to provide centralized support to the State of Michigan (SOM) contact centers across multiple agencies. The MiECC goals are -

- ◆ Unified, cost-effective and efficient contact center support services for SOM.
- ◆ Easy access of Government services to Michigan citizens.
- ◆ Excellence in customer service.

Today, MiECC supports contact centers at eight (8) agencies -

- ◆ Civil Service Commission (MCSC)
- ◆ DTMB-Client Service Center (CSC)
- ◆ DTMB-Office of Retirement Services (ORS)
- ◆ Environmental Quality (DEQ)
- ◆ Human Services (DHS)
- ◆ Licensing and Regulatory Affairs(LARA) – Bureau of Health Professions(BHP)
- ◆ State (MDOS)
- ◆ Treasury

All of the above contact centers serve the citizens of Michigan except Civil Service and DTMB-CSC contact centers which primarily support the State's employee population. The State also has a few contact centers outside of the MiECC, which in the future may require support from the MiECC and this contract.

The support services currently offered by MiECC are -

- ◆ Multi-channel support:
 - Contact center CRM
 - Interactive Voice Response (IVR)
 - Computer Telephony Integration (CTI)
 - Skills Based Routing
 - Reporting service
 - Workforce Management
 - Web self service
 - Email service
 - Web knowledge management
 - Integration with Document Management
 - Quality Assurance:
 - Call Recording
 - Call Monitoring

MiECC is currently working on implementing Virtual Hold Technology for one of its contact centers and the service will soon be offered to other contact centers.

MiECC has identified the following standard products currently used to provide contact center functionality:

- Telephone Switch – Avaya and Cisco
- CRM Software - Siebel
- Computer Telephony Integration – Genesys
- Call Monitoring and Recording – NICE
- Interactive Voice Response (IVR) – Genesys Voice Portal
- Document Management – FileNet
- IVR Monitoring - Empirix

Most of the contact centers (MCSC, LARA-BHP, DEQ, DTMB-ORS, MDOS, Treasury) have the Siebel product as their core CRM software. The Siebel application at MCSC is out of the box and the infrastructure is currently shared with LARA-BHP and DEQ. Other Siebel solutions were initially implemented as stand-alone customized versions, each separate from the other contact centers and using different integrators.



MiECC has also established a shared enterprise database architecture. The Oracle servers are shared among six agencies - MCSC, LARA-BHP, DEQ, DTMB-CSC (Genesys), MDOS and Treasury. There are two production servers (primary and secondary node) and two test servers. MCSC, LARA-BHP and DEQ have one shared Oracle instance.

DTMB-CSC is currently undergoing a project to implement a Genesys 8.x IVR solution. This solution uses SIP technology, has built-in redundancy and uses all virtual servers. MiECC envisions the architecture to be shared among other agencies and to be used as an enterprise Genesys platform.

MiECC has established an enterprise NICE infrastructure for call recording and monitoring. The enterprise NICE environment is currently shared between MCSC, DTMB-ORS and Treasury.

Number of customer contacts for the Calendar Year 2010:

(The shaded areas are not currently supported by MiECC)

	IVR Self service	Agent Calls	Web self service	Email service	Web / eService request	Paper Channel – Inbound	Paper Channel - Outbound
Civil Service Commission	NA	115,232	NA	5,417	NA	40,148	15,000
DTMB-Client Service Center	UPCOMING	190,000	NA	75,000	300	33,900	NA
DTMB-Office of Retirement Services	NA (part year)	285,168	146,062	5,000	NA	145,132	343,700
Environmental Quality	NA	19,000	NA	NA	NA	NA	NA
Human Services	705,047	NA	1,701,159	NA	NA	NA	NA
LARA-Bureau of Health Professions	NA (New in 2011)	125,000	NA	NA	NA	NA	NA
State	1,465,993	1,191,224	NA	31,817	66,791	>100	18,209
Treasury	802,695	349,972	715,688	2,741	21,109	307,735	993,976

For Agency Background Information, see Attachment 8.

1.100 Scope of Work and Deliverables

1.101 In Scope

The contractor shall provide a team to support and enhance the identified eight contact centers. The contractor shall provide the following services:

1. Knowledge transfer from existing contractor.
2. Base Support
3. Major Enhancements (including new functionality or new contact centers)



4. Optional: Software Licenses

The State reserves the right to add contact centers, under this Contract through Contract amendment.

The scope of the agreement will consist of support of the following software components:

- i. Siebel
- ii. Siebel interfaces
- iii. Scheduled/Ad-hoc reports (SQL).
- iv. Batch (from Oracle legacy extract to Siebel Base)
- v. Genesys (CIM Platform, GVP, CTI - Gplus Adapter, WFM, Genesys reporting, Interaction Workspace etc.)
- vi. NUANCE Speech technologies
- vii. FileNet Capture, FileNet CRM Integration Suite (CIS)
- viii. FileNet Inbound Document Linker (IDL), VB script
- ix. New implementation of existing in scope technologies that are implemented under this Contract which shall be agreed upon through SOW.
- x. Virtual Hold Technology , only for DTMB/ORS (other Agency VHT deployment would be considered Major Enhancement, and the base cost for that agency may increase)
- xi. NICE recording and monitoring platforms, only for DTMB/ORS
- xii. Integration with peripheral software, such as SYMON and Empirix
- xiii. New technologies that are implemented under this Contract

Treasury has a customized Visual Basic application for scanning/indexing operation that augments with FileNet Capture and IDL (FileNet Inbound Document Linker). State staff does not maintain anything relating to IDL, VB executable, FileNet Capture configurations and the FileNet CIS products at Treasury. The contractor shall be responsible for this work at Treasury and for any other requesting agency in the future, which shall be agreed upon through a SOW.

**Optional:**

The State reserves the right to purchase software licenses, training, services, maintenance and support used at the contact centers. Examples of these software are - Genesys, NICE, NUANCE, Virtual Hold and Empirix. These additional purchases will require an amendment to the Contract and may require approval from the State Administrative Board.

A more detailed description of the software, services (work) and deliverables is provided in Article 1, Section 1.104, Work and Deliverables.

1.102 Out Of Scope

1. The business operation of the contact centers.
2. The actual operation of the program management office.
3. Purchasing equipment.
4. Infrastructure installation.
5. Purchasing software.
6. Providing customer service representative staff.
7. Providing contact center agent software administration (e.g., new agent setup, etc.) (the Agencies shall be responsible for this with Contractor available to assist on temporary basis upon request and staff availability).
8. Providing Nice recording and monitoring platforms administration (DTMB shall be responsible for this with Contractor available to assist on temporary basis upon request and staff availability).

The following are excluded from the scope of technical support -

- i. Hardware server support including the operating system
- ii. Desktop support
- iii. Avaya Switch
- iv. Data and Voice Connections
- v. Oracle/SQL Server Database Administration
- vi. Websphere
- vii. Xenos
- viii. Avaya vectors
- ix. T1 Trunk lines
- x. Cisco Equipment
- xi. FileNet Image Services/P8

1.103 Environment

The links below provide information on the State's Enterprise information technology (IT) policies, standards and procedures which includes security policy and procedures, IT strategic plan, eMichigan web development and the State Unified Information Technology Environment (SUITE).

Contractors are advised that the State has methods, policies, standards and procedures that have been developed over the years. Contractors are expected to provide proposals that conform to State IT policies and standards. All services and products provided as a result of this CONTRACT must comply with all applicable State IT policies and standards.

Enterprise IT Policies, Standards and Procedures:

<http://www.michigan.gov/dmb/0,1607,7-150-56355---,00.html>

All software and hardware items provided by the Contractor must run on and be compatible with the DTMB Standard Information Technology Environment. Additionally, the State must be able to maintain software and other items produced as the result of the Contract. Therefore, non-standard development tools may not be used unless approved by DTMB. The Contractor must request, in writing, approval to use non-standard software development tools, providing justification for the requested change and all costs associated with any change. The DTMB Project Manager must approve any tools, in writing, before use on any information technology project.



It is recognized that technology changes rapidly. The Contractor may request, in writing, a change in the standard environment, providing justification for the requested change and all costs associated with any change. The State’s Project Manager must approve any changes, in writing, before work may proceed based on the changed environment.

Enterprise IT Security Policy and Procedures:

<http://www.michigan.gov/dmb/0,1607,7-150-56355-107739--,00.html>

The State’s security environment includes:

- DTMB Single Login.
- DTMB provided SQL security database.
- Secured Socket Layers.
- SecurID (State Security Standard for external network access and high risk Web systems)

DTMB requires that its single - login security environment be used for all new client-server software development. Where software is being converted from an existing package, or a client-server application is being purchased, the security mechanism must be approved in writing by the State’s Project Manager and DTMB Office of Enterprise Security.

Please see Appendix K for Department of Treasury’s additional security requirements.

IT Strategic Plan:

<http://www.michigan.gov/itstrategicplan>

IT eMichigan Web Development Standard Tools:

http://www.michigan.gov/documents/Look_and_Feel_Standards_2006_v3_166408_7.pdf

The State Unified Information Technology Environment (SUITE):

Includes standards for project management methodology (PMM), systems engineering methodology (SEM), and associated forms and templates – must be followed: <http://www.michigan.gov/suite>

Technical Environment

**Michigan Enterprise Contact Center
Technology Overview**

Technology	MCSC	DTMB-CSC	DTMB-ORS	DEQ	DHS	LARA-BHP	MDOS	Treasury
CRM								
Siebel CRM Base 7.8	Y		Y	Y		Y	Y	Y
Siebel eServices							Y	Y
Siebel Tools	Y		Y	Y		Y	Y	Y
Siebel Smartsript	Y		Y	Y		Y	Y	Y
Siebel Reports							Y	Y
Siebel Public Sector option							Y	
PBX Switch								
Avaya PBX 3.1.x	Y	Y	Y	Y	Y	Y	Y	Y
AES 4.2	Y	Y	Y		Y	Y	Y	Y



IVR								
GVP 7.6	Y		Y		Y	Y	Y	Y
GVP 8.x		Y						
CTI								
Genesys Gplus Adapter 7.x	Y		Y			Y	Y	Y
Intelligent Call Routing								
Genesys skills based routing		Y	Y				Y	Y
Reporting								
Genesys VAR 7.6		Y	Y		Y	Y	Y	Y
Genesys CCPulse 7.5		Y	Y			Y	Y	Y
Work Force Management								
Genesys WFM 7.6.1			Y					
Inbound Call Load Testing								
Empirix "Hammer"					Y			Y
Voice Monitoring								
Empirix voice watch					Y			Y
Call Monitoring and Recording								
NICE Perform 3.1	Y		Y			Y		Y
Document Management								
FileNet 4.x	Y		Y			Y	Y	Y
FileNet Connector to Siebel								Y

Note: FileNet is used at many agencies for document management but at this point, only Treasury has FileNet integration with Siebel and a customized VB application for scanning/indexing which are supported by the contractor.

For Agency Environment Information, see Attachment 9.

•

System/Software	What does it do?
Avaya	- Avaya provides the telephone "switch". - Automatic Call Distribution (ACD) system - distributes calls from the switch to the appropriate path based on customer selection of options. Provides basic information on calls at various points in the call flow process.



	<ul style="list-style-type: none"> - CentreVu Supervisor provides limited "live" status information to supervisors and historical information for monthly reporting by agent and work units. - Once calls are turned over to Genesys, tracking is via CCPulse. - CMS reporting tool.
FileNet	<p>Serves to image inbound correspondence service requests, which is then "indexed" to the appropriate account and reason for contact in order to be directed to the appropriate team within CRM.</p> <ul style="list-style-type: none"> - IDL – Inbound Document Linker, links inbound correspondence images to Siebel Service Requests. - CIS – CRM Integration Suite, provides connection from Siebel to FileNet for viewing of images.
Genesys	<ul style="list-style-type: none"> - Interactive Voice Response (IVR) system. Automated call handling system that provides account specific information (after caller verifies account information) related to refund status, estimated payments, etc. - Provides the Computer Telephony Integration (CTI) functionality within CRM for screen pops (account related to the call appears on the CSR's screen) - CCPulse provides "live" status and historical statistical information on calls routed to agents. Reporting functionality has been developed and is being developed further. Should replace CentrVu supervisor in the future. - VAR - Reporting system for IVR contacts; provides information based on tax type, call path and resolution (either call ended in IVR or transferred to CSR).
NICE	<p>Quality assurance software that works in conjunction with Genesys CTI and CRM to provide random recording of calls (and could be email responses) for evaluation and training purposes. Also serves as "on-demand" recording for CSR initiated call recording for irate or threatening calls. The system also provides a variety of reports related to the evaluation of calls and correspondence/web SR's related to CSR, evaluator and group performance</p>
Siebel/CRM	<p>Customer Relationship Management System - serves as the basis for call, email (general questions), web service request (account specific info) and correspondence handling. System is updated via interfaces with existing/legacy systems.</p>
Tidal/Opalis	<p>Scheduling software used to move data updates from legacy systems (and SAP) into CRM. Data must be in CRM in order for customer access in self-service applications such as the IVR and web self-service actions.</p>
Xenos	<p>Interface for outbound correspondence from legacy systems that creates images for loading to FileNet, so that images are available for viewing in Siebel.</p>



Enterprise NICE environment:

DTMB has established a shared enterprise NICE environment. NICE PERFORM 3.1 Application Suite is used as the digital multimedia monitoring and recording solution. Currently the solution is implemented at MCSC, DTMB-ORS and Treasury. The hardware includes a NICE Logger for Voice Storage; Screen Capture and Logger for navigation recording; and the NICE Call Logging System (CLS) for storage of call details. The software components include NICE Universe, Scheduler, Forms Designer and List Editor, Evaluator, Monitor, Web Reporter, and Record on Demand.

1.104 Work and Deliverable

I. Services and Deliverables To Be Provided

A. Base Support

The Contractor shall provide the following, as part of the Base Support cost:

1. Break-fixes and troubleshooting,
2. Product/software upgrades and patches,
3. Application/Technical Monitoring,
4. Minor Enhancements
 - a. As agreed upon through Contact Center Strategy, Agency Enhancement Plans, and monthly Operational meetings for in scope software supported
 - b. Up to 200 total hours annually of IVR enhancements
5. Research and analysis,
6. Testing,
7. Assist in infrastructure planning/upgrades,
8. Training, and
9. Contact Center Strategy.

The state shall buy annual maintenance from the software vendors. The Contractor shall be responsible for contacting the software vendors for problem resolution or research for software under valid maintenance contract.

Minor Enhancements are less than 200 hours and must follow SEM Maintenance process. Product upgrades may require more than 200 hours but considered as part of Base Support.

For product upgrades or application enhancements, the Contractor shall provide the State of Michigan with a detailed project plan (technical work plan) before the Contractor starts working.

a) Requirements for Base Support:

a. Break-fixes and troubleshooting

The Contractor shall work with DTMB and agencies to help reduce the number of high priority tickets resulting in more stable, high uptime production environments. Contractor shall meet service level agreements by leveraging the State of Michigan’s Remedy system as the point of entry and status system of record for support issues. The Contractor shall also utilize the DTMB Service Management Center in monitoring State wide incidents and changes. For issues that require in scope software support, the Contractor shall continue to contact the vendors on behalf of the State of Michigan annual support contracts to further triage the issue and execute documented request for change (RFC) procedures that includes obtaining required approvals for software change requests. For issues that require out of scope software, infrastructure and telecommunications support (e.g., server reboots, database administration, firewalls, etc.), DTMB shall execute documented request for change (RFC) procedures that include obtaining required approvals for infrastructure change requests. If the issue cannot be resolved through the normal

Break/Fix

The Break/Fix work type is used if there has been an interruption of a critical service to an agency. An action and a solution are required, even if the solution is temporary. It is required to investigate the problem to determine the root cause. The permanent solution to the problem may result in the initiation of another work type.



support channels, the Contractor shall engage the vendor through internal relationship channels to escalate the issues appropriately within the organizations.

Break/fix support shall consist of:

- “Lights On” support/Break/fix support for production applications
- Remedy system problem management
- Production Troubleshooting
- SLA’s reported and measured

Depending on the nature of the issue break/fix support may involve many different resources for issue resolution and follow-up. The Contractor shall involve necessary skilled resources to resolve break/fix issues.

All production support issues shall be initiated with a Remedy help desk ticket to the support team. The Contractor shall use Remedy for break/fix issue resolution.

The State shall provide vendor support login access (Siebel, Genesys,) as provided by State annual in scope software maintenance agreements and the access to create trouble tickets with these vendors to Contractor Base Support staff.

b. Product/software upgrades and patches

The Contractor shall provide the ongoing in scope software upgrades as part of the Base Support team following the State of Michigan Systems Engineering Methodology (SEM) processes. The Contractor Base Support team shall work in conjunction with the agency and DTMB to provide software upgrade and patching services that helps mitigate the risk of application upgrade failure. Contractor also shall work with the software vendors to validate the upgrade path, product of end life, compatibility, review release notes and important configuration details during the SEM processes. Often times, the current version of software products have bugs that are still being reported and fixed. Contractor shall be an agency advocate for aligning the product upgrades with commercially stable products.

c. Application/Technical Monitoring

The Contractor shall provide resources familiar with the agencies environment and software configuration, be available and ready to react to proactive alarms that are configured in the system. Contractor shall leverage proactive email, SMS and live monitoring to complement the existing skilled team to reduce the unplanned issues to these critical systems.

Monitoring the applications also involves monitoring the underlying infrastructure, servers, storage, general connectivity, and database. Contractor shall work with the DTMB Infrastructure teams to leverage the various enterprise monitoring tools available for the agencies.

Contractor shall improve the monitoring of applications by working with DTMB and call center agencies to identify monitoring services to add such as Vantage monitoring, proactive alerts, Empirix monitoring, disc (memory and CPU) monitoring, etc. as deemed necessary.

Product upgrades and patches are a part of Base Support and the Contractor shall coordinate and plan with the agencies and DTMB using the State of Michigan SEM process.

There are several anticipated major upgrades as part of the contract. The Contractor shall coordinate and plan with the agencies and DTMB the following major upgrades as part of the annual Contact Center Strategy and Agency Enhancement Plan update processes:

- Siebel 7.8 to Siebel 8.x
- Genesys 7.6 to Genesys 8.x
- Genesys CIM Platform from 7.6 to Siebel 8.x
- Oracle 10G to Oracle 11g
- FileNet Image Services 4.0 to FileNet P8 (except as described below)
- PBX upgrades



- NICE for DTMB/ORS only
- Microsoft Server and Desktop upgrades and patches

For the FileNet patch Upgrade (from 4 to P8) from Image Services, the Contractor shall work with the FileNet vendor to determine compatibility and Upgrade path for the Treasury/MGA Scanning Form, FileNet Indexing Form, and FileNet/Siebel Inbound Document Linker. Depending on outcome of analysis, the Contractor shall finalize scope and resources needed to provide comparable functionality as currently exists.

If an Upgrade path exists, services shall be considered in scope of Base Support. If an Upgrade path does not exist and/or different software and/or skill sets are needed, a mutually agreed upon SOW shall be negotiated and issued so that comparable functionality can be provided with the FileNet P8 Upgrade as exists today.

In the event that a software vendor does not support a product Upgrade path or a product Upgrade requires integration with new software solutions not in existing configuration with product suite, the Contractor and State will mutually agree upon course of action which may include a SOW.

d. Minor Enhancements

As part of Base Support, the Contractor shall provide Minor Enhancement services for in scope software.

Contractor shall work with the agency and DTMB specifically during annual project planning cycle and regular monthly agency operational meetings to collect the Minor Enhancement requests. Contractor shall use the agency tool of preference i.e. Serena and/or the State of Michigan Remedy system to record the Minor Enhancement requests. Minor Enhancements shall be classified as work estimated to be less than 200 hours in effort and shall follow the State of Michigan Maintenance methodology. Depending on the scope, complexity, State and Contractor resource availability, and State desired implementation schedule of the Minor Enhancement Contractor shall work with the DTMB program manager to determine whether a SOW shall be executed and a project manager shall be assigned. Contractor shall also work with the DTMB Program Manager to understand any schedule and resource constraints among the agency, DTMB, Contractor teams to schedule and complete the Minor Enhancement requests. Table 1 indicates the high level responsibilities for each of the participating teams.

	DTMB	Customer Agency	Contractor
Communicates Enhancement Requests	<input type="checkbox"/>	<input type="checkbox"/>	
Agency Request Tool updated	<input type="checkbox"/>	<input type="checkbox"/>	
Create Work/Delivery Estimates	<input type="checkbox"/>		<input type="checkbox"/>
Prioritization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approval	<input type="checkbox"/>	<input type="checkbox"/>	
SUITE Processes Determined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Begins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 1. Minor Enhancement initiation roles

Minor Enhancements shall be included as part of Base Support and a Minor Enhancement shall be less than 200 hours of estimated effort and shall be coordinated and planned with the agencies and DTMB using the State of Michigan SEM process. See **Error! Reference source not found.**

Project Size (Effort)	Methodology To Use
0 – 200 hours	System Maintenance process
201 – 1000 hours	System Maintenance process
201 – 1000 hours	SEM Express (enhancements)
1001 hours or larger	SEM

Table 2. Project Size



The Contractor shall work with the DTMB Program Manager to determine whether DTMB project manager shall be assigned by the State.



e. Research and analysis

The Contractor Base Support team shall provide research and analysis services using Contractor internal knowledge stores and vendor alliances. Upon agreement through a SOW, the Contractor may bring industry expertise (e.g., subject matter advisors) to provide global perspective on the challenges facing the State of Michigan Enterprise Call Center.

f. Testing

Contractor shall provide component, system, and integration testing services for the in scope software. Contractor shall leverage the State of Michigan's SEM methodology as it relates to the testing phases of a Product Upgrade, Patch, and Minor/Major Enhancement.

State staff is an integral part of the testing process. State staff shall plan, execute, and validate User Acceptance Test scripts. This provides on-the-job experience that helps "train" the eventual users of the system Contractor will use the existing defect tracking tool or an equivalent State enterprise approved test defect tracking tool, to expedite test defect resolution.

g. Assist in infrastructure planning/upgrades

As part of Base Support, the Contractor shall assist in infrastructure planning and upgrade projects as related to the in scope contact center software.

During infrastructure planning activities, Contractor shall look to reduce the physical server footprint and move to virtual servers where appropriate. When appropriate, the Contractor shall also continue to recommend leveraging available server and application capacities in the Enterprise environment.

h. Training

The Contractor shall work with the State of Michigan when training is needed for a project, Upgrade or Minor Enhancement. The Contractor shall train agency identified trainers. In turn, trained State trainers shall provide training for State contact center agents.

For formal classroom\online technical software package training, the Contractor recommends attending the software vendors "University" style course and shall assist in recommending the appropriate courses.

Contractor shall provide system administration training for designated State call center agent administrators as part of the Base Support services. The State shall provide day-to-day call center agent administrators who will maintain call center agent set-up for in scope contact center software.

The Contractor shall provide training as described below:

- Train the trainer
- Technical training for State personnel who will be working with the Contractor to configure the applications including establishing databases and interfaces, data conversion, customization, and upgrading the customized software.
- System administration training for State personnel who will be responsible for ongoing maintenance and administration of the system, including security.
- Mentoring State-assigned DTMB staff enabling them to become full-valued members of this support team.

The Contractor shall provide training in a variety of formats for product installation, use, and administration for a variety of levels (e.g. basic, advanced, refresher, etc.) based upon approach agreed upon with DTMB and agencies documented in the SOW, release plan or project plan.

All training manuals, training plans and other documentation provided shall become the property of the State.



For Base Support in Scope services, the Contractor shall provide training services as part of Base Support services and hence, the cost of training shall be included in the Base Support cost. For SOW services, the Contractor shall estimate and provide training services as agreed upon in SOW.

a) The Contractor shall provide all requirements listed in this section, and provide detail regarding how they will accomplish these requirements

Train the Trainer

The Contractor shall provide “train the trainer” services as required for major SOW project implementations and upgrades, which allows users to focus on content and processes applicable to their job function. Based on training specifications set forth in a SOW, release plan, or project plan, Contractor may provide the following types of “train the trainer”:

- Scenario based training that increases skill development through realistic learn-by-doing relevant job-related functions.
- Class room training with instructor and training manuals.
- Audio and video clips to provide real life simulations that are readily available for reuse with end-users.
- The Contractor Team shall solicit support and review from the Agency business analysts, which facilitates understanding of the purpose and mechanics of the system skills they are teaching, and enables a focused job-specific training session or module.

Technical Training for State Personnel Who Will Be Working with the Services Contractor to Configure the Applications including Establishing Databases and Interfaces, Data Conversion, Customization, and Upgrading the Customized Software

The Contractor shall collaborate with DTMB and Agencies to train staff. This enables high performance and reliable delivery on State-assumed MiECC functions. Contractor shall provide on-the-job training for the State technical personnel who will be working with them to configure the applications. On-the-job training shall consist of State assigned resources shadowing Contractor staff and working on Remedy support tickets.

System Administration Training for State Personnel Who Will be Responsible for Ongoing Maintenance and Administration of the System, Including Security

The Contractor shall respond to training requests, direct support staff to train State of Michigan personnel, and work with staff in on-the-job shadowing roles as determined in the Contact Center Strategy, release plan, project plan, or SOW. The Contractor shall support the approved training approach with Base Support team.

Mentoring State-Assigned DTMB Staff Enabling Them to Become Full-Valued Members of this Support Team

The Contractor shall provide ideas to proactively assist the State of Michigan in becoming more self-sufficient and improve maintenance efficiency. The Contractor shall use job shadowing and mentoring to help DTMB team members develop technical support skills.

The Contractor shall train new call center agencies that join the MiECC supported agencies through a SOW.

Upgrades and New Versions to the System that Affect End-User Functionality include Training at No Additional Cost (e.g. Classroom or Online Training, Training Flier, Release Features, etc.)/ The State Anticipates that the Base Support Team Shall Provide These Trainings and Hence, the Cost of These Trainings Shall Be Included in the Base Support Cost

The Contractor shall provide training for upgrades and enhancements that change user system functionality as part of Base Support services.

Training is Provided in a Variety of Formats for Product Installation, Use, and Administration for a Variety of Levels (e.g. Basic, Advanced, Refresher, etc.) / All Training Manuals, Training Plans and Other Documentation Provided Become the Property of the State

The Contractor shall provide training as agreed upon in a SOW, Call Center Strategy, or Agency Enhancement Plan.



The Contractor’s training approach shall consist of the following methods:

- “On-the-job” activities (shadowing) – The Contractor shall pair a State of Michigan resource with a Contractor resource to “learn-by-doing”. State resources shall make time to observe and to do while the Contractor resource looks on and provides guidance and feedback.
- Formal Training Classes – The Contractor shall provide classroom/online Technical User training sessions conducted by a skilled individual from an application software vendor. This type of training is usually associated with specific software packages or tools. The Contractor recommends attending the software vendors “University” style course and shall assist in recommending appropriate courses. For example Oracle University, Genesys University, and NICE Training.
- Informal Training Sessions –The Contractor shall provide training that takes place on-the-project, in an informal setting that consists of kick-off or orientation meetings, brown-bag discussions, small group sessions, or other agreed upon information method.
- Technical Interchange Meetings – presentations and discussions conducted by a skilled individual from an application software vendor attended by the appropriate technical staff

Training manuals, training plans and other documentation provided by Contractor shall become the property of the State.

i. Contact Center Strategy

The Contractor shall assist the State of Michigan in developing strategy with the contact centers. For strategic planning activities and assessments beyond the Base Support team, Contractor shall work with the agencies and DTMB to mutually agree upon a SOW in order to provide additional strategy planning activities. The State shall schedule Contact Center Strategy meetings using the State’s calendaring system.

As the Contact Center Strategy is updated, the Contractor Base Support team shall leverage the internal organization to assist the State of Michigan in planning for their contact centers.

The Contractor Base Support team shall work with DTMB and Agencies to update their Contact Center Strategy and Customer Agency Enhancement Plan annually as part of Base Support services provided.

- i. The Contractor shall assist DTMB in devising the strategic plan for multi-channel contact center services across multiple agencies.
- ii. The Contractor shall consult/assist about new technologies in the contact center arena and help in evaluating the tools.
- iii. The Contractor shall assist the business managers in creating a contact center strategy and annual customer service enhancement plans.
- iv. It is anticipated that each contact center will revise/ create its contact center strategy and annual customer service enhancement plans once a year. The Contractor shall provide this assistance on annual basis for a limited number of hours as part of the Base Support price for this contract.
- v. Within 90 days of contract start date, the Contractor will work with DTMB to develop a Contact Center Estimation Model, that will be used to help predict future costs for an agency wishing to use this contract to obtain Enterprise Contact Center services.

a) The Contractor indicates how, and with what personnel, this will be accomplished

i. The Contractor must assist DTMB in devising the strategic plan for multi-channel contact center services across multiple agencies

The Contractor shall assist with the creation, updating and maintenance of annual contact center strategy and individual agency enhancement plans for agencies within scope of this agreement. The agencies shall participate in planning and improving the investments made in the system. The Contractor shall commit to development and support of enterprise-wide and individual agency contact center strategic plans.



The Contractor shall assist in devising the strategic plans for the multi-channel contact center services across multiple agencies. The Contractor shall assist with the annual and monthly strategic planning activities.

ii. The Contractor will consult/assist about new technologies in the contact center arena and help in evaluating the tools

The Contractor shall help identify, evaluate and recommend new technologies as they become available in the contact center software arena.

iii. The Contractor will be required to assist the business managers in creating a contact center strategy and annual customer service enhancement plans

The Contractor shall work with the business managers to help develop Call Center Strategy and Agency Enhancement Plans. In addition to agency strategic planning activities, the Contractor recommends continuing use of the monthly operational meetings to brainstorm and devise enhancement and strategic plans to present to management teams.

iv. It is anticipated that each contact center will revise/create its contact center strategy and annual customer service enhancement plans once a year. The Contractor will be expected to provide this assistance on annual basis for a limited number of hours as part of the base price for this contract

In order to meet the organization's objectives, it is critical that the agencies, DTMB and the Contractor work together on annual/ongoing strategic planning activities. The Contractor shall continue to provide assistance in creating and updating the annual strategy and enhancement plans in harmony with executive level strategy.

v. Within 90 days after contract start, the Contractor, working with DTMB, will develop an Enterprise Contact Center Estimating Model.

This model will include applicable estimating factors and criteria that help provides the basis of estimation for determining the level of effort to a) develop a new Contact Center capability for an agency and b) maintain and support a Contact Center on an annual basis.

b) The Contractor indicates the number of annual staff hours (including staff description) that it proposes to make available for this purpose for each contact center

The Contractor shall make the Base Support team key personnel available for these activities. Consistent with prior year levels of involvement, the Contractor annual hours for this purpose shall be up to 80 hours for larger centers (MDOS, ORS Treasury) and up to 40 hours for the smaller contact centers (Civil Service, DEQ, DHS, DTMB-CSC, LARA). The Contractor's technical and functional expertise shall be provided to the state as per these guidelines. Further assistance can be provided as State need is mutually agreed upon. **Error! Reference source not found.** further outlines DTMB and Contractor responsibilities associated with Contact Center Strategy.

Roles	DTMB	Contractor
Program management - Organizing/scheduling/facilitate the annual planning meetings	<input type="checkbox"/>	
Providing input into the planning process	<input type="checkbox"/>	<input type="checkbox"/>
Assist business managers in creating annual plans	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate, consult and assist with new technologies	<input type="checkbox"/>	<input type="checkbox"/>

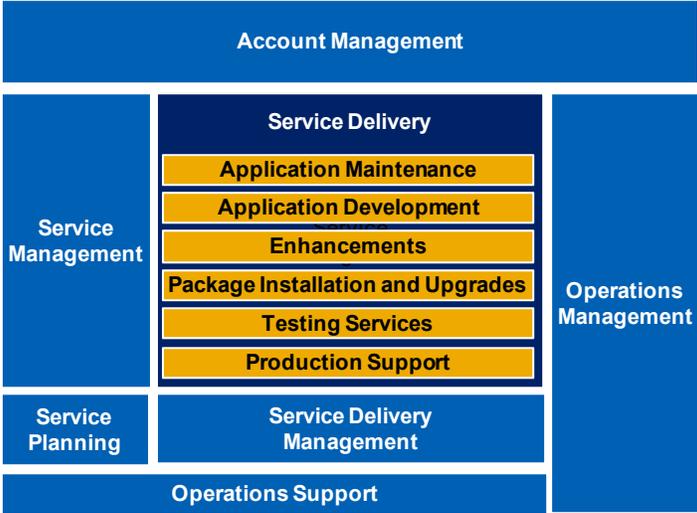
Table 3. Responsibilities in Contact Center Strategy Planning

b) The Contractor's understanding of the terms: Break-fix/troubleshooting, Product upgrades/patches and Minor Enhancements.

The Contractor understands break-fix/troubleshooting, Product upgrades/patches and Minor Enhancements to be a part of a broader concept of Service Delivery within an Application Management portfolio as shown in Figure 1.



ADM for Application Management



MI ECC 11.0027

Figure 1. Accenture Delivery Methods for Application Management

c) How the service delivery will be managed

Contractor shall manage service delivery jointly with the agency and DTMB using State’s established governance processes.

d) How the Base Support team will be staffed.

The Contractor shall staff the Base Support team as described in Table 4. Team Staffing.

Team Staffing

Resource	General Skills
<ul style="list-style-type: none"> Norma Miller Contract Manager Single Point of Contact 	Contract Administration
<ul style="list-style-type: none"> Ryan Sadler** Service Delivery Lead/Project Manager 	Delivery lead (Project Management Professional (PMP), SUITE Contact Center Siebel, Genesys, NICE functional and technical acumen
<ul style="list-style-type: none"> Rajaram Loganathan** System Architect 	Technical Lead Siebel and Genesys SUITE, NICE, Windows Server, Networking, Oracle, Workforce Manager, NICE
<ul style="list-style-type: none"> Pam Numerick** Siebel/Project Manager 	Siebel, SUITE, FileNet
<ul style="list-style-type: none"> Ravi Jaiswal** Genesys Support Specialist 	Genesys Framework, NICE, Genesys IVR
<ul style="list-style-type: none"> Manju Yeddanpalli Siebel Developer 	Siebel, SUITE, Contact Centers, Workflow, reporting
<ul style="list-style-type: none"> Greg Blake Computer Telephony Integration (CTI) Support 	Genesys Framework, SUITE, Genesys IVR, CTI, AES, Avaya
<ul style="list-style-type: none"> Noel Espiritu Technical Application Administrator 	Siebel, Siebel EIM, Oracle, Batch process, workflow

**Denotes Key Personnel Table 4. Team Staffing

With the exception of the Single Point of Contact, the Contractor’s Base Support team shall be dedicated to the MiECC project 100%, full-time of the standard work week (40 hours) taking into consideration holidays and vacation time



In the event a Base Support team member leaves the project, Contractor shall bring on a resource with a skill set comparable to the departing team member.

e) Achieving the SLAs (see Attachment 1)

The Contractor shall continue to staff the team appropriately with the right number of resources and skill sets to achieve the SLAs. Many times issues occur beyond the control of the Contractor team. For example, a server is unavailable. In those cases the Contractor shall continue to follow the DTMB issue management processes to route the issue with supporting details to the correct team for expedited resolution. During non-business hours Contractor shall have the right resources “on call” to respond to reported high priority issues.

Service Level Agreement

The Contractor shall provide support services that meet the agreed upon service level requirements. The State’s Remedy ticket system shall be used to initiate and manage break/fix and maintenance requests.

Standard Response Times Required for Problem Tickets

Once a support ticket is assigned, the Contractor Base Support team shall take ownership of the ticket within the agreed upon Service Level Agreement time specified in Attachment 1. The Remedy and Outlook system are setup to enable a phone text message and email notification for the support team. The Contractor Base Support team shall maintain a continuous effort to resolve reported high and medium severity problems. The Contractor shall also work with DTMB support teams to resolve high severity level problems in as short a timeframe as possible. The Contractor shall use commercially reasonable efforts to fix the defect within the agreed upon Service Level Agreement. If the issue cannot be resolved within the service level, the Contractor shall notify and provide status reports as needed to the appropriate DTMB and agency management personnel.

f) The State’s contact centers operate on different schedules with regard to the timing of upgrade and point cycle releases (e.g. Department of Treasury does not upgrade systems during tax season). Managing schedule constraints between multiple contact centers should ensure that all support and enhancement activity occurs in a timely manner

The Contractor shall work with the DTMB program manager, agency services and the agency contact center managers to create a schedule for upgrades, maintenance and enhancement releases on an 18-24 month rolling plan that is acceptable to the agencies. This plan shall be reviewed weekly/monthly and adjusted as needed to confirm that the scheduled project activities are occurring timely as planned.

The Contractor shall staff the support team to enable both support work and new enhancement work be conducted continuously to minimize resource contention.

In the event of a schedule/resource conflict, the Contractor shall continue to work with the DTMB program manager and agency leads to find an agreeable solution.



g) DTMB team responsibilities and customer agency responsibilities

Table 5 sets forth the DTMB and Customer Agency responsibilities associated with Base Support.

	DTMB	Customer Agency
• Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>
• Operation of Program/Project Management Office	<input type="checkbox"/>	
• Operations Oversight	<input type="checkbox"/>	<input type="checkbox"/>
• Change Control Boards	<input type="checkbox"/>	
• Business operation of the contact centers Agency	<input type="checkbox"/>	
• User Acceptance Testing		<input type="checkbox"/>
• Application Regression Testing		<input type="checkbox"/>
• Internal administrative forms processing i.e. Secure id, Firewall, Telecom 906, network ID's	<input type="checkbox"/>	
• Office Facilities	<input type="checkbox"/>	
• L1 Help Desk	<input type="checkbox"/>	
• Avaya Software	<input type="checkbox"/>	
• Desktop support	<input type="checkbox"/>	
• Purchasing equipment State of Michigan	<input type="checkbox"/>	
• Infrastructure installation	<input type="checkbox"/>	
• Purchasing software	<input type="checkbox"/>	
• Hardware server support including the operating system	<input type="checkbox"/>	
• Avaya Switch	<input type="checkbox"/>	
• Data and Voice Network	<input type="checkbox"/>	
• Oracle/SQL Server Database Administration	<input type="checkbox"/>	
• Websphere	<input type="checkbox"/>	
• Xenos	<input type="checkbox"/>	
• T1 Trunk lines	<input type="checkbox"/>	
• FileNet	<input type="checkbox"/>	
• NICE	<input type="checkbox"/>	

Table 5. DTMB and Customer Agency Base Support responsibilities

h) Monthly support hours report to the DTMB project manager

Base Support is a firm fixed price amount. The Contractor shall provide the breakdown of allocated monthly hours into five (5) areas: Support and Maintenance, Break Fix, Minor Enhancement, Major Enhancement, and Upgrades for the purpose or equitable distribution of relative costs across the agencies supported as part of the firm fixed Base Support.

i) The Contractor shall coordinate operational status meetings with each customer agency

The Contractor shall conduct operational meetings as agreed upon with each customer. The State shall schedule operational meetings using the State's calendaring system. Some agencies may prefer a less frequent meeting schedule depending on the business and level of current activity.



DTMB shall provide (4) full time staff to the team. See Table 6 for the full time and non full time personnel.

Group 1 Full time (providing service)
<ul style="list-style-type: none"> • DTMB Program Manager – issue escalation, project planning • Telephony specialist/Nice Administrator –Avaya, good understand of State of Michigan telecom voice/data network, deep DTMB telecom processes and knowledge • Siebel support staff – Siebel developer • Oracle Database Administrator
Group 2 Non Full time (providing service)
<ul style="list-style-type: none"> • Infrastructure Support (hardware, hosting environments) • Enterprise Security • SQL Database Administrator • Avaya PBX/AES support • Avaya programming • Windows/Linux/UNIX Support • Data Network support • Desktop support • FileNet Support • Level 1 Help Desk • Building Facilities

Table 6. Full time roles and other services

B. Major Enhancements

The Contractor shall treat Major Enhancements to existing applications or implementing new contact centers as separate projects each with its own SOW. Major enhancements consist of development efforts more than 200 hours. Sometimes, due to budgetary reasons, agencies treat a specific Minor Enhancement (or a group of enhancement requests) as a separate project with a SOW. The contractor shall follow appropriate SEM process (Maintenance, Express or Full) for the project.

For Major Enhancements, the State shall provide the SOW and the Contractor will respond with a proposal. In the proposal, the Contractor shall provide scope of work, assumptions, pricing, roles and responsibilities for Contractor and the State. Contractor shall provide resumes describing previous experience and education for new staff added to provide Major Enhancement services.

The responsibilities for these Major Enhancements project teams include:

- Work with Base Support Team to implement Major Enhancements beyond the scope of the Support Team.
- Transition on-going support of new system functionality to Base Support Team.
- Augment the skill sets of the Base Support Team.
- Augment the development capacity of the Base Support Team.

For Major Enhancements, the Contractor shall provide the State with a detailed project plan (technical work plan) before the Contractor starts working on Major Enhancements.

b) How the service delivery and Major Enhancement projects will be managed

In prioritizing the discretionary work of the Contractor’s team, the Contractor, DTMB and the agencies shall continue to work together through the established service delivery governance processes described in Section 1.104.I.A Base Support to verify that the teams are working on the right enhancements and issues at the right time in accordance with the goals and objectives of this contract. The Contractor shall work with the State to discuss the enhancement requests determining course of action whether to handle through a process change, current COTS functionality that can be configured, or customization.



The State of Michigan shall issue a SOW for any work that falls under the category of major implementation, that upon acceptance of proposal response to SOW and issuance of a purchase order by the State that Contractor shall schedule the enhancement according to the established governance prioritization and scheduling processes, and deploy the enhancement according to DTMB change control processes utilizing the defined Request for Change (RFC) procedures. The Contractor shall provide a rate card for these types of Major Enhancements. For every Major Enhancement, the Contractor shall provide a detailed plan with deliverables, tasks, ownership, dependencies and timelines.

Experience has shown that the Major Enhancement projects benefit when the Base Support and Major Enhancement teams are managed by a single individual, namely the assigned Project Manager as well as when Base Support staff involvement is planned for in the Major Enhancement processes especially the planning and requirements phases. This structure has produced consistency and cohesion for agency staff working with the Contractor team resulting in higher quality and more efficient development of Major Enhancements. The Contractor shall name one Project Manager to oversee the Contractor Base Support and Major Enhancement teams. The Contractor shall plan for Base Support team member involvement in Major Enhancement projects, and when agreed upon in the Major Enhancement SOW with the State.

c) Description of the Contractor's software development methodology specifically for the COTS software products in these contact centers

The Contractor shall use the State's SUITE methodology and SEM processes. For COTS products, Contractor shall reference the Accenture Delivery Methods – Siebel extensions and CRM Delivery Methodology.

d) How the project team will be staffed

Section 1.201.A Contractor Staff describes standard roles needed to staff the Base Support team. The same standard roles shall be used to staff Major Enhancements. In the event a specific SOW requires additional roles not described in Cost Table 4 – Rate Card Table, the additional role description and rate shall be provided in the SOW.

The Contractor shall provide the necessary staffing of resources to complete the Major Enhancements. Subcontractors may also be utilized on an as-needed basis, depending upon the requirements (e.g., Siebel, IVR, Genesys, FileNet etc.).

The Contractor shall bring staff on to augment the development capability of the Base Support team and to work with the Base Support team to implement Major Enhancements that are out-of-scope for the Base Support team. The Contractor shall involve Base Support staff in the Major Enhancement projects to leverage Contractor Base Support staff's knowledge of the State's technical environment and processes, experience with the SUITE/SEM methodology and delivery of high quality upgrades, maintenance releases, and Minor Enhancement work. Once Major Enhancement work has been completed, the Contractor Major Enhancement staff shall transition on-going support for new system functionality to the Base Support team.

In addition to involving the Base Support team, the Contractor has over 100 resources local to the Lansing area that can be assigned to Major Enhancement work. This cost efficient workforce has technical skills that may support Major Enhancement work effort. As agency strategies are developed and specific enhancements funded, Contractor shall communicate the workforce skills and effort required to our Public Services Human Resources department. The Contractor shall make commercially reasonable efforts to staff Major Enhancement work with local cost effective Contractor employees.

The Contractor also has ten (10) Siebel Delivery Centers in the US. The Contractor team may draw from those centers for off-site use of Siebel development resources as needed to meet the budget and timeframe for Major Enhancements as mutually agreed upon through SOW.

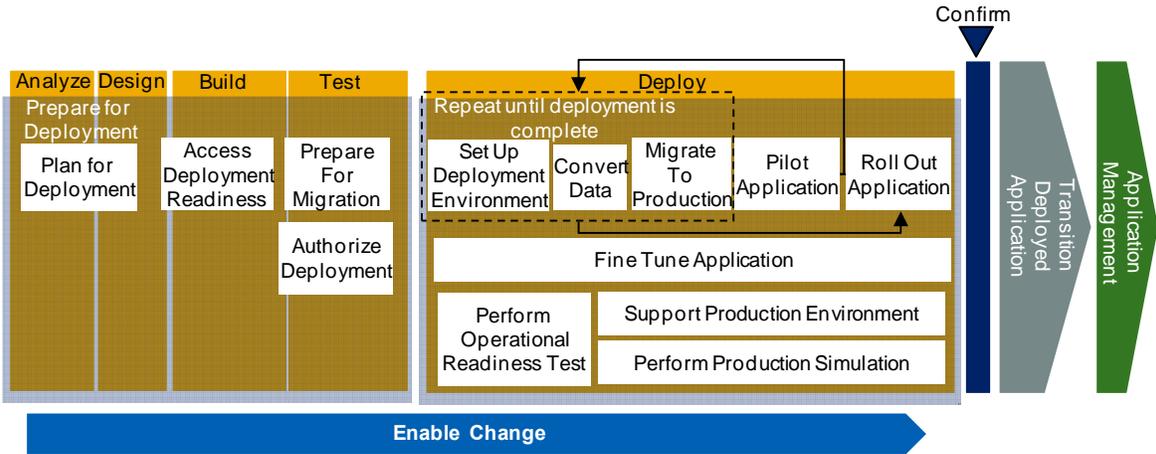


e) The Contractor confirms that the appropriate SEM process shall be followed.

As an essential component of SUITE, the Systems Engineering Methodology (SEM) promotes the development of reliable, cost-effective, computer-based solutions. The Contractor shall deliver MiECC major enhancements using the SEM processes. Contractor agrees that enhancements less than 200 hours for which a SOW has been executed shall be delivered under the SEM Maintenance processes. Enhancements between 200 and 1000 hours shall be delivered under the SEM Express processes. Enhancements requiring greater than 1000 hours shall be delivered under the SEM Full processes.

f) Description of Contractor overall project development approach which will be followed for these Major Enhancements

The Contractor shall provide Major Enhancement work using the Accenture Delivery Methods (ADM) and State SUITE/SEM hybrid COTS development methodology. Figure 2 sets forth the development approach model that shall be used for Major Enhancement project work.



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Figure 2. MiECC Project Development Approach

The major components of the Contractor methodology are described below along with the DTMB corresponding SEM lifecycle phases. The Contractor shall adapt ADM practices to SEM because the two methodologies share many similar functions, activities, and deliverables.

Description	ADM/Siebel Framework	SEM
This phase involves the up-front, project-level planning required to select the packaged software, define the delivery approach, and confirm the project scope.	Plan	Initiation and Planning
The primary goal of this phase is to gather specific requirements, both business and technology, across all in-scope areas to drive completeness in the breadth of the solution and help prioritize the development and release strategy.	Analyze	Requirements Definition
The architecture, functional, and technical design phase takes the requirements from the prior phase and constructs an end-state functional and technical design and all the associated transition components (data conversion, integration design with legacy and vendor applications, etc.).	Design	Functional Design and Technical Design
This phase utilizes the designs from Design to configure the application, and develop interfaces and/or conversion programs. Extensive testing of the individual modules and the integrated solution is needed to confirm production readiness and functional accuracy.	Build	Construction



Description	ADM/Siebel Framework	SEM
This phase utilizes unit- and quality-tested applications from the prior phase in conjunction with representative production data (volumes and breadth/completeness of data) to perform product and performance testing of the integrated applications with real users and subject matter advisors.	Test	Testing
This phase includes the tasks and deliverables needed to deploy the application to the users and transition the application management responsibilities to the application management unit.	Deploy	Implementation

Major Enhancement work shall be initiated by a request formally submitted in the form of a SOW by DTMB or one of the participating call center agencies. The Contractor shall respond to the SOW with a proposal describing the full scope of work, assumptions, State roles and responsibilities, pricing including ongoing fixed price support, resumes of new, proposed staff where requested, general timeframe, acceptance criteria, and pricing. The Contractor shall use the hybrid COTS project development approach to identify SUITE/SEM processes and deliverables required for work effort and document those in the SOW proposal. After the SOW has been agreed upon and executed, DTMB shall submit the appropriate paperwork for processing a purchase order in the State's MAIN system. Once the purchase order has been issued and received by the Contractor, the Contractor shall update the detailed, project work plan, assumptions, and responsibilities and meet with DTMB and call center agency staff to finalize project delivery schedule and commit resources. The Contractor and the State resources identified in SOW shall complete Major Enhancement work according to terms agreed upon through SOW processes. Once the Major Enhancement has been deployed, Contractor's Major Enhancement staff shall transition support of new functionality to the Base Support team. Final acceptance shall occur when appropriate DTMB and agency call center representatives sign project acceptance form after acceptance criteria identified in SOW have been met. Table 7 sets forth the responsibilities across organizations.

Responsibility	DTMB	Customer Agency	Contractor
Prepare SOW	<input type="checkbox"/>	<input type="checkbox"/>	
Respond to SOW			<input type="checkbox"/>
Authorize SOW (signatures)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Process purchase order	<input type="checkbox"/>		
Receive purchase order			<input type="checkbox"/>
Update work plan and finalize schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Begin Work and Monitor Progress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deploy Enhancement(s)	<input type="checkbox"/>		<input type="checkbox"/>
Transition support to Base Support Team			<input type="checkbox"/>
Obtain SOW final acceptance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 7. SOW DTMB, Customer Agency and Contractor Roles and Responsibilities



g) The project timesheet and the monthly hours report will be submitted to the project manager

The Contractor shall submit project timesheets for Major Enhancement work with every monthly invoice and the monthly hours report to the State project manager where cost is based on hourly reporting, according to Reporting Requirements specified in Section 1.302 of this Contract. The report will provide detailed hours for each Contractor resource assigned to the mutually agreed upon SOW.

h) The Contractor provides a Sample Project Plan including necessary time frames and deliverables for the various stages of an implementation or change and the responsibilities MS Project plan or equivalent (check the SUITE/PMM standard)

The Contractor shall provide the State with a detailed project plan (technical work plan) before starting to work on any Major Enhancement activity. The Contractor shall work with the DTMB and call center agency to agree upon schedule and resource commitments prior to project initiation. When Major Enhancements involve other State or third party resource commitments or task dependencies, the DTMB project manager shall incorporate Contractor's project plan into the master project plan.

The Contractor team shall follow the requirements identified and shall incorporate the additional requirements in the following ways:

Description of the deliverables to be provided. Contractor shall provide a description of project deliverables for each phase of work (e.g., Plan, Analyze, Design, Build, Test, etc.) as a standard component of SOW responses.

Timeframes and critical paths for deliverables. Contractor shall document deliverable timeframes and critical path as standard component of SOW responses.

Identification of roles and responsibilities. Contractor shall include a roles and responsibilities matrix as a standard component of SOW responses.

Internal Milestones and Task Durations. Contractor shall add critical path, internal milestones and task durations to the MS Project plan according to the SEM revised standards.

C. Business Requirements

Enhancement requests shall go through a business requirements gathering phase.

- i. The requirements gathering and analysis stage develops documentation based on the specific project goals and constraints. Contractor shall be responsible for gathering business requirements for the contact center applications.
- ii. The Contractor shall gather feedback from the business owner and other stakeholders, experts, and end users to determine how the application should solve the original business problem. DTMB and the agencies shall assign resources as deemed appropriate to provide feedback on business requirements to Contractor.
- iii. The Contractor shall verify and validate requirements for in scope software throughout each phase of the development life cycle.
- iv. The Contractor shall prepare a requirements traceability matrix.
- v. The Contractor shall describe the business requirements with use cases, scenarios, prototypes or other relevant techniques in requirement gathering and documenting as agreed upon with stakeholders following SEM.

a) The Contractor confirms requirements listed in this section, and provide detail regarding how to accomplish these requirements.

The Contractor shall collect and document the requirements for the project using the SEM Methodology. The Contractor shall involve the agency business owners, DTMB, stakeholders, subject matter experts, and end users to get a clear understanding of the business problem. When using the SEM Methodology, the Contractor shall verify and track requirements using a traceability matrix in order to document the requirements throughout the project lifecycle. The Contractor team shall use scenarios, use cases, prototypes or other tools to help confirm the requirements are documented accurately.



b) The Contractor describes their requirements gathering and documentation methodology

Developing product life cycle requirements is important in defining the needs of relevant stakeholders. The Contractor shall develop requirements through collecting, analyzing, validating, communicating, and documenting customer and business needs.

Each phase of the product life cycle builds upon Requirements:

- The Requirements Gathering and Analysis stage develops documentation based on the specific project goals and constraints. This stage includes collecting user/client feedback and information on system behaviors. The Contractor shall conduct a Requirements Gathering and Analysis stage based on specifications agreed upon for work efforts in the corresponding SOW or release plan.
- The Design stage documents the collected feedback for future approval and validates documented requirements. The Contractor shall conduct Design stage for based on specifications agreed upon for work efforts in corresponding SOW or release plan.
- The Development stage uses the approved documented requirements to build functionality into the system. The Contractor shall conduct a Development stage based on specifications agreed upon for work efforts in corresponding SOW or release plan.
- The Build/Test stage verifies and validates that the requirements are operating according to documented business requirements. The Contractor shall conduct a Build/Test stage based on specifications agreed upon for work efforts in corresponding SOW.

The Contractor shall follow SEM/Suite methodology, and secure the Stage Exit approvals.

Contractor shall validate Requirements throughout each phase of the product life cycle to verify the goal of the requirements is met. The Contractor shall prepare and maintain requirements traceability matrix to track requirement throughout project life cycle.

The more visibility stakeholders have in the Requirements process, the more assurance the stakeholders have that Requirements are properly identified. Contractor shall involve key stakeholders (internal and external) in the Requirements development and analysis process. Key stakeholders (internal and external) shall participate in the requirements development and analysis process.

Requirements Gathering

The Contractor shall complete Requirements gathering and analysis during the Analysis stage of Major Enhancement work efforts according to specifications documented in the SOW. The Contractor shall investigate with DTMB and agencies and document specific project goals and constraints as part of the Requirements gathering and analysis process. The Contractor shall obtain feedback from stakeholders, experts, and end users as specified in the SOW to determine application solution. The Contractor shall maintain requirements traceability matrices that verify changes in requirements throughout the project life cycle.

c) DTMB team responsibilities and customer agency responsibilities.

Resources from DTMB, Client Agency, or other key stakeholders shall participate in the requirements gathering and review process. Depending on the scope of work, the Contractor, DTMB, and Client Agency shall determine specific participants. For example, for a Minor Enhancement in Siebel, the process may only require a few specific Client Agency personnel. If the client wants to add a new document class in FileNet that routes to Siebel, the FileNet systems administrator will also need to participate. The Contractor shall ask DTMB and Client Agencies to participate in requirements gathering sessions, reviewing requirements documentation for accuracy, and providing input by meeting with groups of stakeholders to define requirements as specified in the SOW or release plan. The Contractor shall conduct a requirements review and sign-off at the end of the requirements phase to confirm that participating organizations agree with the requirements. Figure X provides an overview of the DTMB and Customer Agency responsibilities regarding business requirements.



Table

Responsibilities	DTMB	Customer Agency
Participate in Requirements Gathering	<input type="checkbox"/>	<input type="checkbox"/>
Review and Provide Feedback to Documented Requirements	<input type="checkbox"/>	<input type="checkbox"/>
Sign-off on Requirements		<input type="checkbox"/>

8.

Responsibilities of DTMB & Customer Agencies

d) SEM documentation standards will be followed for all projects.

The State of Michigan’s SEM documentation provides a clearly defined set of templates that gives consistency across all DTMB projects. The Contractor shall use the SEM for new work products. The SEM work products provide clients a consistent format presented to them for DTMB work products across vendors. The Contractor shall use the SEM documentation standards including, but not limited to the requirements traceability matrix, functional specification documents, and technical specification documents.

D. Infrastructure Planning

- i. For implementing new contact centers, the Contractor shall provide a detailed description of the infrastructure requirements.
- ii. For adding new functionalities, if new hardware is required, the Contractor shall provide the hardware requirements.
- iii. For hardware upgrades or reconfiguring the hardware, the Contractor shall assist in identifying the hardware needs.
- iv. For hardware Upgrade projects, the Contractor shall be responsible for installing and configuring the software and deploying the application.
- v. Contractor shall identify the issues about software and hardware compatibility. Contractor shall provide the roadmap of the vendor software products and Upgrade plans.

a) The Contractor shall provide detail regarding how Contractor will accomplish requirements listed in this section

i. Infrastructure Requirements for Implementing New Contact Centers

During the requirements and design phase of a project, the Contractor shall work with DTMB and agencies to design architecture that maintains, enhances, and satisfies the State’s ongoing needs. The Contractor shall provide the SEM System Design Document to describe the infrastructure architecture plan.

Contractor shall work with DTMB to identify needs for new contact centers. New contact center applications may require new servers or could potentially leverage existing hardware. During the design stage of a project, the Contractor shall provide detailed hardware and software specifications to complete the design and build of the environment and document specifications in the SEM System Design Document.

For implementing new contact centers, Contractor, DTMB and Agency Service teams shall follow the steps listed below:

- Initiate SUITE processes with a DTMB PMO office/Project manager
- Determine requirements of the solution and confirm the business purpose is collected
- Work with DTMB EA (Enterprise Architecture) and ISR (Infrastructure Service Request) teams as part of the architecture solution process to validate the solution fits into the State standards and future direction



Below are some of the standard State contact center hardware/software components that Contractor shall work with a new contact center. The number of servers, licenses, voice ports, desktops, redundancy, and security depends on decisions made during the initial assessment taking into consideration the cost, number of users, volume, business needs, and complexity. The solution may also include middleware components such as web/application software. Standard suite proven successful contact center environment components include:

1. Technical Environments
 - Lab
 - Development
 - Staging/UAT
 - Disaster Recovery
 - Production
2. Application Architecture
 - Siebel Web Servers
 - Siebel Gateway Server
 - Siebel Application\Reporting Server
 - Genesys Framework
 - Genesys Universal Routing Server
 - Genesys Voice Portal
3. Software / Middleware
 - Tomcat
 - GPlus Adapter
 - IIS
4. Database
 - Oracle, SQL Server
5. Voice Telephony network
 - Switches / PBX (Avaya)
 - Avaya Application Enablement Services (AES)
 - SIP Enablement Service (SES)
6. Network Infrastructure
 - Load Balancer
 - Firewall
 - Email SMTP
 - Switches

ii. Hardware Requirements if New Hardware is Required for Adding New Functionalities

If an enhancement request is made and approved by the agencies or DTMB, the Contractor shall review the request. The Contractor shall first look to leverage the existing enterprise hardware/software to improve efficiencies and reduce costs. If enterprise sharing is not a reasonable option, the Contractor shall look to review and recommend new infrastructure to be established and configured for the new functionality. Contractor shall perform these actions:

- Collect requirements for the solution
- Review compatibility issues with current hardware
- Review performance parameters for the software
- Review hardware specifications, e.g. # of CPUs, Memory
- Review security requirements with DTMB Office of Enterprise Security (OES)



- Work with software vendor to understand the software and hardware specifications
- Review performance and failover capacity, e.g. Load Balancing, Clustering
- Work with DTMB infrastructure and telecom teams to fulfill requirements

iii. Identifying the Hardware Needs for Hardware Upgrades or Reconfiguring the Hardware

DTMB uses a host of Intel/Windows family of servers for Enterprise Contact Center as well as Sun Solaris for the enterprise database environment. Different configurations of processors and memory are required depending on the environment in which it resides. Servers are regularly updated to the current patch level required by the hardware/software vendor. Contractor shall work with DTMB and the agencies to plan, upgrade, and maintain the Enterprise Contact Center hardware infrastructure with these goals in mind:

- To provide effective support and enhancement to the client agency contact centers
- To minimize the total cost of ownership of the customer contact centers
- To keep up to date with new releases of software from the COTS providers
- To develop DTMB staff as participating MiECC team members with the Contractor staff
- To provide new technology that allows efficiency and effectiveness gains
- To assist DTMB to with opportunities to leverage solutions for cross-boundary shared services
- To assist DTMB in helping customer contact centers to enhance/improve their customer service

Table 9 describes Contractor’s approach for maintaining the technology of the State’s contact center hardware and software infrastructure.

Technology Upgrade Type	Contractor's Process for Supporting Hardware and Software Upgrades					
	Identify Upgrade Reqs	Business Impact Analysis and Release Plan	Support Proof of Concept	Release Coordination Management	Testing and Issue Management	Implementation Support
Hardware Upgrade	Yes	Yes	Yes	Yes	Yes	Yes
• Server Upgrade	Yes	Yes	Yes	Yes	Yes	Yes
• Server Reconfiguration (Memory, CPU, Disk space)	Yes	Yes	Yes	Yes	Yes	Yes
Software Patches	Yes	Yes	Yes	Yes	Yes	Yes
• Software Hot Fix	Yes	Yes	Yes	Yes	Yes	Yes
• Software New Release/Version	Yes	Yes	Yes	Yes	Yes	Yes
• New Software Packages	Yes	Yes	Yes	Yes	Yes	Yes

Table 9. Contractor's Process for Supporting Software and Hardware Upgrades



iv. Installation/Configuration of the Software and Deploying the Application for Hardware Upgrade Projects

Contractor shall work with DTMB to install and configure in scope software and deploy applications for in scope hardware Upgrade projects as described in the Call Center Strategy and Agency Enhancement plans.

v. Identify the Issues with Software and Hardware Compatibility and Provide the Roadmap of the Vendor Software Products and Upgrade Plans

Contractor shall work with DTMB when performing Microsoft, Oracle and server patches on a quarterly or as needed basis. The software patches shall be first applied and tested in the non-production environments. If the tests are successful and change management process/RFC is approved, the patches shall be applied in production and monitored for any issues.

Test Lab Environment

The State intends to provide a dedicated MiECC test lab environment. The State’s inability to provide a dedicated test lab environment may impact the quality and timeliness of Contractor’s services which impacts will be addressed through mitigation plans agreed upon by Contractor and State within Statements of Work, Call Center Strategy, Agency Enhancement Plans, or Agency Operational meetings. When the State proceeds with efforts to provide a dedicated test lab environment, Contractor shall:

- Work with DTMB to identify and confirm requirements for a test lab environment.
- Use completed test lab environment to regression test and identify compatibility issues between contact center software/PBX and the desktop/phones/SOM M1 image of various agencies.

Figure 3 depicts recommended and proposed test lab environment.

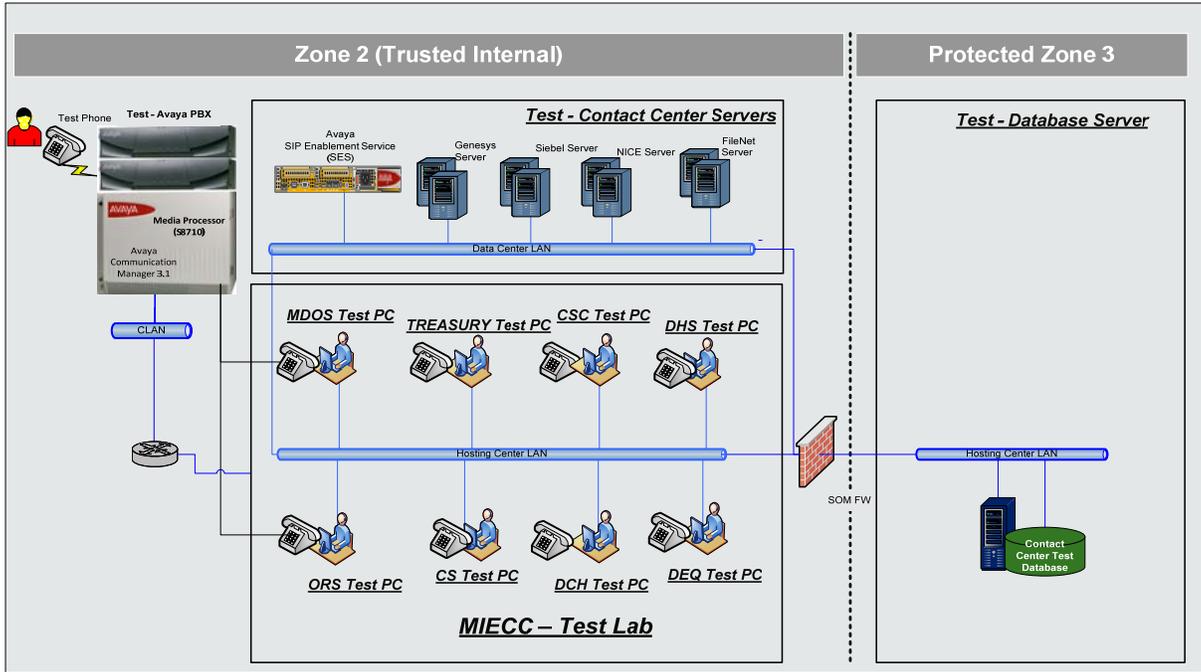


Figure 3. Test Lab Environment



Product Roadmap for Call Center Enterprise Application and Upgrade Path

The Contractor shall work with DTMB, agencies, and vendors to maintain and enhance call center infrastructure and document during the annual Call Center and Agency Enhancement Plan update processes.

Contractor resources working in Siebel and Genesys technologies shall also receive monthly email newsletters regarding Siebel/Genesys Technologies to enable them to become well-informed Siebel/Genesys Technology practitioners.

Contractor shall review each vendor's product strategy to determine version applicability for the State's needs. The Contractor shall take into consideration stability, costs, compatibility, functionality and vendor support (statements of direction) between each application interface.

When a request is made for an application Upgrade in order to improve functionality or support new infrastructure architecture, Contractor shall review each vendor's product strategy to determine version applicability for the State's needs. Table 9 below represents an Upgrade path from the current installed version in the State environment. The table is meant to be a representation of the general approach to upgrading a major component of the contact center software. When a major software Upgrade project is considered and authorized, the Contractor shall conduct a more detailed analysis working close with the agency and DTMB to determine the overall benefits, costs, schedule, risks etc.

Activity	Current	Upgrade Path/Benefits
Siebel	7.8.2.16	Siebel 8.1.x Benefits: <ol style="list-style-type: none"> 1. Minimal system downtime maximizes business continuity. 2. An Upgrade methodology that offers accelerated Upgrade cycle and significant cost advantage 3. Minimize dependency on Infrastructure upgrades by using the Upgrade Factory model 4. Minimal involvement of internal resources. 5. Leverage TCS Upgrade tools, accelerators and preferred practices
Genesys	7.6	Genesys 8.x Benefits: <ol style="list-style-type: none"> 1. Interoperates with off-the-shelf hardware and supports open standards such as VoiceXML 2.1, CCXML, as well as Session Initiation Protocol (SIP) and related standards. 2. No rewriting of applications needed as a result of infrastructure changes. 3. Compatible with open or proprietary implementations: TDM, IP, or hybrid. 4. Flexibility to evolve Genesys Voice Platform with changing enterprise deployment needs. 5. Unlimited choices for adding speech technology

Table 10. Contractor's general approach to upgrading a major component of the contact center software clearly outlines the benefits of the upgrade



b) DTMB team responsibilities and customer agency responsibilities

Table 10 below sets forth DTMB and Customer Agency staff responsibilities for supporting infrastructure planning.

Responsibilities	DTMB	Customer Agency
Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>
Operations Oversight	<input type="checkbox"/>	<input type="checkbox"/>
Operation of Program/Project Management Office	<input type="checkbox"/>	
Business operation of the contact centers Agency		<input type="checkbox"/>
Change Control Boards	<input type="checkbox"/>	
User Acceptance Testing		<input type="checkbox"/>
Application Regression Testing		<input type="checkbox"/>
Internal administrative forms processing i.e. Secure id, Firewall, Telecom 906, network ID's	<input type="checkbox"/>	
Office Facilities	<input type="checkbox"/>	
L1 Help Desk	<input type="checkbox"/>	
Avaya Software	<input type="checkbox"/>	
Desktop support	<input type="checkbox"/>	
Purchasing Equipment	<input type="checkbox"/>	
Infrastructure installation	<input type="checkbox"/>	
Purchasing software	<input type="checkbox"/>	
Hardware server support including the operating system	<input type="checkbox"/>	
Avaya Switch	<input type="checkbox"/>	
Data and Voice Network	<input type="checkbox"/>	
Oracle/SQL Server Database Administration	<input type="checkbox"/>	
Websphere	<input type="checkbox"/>	
Xenos	<input type="checkbox"/>	
T1 Trunk lines	<input type="checkbox"/>	
FileNet	<input type="checkbox"/>	

Table 11. DTMB and Customer Agency Infrastructure Planning Responsibilities

E. Training

b) DTMB team responsibilities and customer agency responsibilities



Responsibilities	DTMB	Customer Agency
Identify staff and training needs	Yes	Yes
Identify trainers to be trained and staff attends training sessions for major SOW implementations.		Yes
Attend training sessions conducted by an application software vendor in a classroom setting. Accenture would recommend attending the software vendors "University" style course and would assist in recommending appropriate courses	Yes	Yes
Coordinates the training sessions with the agencies and assists in setting up rooms, equipment for training	Yes	
Participate in training that occurs on-the-project, in an informal setting, for example brown bag lunch topics	Yes	Yes
Participate in presentations and discussions attended by the appropriate technical staff	Yes	
Procure 3rd party training	Yes	

Table 11 includes responsibilities for DTMB and Customer Agencies associated with training State of Michigan Staff.

F. Documentation

- i. The Contractor shall follow SUITE documentation standards.
- ii. The Contractor shall maintain documentation describing the application designs at all the contact centers in accordance with best practices.
- iii. The Contractor shall validate the current documentation and where there are inaccuracies or omissions; the Contractor shall make the appropriate changes.
- iv. As the Contractor makes changes to the applications, the contractor shall also update documentation.
- v. Contractor staff shall create and update SEM required documentation as part of Base Support cost.
- vi. SEM required documentation shall be available to Contractor, DTMB, and agency staff in a shared area provided by the State.

a) The Contractor shall provide all requirements listed in this Section and provide detail regarding how they will accomplish these requirements

i. The Contractor must follow all SUITE documentation standards

Contractor shall use the State’s Systems Engineering Methodology (SEM) and the State’s Unified Information Technology Environment (SUITE) methodology to support and continuously improve the applications.

The Contractor shall use SEM as a guide to what methodology should be used: Full, Express, or Maintenance. The Contractor shall provide documentation and conduct checkpoints for reviews within the project lifecycle as specified for methodology selected. The Contractor shall use SEM to confirm that requirements and documents are verified as the project progresses.

ii. The Contractor will maintain documentation describing the application designs at all the contact centers in accordance with best practices

The Contractor shall maintain SEM required documentation for each supported, agency contact center. The Contractor shall maintain documentation in accordance with leading practices.



iii. The Contractor will validate the current documentation and where there are inaccuracies or omissions, the Contractor will make the appropriate changes

The Contractor shall update SEM required documentation that is incorrect or may have omissions. Project documentation consists of SEM required documentation and includes:

- Application Architecture Diagrams
- Entity Relationship Diagrams
- Requirement documentation
- Project Design documentation
- Development documentation
- Support Documentation
- Training Materials

The DTMB-170 and other security documentation (State Security Documentation) forms shall be completed by the Office of Enterprise Security and Agency Services, with input from Contractor as needed. The State Security Documentation processes, documentation, and approvals are owned by the State of Michigan. The Contractor shall provide input as required such as architectural diagrams and data flows, and as requested, shall facilitate the submittal and approval of the State Security Documentation.

iv. As the Contractor makes changes to the applications, documentation will also be updated

With each project release, the Contractor shall submit documentation updates as required by the SEM documentation standards. This shall include updating documentation such as hardware diagrams and Entity Relationship Diagrams when new functionality is added to the applications.

v. These tasks shall be completed as part of the Base Support cost.

As part of the management of the Contact Center applications, the Contractor shall consider documentation tasks a part of Base Support services provided.

vi. All documents must be stored in a shared area provided by the state.

The Contractor shall provide documentation in a shared area that is provided by the State. The State shall provide a shared area for documentation and grant Contractor staff access to the shared area location.

b) DTMB team responsibilities and customer agency responsibilities

The Contractor, DTMB and the Customer Agencies shall be responsible for providing input and iteratively reviewing documentation based on acceptance criteria set forth in the Contract. The Contractor shall conduct and DTMB and Customer Agencies shall participate in structured document reviews within the project to help confirm that there is a mutual understanding of what is to be changed. Documentation sign-offs shall take place at the end of Requirements, Design, Testing, and at Delivery. DTMB and the Agencies shall participate in documentation review activities to confirm that parties have similar understanding of system changes. Table 12 sets forth the responsibilities of DTMB and Customer Agency staff.

Responsibilities	DTMB	Customer Agency
Participate in documentation reviews and provide feedback	Yes	Yes
Provide area to store shared documentation	Yes	Yes

Table 12. Responsibilities of DTMB and Customer Agencies associated with Documentation

G. Knowledge Transfer/Transition

- i. There will be Knowledge Transfer Period from the Contractor currently providing these services to the new Contractor awarded this contract.
- ii. It is expected that during this transfer period the Contractor will gain a detailed operational understanding of all the contact centers and the IT systems that support them.



- iii. The Contractor will provide sufficient staff with the appropriate skills to undertake this knowledge transfer.
- iv. It should not be assumed that the current support team will be free all the time during this period to update the Contractor since they will be engaged in supporting the various contact centers. Therefore a weekly timetable of meetings should be scheduled to facilitate Q&A sessions.
- v. This Knowledge Transfer period is not to be used by the Contractor as training for their team in how to configure the various software products employed.
- vi. This Knowledge Transfer period is for the on-site transfer of knowledge of the existing configurations in the various technologies of each of the contact centers to personnel of the new Contractor who are already fully skilled and proficient in the various products and their respective integrations.
- vii. The Contractor will gain a detailed understanding of the interfaces from/to the various legacy systems connected to Siebel identified earlier in this document and interfaces with products previously identified which are maintained by DTMB.
- viii. After the knowledge transfer period, the responsibility for support and identified work and deliverables will pass to the new Contractor.

Activities and Responsibilities

Table 13 below lists the major activities performed during the Transition Phase. Responsibility for some activities may be shared between DTMB and the current Contractor.

Legend: **R**esponsible, **A**pproval, **S**upport, **I**nform, **C**onsult

#	Activities	Responsibility		
		New Contractor	DTMB	Current Contractor
1	Provide existing technical documentation.		R	S
2	Create a knowledge repository for managing the documents and tracking the knowledge acquired	R	A	
3	Understand application environments (dev, test, prod)	R	I	
4	Provide demonstration of applications		R	S
5	Understand business processes and data flows	R	I	S
6	Understand data models	R	I	S
7	Understand call flows	R	I	S
8	Understand architecture of application	R	I	S
9	Review source code	R	I	
10	Study sample past problem tickets of all severity types, and their resolutions	R	I	S
11	Study development and documentation standards	R	I	S
12	Understand the development and support processes: change & configuration management, testing, QA, user acceptance, release and problem management	R	S	S
13	Understand call handling, escalation, and communication procedures and standards	R	I	S
14	Update/create any missing basic documentation	R	I	

Table 13. Transition Responsibilities by Organization

a) Recommended knowledge transfer period (in months) and start date

The Contractor is the incumbent vendor for the MiECC program; therefore, no knowledge transfer period is required.

b) An overview of the proposed transition plan

The Contractor shall continue operations and critical project work without disruption to the agencies business and resources. The Contractor shall need two weeks (10 business days) with members of the proposed team to accomplish the transition to the new contract.

The Contractor shall collaborate with the State to confirm this approach, capturing the State's desires and direction regarding our proposed timeframes, content, participants, and speed of transition. The Contractor



shall focus on initiating the new contract, which shall include understanding the changes from the old contract as well as the State’s expectations for the new one. The proposed transition items to be completed over the (10) business days shall be:

- Update risk management plans
- Provide suggested improvement on the report formats
- Update monthly reports process to conform to what is required
- Review and update the governance model
- Review and validate with the State project manager(s) the detailed project plan (technical work plan)
- Continue and complete existing work in progress
- Update the SOW template and processes to conform to any new requirements.
- Review and validate the State purchase orders and invoice submission process for the new contract
- Attend Contract initiation meetings

c) A timeline for the transition, with appropriate milestones. Tasks/Milestones should constitute elements of a successful knowledge transfer. Each task must show the responsibilities for all parties involved

Contractor’s proposed high level transition plan in MSProject is depicted in Figure 4.



Figure 4

d) Identification of risks and mitigation strategies

In Table 13 the Contractor provides several key risks and mitigation strategies.

Risk	Mitigation
Treasury's Customer Contact Bureau applications risk support during 2012 tax season	Maintain existing Contractor staff through 2012 tax season.
Existing Enterprise Contact Center agencies risk support post-March 4, 2012	Maintain existing Contractor staff through 2012 tax season.

Table 13

e) A description of the Contractor’s plan for transferring knowledge/work from existing Contractors to new personnel

The Contractor shall staff the new Contract with the experienced resources that have extensive knowledge of the in scope items for the system.

f) The Contractor identifies their knowledge transfer team and provides skills description for knowledge transfer

The Contractor shall not require a separate knowledge transfer team.

g) A description of the roles and responsibilities during this phase for State of Michigan and Contractor responsibilities



Table 14 represents key activities and roles.

Responsibility/High Level Task	Roles State of Michigan	Contractor
Initiation	✓	✓
Planning	✓	✓
Detailed Project Plan (Technical Work Plan)		✓
Contract Transition	✓	✓
OrganizationChart / Key Personnel Approval	✓	✓
Report Templates		✓
Project Management Processes	✓	✓
Reviewing and updating the governance model	✓	✓
Review and validate the State purchase orders and invoice submission process for the new contract	✓	✓
Updating risk management plans		✓
Execution- Base Support		✓

Table 14. Key Transition Activities and Responsibilities



h) Commitment on similar knowledge transfer to the future Contractor when this Contract expires

The Contractor shall be committed to provide the State of Michigan and/or future contractors with the knowledge transfer and transition services to help confirm that the systems are handed off when the Contract expires. The Contractor shall work with DTMB, agencies and the future contractor to validate that there is enough time and resources to effectively complete the knowledge transfer phase prior to the date when the Contract expires.

H. RESERVED

I. Meeting DTMB's Objectives

Contractor shall describe how it will help DTMB to meet all its strategic objectives, identified in Section 1.002.

a) The Contractor shall meet all requirements listed in this section:

1. To provide effective support and enhancement to the client agency contact centers.

To provide effective support and enhancement to the client agency contact centers, the Contractor shall:

- Work with DTMB and agencies to execute Call Center Strategy and Agency Enhancement plans deploying software releases that support and enhance client agency contact centers.
- Use DTMB Remedy to monitoring and resolving support requests from client agency contact centers.
- Use Contractor's network professionals, internal knowledge capital and vendor alliances to identify, discuss, and incorporate CRM trends and leading practices.

2. To minimize the total cost of ownership of the customer contact centers.

To reduce the total cost of ownership of customer contact centers, the Contractor shall:

- apply the standard, developed methodology when implementing new customer contact centers
- identify enhancements, upgrades, infrastructure sharing opportunities, procedure changes for implementation consideration during the Call Center Strategy and Agency Enhancement Plan annual update processes.

3. To leverage the same hardware architecture across all contact centers.

The Contractor shall seek opportunities where agencies could share hardware but maintain their individual service levels and performance goals. During the Contract Center Strategy and Agency Enhancement plan annual update processes as well as during infrastructure assessments required for services delivered under a SOW, the Contractor shall assess and make hardware architecture recommendations to leverage existing hardware. Driving total cost of ownership down requires that the State use shared infrastructure environments to the highest extent possible.

4. To keep up to date with new releases of software from the COTS providers

The Contractor shall maintain COTS software releases current according to the agreed upon projects prioritized in the annual Contact Center Strategy and Agency Enhancement plans.

Contractor shall provide the ongoing software upgrades as part of the Base Support team following the SEM processes.

5. To develop DTMB staff as full partners with the Contractor staff

The Contractor and State teams shall work together to perform project tasks as a collaborative working team.

**6. To minimize the use of custom code and to migrate to “out of the box” functionality**

The Contractor team shall work with each contact center agency during Requirements Gathering sessions to educate users on what the capability of the COTS products are - and matching business requirements to those 'out of the box' capabilities. The Contractor shall classify requirements as custom code or out-of-box functionality and work with DTMB and call center agency on work around business process solutions or on approval of custom code solution.

7. To provide new technology that will allow efficiency and effectiveness gains

The Contractor shall continuously look for new ideas and validate with Contractor's Customer Relationship Management practice to evaluate new technology and new capabilities that will bring value to the State. The Contractor shall evaluate these innovations not just for technology's sake, but for the efficiency and effectiveness that it will provide to contact center agencies.

8. To use the same software configurations across all contact centers for the same functions

As with using functionality 'out of the box', the Contractor recognizes that full benefits of COTS product implementations comes when leveraging products and configurations in a manner that can be shared across multiple agencies. The Contractor shall look for additional opportunities to build common configurations and leverage those across contact center.

9. To provide an entry-level Siebel configuration for new agencies with minimal requirements.

The Contractor has created an entry-level Siebel configuration. Agencies that want to deploy call center capability quickly and do not have extensive configuration requirements shall use the Contractor's configuration to do this. Following the SEM methodology requirements, the Contractor shall implement entry-level Siebel configuration for an agency in 2 to 3 months, although duration may be longer due to scheduling issues. The configuration shall provide the following, basic capabilities:

- Email Response: automatically respond to customer emails
- Computer Telephony Integration capability: provide caller information to agents automatically
- Customer Dashboard: present a comprehensive view of critical information about a customer
- Contact Management: provide agents with a complete history of all interactions with a customer/contact
- Workflow Management: route and track tasks throughout their life cycle
- Service Request Management: automatic assignment of service requests to employees based on a variety of factors, such as employee skills or organization
- Activity Management: associated activities to service requests to track work between an employee and a customer/contact
- Literature Management: Manage and post FAQs, training manuals, and any other publications for employees or customers
- Multi-channel support: voice, web, email, web collaboration

10. To assist DTMB to with opportunities to leverage solutions for cross-boundary partnerships

The Contractor supports public/private sector and local government collaborations as a way to further enhance and leverage efficiencies that DTMB has in the Enterprise Contact Center solution. Especially with the entry level Siebel configuration, the State has a quick, cost effective way to help other entities 'test the waters' in the call center arena and prove value before making a major investment.

The Contractor shall work with DTMB to market and deploy the Enterprise Call Center solution across Michigan departments and agencies as set forth in SOW specifications.

11. To assist DTMB in helping customer contact centers to enhance/improve their customer service

To help improve customer service, the Contractor shall assist agencies in identifying, collecting, and measuring the data points that define customer satisfaction for the agency. For some agencies, it may be the total time to process a request while for other agencies it may be measuring how the answer was delivered to the customer.



The Contractor shall:

- Support service level agreements defined herein,
- Work to reduce defect rates,
- Deliver project within timelines set forth in agreed upon project plans and statements of work,
- Deliver projects within budgets set forth in agreed upon project plans and statements of work

b) DTMB team responsibilities and customer agency responsibilities

The DTMB team and the customer agencies play a significant role in meeting the strategic objectives for this contract. Together DTMB, customer agencies and the Contractor form a team sharing common goals for the Michigan Enterprise Call Center initiative.

DTMB plays many roles in helping support this contract. From management of the infrastructure such as the voice and data network, database servers to the project management office, and contract and procurement. DTMB is a critical team member for this contract's objectives. For the everyday projects and support, DTMB shall provide a program manager, telephony specialist, NICE specialist, Siebel developer and database administrator. The program manager plays as important role in the governance of the contract, communication and team activities. The telephony and NICE specialists provide the deep knowledge in the State voice and data networks and applies this knowledge to successfully deliver projects and support with the Contractor team. The Siebel developer role shall be critical in effective support and enhancement to the client agency contact centers and keeping up to date with new releases of software from the COTS providers. The DTMB database administrator shall keep the foundation of the application database secure and running effectively 24/7. The customer agency businesses are why DTMB and the Contractor set objectives in providing technology services. The customer agencies play a critical role in meeting their annual objectives and the objectives for this contract. The agency contact centers are the front line for providing services to the State of Michigan citizens. By communicating their challenges and requirements to the DTMB and the Contractor, the Contractor can work together to design solutions that meet requirements. The agencies also provide vital daily system user administrative functions for their contact center agents. By providing user acceptance, regression testing and approving system changes, the agencies help validate that the changes to the systems are what is expected. Table 15 provides key State responsibilities in meeting the objectives of this contract.

Area of Responsibility	DTMB	Customer Agency
Infrastructure Support (voice data network, servers, firewall, database)	<input type="checkbox"/>	
Program Management	<input type="checkbox"/>	
Software user/agent administration		<input type="checkbox"/>
User acceptance and application regression testing		<input type="checkbox"/>
Proactive communication	<input type="checkbox"/>	<input type="checkbox"/>
IT standards	<input type="checkbox"/>	
Project and support Governance	<input type="checkbox"/>	<input type="checkbox"/>
Annual Strategic planning	<input type="checkbox"/>	<input type="checkbox"/>
Weekly MiECC meetings	<input type="checkbox"/>	
Monthly support operations meeting	<input type="checkbox"/>	<input type="checkbox"/>
Quarterly performance meetings	<input type="checkbox"/>	<input type="checkbox"/>
Telephony and Siebel State specialists	<input type="checkbox"/>	
License management	<input type="checkbox"/>	
Annual software vendor support renewals	<input type="checkbox"/>	
Contract management	<input type="checkbox"/>	<input type="checkbox"/>

Table 15. DTMB and Customer agency responsibilities for Contract objectives



J. Solution Center

The Contractor:

- i. Identifies their own center of excellence for contact center implementation and support.
- ii. The center of excellence will have the contact center technologies, as used in State of Michigan, implemented in a test environment.
- iii. The Contractor’s centers of excellence will act as a knowledge source for the on-site Contractor staff when complex problems arise.
 - a. On-site Contractor staff shall be able to reach out to experts at these centers to help in problem solving without extra cost to the State.
 - b. It may also host examples of all new versions of the software applications and give guidance to on-site Contractor staff.
- iv. The Contractor will describe any Contractor resources that shall be made available to on-site Contractor staff

a) The Contractor confirms that they will provide all requirements listed in this Section and provides detail regarding how they will accomplish these requirements

**i. Identify their own center of excellence for contact center implementation and support
The Contractor shall provide requirements listed in this section.**

The Contractor team shall leverage the assets, skills, processes and technology in the entire Contractor network of professionals.

ii. The center of excellence will have the contact center technologies, as used in State of Michigan, implemented in a test environment

The Contractor’s Global Delivery network, which includes Innovation Centers, Centers of Excellence, Infrastructure Outsourcing projects and Contractor supported clients, has an extensive number of contact center technologies including those used in the State of Michigan. The Contractor has Siebel, Genesys, Avaya, and Cisco environments implemented and supported in lab, development, test and production environments within its Global Delivery Center Network.

iii. The Contractor’s centers of excellence will act as a knowledge source for the on-site Contractor staff when complex problems arise

The Contractor shall leverage resources available including the Contractor Global Delivery network in supporting the State of Michigan in meeting the Enterprise Call Center objectives.

a. On-site Contractor staff shall be able to reach out to experts at these centers to help in problem solving without extra cost to the State

The Contractor shall look to support the State of Michigan in cost effective ways. As part of Base Support services, the Contractor shall leverage Contractor’s network of alliances, resources and internal knowledge assets to support the State of Michigan. The Contractor shall leverage all resources available including the Contractor’s Global Delivery network as in supporting the State of Michigan in meeting the objectives of this Agreement.

b. It may also host examples of all new versions of the software applications and give guidance to on-site Contractor staff

The Contractor Global Delivery network shall be the environment where new versions of industry software are available, tested and knowledge assets made available to the Contractor professionals working globally including Contractor’s local Lansing, Michigan based team.

iv. The Contractor describes Contractor resources that shall be made available to on-site Contractor staff

The Contractor maintains global alliance agreements with Genesys, Oracle, and Empirix. Resources from these organizations shall be available to the local team. In addition, as needed, the Contractor local team



shall provide independent Contractors specialized in contact center technologies on a project basis which may result in increased costs as documented in a mutually agreed upon SOW.

b) The Contractor describes their own contact centers of excellence, the supporting team skills and what access the onsite Contractor staff will have to the Contact center of excellence team

The Centers of Excellence described above are a part of the Contractor Delivery Network. The Base Support team shall have access to Contractor global colleagues and contact center knowledgeable professionals in support of the MiECC program which may result in increased costs as documented in a mutually agreed upon SOW.

c) DTMB team responsibilities and customer agency responsibilities.

Other than awareness as listed in Table 16, DTMB and agency shall have no other responsibilities regarding Contractor Solution Centers.

Area of Responsibility	DTMB	Customer Agency
Awareness of the Accenture Delivery Network	□	□

Table 16. Solution Center Responsibilities

K. Encryption

Since not all contact center agencies use sensitive data requiring encryption, Contractor shall work with DTMB and call center agencies to determine and document data encryption requirements and deploy an encryption solution for sensitive data in transit and at rest.

After services described in this Section are completed, full data encryption of sensitive data shall be included in Base Support. Genesys software transmits sensitive data over the State supported network infrastructure. To ensure transmission of sensitive data is encrypted, the State’s Network Communication Infrastructure team shall enable and configure (e.g., use of SSL) data transmission for encryption based on data encryption requirements identified in encryption analysis completed by Contractor, DTMB, and call center agencies.

Client Data Protection Controls and Standards

The Contractor acknowledges that its clients, as data controllers / data owners, shall be primarily responsible for compliance with applicable data privacy laws. The Contractor, as data processor/service provider, is responsible to use client data only for specified purpose and in accordance with client instructions and client contracts. In addition, the Contractor shall have responsibility to keep client data secure and work with the State to help comply with its obligations under data privacy laws. To help clients protect their data, the Contractor has implemented its Client Data Protection Program which is focused on meeting our client’s security and privacy needs.

As part of our program, each Contractor service delivery team works very closely with the client to understand precisely what sort of data shall be exposed to and how that data should be handled. The Contractor shall implement controls to provide security in handling client data, and to implement any client-specified rule sets, policies or compliance measures. These controls include the following:

- Allocation of senior level responsibility for client data protection for every project appointment of a dedicated data protection steward to support compliance with the client’s data protection requirements.
- Clear documentation and communication of the client’s requirements to Contractor personnel with access to client data



- Data protection training for all Contractor personnel on a client project (this can be client specific where this is stipulated)
- Procedures for managing security incidents with full client involvement
- Standards for secure transmission, storage, back up and destruction of client data
- Technical, organizational and physical security controls including hard drive encryption for laptops and other removable media, physical and logical access controls and employee background checking.
- Periodic audits by our Data Privacy Compliance Team of service delivery teams to confirm compliance with the client's instructions and data privacy policies as well as the standards and controls set out above.

MiECC Data Protection

Contractor piloted its data protection compliance program at MiECC in the fall of 2007. Staff was trained in January 2008 and has received refresher training annually since that time. In addition, each employee is provided a Client Data Protection Reference Guide that answers frequently asked questions and provides strict guidance on data transmission and storage methods when dealing with all types of client data including highly confidential personally identifiable information.

The data protection program at MiECC complies with the strict global protocols Contractor requires. The Global Data Protection Group travels every 18-24 months to review projects, including the MiECC initiative.

DTMB requires that encryption be utilized when moving or storing protected information including resident's privacy information or Personally Identifying Information (PII) such as social security numbers, regulated health information, or financial data including credit card numbers. Through encryption methods the objective is to minimize the likelihood that sensitive or confidential State information is inadvertently disclosed or accessed during the transmission or storage of sensitive and/or confidential data. The link given below contains the policy which identifies the requirements for the encryption methods when data is transmitted and when data is stored in permanent or removable electronic media.

http://www.michigan.gov/documents/1315_162707_7.10_Encryption_Policy.pdf

DTMB would like to implement encryption of all sensitive data at rest and in transmission. The Contractor should use functionality from the existing COTS software, the Oracle Advanced Security Option and where necessary custom code.

Depending on the amount of work involved for individual agencies, this work may be part of Base Support or State may consider this as Major Enhancement.

a) The Contractor shall provide all requirements listed in this section, and provide detail regarding how they will accomplish each of the above tasks

Contractor understands the State's intent to implement encryption of all sensitive data at rest and in transmission in the State enterprise. Sensitive data consists of Personally Identifying Information (PII) such as social security numbers, regulated health information or financial data such as credit card numbers. Encrypting sensitive PII data at rest and in transmission lessens the likelihood that State data will be compromised. The Contractor shall review and document MiECC requirements for DTMB standard Standard 1315.10 that specifies requirements to meet minimum protection through the use of encryption.

As part of the Contractor's scope for this contract, Contractor shall assist agencies and DTMB in evaluating the contact center applications with the objective of identifying and implementing a contact center data encryption plan to have all of the sensitive data encrypted. The Contractor shall document the contact center data encryption plan as part of the Call Center Strategy and Agency Enhancement plan update activities.



Requirements of data encryption vary between agencies, like source of data, sensitivity of the data, how the data is handled, means of data transit that should be secured, should encryption be real-time for large amounts of data during transmission or is it 'batch' where data should be encrypted before it enters persistent storage (DB), etc., Contractor shall document data encryption scope requirements prior to starting work on deploying an encryption solution. Contractor staff, DTMB, Siebel and Oracle/SQL server knowledge resources shall study and document scope, verifying the assumptions made on scope, data volume and mechanism to be employed. Depending on the amount of work involved for individual agencies, this work may be part of Base Support or Contractor and State may consider this as Major Enhancement through a mutually agreed upon SOW.

Data encryption scope shall consist of:

- Storage of data in Oracle DB - selective data, granularity at table level
- Siebel in-memory or online data - selective data, granularity at field, report level
- Transmission channels of web access to be secured for all contact centers
- Access to CSRs, field staff if any over State's network
- Access to data over PSTN not included in scope

Contact Center Software Vendor Data Encryption Capabilities

The Contractor shall review the Siebel data encryption capabilities described below and map to documented requirements in the call center data encryption plan.

Siebel End-to-End Encryption for Data Confidentiality

- Stored data can be selectively encrypted at the field level, and access to this data can be secured. In addition, data can be converted into an encrypted form for transmission over a network. Encrypting communications safeguards such data from unauthorized access. Transmitted data shall be protected from intrusive techniques (such as sniffer programs) that can capture data and monitor network activity. Data encryption is a method of encoding data for security purposes. Siebel Business Applications support industry standards for secure Web communications and encryption of sensitive data such as passwords. End-to-end encryption protects confidentiality along the entire data path: from the client browser, to the Web server, to the Siebel Server, to the database, and back. Figure 5 shows the types of encryption available for communications within the Siebel environment

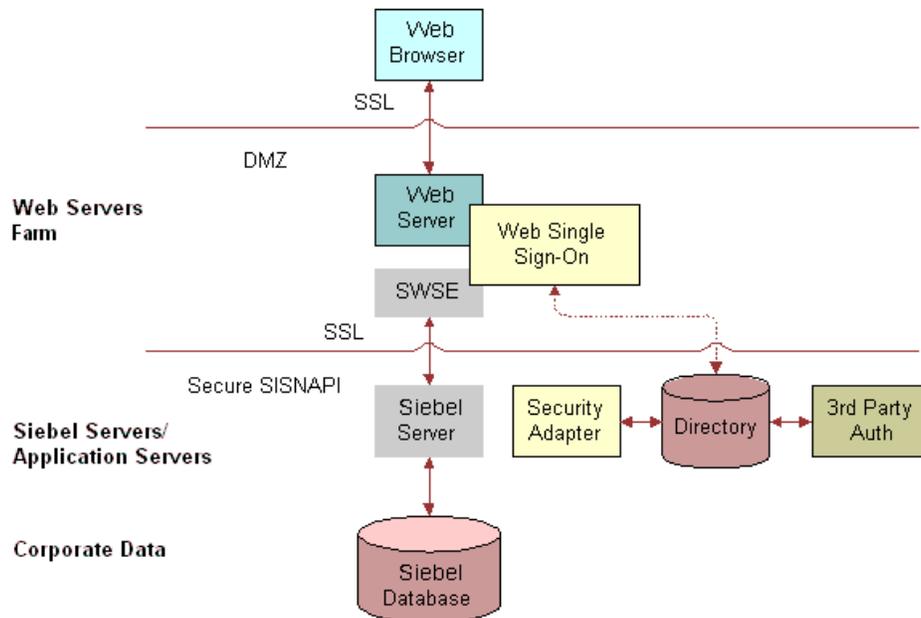


Figure 5. Encryption of Communications in the Siebel Environment

Client Browser to Web Server

Siebel Business Applications run using the Siebel Web Client in a standard Web browser. When a user accesses Siebel Business Applications, a Web session is established between the browser and the Siebel Server, with the Web server in between. Secure Sockets Layer (SSL) protects against session hijacking when sensitive data is transmitted. Siebel Business Applications support 128-bit SSL data encryption, an extremely secure level of protection for Internet communications. Customers using SSL can configure which Web pages (known as views) within Siebel Business

Applications use SSL in the following scenarios:

- Use SSL only on the login view to protect password transmission
- Use SSL for additional specific views
- Use SSL for the entire application

Web Server to Siebel Server

Siebel Business Applications components communicate over the network using a Siebel TCP/IP based protocol called SISNAPI (Siebel Internet Session API). Customers have the option to secure SISNAPI using Secure Sockets Layer (SSL) or embedded encryption from RSA or Microsoft Crypto APIs. These technologies allow data to be transmitted securely between the Web server and the Siebel Server.

Siebel Server to Database

For secure transmission between the database and the Siebel Server, data can be encrypted using the Oracle Advanced Security network encryption for Oracle and/or SSL encryption for SQL server. Since it is required to use a minimum 128-bit vs. 56-bit encryption Contractor shall work to install and configure the Siebel Strong Encryption package on the Siebel Web and Application servers. This is a package that is available from Siebel without any additional licensing.

Siebel Business Applications by default use the RC4 encryption. RC4 encrypts all the server passwords which writes the encrypted password to the Siebel Gateway server .dat file.



RC4 encryption: Siebel Business Applications use RC4 encryption to encrypt passwords stored in the siebns.dat file and to encrypt the Auto-Login Credential Cookie. The siebns.dat file stores information required by the Siebel Gateway Name Server

Contractor uses the below Algorithm in order to directly access to the database.

RSA SHA-1 password hashing: Siebel administrators can enable password hashing. Hashing uses a one-way hashing algorithm. The default password hashing method is RSA SHA-1. (The previous mangle algorithm is still available for existing customers.) Password hashing invalidates the password to unauthorized external applications and prevents direct SQL access to the data by anything other than Siebel Business Applications. Database Storage

Transparent Data Encryption (TDE) technologies exists both for the Oracle and SQLServer environments. TDE technologies allow full databases and/or columns to be encrypted with no application code changes.

b) The Contractor describes their overall approach to implement the encryption. The encryption projects will be considered part of Major Enhancements

Contractor's approach to protecting sensitive data shall consist of working with the agency and DTMB to effectively inventory the sensitive contact center data both at rest and in transit. Contractor shall identify approaches to protect this data through the latest industry acceptable methods that meet the standards of the State. Contractor shall leverage its experience in data privacy and data encryption to help guide the project by reducing risks. The Contractor high-level planning approach shall be as follows:

- Inventory the candidate data - category, volumes, nature of data, locations
- Identify transit mechanisms to be secured - web, dedicated network, intra-application or intra-server transits
- Performance, testability, maintainability and other non-functional considerations of data security
- High level execution approach shall be:
 - Assist in documenting the approach as part of the State SEM processes in detail and review with the stakeholders including the agency, DTMB and Office of Enterprise Security.
 - Consult State Security, DB Admin team and functional stakeholders and finalize functional requirements
 - Seek planning and budgeting approvals after estimation confirmation
 - Design implementation plan
 - Implementation and roll-out

Contractor shall leverage its experience in data privacy and data encryption to help guide the project by reducing risks. As part of the project, the Contractor shall assist in documenting the approach as part of the State SEM processes in detail and review with the stakeholders including the agency, DTMB and Office of Enterprise Security. As part of Contractor approach, Contractor shall consult with State security experts and the database administrators.

c) The Contractor details out each movement and storage areas for all sensitive data, and describe how the encryption requirements will be met for each agency solution. This includes the software that will be used and whether it will require configuration or custom code

Contractor shall work closely with the agency and DTMB to confirm that sensitive data is included in data encryption plans for the contact center. Table 17 represents a high-level initial view of the applications in the contact centers that shall be candidates at storage/transit points for sensitive data. This view is subject to change upon a further analysis with the agency and DTMB but it is Contractor's initial view of the data scope for the contact center. Contractor shall look to reduce and eliminate configuration or coding to encrypt the



data. Contractor shall look to transparently encrypt the data at rest with the use of Oracle and SQL Server built in encryption packages that use Transparent Data Encryption (TDE).

Sensitive Data items considered (SSN, DLN, CC, Regulated Health Information)						
Agency	Genesys Storage	Genesys Transit	Siebel Storage	Siebel Transit	NICE Storage	NICE Transit
Civil Service	NO	✓	✓	✓	✓	✓
DHS IVR	NO	✓	N/A	N/A	N/A	N/A
DTMB-CSC	NO	---	N/A	N/A	N/A	N/A
DEQ	N/A	N/A	NO	NO	N/A	N.A
LARA-BHP	NO	✓	✓	✓	✓	✓
MDOS	NO	✓	✓	✓	✓	✓
ORS	NO	✓	✓	✓	✓	✓
Treasury	NO	✓	✓	✓	✓	✓

Table 17. High Level possible sensitive data areas

The Contractor shall review the database data encryption capabilities described below and map to documented requirements in the call center data encryption plan.

Transparent Data Encryption with Oracle Advanced Security Transparent Data Encryption (TDE) enables users to encrypt data within a database. When an application such as Siebel accesses the data, Oracle Database transparently decrypts the relevant data for the application. Encryption is a very important tool for applications. The State can use Oracle Advanced Security TDE to address PCI-DSS requirements and can use TDE to safeguard social security numbers and other sensitive information. Encryption plays an especially important role in safeguarding data in transit. Oracle Advanced Security network encryption protects data in transit on the intranet from network sniffing and modification. Oracle Advanced Security TDE protects sensitive data on disk drives and backup media from unauthorized access, helping reduce the impact of lost or stolen media. Transparent Data Encryption encrypts entire tables of data at the table space level in the database. Table space encryption does not require the complicated database triggers and views commonly associated with other database encryption solutions. This means that no Siebel application changes are required to take advantage of this feature. Data for existing Siebel applications can be encrypted with minimal performance impact.

Microsoft SQL server has similar transparent data encryption options that could be enabled without the need for application changes. For MSSQL server you can enable encryption of an entire database (all data files and log files) without the need for application changes. For example, the Database Administrator can encrypt the entire Siebel database with no changes needed on the Siebel Server(s), Siebel Tools, and so on. Note that encryption may be enabled for the entire database, but not for selective tables or columns. The database pages are decrypted once read into SQL Server memory, and encrypted any time a page is written to disk. Moreover, backups are encrypted once encryption is enabled on the Siebel database. Contractor shall work with the DTMB database administrators to confirm which options of TDE exists for the versions of the database that we are currently operating.



d) The Contractor identifies whether additional software licenses are required and their estimated cost (purchase price and maintenance)

As part of contact center data encryption plan, the Contractor shall confirm what additional software licensing, if any, shall be required to implement data encryption.

e) The Contractor identifies whether additional hardware is required to cover the overhead involved with encryption /decryption and their estimated cost

As part of the contact center data encryption plan, the Contractor shall confirm what additional, if any, hardware shall be required to implement data encryption.

f) The Contractor provides an estimated cost for its involvement to configure/custom code all components for the encryption requirements. The Contractor provides the required skill sets and hours required to complete the work. Service cost estimates should be based on the Table 4: Rate Card in Attachment 3A - Cost Tables

The Contractor's approach shall be to leverage the network encryption and storage encryption technologies to accomplish the objective of further protecting sensitive data. As part of the contact center data encryption plan, the Contractor shall document what configuration/custom application code changes to the in scope applications, if any, shall be required.

Contractor, under the data encryption plan, shall recommend Siebel, Oracle, and other call center software capabilities be used to meet the State's encryption requirements.

For example, Siebel Applications also allow customers to encrypt sensitive information stored in the Siebel database (for example, credit card numbers, Social Security numbers, birth dates, and so on) so that it cannot be viewed without access to Siebel Business Applications. Customers can configure Siebel Business Applications to encrypt a column's data before it is written to the database and decrypt the same data when it is retrieved. This encryption prevents attempts to view sensitive data directly from the database. Sensitive data can be encrypted by using AES (Advanced Encryption Standard) or RC2 encryption, at various key lengths. Encryption can be enabled using Siebel Tools. This as an alternative to the native database TDE encryption but Contractor's preliminary recommendation shall be to use the TDE encryption.

g) The Contractor describes the provisions made for preparing the response

The Contractor has following provisions to the encryption requirements:

- Oracle 11G shall be available for table level TDE
- Oracle 10G shall be available for column level TDE
- SQLServer 2008 shall be available for TDE
- The Contractor team does not have administrative rights on the servers. Data Encryption in transit shall be in scope for DTMB to generate and install SSL encryption certificates on the appropriate servers as defined by the Contractor MiECC team in the call center data encryption plan.
- The Contractor team shall be in a consult and assist role and shall work closely with agency, OES, DTMB teams to validate the encryption assumptions and test the final encryption configurations for usability and performance considerations.
- The State shall provide a project manager.
- Agencies shall request data encryption projects through the annual Call Center Strategy and Agency Enhancement Plan update work efforts.
- Current data reports that agency management receive on a daily, weekly and monthly basis do not contain sensitive data and still need to be included in regression testing to validate that data is presented the same after data encryption is applied to the environment.

h) The Contractor identifies any underlying risk for implementing or not implementing the solution

The Contractor sees more risks for not encrypting sensitive data than in encrypting the data. The main risks in not encrypting the sensitive data are that data at rest or in transit data could be compromised putting the



citizens at risk for unauthorized use of personal information. The main risk to implement a full data encryption environment affects the application performance. From Contractor’s experience, the risk of performance degradation is low and could be mitigated through proper testing, database configuration and expectations management.

i)

High-Level Cost Estimate

The Contractor provided high-level cost estimate for Encryption in Contractor’s Price Proposal.

L. Licenses/Training Services

Reserved

M. Other Contact Center Services

The Contractor may provide extra contact center services. The state shall provide an SOW and the Contractor shall respond with a proposal. The proposal shall include all possible skills/ services that may be required in the contact center space.

Approach

Working with the State of Michigan agencies to identify additional contact center services, Contractor shall follow the accepted SOW process described in Section 1.403 Change Management.

b) Bidder must specify the DTMB team responsibilities and customer agency responsibilities

Contractor shall work with DTMB and agency contacts to identify and document staffing requirements. Contractor shall then search for and secure appropriate third-party staff. Contractor shall prepare and submit a SOW response to DTMB and agency contacts as needed. The agency contact(s) shall approve the SOW and DTMB prepare/submit the purchase order request for approval and processing. Upon issuance of a purchase order, Contractor, DTMB, and agency contact(s) shall work within in the existing service delivery model to prioritize and schedule work completion approved in the SOW. Table 18 sets forth the responsibilities of each party.

Area of Responsibility	DTMB	Agency	Contractor
Identify staffing requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare requirements documentation			<input type="checkbox"/>
Search and secure appropriate staff			<input type="checkbox"/>
Prepare SOW			<input type="checkbox"/>
Approve SOW		<input type="checkbox"/>	
Issue purchase order	<input type="checkbox"/>		
Monitor SOW delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 18. DTMB, Customer Agency and Contractor Responsibilities associated with providing Other Contact Center Services

II. Requirements

A. Work Requirements

See Attachment 2



1.200 Roles and Responsibilities

1.201 Contractor Staff, Roles, And Responsibilities

A. Contractor Staff

The Contractor’s team’s years of experience with the State of Michigan, MiECC, project management, and the MiECC systems and technologies is illustrated in Table 27.

Table 27. The Contractor’s team’s years of experience with the State of Michigan, MiECC, project management, and the MiECC systems and technologies is illustrated in Table 27. 19.

	State of Michigan	MiECC	Project Mgmt	Siebel	Oracle/SQL	Genesys	IVR	NICE
Jamie Walker	7	6	20+					
Ryan Sadler	8	8	13+	8	13+	8	8	3
Norma Miller	4	2	20+					
Rajaram Loganathan	9	8	9	12+	12	8	8	7+
Pam Numerick	4	4	11	11+	14	1	1	
Ravindra Jaiswal	3	3	4	2	6	6	6	3
Noel Espiritu	2	2		12	11	4	1	
Manju Yeddanapalli	3	3	4	7	9	1	1	
Greg Blake	3	2		1	3	2	2	1

Contractor MiECC Team’s Experience at a Glance

Contractor’s team members in key personnel positions meet or exceed the minimum skills and experience directly related to the assigned job functions. Contractor commits the staff identified in the Contract to the MiECC project.

In anticipation of future staffing changes and SOW work that requires staffing from third parties, Contractor shall enlist the support of a Global Alliance member or Contractor Exchange supplier to provide the specialized skill set, including:

Name of Subcontractor	Genesys Telecommunications Laboratories, Inc.
Address	2001 Junipero Serra Blvd, Daly City, CA 94014
Contact Person	Dave Kregness, Account Executive for State of Michigan dave.kregness@genesyslab.com William Grabner, Director of US Sales, wbrabner@genesyslab.com
Work to be Contracted	Future Genesys Specialist skill set.
Contractor Descriptive Information and Abilities	Genesys is the world’s largest software only contact center company. Genesys has locations across the US and 80 countries globally. Industry organizations such as Gartner, Forrester, Datamonitor and others consistently rank Genesys products and platforms as best in class. Specific to the State of Michigan, Genesys is currently installed at eight (8) Agencies including Treasury, DTMB CSC, Office of Retirement Services, DHS, Community Health, Civil Service, DNR and Department of State.



	Genesys offers a broad array of software products, consulting, professional services and training that can have a positive effect on State and Local government entities as they seek to be more effective and efficient within and across their organization as well as with their citizens and other key stakeholders.
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Name of Subcontractor	Actium Consulting, www.actium-consulting.com
Address	P.O. Box 4631, El Dorado Hills, CA 95762
Contact Person	Gus Exarchos, Managing Director; 314-378-5317
Work to be Contracted	Future Business Analyst, System Architect, Seibel Lead, Siebel Developer, Computer Telephony Specialist, Genesys Specialist, IVR Developer, NICE Analyst skill sets.
Contractor Descriptive Information and Abilities	Actium Consulting has over 18 years of experience in the development, implementation and support of large public sector systems and is an Accenture Preferred Contractor Exchange supplier. Actium Consulting's experience includes 9 years collaborating with Accenture on the State of Michigan Child Support Enforcement (MiCSES) project serving as an integral part of MiCSES in the production support effort providing training, technical writing, and advanced Oracle development skill sets. They also provide computer telephony specialists and Genesys specialists for the State of California Child Support call center. They are able to provide the MiCSES project with Business Analyst, System Architect, Seibel Lead, Siebel Developer, Computer Telephony Specialist, Genesys Specialist, IVR Developer, NICE Analyst skill sets.

The Contractor has identified a Single Point of Contact (SPOC), Norma Miller. The duties of the SPOC shall include, but not be limited to:

- supporting the management of the Contract,
- facilitating dispute resolution, and
- advising the State of performance under the terms and conditions of the Contract.

With extensive program management experience and her current experiences as the contract manager for the Michigan Child Support Enforcement System project and the existing Michigan Enterprise Call Center project, she has familiarity with Contractor's contractual responsibilities.

The State reserves the right to require a change in the current SPOC if the assigned SPOC is not, in the opinion of the State, adequately serving the needs of the State.

The Contractor shall provide, and update when changed, an organizational chart indicating lines of authority for personnel involved in performance of this Contract and relationships of this staff to other programs or functions of the firm. This chart must show lines of authority to the next senior level of management and indicate who within the Company will have prime responsibility and final authority for the work.

Figure 6 displays the organizational chart, which indicates the lines of authority with Contractor personnel responsible for the performance of this contract.

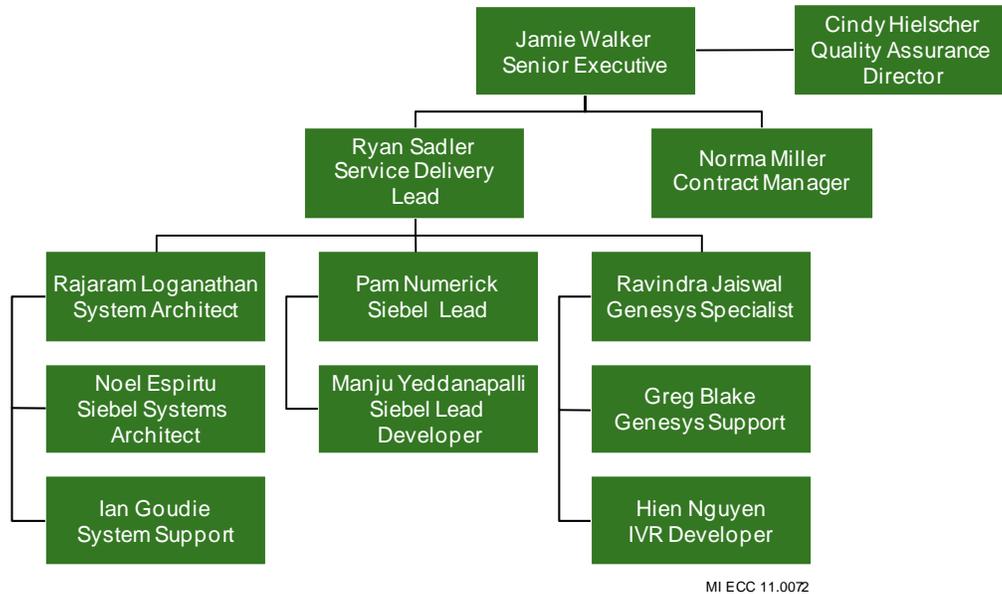


Figure 6. The Contractor MiECC Team brings highly skilled and qualified individuals with demonstrated experience in the MiECC environment

Jamie Walker, the MiECC Client Account Lead, will sign the MiECC Contract and have final authority for the work.

All Key Personnel may be subject to the State’s interview and approval process. Any key staff substitution must have the prior approval of the State. The State has identified the following as key personnel for this project:

- Project Manager - Service Delivery
- System Architect
- Siebel Lead
- Genesys Specialist

The Project Manager – Service Delivery is Ryan Sadler.

The System Architect is Rajaram Loganathan.

The Siebel Lead is Pam Numerick.

The Genesys Specialist is Ravindra Jaiswal.

The Contractor shall identify whether the key personnel will perform any secondary roles. The key personnel are expected to be available on site during normal state working hours (see B2 below) unless remote work arrangements have been agreed upon with DTMB Project Manager.

The Contractor will provide a project manager (service delivery) to interact with the designated personnel from the State to insure a smooth transition to the new system. The project manager (service delivery) will coordinate all of the activities of the Contractor personnel assigned to the project and create all reports required by State.

The Contractor will provide sufficient qualified staffing to satisfy the deliverables of this SOW.

For all role descriptions, please refer to Attachment 4: Personnel Requirements



The Enterprise Contact Center Base Support team shall include six different groups of personnel.

- a. Contractor staff who will be on the support team.
- b. DTMB staff who will be on the support team for full time.
- c. DTMB staff who will provide necessary services to the support team.
- d. Business staff who will perform system administration
- e. Business staff who will product test the system.
- f. DTMB project oversight

The Contractor shall show a resource plan for the five years identifying all Contractor personnel involved in this project, their skills and the tasks that they will be allocated. The Contractor has included representative resumes of all non-key personnel in the Base Support team.

The Contractor will describe any other Contractor resources that will be made available to on-site Contractor staff.

The Contractor will designate specific skill sets for their personnel permanently assigned to the team. The Contractor will describe the experience of all personnel listed in their response along with any relevant qualifications.

The State, with multiple contact centers, has a complex environment often requiring the ability to manage a number of maintenance and support related activities concurrently. The Contractor shall leverage their resource bench to support any of the operational activities (including for key personnel) on short notice in the event that such action is required.

Further it is recognized that designated State staff may leave the team and seek employment elsewhere. The Contractor may be required by DTMB temporarily to provide Contractor staff with at least the same knowledge and skill levels while the State seeks a replacement. The Contractor shall provide costs for this when required. The State will provide the Contractor a SOW and the Contractor will respond with a proposal using the rate card in cost tables, if possible.

Likewise, Contractor staff may leave the team and seek employment elsewhere. The Contractor may be required by DTMB to temporarily provide Contractor staff with at least the same knowledge and skill levels while the Contractor seeks an equivalently skilled replacement.

In the event that Contractor need to bring on a new member to its team, either to replace a departing Contractor team member or support the State after departure of a key State staff member, Contractor shall use global network of professional as described in the Bench Strength Section below.

In addition to our highly qualified employees, Contractor maintains Global Alliances and teams with Contractor Exchange suppliers. Contractor shall enlist the support of a Global Alliance member or Contractor Exchange supplier to provide the specialized skill set in the event of future staffing changes and SOW work that shall require staffing from third parties. Potential team members include but are not limited to the following:

- Genesys
- Empirix
- Oracle
- VMWare
- IBM-ECM (formerly FileNet)
- Actium Consulting

The Contractor understands that the State may wish to create additional SOWs for an increase in services over the duration of the five-year Base Support contract. The Contractor shall work with the State to pursue the appropriate Contract modifications at that time to increase staff above the proposed staffing plan as appropriate to meet the requested services.



Personnel	Type / Skill	In Scope Services	Planned Resource FTE Hours By Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Mr. Sadler	Service Delivery	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,260	1,260	1,080	1,080	1,080
		Major Enhancements	540	540	720	720	720
Ms. Miller	Contract Management	SPOC, Contract Administration	90	90	90	90	90
Mr. Loganathan	Systems Architect	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,440	1,440	1,440	1,440	1,440
		Major Enhancements	360	360	360	360	360
Ms. Numerick	Siebel Lead	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,440	1,440	1,440	1,440	1,440
		Major Enhancements	360	360	360	360	360
Mr. Jaiswal	Genesys Specialist	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,440	1,440	1,440	1,440	1,440
		Major Enhancements	360	360	360	360	360
Ms. Yeddanapalli	Siebel Developer	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,620	1,620	1,620	1,620	1,620
		Major Enhancements	180	180	180	180	180
Mr. Espiritu	Technical Administrator	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,800	1,800	1,620	1,620	1,620
		Major Enhancements	0	0	180	180	180
Mr. Nguyen	IVR Developer	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	0	0	0	0	0
		Major Enhancements	1,800	1,800	1,800	1,800	1,800
Mr. Blake	Genesys Support Specialist	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	1,800	1,800	1,800	1,800	1,800
		Major Enhancements	0	0	0	0	0
Ian Goudie	Support Specialist (NICE, Siebel, L1)	Knowledge Transfer	0	0	0	0	0
		Base Support Tasks	0	0	0	0	0
		Major Enhancements	1,800	1,800	1,800	1,800	1,800
Total FTE by Period			9.05	9.05	9.05	9.05	9.05

Table 20. Contractor proposes a consistent team to deliver MiECC Base Support over the duration of the Contract

Additional Contractor Resources

During the Contract term, Contractor may be required to reach out to additional resources when needed. Those resources may be Contractor employees, subcontractors, or software vendors on an as needed and/or requested basis. The Contractor Delivery Network provides the local Contractor MiECC Team and the State with global knowledge assets. Contractor shall use the Contractor Delivery Network to bring the right skilled resources at the right time to provide the required support. The Contractor has a global resource management organization that could be used to locate and schedule a skilled resource to assist the Michigan team.

Specific Skill Sets and Experience

The Contractor Base Support team performed similar roles under the previous MiECC contract. These personnel have demonstrated their knowledge, experience and ability to perform their responsibilities in the MiECC environment. Table 21 provides a high-level view of the skills and experience Contractor team provides.



Name	IT Classification	General Skills
Norma Miller	Project Manager	<ul style="list-style-type: none"> • Contract Administration • Project Management • Contact Center Administration
Ryan Sadler	Project Manager (Service Delivery)	<ul style="list-style-type: none"> • Contractor Lead • Project Management Professional (PMP) • SUITE • Contact Center Siebel, Genesys, and NICE Functional and Technical Acumen
Rajaram Loganathan	System Architect	<ul style="list-style-type: none"> • Technical Lead • Siebel and Genesys SUITE • NICE • Windows Server • Networking • Oracle • Workforce Manager
Pam Numerick	Siebel Lead	<ul style="list-style-type: none"> • Siebel • SUITE • FileNet
Ravi Jaiswal	Genesys Specialist	<ul style="list-style-type: none"> • Genesys Framework • NICE • Genesys IVR
Manju Yeddanapalli	Siebel Developer	<ul style="list-style-type: none"> • Siebel • SUITE • Contact Centers • Workflow • Reporting
Greg Blake	Computer Telephony Specialist	<ul style="list-style-type: none"> • Genesys Framework • SUITE • Genesys IVR • CTI • AES • Avaya
Noel Espiritu	Siebel Developer	<ul style="list-style-type: none"> • Siebel • Siebel EIM • Oracle • Batch Process • Workflow

Table 21. The Contractor MiECC Team has demonstrated the skills and experience needed to support the DTMB and the State of Michigan agency customer contact centers

Ongoing Team Management

Bench Strength

The Contractor has a robust process to pull from their experienced and skilled resource pool of approximately 236,000 employees across the globe. Many of these employees currently possess the specific skills requested by this contract. In the event a Contractor resource can no longer work on the project, Contractor shall work with its dedicated Human Resource Staffing Coordinators to identify a suitable replacement for the departing individual based on the skills and qualifications needed for the role. Ryan Sadler, the Project Manager - Service Delivery, shall be responsible for finding the right candidates and Jamie Walker, the MiECC Client Account Lead, shall be responsible for helping the Project Manager and solving escalated staffing issues.

B. On Site Work Requirements

1. Location of Work



The work is to be performed, completed, and managed at the following locations:
 General vicinity of Lansing, Michigan

Knowledge transfer and Base Support team members must be on site. The Major Enhancements project team members may be off site as agreeable by state's project manager on a case by case basis.

2. Hours of Operation:

- a. Normal State working hours are 8:00 a.m. to 5:00 p.m. EST, Monday through Friday. However, contact center business hours are 7 AM to 7:30 PM Monday through Friday and 9 AM to 12:30 PM on Saturdays. Work may be performed as necessary and with proper approval after those hours to meet project deadlines or service levels as defined in Attachment 1. No overtime will be authorized or paid.
- b. The State is not obligated to provide State management of assigned work outside of normal State working hours. The State reserves the right to modify the work hours in the best interest of the project.
- c. Contractor shall observe the same standard holidays as State employees. The State does not compensate for holiday pay.

3. Travel:

- a. No travel or expenses will be reimbursed. This includes travel costs related to training provided to the State by Contractor.
- b. Travel time will not be reimbursed.

4. Additional Security and Background Check Requirements:

Contractor must present certifications evidencing satisfactory Michigan State Police Background checks ICHAT and drug tests for all staff identified for assignment to this project.

In addition, proposed Contractor personnel will be required to complete and submit an RI-8 Fingerprint Card for the National Crime Information Center (NCIC) Finger Prints, if required by project.

Contractor will pay for all costs associated with ensuring their staff meets all requirements.

The Contractor shall perform work in the general vicinity of Lansing, Michigan. The Contractor shall provide support resources during the normal State working hours. The Contractor shall continue to look to staff the Base Support team with local resources that shall work on-site during business hours and also be available on call should a high priority remedy ticket be received. Portions of the contact center support requires 24/7 support. Contractor shall coordinate to have work completed during core business hours to reduce the impact on State and Contractor resources after hours. However, in the event that an issue occurs, resources may be required to work after hours to troubleshoot and confirm system availability. The Contractor shall continue to work with DTMB and agencies to complete server maintenance, product upgrades, executed batch jobs, release migrations, and regression testing after normal State working hours to reduce the impact on State and MiECC resources. This work is consistently validated and approved confirming that the contact center applications are available the next business day. These events are coordinated with the Agency requesting the assistance. These production activities are communicated in the monthly status meetings to the agencies and to the DTMB project manager.

The Contractor team shall work with the State project manager if project working hours are to be modified. The Contractor team may complete a FileNet, Siebel or Genesys Upgrade after-hours or over a weekend to reduce the business impact. In these cases, the Contractor shall coordinate with the State to provide the requested support outside of normal business hours.

The Contractor team shall observe the same holidays as State employees as needed.



The Contractor team shall not expect the State to reimburse for Travel or Expenses. The Contractor team also shall not have travel time reimbursed.

The Contractor shall continue to fully comply with the requested State background checks.

1.202 State Staff, Roles, And Responsibilities

The State will provide the following resources for the Contractor’s use on this project:

- Co-located Contractor team Work space
- Minimal clerical support
- Desk
- Telephone
- PC workstation with hard drive encryption
- Printer
- Access to copiers and fax machine

The State project team will consist of Executive Subject Matter Experts (SME’s), project support, and a DTMB and Agency project manager:

Executive Subject Matter Experts

The Executive Subject Matter Experts representing the business units involved will provide the vision for the business design and how the application shall provide for that vision. They shall be available on an as needed basis. The Executive SME’s will be empowered to:

- Resolve project issues in a timely manner
- Review project plan, status, and issues
- Resolve deviations from project plan
- Provide acceptance sign-off
- Utilize change control procedures
- Ensure timely availability of State resources
- Make key implementation decisions, as identified by the Contractor’s project manager, within 48-hours of their expected decision date.

List of Business and Technical SME from each agency -

Name	Agency/Division	Title
Michelle Suchner	Civil Service	Business Manager
Anne Brys	DTMB-MCSC	Agency Services Manager
Phat Tran	DTMB-Client Service Center	Business Manager
Dan Conlin	DTMB-Client Service Center	DTMB-CSC Director
Sean Bodell	ORS	Business Manager
Mike Bilek	DTMB ORS	Agency Services Manager
Christine Grossman	DEQ	Business Manager
Jeff Beasley	DTMB DEQ	Agency Services PM
Tess Layman	DTMB DHS	Leveraged Services Director
Joe Campbell	LARA-BHP	Business Manager
Celeste Sickles	DTMB LARA	Agency Services Manager
Bud Diver	MDOS	Business Manager
Tiziana Galeazzi	DTMB MDOS	Agency Services Manager
Patricia Cotter	Treasury	Business Manager
Randy Leyrer	DTMB Treasury	Agency Services Manager

State Project Manager- (DTMB and Agency)



DTMB will provide a Project Manager who will be responsible for the State’s infrastructure and coordinate with the Contractor in determining the system configuration.

The State’s Project Manager shall provide the following services:

- Provide State facilities, as needed
- Coordinate the State resources necessary for the project
- Facilitate coordination between various external contractors
- Facilitate communication between different State departments/divisions
- Provide acceptance and sign-off of deliverable/milestone
- Review and sign-off of timesheets and invoices
- Resolve project issues
- Escalate outstanding/high priority issues
- Utilize change control procedures
- Conduct regular and ongoing review of the project to confirm that it meets original objectives and requirements
- Document and archive all important project decisions
- Arrange, schedule and facilitate State staff attendance at all project meetings.

The DTMB Project Manager shall approve any Major Enhancements.

Name	Agency/Division	Title
Abhijit Sarkar	DTMB	Project Manager

DTMB shall provide a Contract Administrator whose duties shall include, but not be limited to, supporting the management of the Contract.

Name	Agency/Division	Title
Mark Lawrence	DTMB	Contract Administrator

The support team will consist of DTMB staff, business staff and Contractor staff providing services to the contact centers.

DTMB will be responsible for the State’s infrastructure and work together with the Contractor in determining the system configuration.

The State currently has two technical team members at MiECC – a Computer Telephony/Genesys Specialist and a trainee Siebel developer.

DTMB staff who will provide necessary services to the support team

The State currently has staff in the following support roles:

- a. Database Administrator
- b. NICE administration specialist
- c. Telecom division technical employees for Telephony programming, troubleshooting and order processing.
- d. Telecom staff to maintain the telephony environment components including T-API’s.
- e. Server hosting staff to maintain all hardware and operating systems. This includes the Cisco switches that act as load balancers.
- f. State programmers who will maintain the legacy data load to Siebel repository tables
- f. EMichigan staff who will review and approve all external facing websites.
- g. FileNet technical administrator (and back up) who maintains the hardware infrastructure, the basic FileNet software configurations and all security for files and users.

State staff does not maintain anything relating to the IDL, VB script, FileNet Capture configurations and the FileNet CIS products at Treasury.



Business staff who will perform system/business administration

Each agency will have one employee who will be responsible for business administration. This includes adding new users and list of values (LOV's).

Business staff who will product test the system

Each agency will provide a testing team that will complete users' acceptance testing for system changes. They will also identify the data necessary to test the new functionality.

1.203 Other Roles And Responsibilities

RESERVED

1.300 Project Plan

1.301 Project Plan Management

Project Plan Management Approach

Accenture Delivery Methods (ADM) is central to the Contractor's approach to managing the MiECC project work. ADM aligns with both industry standards and the State's Project Management Methodology (PMM).

The Contractor's methods and tools are not strictly Contractor-centric; they use project management industry preferred practices from external sources as well, promoting a high level of quality and completeness. For example, ADM incorporates industry standards from the Software Engineering Institute's (SEI) Capability Maturity Model Integrated (CMMI), the Project Management Institute's Body of Knowledge (PMBOK), Institute of Electrical and Electronics Engineers (IEEE), and IT Infrastructure Library (ITIL).

CMMI Process Maturity - Delivering Quality Standards, Practices and Processes

Knowing and practicing well-defined and proven standards and processes from the start of the project can produce higher quality deliverables in less time. The Contractor's team is part of Contractor's Public Service USA group. The USA Public Service group as a whole is CMMI Level 4 assessed.



PMBOK Project Management Industry Standards

The Contractor's project management methodology is consistent with the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK). PMI is the world's leading not-for-profit membership association for the project management profession. PMI's global standards provide widely accepted guidelines, rules, and characteristics for project management.

Alignment with State PMM and SEM Methodologies

Contractor's ADM aligns with the State's SEM. Both encourage consistent use of process and templates, detailed planning, and multiple checkpoints. Both methodologies include verification of the completion of phase activities before moving to the next phase. This helps prevent problems from moving to later project phases when they are more costly to resolve.

The Contractor Team shall bring knowledge, experience, and discipline provided through ADM and manage the project in accordance with the State's PMM and System Engineering Methodology (SEM), processes, and templates.

Contractor shall use Capability Maturity Model Integration (CMMI) Level 4 practices, Quantitative Project Management, Organizational Process Performance, and ADM knowledge base for estimating and project planning. This helps the team develop estimates and schedules that are achievable and meet the State's goals and objectives for each release and system patch/upgrade.

Ongoing Management

The Contractor team shall use the process to manage new or modified project work that was proven to be successful under the prior MiECC contract. In this process, as new requests are submitted to the joint MiECC DTMB and Contractor Teams, work shall be categorized as either: 1) break-fix, 2) support or maintenance, 3) Minor Enhancements, 4) Upgrades, or 5) Major Enhancements.

Break-fix and support and maintenance work shall be scheduled and completed in accordance with the SLA's and communicated through the State's Service Request Management system. Changes to the production system shall first be developed and tested in the non-production environments. Once the changes have passed internal and user acceptance testing, the release deployment shall be scheduled and communicated as a Request for Change. This request shall be reviewed by the local/enterprise change control boards prior to migration into production.

Minor Enhancement, Upgrades, and Major Enhancements may require more resources within the organization. These resources are often agency, DTMB, Telecom Teams, Infrastructure Teams, or PMO resources. These efforts thus include more detailed tasks within the project plan.

The Contractor shall use annual project planning and monthly Business Operations Status Meetings to discuss Minor/Major Enhancement and Upgrade projects. Discretionary enhancement (non-software upgrade) requests greater than 200 hours shall result in a SOW request from the Contractor. This SOW, once approved, generates a purchase order from the funds available on the master Contract that are separate from the annual Base Support purchase order.

For discretionary, non-upgrade work, agencies shall submit requests through the Remedy System or to the DTMB PMO Program Manager directly. The DTMB Project Manager shall work with the Contractor and DTMB teams to create cost, schedule, and resource estimates as part of the SUITE initiation and planning process. Agencies and DTMB Client Service Directors (CSD) shall obtain work request approval from their own project/budget office. Once the work is approved, the DTMB PMO Program Manager and the Contractor Delivery Lead shall work together to schedule the project taking into account resources available and other work constraints. The Contractor Delivery Lead shall assign a Project Manager, if required, and Functional Leads and other key resources for the work. The assigned lead is responsible for creating the project plans and following the applicable SUITE methodology processes to guide a successful project.



Preliminary Project Plan

The Contractor’s Preliminary Project Plan is in Attachment 7.

Note: A Final Project Plan will be required as stated in Article 1, Section 1.301 (C) Project Control.

1. Preliminary Project Plan Components

A. Deliverables

Effective deliverable management is critical to managing activities and work products outlined in the Preliminary Project Plan. The Contractor shall use the State’s SUITE and SEM tools, processes, and templates to drive the successful management of Contract deliverables, tracing all work back to its requirements and verifying the end product meets the success criteria for each requirement. The Contractor shall provide weekly status reports for the DTMB, monthly status reports for the eight state agencies, and quarterly reports for the quarterly Performance Review Meetings. Monthly Project Portfolio Status Report and Monthly Breakdown of Support Hours deliverables shall be used for payment and provided within 10 business days of the end of the month in the format requested by the State. For additional information on reports provided by the Contractor, see Section 1.302.

For minor and Major Enhancements, the Contractor Team shall provide the following documentation in accordance with the SEM documentation:

- State of Michigan System Maintenance Documents
- Requirements, Design, and Test Artifacts
- Release Notes

B. Timeframes and Critical Path, E. Task Durations, and F. Internal Milestones

The Contractor Team and the DTMB Program Manager shall develop and maintain a Project Work Plan in Microsoft Project to outline the target dates, critical path, task durations, and internal milestones associated with project work and deliverables. Contractor and State shall work jointly and mutually agree upon proposed work plan timeframes.

C. Matrix of Roles and Responsibilities

The Contractor, DTMB, and Agency staff shall jointly complete the preliminary project work plan with roles and responsibilities outlined in Table 26. Preliminary Project Work Plan Roles and Responsibilities Matrix.

Responsibilities	DTMB	Customer Agency	Contractor
Provide overall management and strategic direction for the MiECC project	<input type="checkbox"/>		
Approve all Contract deliverables	<input type="checkbox"/>		
Provide business requirements	<input type="checkbox"/>	<input type="checkbox"/>	
Develop training materials			<input type="checkbox"/>
Manage the change control process			<input type="checkbox"/>
Create project schedule			<input type="checkbox"/>
Manage project schedule			<input type="checkbox"/>
Provide technical infrastructure support	<input type="checkbox"/>		<input type="checkbox"/>
Track project progress			<input type="checkbox"/>
Perform configuration management			<input type="checkbox"/>
Provide release management			<input type="checkbox"/>
Propose innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perform application maintenance			<input type="checkbox"/>
Integration testing			<input type="checkbox"/>
Administer project staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide knowledge of current system functionality			<input type="checkbox"/>
Develop level of effort estimates			<input type="checkbox"/>
Participate in Change Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 22. Preliminary Project Work Plan Roles and Responsibilities Matrix



2. Payment Deliverables

The Preliminary Project Plan includes the monthly Project Portfolio Status Report and Monthly Breakdown of Support Hours deliverables for which payment shall be made. Contractor shall produce these deliverables to the State within 10 business days of the end of the month in the formats agreed upon by the State and Contractor. The Contractor shall provide payment deliverables on time.

For additional information on these reports provided by the Contractor MiECC Team, see Section 1.302

Final Project Plan

The Contractor shall provide a Final Project Plan within 10 business days of the Contract award.

Orientation Meeting

1. Upon 10 business days from execution of the Contract, the State shall schedule and the Contractor shall attend an orientation meeting to discuss the content and procedures of the Contract.
2. The meeting will be held in general vicinity of Lansing, Michigan, at a date and time mutually acceptable to the State and the Contractor.
3. The State shall bear no cost for the time and travel of the Contractor for attendance at the meeting.

Performance Review Meetings

1. The State shall schedule and the Contractor shall attend quarterly meetings, at a minimum, to review the Contractor's performance under the Contract.
2. The meetings will be held in general vicinity of Lansing, Michigan, or by teleconference, as mutually agreed by the State and the Contractor.
3. The State shall bear no cost for the time and travel of the Contractor for attendance at the meeting.

Project Control

1. The Contractor will carry out this project under the direction and control of DTMB.
2. Within 10 business days of the work approval, the Contractor shall submit to the State project manager(s) for final approval of the detailed project plan (technical work plan). This project plan must be in agreement with Article 1, Section 1.104 Work and Deliverables, and must include the following:
 - The Contractor's project organizational structure.
 - The Contractor's staffing table with names and title of personnel assigned to the project. This must be in agreement with staffing of accepted proposal. Necessary substitutions due to change of employment status and other unforeseen circumstances may only be made with prior approval of the State.
 - The project work breakdown structure (WBS) showing sub-projects, activities and tasks, and resources required and allocated to each.
 - The time-phased plan in the form of a graphic display, showing each event, task, and decision point in the WBS.

2. Detailed Project Plan (Technical Work Plan)

Within the first 10 business days of the work approval, Contractor shall submit a final plan to the State that directs Contractor MiECC Team efforts throughout the duration of the new MiECC contract. This plan shall include an approved work breakdown structure (WBS) and a graphic depiction of planned project work that shows the tasks and decision points identified in the WBS.

The Contractor shall discuss project organizational structure and staffing table with DTMB before being finalized. Staffing represented in the staffing table shall be in agreement with the staffing approved as part Contract negotiations. Contractor shall work with the State to gain approval of any necessary substitutions due to change of employment status and other unforeseen circumstances that may occur.

1.302 Reports

Once both parties have agreed to the format of the report, it shall become the standard to follow for the duration of the contract. The State and Contractor will follow the same process for requesting additional reports.



The Contractor shall provide any suggested improvement on the report formats for approval within 10 business days after the Contract orientation meeting.

- Weekly Program and Project status report – due every week
- Monthly Operational Status for business agencies – due 3 business days prior to the monthly operational meeting with the agency.
- Monthly Project Portfolio Status report – due within 3 business days after month end.
- Individual Project Status (Achievements, Milestones, Issues, Risks) every other week.
- Action Item status every other week.
- Monthly Maintenance Activity/Hours Report – due within 10 business days after month end.

1.400 Project Management

1.401 Issue Management

An issue is an identified event that if not addressed may affect schedule, scope, quality, or budget.

The Contractor shall maintain an issue log for issues relating to the provision of services under this Contract. The Contractor shall communicate issue management log to the State's Project Manager on an agreed upon schedule, with email notifications and updates. The Contractor shall update the issue log and updates shall contain the following minimum elements:

- Description of issue
- Issue identification date
- Responsibility for resolving issue.
- Priority for issue resolution (to be mutually agreed upon by the State and the Contractor)
- Resources assigned responsibility for resolution
- Resolution date
- Resolution description

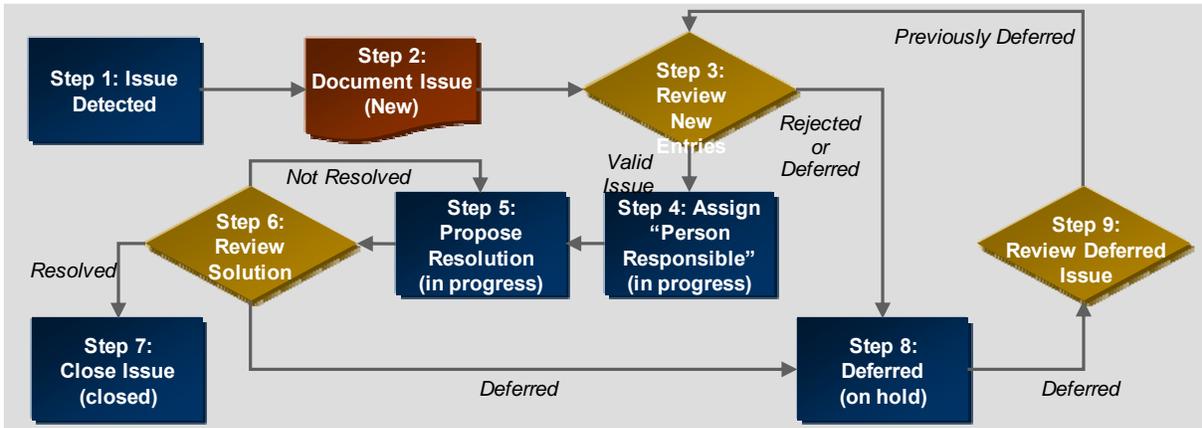
Issues shall be escalated for resolution from level 1 through level 3, as defined below:

- Level 1 – Subject Matter Experts (SME's)
- Level 2 – DTMB Project Manager
- Level 3 – DTMB Executive Manager

Level 1 Help Desk includes initial documentation and routing of reported issue.

Issue Management Approach

Project management spans the entire life cycle of the project and includes iterative processes and activities, including Issue Management. The Contractor shall apply a disciplined, rigorous, and control-based methodology to this important management function. The Contractor's issue management approach includes interaction and coordination with the State and the Contractor team, improves the quality of the Contractor's work, and lowers delivery risk.



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Figure 7. Issue Management.

The Contractor shall provide timely and accurate tracking, control, monitoring, and reporting of issues as defined by SLAs. Several discrete process steps make up the issue management process, leading to a repeatable, well-understood and functioning process as shown in Figure 7. The process includes identifying and tracking an issue, as well as attaining a resolution.

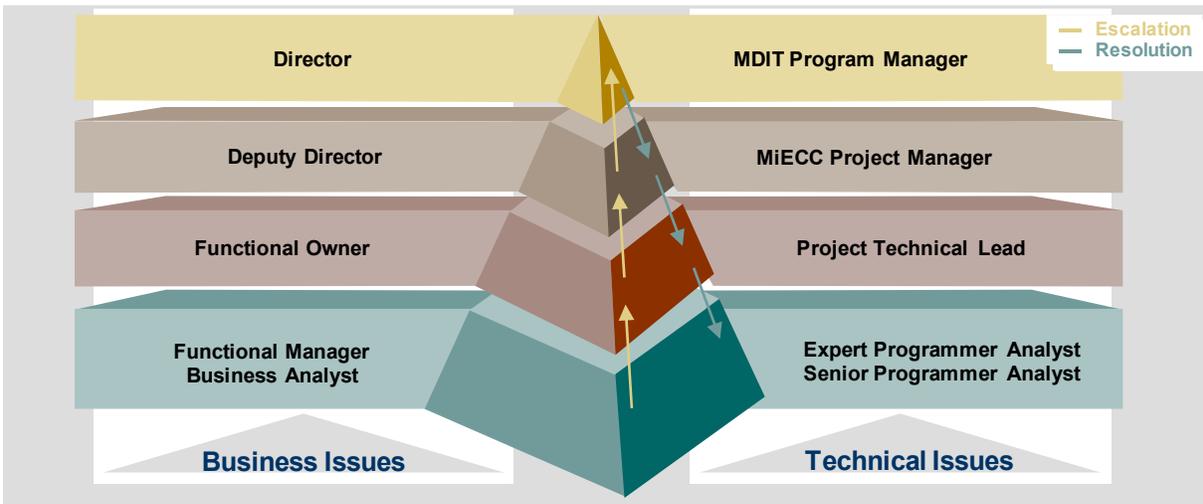
The Contractor team shall view issue management as an iterative, collaborative, and ongoing process to identify and respond timely to project issues. Open and honest communication about project issues and potential action plans further promotes collaboration. The Contractor team shall be involved throughout the process and supports the Agencies initiation of the issue to its successful resolution. See Table 23 Issue Management Responsibilities of the parties.

Responsibilities	DTMB	Customer Agency	Contractor
Monitor Issues for timely resolution and minimal impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Issues in the Issue Tracker Tool			<input type="checkbox"/>
Issue Resolution	<input type="checkbox"/>		<input type="checkbox"/>
Issue Escalation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Acceptance Testing during issue resolution		<input type="checkbox"/>	
Application Regression Testing during issue resolution		<input type="checkbox"/>	
Communication through project meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue and Change Control meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 23. DTMB, Customer Agency and Contractor Responsibilities for issue management

The Contractor team shall distinguish between issues and risks. An issue is an identified event that may affect schedule, scope, quality or budget. Risks are a proactive look to identify possible events that could negatively affect the project. Once realized, a risk may become an issue. As issues are resolved and closed, the resulting situation may introduce a new risk, may result in change controls, or result in new initiatives or plans.

As issues are reviewed, discussed, and managed at various levels within the project, some may need to be escalated to the next management level to gain appropriate guidance and to reach decisions. The Contractor shall discuss issues at the monthly operational meetings where many issues are resolved. If the issue is not resolved at Level 2, it shall be escalated to Level 3. This process continues up through the levels. An example of the escalation process is illustrated in Figure 8. When an issue travels through the multiple levels of state-defined escalation levels, the Contractor shall support every step so that issues are resolved in a timely manner. The Contractor team shall work closely with the various levels of management and leadership supporting expedient issue escalation and resolution. Issues are formally tracked and escalated for resolution from Level 1 through Level 3, as defined below:



MI ECC 11.0095

Figure 8. Issue Escalation.

Issue Tool Usage

The Contractor shall use the Issue Tracker Tool to identify, document, manage, resolve, and report issue status and resolution. The Contractor shall work collaboratively with the State to proactively identify issues and thoroughly document each issue. Each issue shall contain the following information:

- Issue Subject
- Description of the issue
- Start date
- Due date
- Assignee
- Status
- Priority (to be mutually agreed upon by the State and the Contractor)

Contractor shall use a DTMB-approved tool to track issues.

The issue management log is kept up to date for input to the weekly Contractor project management and status meetings. Proactive issue management and reporting is essential to understanding project status, increasing project quality, and reducing risk. The Contractor shall report status and issues weekly to the State. The Contractor shall perform issue management through collaboration with the State.

1.402 Risk Management

A risk is an unknown circumstance or event that, if it occurs, may have a positive or negative impact on the project.

The Contractor is responsible for establishing a risk management plan and process, including the identification and recording of risk items, prioritization of risks, definition of mitigation strategies, monitoring of risk items, and periodic risk assessment reviews with the State.

A risk management plan format shall be submitted to the State for approval within twenty (20) business days after the effective date of the Contract. The risk management plan will be developed during the initial planning phase of the project, and be in accordance with the State's PMM methodology. Once both parties have agreed to the format of the plan, it shall become the standard to follow for the duration of the contract. The plan must be updated bi-weekly, or as agreed upon.



The Contractor shall use a DTMB-approved tool to track risks. The Contractor shall work with the State and allow input into the prioritization of risks.

The Contractor is responsible for identification of risks for each phase of the project. Mitigating and/or eliminating assigned risks will be the responsibility of the Contractor. The State will assume the same responsibility for risks assigned to them.

Risk Management Approach

The MiECC project requires diligent risk management to proactively identify and mitigate risks. Contractor’s risk management approach shall focus on identifying and reducing potential risks so that the Contractor can achieve project objectives throughout the project lifecycle. Risk management shall be performed as part of normal delivery. Contractor shall use a standard, repeatable risk management process for all of its projects. The Contractor shall work closely and collaborate with DTMB, to proactively manage known risks and react rapidly to unanticipated risks.

The Contractor Risk Management Plan shall be used by the State to provide an effective risk management framework for the project. The plan shall discuss where risks are identified, recorded, prioritized, mitigated, monitored, and reviewed. This comprehensive risk management approach yields many benefits, as illustrated in Table 24.

Steps to Managing Risk	Benefits to the Customer
Step 1 – Proactively Classify Risks	<ul style="list-style-type: none"> • Our approach identifies and classifies risks from a variety of sources early before they become issues. This serves to reduce the risk of scheduled delays, cost overruns, and performance problems • We document risks in the Risk Tracker Tool providing complete visibility and access to risks by the State and PMO
Step 2 – Analyze and Prioritize Risk	<ul style="list-style-type: none"> • We document areas where the consequences of risk are most severe in order to direct our efforts at addressing high priority risks before they become issues. We assess impact and probability to assist with prioritization and effective monitoring
Step 3 – Determine Risk Response Approach	<ul style="list-style-type: none"> • If a risk could affect the achievement of project dates, the project leadership team works to identify and evaluate potential courses of action. The State, PMO, and Accenture weighs the pros and cons of various mitigation actions, identify the appropriate course of action, and move toward applying a decision
Step 4 – Monitor and Control Risks	<ul style="list-style-type: none"> • By capturing all risks through the Tracking Tool, the State and PMO can easily view the information relating to any risk. This access assists the project leadership to provide appropriate direction without jeopardizing the progress of concurrent work efforts

Table 24.

Contractor shall use the existing plan as a starting point to develop and deliver a revised Risk Management Plan during the initial planning phase of the project. Contractor’s ability to maintain the project’s momentum by modifying the existing plan and continuing with an integrated Contractor and risk process results in no program disruption, continued focus on release management, and high quality application maintenance services.

Table 25 sets forth s DTMB, Customer Agency and Contractor responsibilities regarding Risk Management.



Responsibilities	DTMB	Customer Agency	Contractor
Identify, Monitor and Mitigate Risks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track Risks in the Risk Tracker Tool			<input type="checkbox"/>
Analyze Risk and Determine Risk Response Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Control Risks			<input type="checkbox"/>
Communication through project meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk and Change Control meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 25. DTMB, Customer Agency and Contractor Responsibilities for Risk Management

Risks and Assumptions

In a project sense, an assumption is something Contractor establishes as true for the purposes of allowing project work to proceed, usually during the planning and estimating phase. Assumptions enable the project to move forward without absolutely certain information. For example, when performing the project planning for a server replacement project, the Contractor may assume that it shall have access to the new servers at a certain time to configure required applications and software, even though at the early planning stage Contractor is dependent on the State for procuring the servers and on the State's server team to complete their activities on time. The Contractor monitors records in the risk tracker tool as a risk, tracks and manages assumptions using the risk management process.

Risk Tracking

The Contractor shall detail the comprehensive risk processes in the Risk Management Plan. The Contractor shall delineate discrete steps and processes that serve to communicate risk status. The Contractor MiECC Risk Management Plan calls out four major steps used by Contractor and the State to identify, monitor, manage and track project risks.

The Contractor shall develop the initial plan in concert with the State using the State's PMM methodology and our Risk Management Plan template as a starting point. Contractor shall use the project documents from the State Unified Information Technology Enterprise (SUITE) templates for the development of a new Risk Plan.

Identify and Classify Risk

The Contractor shall approach risk identification as an iterative and collaborative process with the State focusing on identifying risk events and subsequently monitoring them throughout the project lifecycle. The Contractor shall identify risks during the ongoing project management process, which includes Weekly Status Meetings and release planning meetings.

The Contractor shall work with project team members, subject matter experts, stakeholders, and project management to identify risks as early as possible and continue monitoring them throughout the project. The Contractor shall document and add risks to the risk tracker tool. The Contractor Project Manager shall meet with DTMB Program Manager weekly to identify, review, or discuss project operational or organizational risks.

Analyze Risk

The Contractor shall analyze new risks. The outputs of risk analysis are the assessment of the impact and probability of identified risks.



Determine Risk Response Approach

The Contractor shall work with the State to identify options that shall turn risk information into decisions and actions. The Contractor shall document actions in the Risk Management tool.

Risk Monitoring and Control

During risk monitoring and control, the Contractor and the other members of the Project Management Team keep track of identified risks, monitor residual risks, execute the risk plans, and monitor their effectiveness in reducing risk. Risk tracking is essential to effective action plan implementation.

The Contractor shall devise risk metrics and triggering events to monitor and gauge effectiveness of planned risk actions. The Contractor shall accomplish this through regular and frequent reporting.

The Contractor shall continue to build and update the present risk list using the project leadership team's experience and knowledge. The Contractor shall, as the project proceeds, continue to identify risks in each project phase and actively work each risk, eliminating and mitigating those risks assigned to Contractor. For those risks assigned to the State, Contractor shall collaborate with State to reach closure. Contractor shall review the initial risk list with the State to confirm its accuracy and to identify additional risks. Contractor shall continue to identify risks throughout the project, adding risks to the list, and reporting on risks in accordance with the project's governance structure.

Tool Usage

Contractor shall use a risk tracker tool and methodology, to manage risks. The Contractor shall provide a weekly risk log that provides input to the weekly Contractor MiECC project management and status meeting.

1.403 Change Management

Change management is defined as the process to communicate, assess, monitor, and control all changes to system resources and processes. The State also employs change management in its administration of the Contract.

If a proposed Contract change is approved by the Agency, the Contract Administrator will submit a request for change to the Department of Technology, Management and Budget, Purchasing Operations Buyer, who will make recommendations to the Director of Purchasing Operations regarding ultimate approval/disapproval of change request. If the DTMB Purchasing Operations Director agrees with the proposed modification, and all required approvals are obtained (including State Administrative Board), the Purchasing Operations Buyer will issue an addendum to the Contract, via a Contract Change Notice. **Contractors who provide products or services prior to the issuance of a Contract Change Notice by the DTMB Purchasing Operations, risk non-payment for the out-of-scope/pricing products and/or services.**

The Contractor shall employ change management procedures to handle such things as "out-of-scope" requests or changing business needs of the State while the migration is underway.

The Contractor shall employ the change control methodologies to justify changes in the processing environment, and to ensure those changes will not adversely affect performance or availability.

Change Management Approach

The Contractor team's approach to managing changes on the project allows us to identify potential impacts of proposed changes, develop mitigation strategies to minimize negative impacts, and control the outcome. Strong collaboration with the State shall facilitate the Change Control Process, providing continuous support through the delivery of detailed estimates and impact analyses to aid the decision to accept or deny a change. Contractor team shall employ change management methodologies and processes that provide the State with the ability to remain proactive, deliberate in its assessment of impacts and estimates, and avoid costly program risk.



In a project environment, positive changes can have unintended impacts. There are two types of changes that impact project processes. Each type of change requires a different management approach:

- Changes that impact planned releases that are within the scope of the Contract but require change decisions
- Out-of-Scope changes that go beyond the Contract and require a Contract modification

Contractor shall use a proactive, collaborative approach in the change control and contract change processes to promote synergy and drive our successful release delivery and Contract compliance. This approach involves proactively identifying, assessing, responding to, and determining the disposition of the change request. The Contractor shall be responsible for analyzing change control requests and out-of-scope requests to estimate the level of effort it takes to accommodate the change, assess its impact on release/project cost, schedule, and quality, and recommend the appropriate course of action. The team shall use this information to work with the appropriate stakeholders to facilitate a quick and informed decision to approve or deny the request for change.

The project shall handle changes within scope via the MiECC Change Control process to assess requested changes, and to verify the changes do not adversely affect system performance or availability. For example, production changes are scheduled outside of the normal operating hours to allow for the least amount of impact to the system users. The in scope changes shall follow the documented process complete with client sign-offs, deployment plans, and dry run examples. For example, when Contractor implements new hardware, the Contractor may plan to test new hardware one night and then implement a full cutover another night. This cutover test allows the system to be tested before allowing users access on the system therefore, lowering the risk. The parties shall handle out-of-scope change requests and changing business needs of the State through the MiECC Contract Control process which assesses the level of effort required to accommodate the request and acquire the State's approval to modify the contract.

The State's Change Control process and the Contract Change Control process are established processes. The Contractor shall work with the State in the Change Control Process. Contractor's team shall support the State in instituting the necessary change management procedures and methodologies to enable release delivery and compliance with the MiECC contract.

Tool Usage

The Contractor team shall use the State's System Engineering Methodology (SEM) and Project Management Methodology (PMM) processes, templates, and tools for change control across the MiECC system development and maintenance efforts and MiECC Contract change control efforts. The Contractor project team shall log and track change controls for in scope software changes via the RFC website.

The Contractor team shall use the ADM knowledge base for estimation and configuration management to develop the level of effort estimates and assess the impact of each change. This shall help the Contractor to make recommendations that reduce risk and negative impacts to cost, quality, and schedule of the services delivered in the planned release. Contractor shall take the estimates and provide them in the format as prescribed by SEM and PMM.

MiECC Release Change Control Process

Change controls are critical to planned MiECC releases. The goal of change control is to have consistent and controlled handling of all requests for changes to the release scope, deliverables, timeframes, or resources, in order to avoid negatively influencing services the release delivers to MiECC users. Other change controls shall be necessary in order to document deviations from the standard process.

Change controls build rigor into the process and verify that proposed changes not negatively influence the cost, schedule, and quality associated with the release. Drivers such as "removing a unit of work from a release" or "moving the release date" are significant changes. The management team shall take into consideration significant changes with the local and enterprise control board.



The Contractor team shall work collaboratively with the Agencies and members of the Change Control Boards (CCB's) to support the MiECC Change Control Process. The Contractor team shall be involved throughout the process and support the Agencies and the Change Control Board's from initiation of the request through implementation. See Table 26 for Change Management Responsibilities.

Responsibilities	DTMB	Customer Agency	Contractor
Identify changes that could impact operations	Yes	Yes	Yes
Communicate changes to agencies	Yes		Yes
Create RFC's for production changes			Yes
Attend CCB meeting	Yes		
Communicate status of approval of RFC to Contractor	Yes		
Communicate status of Contractor created RFC's Success/Failure of RFC to DTMB and Agencies			Yes

Table 26. DTMB, Customer Agencies, and Contractor Responsibilities for changes impacting operations

Contractor shall provide complete Request For Change (RFC) required information to the Agency before the Change Control Board (CCB) review to allow them to review the request and enable the CCB to make a quick and informed decision about the change.

MiECC Contract Change Process

The State employs a formal process to handle requests that trigger changes to the services and support delivered through the contract. The Contractor's Contract Administrator shall maintain a Contract compliance matrix and a scope control document that helps the Contractor team assess work they perform and determine whether a particular request is in the current scope of the Contract or not. Contractor shall monitor changes from two vantage points:

- Is the change within the scope of services for our contract?
- Is the change within the budget of our contract?

If the answer to either of these is 'No,' then Contractor team initiates the Contract change process.

The Contractor shall work with DTMB and the Agencies through the Contract Change Control process. The State shall authorize new enhancements through the SOW process and pursue without a formal change to the Contract if:

- The enhancements are within the budgeted SOW amount for the Contract and
- Do not require services outside of those contemplated in Contractor's base contract

Any change deemed outside the budget for the project or the originally contemplated scope of services requires a formal Contract change. All such Contract changes are pursued first by DTMB and, if approved, are submitted to the MiECC Contract Administrator. The Contract Administrator then shall submit a request for change to the Department of Technology Management and Budget (DTMB), Purchasing Operations Buyer, who shall make recommendations to the Director of Purchasing Operations regarding ultimate approval/disapproval of change request. If the DTMB Purchasing Operations Director agrees with the proposed modification, and all required approvals are obtained (including State Administrative Board), the Purchasing Operations Buyer shall issue an addendum to the Contract, via a Contract Change Notice.

1.500 Acceptance

1.501 Criteria

Acceptance is tied to meeting the defined acceptance criteria and performance service levels.



1.502 Final Acceptance

Final Acceptance is tied to performance of required Services and delivery of identified deliverables during the term of the Contract.

1.600 Compensation and Payment

1.601 Compensation And Payment

Method of Payment

The project will be paid as a combination of fixed price and rate card as detailed below. The Costs Table(s) attached must be used as the format for submitting pricing information.

A. Knowledge Transfer Cost

There is no Knowledge Transfer cost.

B. Base Support Cost

A total fixed cost by year includes all of the tasks as described in Section 1.104 I A (Base Support).

For future implementation/support of additional contact centers, the increase in the Base Support cost will be mutually agreed upon with a SOW. See Attachment 10: Cost of Additional Contact Centers.

After providing monthly services, the Contractor shall submit an invoice at the end of the month.

C. Major Enhancement and Other Contact Center Services Costs

In Table 4 Rate Card, the Contractor confirmed the personnel, skills and rates that they shall use to complete the Major Enhancements. The pricing approach is based on leveraging the existing Base Support team for change orders that arrive when appropriate. This approach is intended to reduce the cost of each change order as fewer hours are required, and allows for improved quality and speeds delivery.

Major Enhancements may be paid on either of two cost models – fixed price, deliverable based or time and materials (hourly rate).

For fixed price proposals, the Contractor shall identify the skill sets and anticipated number of hours used by each skill set to justify the cost. For payment, the Contractor shall send the invoice after the deliverable is accepted.

For time and materials, the Contractor shall use the rates set forth in Attachment 3A - Cost Tables, Table 4 - Rate Card, unless lower rates are negotiated. For payment, the Contractor shall send the invoice after the end of the month. This invoice must be supported by timesheet for each consultant showing days and hours worked on the project.

The rate card (Attachment 3A, Table 4) details hourly rates for skills for this Contract. During the Contract period, the Contractor shall provide cost quotes for detailed statements of work that will be created by the State for Major Enhancements. If these costs are accepted, a change order shall be made to the Contract to allow these implementations to proceed.

Travel

The State will not pay for any travel expenses, including hotel, mileage, meals, parking, etc. Travel time will not be reimbursed.

Statements of Work and Issuance of Purchase Orders

Unless otherwise agreed by the parties, each SOW will include:

1. Background
2. Project Objective
3. Scope of Work
4. Deliverables
5. Acceptance Criteria



6. Project Control and Reports
7. Specific Department Standards
8. Payment Schedule
9. Travel and Expenses
10. Project Contacts
11. Agency Responsibilities and Assumptions
12. Location of Where the Work is to be performed
13. Expected Contractor Work Hours and Conditions

The parties agree that the Services/Deliverables to be rendered by Contractor pursuant to this Contract (and any future amendments of it) will be defined and described in detail in Statements of Work or Purchase Orders (PO) executed under this Contract. Contractor shall not be obliged or authorized to commence any work to implement a SOW until authorized via a PO issued against this Contract. Contractor shall perform in accordance with this Contract, including the Statements of Work/Purchase Orders executed under it.

Invoicing

Contractor will submit properly itemized invoices to

DTMB – Financial Services
Accounts Payable
P.O. Box 30026
Lansing, MI 48909
or
DTMB-Accounts-Payable@michigan.gov

. Invoices must provide and itemize, as applicable:

- Contract number;
- Purchase Order number
- Contractor name, address, phone number, and Federal Tax Identification Number;
- Description of any commodities/hardware, including quantity ordered;
- Date(s) of delivery and/or date(s) of installation and set up;
- Price for each item, or Contractor's list price for each item and applicable discounts;
- Maintenance charges;
- Net invoice price for each item;
- Shipping costs;
- Other applicable charges;
- Total invoice price; and
- Payment terms, including any available prompt payment discount.

The State may pay maintenance and support charges on a monthly basis, in arrears. Payment of maintenance service/support of less than one (1) month's duration shall be prorated at 1/30th of the basic monthly maintenance charges for each calendar day.

Incorrect or incomplete invoices will be returned to Contractor for correction and reissue.

1.602 Holdback RESERVED



Article 2. Terms and Conditions

2.000 Contract Structure and Term

2.001 Contract Term

This Contract is for a period of **5 years beginning May 1, 2012 through April 30, 2017**. All outstanding Purchase Orders must also expire upon the termination for any of the reasons listed in **Section 2.150** of the Contract, unless otherwise extended under the Contract. Absent an early termination for any reason, Purchase Orders issued but not expired, by the end of the Contract's stated term, shall remain in effect for the balance of the fiscal year for which they were issued.

2.002 Options to Renew

This Contract may be renewed in writing by mutual agreement of the parties not less than 30 days before its expiration. The Contract may be renewed for up to **5 additional 1 year periods**.

2.003 Legal Effect

Contractor accepts this Contract by signing two copies of the Contract and returning them to the Purchasing Operations. The Contractor shall not proceed with the performance of the work to be done under the Contract, including the purchase of necessary materials, until both parties have signed the Contract to show acceptance of its terms, and the Contractor receives a contract release/purchase order that authorizes and defines specific performance requirements.

Except as otherwise agreed in writing by the parties, the State shall not be liable for costs incurred by Contractor or payment under this Contract, until Contractor is notified in writing that this Contract or Change Order has been approved by the State Administrative Board (if required), signed by all the parties and a Purchase Order against the Contract has been issued.

2.004 Attachments & Exhibits

All Attachments and Exhibits affixed to any and all Statement(s) of Work, or appended to or referencing this Contract, are incorporated in their entirety and form part of this Contract.

2.005 Ordering

The State must issue an approved written Purchase Order, Blanket Purchase Order, Direct Voucher or Procurement Card Order to order any Services/Deliverables under this Contract. All orders are subject to the terms and conditions of this Contract. No additional terms and conditions contained on either a Purchase Order or Blanket Purchase Order apply unless they are specifically contained in that Purchase Order or Blanket Purchase Order's accompanying Statement of Work. Exact quantities to be purchased are unknown; however, the Contractor will be required to furnish all such materials and services as may be ordered during the Contract period. Quantities specified, if any, are estimates based on prior purchases, and the State is not obligated to purchase in these or any other quantities.

2.006 Order of Precedence

The Contract, including any Statements of Work and Exhibits, to the extent not contrary to the Contract, each of which is incorporated for all purposes, constitutes the entire agreement between the parties with respect to the subject matter and supersedes all prior agreements, whether written or oral, with respect to the subject matter and as additional terms and conditions on the purchase order must apply as limited by **Section 2.005**.

In the event of any inconsistency between the terms of the Contract and a Statement of Work, the terms of the Statement of Work shall take precedence (as to that Statement of Work only); provided, however, that a Statement of Work may not modify or amend the terms of the Contract. The Contract may be modified or amended only by a formal Contract amendment.



2.007 Headings

Captions and headings used in the Contract are for information and organization purposes. Captions and headings, including inaccurate references, do not, in any way, define or limit the requirements or terms and conditions of the Contract.

2.008 Form, Function & Utility

If the Contract is for use of more than one State agency and if the Deliverable/Service does not meet the form, function, and utility required by that State agency, that agency may, subject to State purchasing policies, procure the Deliverable/Service from another source.

2.009 Reformation and Severability

Each provision of the Contract is severable from all other provisions of the Contract and, if one or more of the provisions of the Contract is declared invalid, the remaining provisions of the Contract remain in full force and effect.

2.010 Consents and Approvals

Except as expressly provided otherwise in the Contract, if either party requires the consent or approval of the other party for the taking of any action under the Contract, the consent or approval must be in writing and must not be unreasonably withheld or delayed.

2.011 No Waiver of Default

If a party fails to insist upon strict adherence to any term of the Contract then the party has not waived the right to later insist upon strict adherence to that term, or any other term, of the Contract.

2.012 Survival

Any provisions of the Contract that impose continuing obligations on the parties, including without limitation the parties' respective warranty, indemnity and confidentiality obligations, survive the expiration or termination of the Contract for any reason. Specific references to survival in the Contract are solely for identification purposes and not meant to limit or prevent the survival of any other section.

2.020 Contract Administration

2.021 Issuing Office

This Contract is issued by the Department of Technology, Management and Budget, Purchasing Operations. DTMB-Procurement is the sole point of contact in the State with regard to all procurement and contractual matters relating to the Contract. The DTMB-Procurement Contract Administrator for this Contract is:

[Mark Lawrence](#)

Buyer

Procurement

Department of Technology, Management and Budget

Mason Bldg, 2nd Floor

PO Box 30026

Lansing, MI 48909

Email: LawrenceM1@michigan.gov

Phone: 517-241-1640

2.022 Contract Compliance Inspector

The Director of DTMB-Procurement directs the person named below, or his or her designee, to monitor and coordinate the activities for the Contract on a day-to-day basis during its term. **Monitoring Contract activities does not imply the authority to change, modify, clarify, amend, or otherwise alter the prices, terms, conditions and specifications of the Contract.** DTMB-Procurement is the only State office authorized to



change, modify, amend, alter or clarify the prices, specifications, terms and conditions of this Contract. The Contract Compliance Inspector for this Contract is:

[Mark Lawrence](#), Buyer
DTMB-Procurement
Department of Technology, Management and Budget
Mason Bldg., 2nd Floor
PO Box 30026
Lansing, MI 48909
Email: LawrenceM1@michigan.gov
Phone: 517-241-1640

2.023 Project Manager

The following individual will oversee the project:

Abhijit Sarkar
Department of Technology, Management and Budget
Operations Center – 2nd Floor
7285 Parsons Dr.
Dimondale, MI
Email: sarkara@michigan.gov
Phone: 517-636-5058

2.024 Change Requests

The State reserves the right to request from time to time any changes to the requirements and specifications of the Contract and the work to be performed by the Contractor under the Contract. During the course of ordinary business, it may become necessary for the State to discontinue certain business practices or create Additional Services/Deliverables. At a minimum, to the extent applicable, Contractor shall provide a detailed outline of all work to be done, including tasks necessary to accomplish the Additional Services/Deliverables, timeframes, listing of key personnel assigned, estimated hours for each individual per task, and a complete and detailed cost justification.

If the State requests or directs the Contractor to perform any Services/Deliverables that are outside the scope of the Contractor's responsibilities under the Contract ("New Work"), the Contractor must notify the State promptly before commencing performance of the requested activities it believes are New Work. If the Contractor fails to notify the State before commencing performance of the requested activities, any such activities performed before the Contractor gives notice shall be conclusively considered to be in-scope Services/Deliverables and not New Work.

If the State requests or directs the Contractor to perform any services or provide deliverables that are consistent with and similar to the Services/Deliverables being provided by the Contractor under the Contract, but which the Contractor reasonably and in good faith believes are not included within the Statements of Work, then before performing such Services or providing such Deliverables, the Contractor shall notify the State in writing that it considers the Services or Deliverables to be an Additional Service/Deliverable for which the Contractor should receive additional compensation. If the Contractor does not so notify the State, the Contractor shall have no right to claim thereafter that it is entitled to additional compensation for performing that Service or providing that Deliverable. If the Contractor does so notify the State, then such a Service or Deliverable shall be governed by the Change Request procedure in this Section.

In the event prices or service levels are not acceptable to the State, the Additional Services or New Work shall be subject to competitive bidding based upon the specifications.

(1) Change Request at State Request

If the State requires Contractor to perform New Work, Additional Services or make changes to the Services that would affect the Contract completion schedule or the amount of compensation due



- Contractor (a "Change"), the State shall submit a written request for Contractor to furnish a proposal for carrying out the requested Change (a "Change Request").
- (2) Contractor Recommendation for Change Requests:
Contractor shall be entitled to propose a Change to the State, on its own initiative, should Contractor believe the proposed Change would benefit the Contract.
 - (3) Upon receipt of a Change Request or on its own initiative, Contractor shall examine the implications of the requested Change on the technical specifications, Contract schedule and price of the Deliverables and Services and shall submit to the State without undue delay a written proposal for carrying out the Change. Contractor's proposal shall include any associated changes in the technical specifications, Contract schedule and price and method of pricing of the Services. If the Change is to be performed on a time and materials basis, the Labor Rates set forth in Attachment 3 shall apply to the provision of such Services. If Contractor provides a written proposal and should Contractor be of the opinion that a requested Change is not to be recommended, it shall communicate its opinion to the State but shall nevertheless carry out the Change as specified in the written proposal if the State directs it to do so.
 - (4) By giving Contractor written notice within a reasonable time, the State shall be entitled to accept a Contractor proposal for Change, to reject it, or to reach another agreement with Contractor. Should the parties agree on carrying out a Change, a written Contract Change Notice must be prepared and issued under this Contract, describing the Change and its effects on the Services and any affected components of this Contract (a "Contract Change Notice").
 - (5) No proposed Change shall be performed until the proposed Change has been specified in a duly executed Contract Change Notice issued by the Department of Technology, Management and Budget, Purchasing Operations.
 - (6) If the State requests or directs the Contractor to perform any activities that Contractor believes constitute a Change, the Contractor must notify the State that it believes the requested activities are a Change before beginning to work on the requested activities. If the Contractor fails to notify the State before beginning to work on the requested activities, then the Contractor waives any right to assert any claim for additional compensation or time for performing the requested activities. If the Contractor commences performing work outside the scope of this Contract and then ceases performing that work, the Contractor must, at the request of the State, retract any out-of-scope work that would adversely affect the Contract.

2.025 Notices

Any notice given to a party under the Contract must be deemed effective, if addressed to the party as addressed below, upon: (i) delivery, if hand delivered; (ii) receipt of a confirmed transmission by facsimile if a copy of the notice is sent by another means specified in this Section; (iii) the third Business Day after being sent by U.S. mail, postage pre-paid, return receipt requested; or (iv) the next Business Day after being sent by a nationally recognized overnight express courier with a reliable tracking system.

State:
State of Michigan
Procurement
Attention: Mark Lawrence
PO Box 30026
530 West Allegan
Lansing, Michigan 48909

Contractor: Accenture LLP
Name: Jamie Walker
Address: 3000 Town Center, Suite 2400, Southfield, Mi. 48075

Either party may change its address where notices are to be sent by giving notice according to this Section.

**2.026 Binding Commitments**

Representatives of Contractor must have the authority to make binding commitments on Contractor's behalf within the bounds set forth in the Contract. Contractor may change the representatives from time to time upon giving written notice.

2.027 Relationship of the Parties

The relationship between the State and Contractor is that of client and independent contractor. No agent, employee, or servant of Contractor or any of its Subcontractors shall be deemed to be an employee, agent or servant of the State for any reason. Contractor shall be solely and entirely responsible for its acts and the acts of its agents, employees, servants and Subcontractors during the performance of the Contract.

2.028 Covenant of Good Faith

Each party shall act reasonably and in good faith. Unless stated otherwise in the Contract, the parties shall not unreasonably delay, condition or withhold the giving of any consent, decision or approval that is either requested or reasonably required of them in order for the other party to perform its responsibilities under the Contract.

2.029 Assignments

Neither party may assign the Contract, or assign or delegate any of its duties or obligations under the Contract, to any other party (whether by operation of law or otherwise), without the prior written consent of the other party; provided, however, that the State may assign the Contract to any other State agency, department, division or department without the prior consent of Contractor and Contractor may assign the Contract to an affiliate so long as the affiliate is adequately capitalized and can provide adequate assurances that the affiliate can perform the Contract. The State may withhold consent from proposed assignments, subcontracts, or novations when the transfer of responsibility would operate to decrease the State's likelihood of receiving performance on the Contract or the State's ability to recover damages.

Contractor may not, without the prior written approval of the State, assign its right to receive payments due under the Contract. If the State permits an assignment, the Contractor is not relieved of its responsibility to perform any of its contractual duties and the requirement under the Contract that all payments must be made to one entity continues.

If the Contractor intends to assign the Contract or any of the Contractor's rights or duties under the Contract, the Contractor must notify the State in writing at least 90 days before the assignment. The Contractor also must provide the State with adequate information about the assignee within a reasonable amount of time before the assignment for the State to determine whether to approve the assignment.

2.030 General Provisions**2.031 Media Releases**

News releases (including promotional literature and commercial advertisements) pertaining to the RFP and Contract or project to which it relates shall not be made without prior written State approval, and then only in accordance with the explicit written instructions from the State. No results of the activities associated with the RFP and Contract are to be released without prior written approval of the State and then only to persons designated.

2.032 Contract Distribution

Purchasing Operations retains the sole right of Contract distribution to all State agencies and local units of government unless other arrangements are authorized by DTMB-Procurement.

2.033 Permits

Contractor must obtain and pay any associated costs for all required governmental permits, licenses and approvals for the delivery, installation and performance of the Services. The State shall pay for all costs and expenses incurred in obtaining and maintaining any necessary easements or right of way.



2.034 Website Incorporation

The State is not bound by any content on the Contractor's website, even if the Contractor's documentation specifically referenced that content and attempts to incorporate it into any other communication, unless the State has actual knowledge of the content and has expressly agreed to be bound by it in a writing that has been manually signed by an authorized representative of the State.

2.035 Future Bidding Preclusion

Contractor acknowledges that, to the extent this Contract involves the creation, research, investigation or generation of a future RFP; it may be precluded from bidding on the subsequent RFP. The State reserves the right to disqualify any Bidder if the State determines that the Bidder has used its position (whether as an incumbent Contractor, or as a Contractor hired to assist with the RFP development, or as a Vendor offering free assistance) to gain a competitive advantage on the RFP.

2.036 Freedom of Information

All information in any proposal submitted to the State by Contractor and this Contract is subject to the provisions of the Michigan Freedom of Information Act, 1976 Public Act No. 442, as amended, MCL 15.231, et seq (the "FOIA").

2.037 Disaster Recovery

Contractor and the State recognize that the State provides essential services in times of natural or man-made disasters. Therefore, except as so mandated by Federal disaster response requirements, Contractor personnel dedicated to providing Services/Deliverables under this Contract shall provide the State with priority service for repair and work around in the event of a natural or man-made disaster.

2.040 Financial Provisions

2.041 Fixed Prices for Services/Deliverables

Each Statement of Work or Purchase Order issued under this Contract shall specify (or indicate by reference to the appropriate Contract Exhibit) the firm, fixed prices for all Services/Deliverables, and the associated payment milestones and payment amounts. The State may make progress payments to the Contractor when requested as work progresses, but not more frequently than monthly, in amounts approved by the Contract Administrator, after negotiation. Contractor shall show verification of measurable progress at the time of requesting progress payments.

2.042 Adjustments for Reductions in Scope of Services/Deliverables

If the scope of the Services/Deliverables under any Statement of Work issued under this Contract is subsequently reduced by the State, the parties shall negotiate an equitable reduction in Contractor's charges under such Statement of Work commensurate with the reduction in scope.

2.043 Services/Deliverables Covered

The State shall not be obligated to pay any amounts in addition to the charges specified in this Contract for all Services/Deliverables to be provided by Contractor and its Subcontractors, if any, under this Contract.

2.044 Invoicing and Payment – In General

- (a) Each Statement of Work issued under this Contract shall list (or indicate by reference to the appropriate Contract Exhibit) the prices for all Services/Deliverables, equipment and commodities to be provided, and the associated payment milestones and payment amounts.
- (b) Each Contractor invoice shall show details as to charges by Service/Deliverable component and location at a level of detail reasonably necessary to satisfy the State's accounting and charge-back requirements. Invoices for Services performed on a time and materials basis shall show, for each individual, the number of hours of Services performed during the billing period, the billable skill/labor category for such person and the applicable hourly billing rate. Prompt payment by the State is contingent on the Contractor's invoices showing the amount owed by the State minus any holdback amount to be retained by the State in accordance with **Section 1.600**.



- (c) Correct invoices shall be due and payable by the State, in accordance with the State's standard payment procedure as specified in 1984 Public Act No. 279, MCL 17.51 et seq., within 45 days after receipt, provided the State determines that the invoice was properly rendered.
- (d) All invoices should reflect actual work done. Specific details of invoices and payments shall be agreed upon between the Contract Administrator and the Contractor after the proposed Contract Agreement has been signed and accepted by both the Contractor and the Director of Purchasing Operations, Department of Management & Budget. This activity shall occur only upon the specific written direction from DTMB-Procurement.

The specific payment schedule for any Contract(s) entered into, as the State and the Contractor(s) shall mutually agree upon. The schedule should show payment amount and should reflect actual work done by the payment dates, less any penalty cost charges accrued by those dates. As a general policy, statements shall be forwarded to the designated representative by the 15th day of the following month.

The Government may make progress payments to the Contractor when requested as work progresses, but not more frequently than monthly, in amounts approved by the Contract Administrator, after negotiation. Contractor must show verification of measurable progress at the time of requesting progress payments.

2.045 Pro-ration

To the extent there are Services that are to be paid for on a monthly basis, the cost of such Services shall be pro-rated for any partial month.

2.046 Antitrust Assignment

The Contractor assigns to the State any claim for overcharges resulting from antitrust violations to the extent that those violations concern materials or services supplied by third parties to the Contractor, toward fulfillment of this Contract.

2.047 Final Payment

The making of final payment by the State to Contractor does not constitute a waiver by either party of any rights or other claims as to the other party's continuing obligations under the Contract, nor shall it constitute a waiver of any claims by one party against the other arising from unsettled claims or failure by a party to comply with this Contract. Contractor's acceptance of final payment by the State under this Contract shall constitute a waiver of all claims by Contractor against the State for payment under this Contract, other than those claims previously filed in writing on a timely basis and still unsettled.

2.048 Electronic Payment Requirement

Electronic transfer of funds is required for payments on State Contracts. Contractors are required to register with the State electronically at <http://www.cpexpress.state.mi.us>. As stated in Public Act 431 of 1984, all contracts that the State enters into for the purchase of goods and services shall provide that payment shall be made by electronic fund transfer (EFT).

2.050 Taxes

2.051 Employment Taxes

Contractor shall collect and pay all applicable federal, state, and local employment taxes, including the taxes.

2.052 Sales and Use Taxes

Contractor shall register and remit sales and use taxes on taxable sales of tangible personal property or services delivered into the State. Contractors that lack sufficient presence in Michigan to be required to register and pay tax must do so as a volunteer. This requirement extends to: (1) all members of any controlled group as defined in § 1563(a) of the Internal Revenue Code and applicable regulations of which the company is a member, and (2) all organizations under common control as defined in § 414(c) of the Internal Revenue Code and applicable regulations of which the company is a member that make sales at retail for delivery into the State are registered with the State for the collection and remittance of sales and use taxes. In applying



treasury regulations defining “two or more trades or businesses under common control” the term “organization” means sole proprietorship, a partnership (as defined in § 701(a) (2) of the Internal Revenue Code), a trust, an estate, a corporation, or a limited liability company.

2.060 Contract Management

2.061 Contractor Personnel Qualifications

All persons assigned by Contractor to the performance of Services under this Contract must be employees of Contractor or its majority-owned (directly or indirectly, at any tier) subsidiaries (or a State-approved Subcontractor) and must be fully qualified to perform the work assigned to them. Contractor must include a similar provision in any subcontract entered into with a Subcontractor. For the purposes of this Contract, independent contractors engaged by Contractor solely in a staff augmentation role must be treated by the State as if they were employees of Contractor for this Contract only; however, the State understands that the relationship between Contractor and Subcontractor is an independent contractor relationship.

2.062 Contractor Key Personnel

(a) Key Personnel

(i) In discharging its obligations under this Contract, Contractor shall provide the named Key Personnel on the terms indicated. **Section 1.201 Contractor Staff, Roles, and Responsibilities** provides an organization chart showing the roles of certain Key Personnel, if any.

(ii) Key Personnel shall be dedicated as defined in **Section 1.201 Contractor Staff, Roles, and Responsibilities** to the Project for its duration in the applicable Statement of Work with respect to other individuals designated as Key Personnel for that Statement of Work.

(iii) The State will have the right to recommend and approve in writing the initial assignment, as well as any proposed reassignment or replacement, of any Key Personnel. Before assigning an individual to any Key Personnel position, Contractor will notify the State of the proposed assignment, will introduce the individual to the appropriate State representatives, and will provide the State with a resume and any other information about the individual reasonably requested by the State. The State reserves the right to interview the individual before granting written approval. In the event the State finds a proposed individual unacceptable, the State will provide a written explanation including reasonable detail outlining the reasons for the rejection. Additionally, the State’s request shall be based on legitimate, good-faith reasons. Proposed alternative for the individual denied, shall be fully qualified for the position.

(iv) Contractor shall not remove any Key Personnel from their assigned roles or the Contract without the prior written consent of the State. If the Contractor does remove Key Personnel without the prior written consent of the State, it shall be considered an unauthorized removal (“Unauthorized Removal”). It shall not be considered an Unauthorized Removal if Key Personnel must be replaced for reasons beyond the reasonable control of Contractor, including illness, disability, leave of absence, personal emergency circumstances, resignation or for cause termination of the Key Personnel’s employment. It shall not be considered an Unauthorized Removal if Key Personnel must be replaced because of promotions or other job movements allowed by Contractor personnel policies or Collective Bargaining Agreement(s) as long as the State receives prior written notice before shadowing occurs and Contractor provides thirty (30) days of shadowing unless parties agree to a different time period. The Contractor with the State shall review any Key Personnel replacements, and appropriate transition planning will be established. Any Unauthorized Removal may be considered by the State to be a material breach of the Contract, in respect of which the State may elect to exercise its rights under **Section 2.150**.

(v) It is acknowledged that an Unauthorized Removal will interfere with the timely and proper completion of the Contract, to the loss and damage of the State, and that it would be impracticable and extremely difficult to fix the actual damage sustained by the State as a result of any Unauthorized Removal. Therefore, Contractor and the State agree that in the case of any Unauthorized Removal in respect of which the State does not elect to exercise its rights under **Section 2**, the State may assess liquidated damages against Contractor as provided for in **Section 2.243**.

(b) Re-assignment of non-Key Personnel. Prior to re-deploying to other projects, at the completion of their assigned tasks on the Project, teams of its non-Key Personnel who are performing Services on-



site at State facilities or who are otherwise dedicated primarily to the Project, Contractor will give the State at least ten (10) Business Days notice of the proposed re-deployment to give the State an opportunity to object to the re-deployment if the State reasonably believes such team's Contract responsibilities are not likely to be completed and approved by the State prior to the proposed date of re-deployment.

2.063 Re-assignment of Personnel at the State's Request

The State reserves the right to require the removal from the Project of Contractor personnel found, in the judgment of the State, to be unacceptable. The State's request must be written with reasonable detail outlining the reasons for the removal request. Additionally, the State's request must be based on legitimate, good faith reasons. Replacement personnel for the removed person must be fully qualified for the position. If the State exercises this right, and the Contractor cannot immediately replace the removed personnel, the State agrees to an equitable adjustment in schedule or other terms that may be affected by the State's required removal. If any incident with removed personnel results in delay not reasonably anticipatable under the circumstances and which is attributable to the State, the applicable SLAs for the affected Service shall not be counted for a time as agreed to by the parties.

2.064 Contractor Personnel Location

All staff assigned by Contractor to work on the Contract shall perform their duties either primarily at Contractor's offices and facilities or at State facilities. Without limiting the generality of the foregoing, Key Personnel shall, at a minimum, spend at least the amount of time on-site at State facilities as indicated in the applicable Statement of Work. Subject to availability, selected Contractor personnel may be assigned office space to be shared with State personnel.

2.065 Contractor Identification

Contractor employees must be clearly identifiable while on State property by wearing a State-issued badge, as required. Contractor employees are required to clearly identify themselves and the company they work for whenever making contact with State personnel by telephone or other means.

2.066 Cooperation with Third Parties

Contractor agrees to cause its personnel and the personnel of any Subcontractors to cooperate with the State and its agents and other contractors including the State's Quality Assurance personnel. As reasonably requested by the State in writing, the Contractor shall provide to the State's agents and other contractors reasonable access to Contractor's Project personnel, systems and facilities to the extent the access relates to activities specifically associated with this Contract and shall not interfere or jeopardize the safety or operation of the systems or facilities. The State acknowledges that Contractor's time schedule for the Contract is very specific and agrees not to unnecessarily or unreasonably interfere with, delay or otherwise impede Contractor's performance under this Contract with the requests for access.

2.067 Contract Management Responsibilities

Contractor shall be responsible for all acts and omissions of its employees, as well as the acts and omissions of any other personnel furnished by Contractor to perform the Services. Contractor shall have overall responsibility for managing and successfully performing and completing the Services/Deliverables, subject to the overall direction and supervision of the State and with the participation and support of the State as specified in this Contract. Contractor's duties shall include monitoring and reporting the State's performance of its participation and support responsibilities (as well as Contractor's own responsibilities) and providing timely notice to the State in Contractor's reasonable opinion if the State's failure to perform its responsibilities in accordance with the Project Plan is likely to delay the timely achievement of any Contract tasks.

The Contractor shall provide the Services/Deliverables directly or through its affiliates, subsidiaries, subcontractors or resellers. Regardless of the entity providing the Service/Deliverable, the Contractor shall act as a single point of contact coordinating these entities to meet the State's need for Services/Deliverables. Nothing in this Contract, however, shall be construed to authorize or require any party to violate any applicable law or regulation in its performance of this Contract.



2.068 Contractor Return of State Equipment/Resources

The Contractor shall return to the State any State-furnished equipment, facilities and other resources when no longer required for the Contract in the same condition as when provided by the State, reasonable wear and tear excepted.

2.070 Subcontracting by Contractor

2.071 Contractor full Responsibility

Contractor shall have full responsibility for the successful performance and completion of all of the Services and Deliverables. The State shall consider Contractor to be the sole point of contact with regard to all contractual matters under this Contract, including payment of any and all charges for Services and Deliverables.

2.072 State Consent to delegation

Contractor shall not delegate any duties under this Contract to a Subcontractor unless the Department of Technology, Management and Budget, Procurement has given written consent to such delegation. The State shall have the right of prior written approval of all Subcontractors and to require Contractor to replace any Subcontractors found, in the reasonable judgment of the State, to be unacceptable. The State's request shall be written with reasonable detail outlining the reasons for the removal request. Additionally, the State's request shall be based on legitimate, good faith reasons. Replacement Subcontractor(s) for the removed Subcontractor shall be fully qualified for the position. If the State exercises this right, and the Contractor cannot immediately replace the removed Subcontractor, the State shall agree to an equitable adjustment in schedule or other terms that may be affected by the State's required removal. If any such incident with a removed Subcontractor results in delay not reasonably anticipatable under the circumstances and which is attributable to the State, the applicable SLA for the affected Work shall not be counted for a time agreed upon by the parties.

2.073 Subcontractor bound to Contract

In any subcontracts entered into by Contractor for the performance of the Services, Contractor shall require the Subcontractor, to the extent of the Services to be performed by the Subcontractor, to be bound to Contractor by the terms of this Contract and to assume toward Contractor all of the obligations and responsibilities that Contractor, by this Contract, assumes toward the State. The State reserves the right to receive copies of and review all subcontracts, although Contractor may delete or mask any proprietary information, including pricing, contained in such contracts before providing them to the State. The management of any Subcontractor shall be the responsibility of Contractor, and Contractor shall remain responsible for the performance of its Subcontractors to the same extent as if Contractor had not subcontracted such performance. Contractor shall make all payments to Subcontractors or suppliers of Contractor. Except as otherwise agreed in writing by the State and Contractor, the State shall not be obligated to direct payments for the Services other than to Contractor. The State's written approval of any Subcontractor engaged by Contractor to perform any obligation under this Contract shall not relieve Contractor of any obligations or performance required under this Contract. A list of the Subcontractors, if any, approved by the State as of the execution of this Contract, together with a copy of the applicable subcontract is attached as Attachment 6 – List of Approved Subcontractors.

2.074 Flow Down

Except where specifically approved in writing by the State on a case-by-case basis, Contractor shall flow down the obligations in **Sections 2.031, 2.060, 2.100, 2.110, 2.120, 2.130, and 2.200** in all of its agreements with any Subcontractors.

2.075 Competitive Selection

The Contractor shall select subcontractors (including suppliers) on a competitive basis to the maximum practical extent consistent with the objectives and requirements of the Contract.



2.080 State Responsibilities

2.081 Equipment

The State shall provide only the equipment and resources identified in the Statement of Work and other Contract Exhibits.

2.082 Facilities

The State must designate space as long as it is available and as provided in the Statement of Work, to house the Contractor's personnel whom the parties agree will perform the Services/Deliverables at State facilities (collectively, the "State Facilities"). The Contractor shall have reasonable access to, and unless agreed otherwise by the parties in writing must observe and comply with all rules and regulations relating to each of the State Facilities (including hours of operation) used by the Contractor in the course of providing the Services. Contractor agrees that it shall not, without the prior written consent of the State, use any State Facilities or access any State information systems provided for the Contractor's use, or to which the Contractor otherwise gains access in the course of performing the Services, for any purpose other than providing the Services to the State.

2.090 Security

2.091 Background Checks

On a case-by-case basis, the State may investigate the Contractor's personnel before they may have access to State facilities and systems. The scope of the background check is at the discretion of the State and the results shall be used to determine Contractor personnel eligibility for working within State facilities and systems. The investigations shall include Michigan State Police Background checks (ICHAT) and may include the National Crime Information Center (NCIC) Finger Prints. Proposed Contractor personnel may be required to complete and submit an RI-8 Fingerprint Card for the NCIC Finger Print Check. Any request for background checks shall be initiated by the State and shall be reasonably related to the type of work requested.

All Contractor personnel shall also be expected to comply with the State's security and acceptable use policies for State IT equipment and resources. See <http://www.michigan.gov/dit>. Furthermore, Contractor personnel shall be expected to agree to the State's security and acceptable use policies before the Contractor personnel shall be accepted as a resource to perform work for the State. It is expected the Contractor shall present these documents to the prospective employee before the Contractor presents the individual to the State as a proposed resource. Contractor staff shall be expected to comply with all Physical Security procedures in place within the facilities where they are working.

2.092 Security Breach Notification

If the Contractor breaches this Section, the Contractor must (i) promptly cure any deficiencies and (ii) comply with any applicable federal and state laws and regulations pertaining to unauthorized disclosures. Contractor and the State shall cooperate to mitigate, to the extent practicable, the effects of any breach, intrusion, or unauthorized use or disclosure. Contractor must report to the State in writing any use or disclosure of Confidential Information, whether suspected or actual, other than as provided for by the Contract within 10 days of becoming aware of the use or disclosure or the shorter time period as is reasonable under the circumstances.

2.093 PCI DATA Security Requirements

Reserved

2.100 Confidentiality

2.101 Confidentiality

Contractor and the State each acknowledge that the other possesses and will continue to possess confidential information that has been developed or received by it. As used in this Section, "Confidential Information" of Contractor shall mean all non-public proprietary information of Contractor (other than Confidential Information



of the State as defined below) which is marked confidential, restricted, proprietary or with a similar designation. "Confidential Information" of the State shall mean any information which is retained in confidence by the State (or otherwise required to be held in confidence by the State pursuant to applicable federal, state and local laws and regulations) or which, in the case of tangible materials provided to Contractor by the State pursuant to its performance under this Contract, is marked as confidential, proprietary or with a similar designation by the State. In the case of information of either Contractor or the State "Confidential Information" shall exclude any information (including this Contract) that is publicly available pursuant to the Michigan FOIA.

The respective rights and obligations for the Contractor and State regarding the handling and treatment of State Personal Data will be governed by **Section 2.106** of this Contract.

2.102 Protection and Destruction of Confidential Information

The State and Contractor shall each use at least the same degree of care to prevent disclosing to third parties the Confidential Information of the other as it employs to avoid unauthorized disclosure, publication or dissemination of its own confidential information of like character, but in no event less than reasonable care. Neither Contractor nor the State shall (i) make any use of the Confidential Information of the other except as contemplated by this Contract, (ii) acquire any right in or assert any lien against the Confidential Information of the other, or (iii) if requested to do so, refuse for any reason to promptly return the other party's Confidential Information to the other party. Each party shall limit disclosure of the other party's Confidential Information to employees and Subcontractors who must have access to fulfill the purposes of this Contract. Disclosure to, and use by, a Subcontractor is permissible where (A) use of a Subcontractor is authorized under this Contract, (B) the disclosure is necessary or otherwise naturally occurs in connection with work that is within the Subcontractor's scope of responsibility, and (C) Contractor obligates the Subcontractor in a written Contract to maintain the State's Confidential Information in confidence. At the State's request, any employee of Contractor and of any Subcontractor having access or continued access to the State's Confidential Information may be required to execute an acknowledgment that the employee has been advised of Contractor's and the Subcontractor's obligations under this Section and of the employee's obligation to Contractor or Subcontractor, as the case may be, to protect the Confidential Information from unauthorized use or disclosure.

Promptly upon termination or cancellation of the Contract for any reason, Contractor must certify to the State that Contractor has destroyed all State Confidential Information.

2.103 Exclusions

Notwithstanding the foregoing, the provisions in this Section shall not apply to any particular information which the State or Contractor can demonstrate (i) was, at the time of disclosure to it, in the public domain; (ii) after disclosure to it, is published or otherwise becomes part of the public domain through no fault of the receiving party; (iii) was in the possession of the receiving party at the time of disclosure to it without an obligation of confidentiality; (iv) was received after disclosure to it from a third party who had a lawful right to disclose the information to it without any obligation to restrict its further disclosure; or (v) was independently developed by the receiving party without reference to Confidential Information of the furnishing party. Further, the provisions of this Section shall not apply to any particular Confidential Information to the extent the receiving party is required by law to disclose the Confidential Information, provided that the receiving party (i) promptly provides the furnishing party with notice of the legal request, and (ii) assists the furnishing party in resisting or limiting the scope of the disclosure as reasonably requested by the furnishing party.

2.104 No Implied Rights

Nothing contained in this Section must be construed as obligating a party to disclose any particular Confidential Information to the other party, or as granting to or conferring on a party, expressly or impliedly, any right or license to the Confidential Information of the other party.

2.105 Respective Obligations

The parties' respective obligations under this Section must survive the termination or expiration of this Contract for any reason.



2.106 State Personal Data and Security Breach Notification

“State Personal Data” or “personally identifiable information” means data and/or information which is provided by or on behalf of the Client and which consists of information or data naming or identifying a natural person such as: (a) personally identifying information that is explicitly defined as a regulated category of data under a data privacy or data protection laws applicable to the State or its customers; (b) non-public information, such as a national identification number, passport number, social security number, driver’s license number; (c) health or medical information, such as insurance information, medical prognosis, diagnosis information or genetic information; (d) financial information, such as a policy number, credit card number and/or bank account number; and/or (e) sensitive personal data, such as mother’s maiden name, race, marital status, gender or sexuality. The term “State Personal Data” shall not mean to include information or data that is anonymized, aggregated, de-identified and/or compiled on a generic basis and which does not name or identify a specific individual or person.

Contractor shall maintain procedures to detect and respond to an unauthorized acquisition of or a security breach affecting the State’s Personal Data while such data is in its possession or control. Contractor shall promptly notify the Client of an unauthorized acquisition or misuse of the unencrypted State Personal Data in Contractor’s possession when it becomes aware of it. Contractor shall promptly furnish to the State appropriate details of the unauthorized acquisition or misuse and shall use commercially reasonable efforts to assist the State in investigating or preventing the recurrence of an unauthorized acquisition or misuse of the State Personal Data. Each Party shall cooperate, as is commercially reasonable, with the other Party to correct an unauthorized acquisition, misuse or other security breaches, and with the other Party in any litigation and investigation deemed necessary by the other Party. Each Party shall use commercially reasonable efforts to prevent a recurrence of an unauthorized acquisition or misuse of the State Personal Data. The State shall determine whether and when to notify any individuals or persons (including governmental authorities) regarding any security breach affecting Personal Data. Notwithstanding the foregoing, Contractor is permitted to comply with all applicable laws to which it is subject.

As defined by data privacy laws, the State shall be the data controller/owner of the data and the Contractor shall be the data processor. The Contractor shall comply with all laws and regulations applicable to the State Personal Data. However, the State shall be solely responsible for determining compliance with data privacy laws. In no event, shall Contractor be required to monitor or advise on the data privacy laws. In the event that there are any changes to (including changes in interpretation of) any of the data privacy laws which require a change to the provision of all or any part of the deliverables or services or a method of delivery of such deliverables or services in use by Contractor, prior to such change the parties shall make appropriate adjustments to the terms of this Contract and the services or deliverables (and corresponding fees) in accordance with the change control process.

2.110 Records and Inspections

2.111 Inspection of Work Performed

The State’s authorized representatives shall at all reasonable times and with 10 days prior written request, have the right to enter Contractor’s premises, or any other places, where the Services are being performed, and shall have access, upon reasonable request, to interim drafts of Deliverables or work-in-progress. Upon 10 Days prior written notice and at all reasonable times, the State’s representatives shall be allowed to inspect, monitor, or otherwise evaluate the work being performed and to the extent that the access will not reasonably interfere or jeopardize the safety or operation of the systems or facilities. Contractor shall provide all reasonable facilities and assistance for the State’s representatives.

2.112 Examination of Records

For seven years after the Contractor provides any work under this Contract (the "Audit Period"), the State may examine and copy any of Contractor’s books, records, documents and papers pertinent to establishing Contractor’s compliance with the Contract and with applicable laws and rules. The State shall notify the Contractor 20 days before examining the Contractor’s books and records. The State does not have the right to review any information deemed confidential by the Contractor to the extent access would require the



confidential information to become publicly available. This provision also applies to the books, records, accounts, documents and papers, in print or electronic form, of any parent, affiliated or subsidiary organization of Contractor, or any Subcontractor of Contractor performing services in connection with the Contract.

2.113 Retention of Records

Contractor shall maintain at least until the end of the Audit Period all pertinent financial and accounting records (including time sheets and payroll records, and information pertaining to the Contract and to the Services, equipment, and commodities provided under the Contract) pertaining to the Contract according to generally accepted accounting principles and other procedures specified in this Section. Financial and accounting records shall be made available, upon request, to the State at any time during the Audit Period. If an audit, litigation, or other action involving Contractor's records is initiated before the end of the Audit Period, the records shall be retained until all issues arising out of the audit, litigation, or other action are resolved or until the end of the Audit Period, whichever is later.

2.114 Audit Resolution

If necessary, the Contractor and the State shall meet to review each audit report promptly after issuance. The Contractor shall respond to each audit report in writing within 30 days from receipt of the report, unless a shorter response time is specified in the report. The Contractor and the State shall develop, agree upon and monitor an action plan to promptly address and resolve any deficiencies, concerns, and/or recommendations in the audit report.

2.115 Errors

If the audit demonstrates any errors in the documents provided to the State, then the amount in error shall be reflected as a credit or debit on the next invoice and in subsequent invoices until the amount is paid or refunded in full. However, a credit or debit may not be carried for more than four invoices. If a balance remains after four invoices, then the remaining amount shall be due as a payment or refund within 45 days of the last quarterly invoice that the balance appeared on or termination of the contract, whichever is earlier.

In addition to other available remedies, the difference between the payment received and the correct payment amount is greater than 10%, then the Contractor shall pay all of the reasonable costs of the audit.

2.120 Warranties

2.121 Warranties and Representations

The Contractor represents and warrants:

- (a) It is capable in all respects of fulfilling and must fulfill all of its obligations under this Contract. The performance of all obligations under this Contract must be provided in a timely, professional, and workman-like manner and must meet the performance and operational standards required under this Contract.
- (b) The Contract Appendices, Attachments and Exhibits identify the equipment and software and services necessary for the Deliverable(s) to perform and Services to operate in compliance with the Contract's requirements and other standards of performance.
- (c) It is the lawful owner or licensee of any Deliverable licensed or sold to the State by Contractor or developed by Contractor under this Contract, and Contractor has all of the rights necessary to convey to the State the ownership rights or licensed use, as applicable, of any and all Deliverables. None of the Deliverables provided by Contractor to the State under neither this Contract, nor their use by the State shall infringe the patent, copyright, trade secret, or other proprietary rights of any third party.
- (d) If, under this Contract, Contractor procures any equipment, software or other Deliverable for the State (including equipment, software and other Deliverables manufactured, re-marketed or otherwise sold by Contractor under Contractor's name), then in addition to Contractor's other responsibilities with respect to the items in this Contract, Contractor must assign or otherwise transfer to the State or its designees, or afford the State the benefits of, any manufacturer's warranty for the Deliverable.
- (e) The Contract signatory has the power and authority, including any necessary corporate authorizations, necessary to enter into this Contract, on behalf of Contractor.



- (f) It is qualified and registered to transact business in all locations where required.
- (g) Neither the Contractor nor any Affiliates, nor any employee of either, has, must have, or must acquire, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with Contractor’s performance of its duties and responsibilities to the State under this Contract or otherwise create an appearance of impropriety with respect to the award or performance of this Agreement. Contractor must notify the State about the nature of the conflict or appearance of impropriety within two days of learning about it.
- (h) Neither Contractor nor any Affiliates, nor any employee of either has accepted or must accept anything of value based on an understanding that the actions of the Contractor or Affiliates or employee on behalf of the State would be influenced. Contractor must not attempt to influence any State employee by the direct or indirect offer of anything of value.
- (i) Neither Contractor nor any Affiliates, nor any employee of either has paid or agreed to pay any person, other than bona fide employees and consultants working solely for Contractor or the Affiliate, any fee, commission, percentage, brokerage fee, gift, or any other consideration, contingent upon or resulting from the award or making of this Contract.
- (j) The prices proposed by Contractor were arrived at independently, without consultation, communication, or agreement with any other Bidder for the purpose of restricting competition; the prices quoted were not knowingly disclosed by Contractor to any other Bidder; and no attempt was made by Contractor to induce any other person to submit or not submit a proposal for the purpose of restricting competition.
- (k) All financial statements, reports, and other information furnished by Contractor to the State as part of its response to the RFP or otherwise in connection with the award of this Contract fairly and accurately represent the business, properties, financial condition, and results of operations of Contractor as of the respective dates, or for the respective periods, covered by the financial statements, reports, other information. Since the respective dates or periods covered by the financial statements, reports, or other information, there have been no material adverse changes in the business, properties, financial condition, or results of operations of Contractor.
- (l) All written information furnished to the State by or for the Contractor in connection with this Contract, including its bid, is true, accurate, and complete, and contains no untrue statement of material fact or omits any material fact necessary to make the information not misleading.
- (m) It is not in material default or breach of any other contract or agreement that it may have with the State or any of its departments, commissions, boards, or agencies. Contractor further represents and warrants that it has not been a party to any contract with the State or any of its departments that was terminated by the State or the department within the previous five years for the reason that Contractor failed to perform or otherwise breached an obligation of the contract.
- (n) If any of the certifications, representations, or disclosures made in the Contractor’s original bid response change after Contract award, the Contractor is required to report those changes immediately to the Department of Technology, Management and Budget, Purchasing Operations

THE FOREGOING EXPRESS WARRANTIES ARE IN LIEU OF ALL OTHER WARRANTIES AND EACH PARTY EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, BY OPERATION OF LAW OR OTHERWISE, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

2.122 Warranty of Merchantability

Reserved

2.123 Warranty of Fitness for a Particular Purpose

Reserved

2.124 Warranty of Title

Reserved

2.125 Equipment Warranty



To the extent Contractor is responsible under this Contract for maintaining equipment/system(s), Contractor represents and warrants that it will maintain such equipment/system(s) in good operating condition and will undertake all repairs and preventive maintenance in accordance with the applicable manufacturer's recommendations for the period specified in this Contract.

The Contractor represents and warrants that the equipment/system(s) shall be in good operating condition and shall operate and perform to the requirements and other standards of performance contained in this Contract, when installed, at the time of Final Acceptance by the State, and for a period of one (1) year commencing upon the first day following Final Acceptance.

Within three (3) business days of notification from the State, the Contractor shall adjust, repair or replace all equipment that is defective or not performing in compliance with the Contract. The Contractor shall assume all costs for replacing parts or units and their installation including transportation and delivery fees, if any.

The Contractor shall provide a toll-free telephone number to allow the State to report equipment failures and problems to be remedied by the Contractor.

The Contractor agrees that all warranty service it provides under this Contract shall be performed by original equipment manufacturer (OEM) trained, certified and authorized technicians.

The Contractor shall act as the sole point of contact for warranty service. The Contractor warrants that it shall pass through to the State any and all warranties obtained or available from the original equipment manufacturer, including any replacement, upgraded, or additional equipment warranties.

All warranty work shall be performed on the State of Michigan worksite(s).

2.126 Equipment to be New

If applicable, all equipment provided under this Contract by Contractor shall be new where Contractor has knowledge regarding whether the equipment is new or assembled from new or serviceable used parts that are like new in performance or has the option of selecting one or the other. Equipment that is assembled from new or serviceable used parts that are like new in performance is acceptable where Contractor does not have knowledge or the ability to select one or other, unless specifically agreed otherwise in writing by the State.

2.127 Prohibited Products

The State will not accept salvage, distressed, outdated or discontinued merchandise. Shipping of such merchandise to any State agency, as a result of an order placed against the Contract, shall be considered default by the Contractor of the terms and conditions of the Contract and may result in cancellation of the Contract by the State. The brand and product number offered for all items shall remain consistent for the term of the Contract, unless Purchasing Operations has approved a change order pursuant to **Section 2.024**.

2.128 Consequences for Breach

In addition to any remedies available in law, if the Contractor breaches any of the warranties contained in this section, the breach may be considered as a default in the performance of a material obligation of this Contract.

2.130 Insurance

2.131 Liability Insurance

The Contractor must provide proof of the minimum levels of insurance coverage as indicated below. The insurance must protect the State from claims that may arise out of or result from the Contractor's performance of services under the terms of this Contract, whether the services are performed by the Contractor, or by any subcontractor, or by anyone directly or indirectly employed by any of them, or by anyone for whose acts they may be liable.



The Contractor waives all rights against the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents for recovery of damages to the extent these damages are covered by the insurance policies the Contractor is required to maintain under this Contract.

All insurance coverage provided relative to this Contract/Purchase Order is PRIMARY and NON-CONTRIBUTING to any comparable liability insurance (including self-insurances) carried by the State.

The insurance must be written for not less than any minimum coverage specified in this Contract or required by law, whichever is greater.

The insurers selected by Contractor must have an A.M. Best rating of A or better, or as otherwise approved in writing by the State, or if the ratings are no longer available, with a comparable rating from a recognized insurance rating agency. All policies of insurance required in this Contract must be issued by companies that have been approved to do business in the State.

See www.michigan.gov/dleg.

Where specific limits are shown, they are the minimum acceptable limits. If Contractor’s policy contains higher limits, the State must be entitled to coverage to the extent of the higher limits.

The Contractor is required to pay for and provide the type and amount of insurance checked below:

- 1. Commercial General Liability with the following minimum coverage:
 \$2,000,000 General Aggregate Limit other than Products/Completed Operations
 \$2,000,000 Products/Completed Operations Aggregate Limit
 \$1,000,000 Personal & Advertising Injury Limit
 \$1,000,000 Each Occurrence Limit

The Contractor must list the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents as ADDITIONAL INSUREDS on the Commercial General Liability certificate. The Contractor also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company.

- 2. If a motor vehicle is used to provide services or products under this Contract, the Contractor must have vehicle liability insurance on any auto including owned, hired and non-owned vehicles used in Contractor’s business for bodily injury and property damage as required by law.

The Contractor must list the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents as ADDITIONAL INSUREDS on the vehicle liability certificate. The Contractor also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company.

- 3. Workers’ compensation coverage must be provided according to applicable laws governing the employees and employers work activities in the state of the Contractor’s domicile. If a self-insurer provides the applicable coverage, proof must be provided of approved self-insured authority by the jurisdiction of domicile. For employees working outside of the state of qualification, Contractor must provide appropriate certificates of insurance proving mandated coverage levels for the jurisdictions where the employees’ activities occur.

Any certificates of insurance received must also provide a list of states where the coverage is applicable.

The Contractor also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company. This provision must not be applicable where prohibited or limited by the laws of the jurisdiction in which the work is to be performed.

- 4. Employers liability insurance with the following minimum limits:
 \$100,000 each accident
 \$100,000 each employee by disease
 \$500,000 aggregate disease



5. Employee Fidelity, including Computer Crimes, insurance naming the State as a loss payee, providing coverage for direct loss to the State and any legal liability of the State arising out of or related to fraudulent or dishonest acts committed by the employees of Contractor or its Subcontractors, acting alone or in collusion with others, in a minimum amount of one million dollars (\$1,000,000.00) with a maximum deductible of fifty thousand dollars (\$50,000.00).

2.132 Subcontractor Insurance Coverage

Except where the State has approved in writing a Contractor subcontract with other insurance provisions, Contractor must require all of its Subcontractors under this Contract to purchase and maintain the insurance coverage as described in this Section for the Contractor in connection with the performance of work by those Subcontractors. Alternatively, Contractor may include any Subcontractors under Contractor's insurance on the coverage required in this Section. Subcontractor(s) must fully comply with the insurance coverage required in this Section. Failure of Subcontractor(s) to comply with insurance requirements does not limit Contractor's liability or responsibility.

2.133 Certificates of Insurance and Other Requirements

Before the Contract is signed by both parties or before the purchase order is issued by the State, the Contractor must furnish to the Director of Purchasing Operations, certificate(s) of insurance verifying insurance coverage ("Certificates"). The Certificate must be on the standard "accord" form or equivalent. **THE CONTRACT OR PURCHASE ORDER NO. MUST BE SHOWN ON THE CERTIFICATE OF INSURANCE TO ASSURE CORRECT FILING.** All Certificate(s) are to be prepared and submitted by the Insurance Provider. All Certificate(s) shall contain a provision indicating that coverages afforded under the policies WILL NOT BE CANCELLED, MATERIALLY CHANGED, OR NOT RENEWED without THIRTY (30) days prior written notice, except for ten (10) days for non-payment of premium, having been given to the Director of Purchasing Operations, Department of Management and Budget. The notice must include the Contract or Purchase Order number affected and be mailed to: Director, Purchasing Operations, Department of Management and Budget, P.O. Box 30026, Lansing, Michigan 48909. Failure to provide evidence of coverage, may, at the State's sole option, result in this Contract's termination.

2.140 Indemnification

2.141 General Indemnification

To the extent permitted by law, the Contractor must indemnify, defend and hold harmless the State from liability, including all claims and losses, and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties), accruing or resulting to any person, firm or corporation that may be injured or damaged by the Contractor in the performance of this Contract and that are attributable to the negligence or tortious acts of the Contractor or any of its subcontractors, or by anyone else for whose acts any of them may be liable.

2.142 Code Indemnification

To the extent permitted by law, the Contractor shall indemnify, defend and hold harmless the State from any claim, loss, or expense arising from Contractor's breach of the No Surreptitious Code Warranty.

2.143 Employee Indemnification

In any claims against the State of Michigan, its departments, divisions, agencies, sections, commissions, officers, employees and agents, by any employee of the Contractor or any of its subcontractors, the indemnification obligation under the Contract must not be limited in any way by the amount or type of damages, compensation or benefits payable by or for the Contractor or any of its subcontractors under worker's disability compensation acts, disability benefit acts or other employee benefit acts. This indemnification clause is intended to be comprehensive. Any overlap in provisions, or the fact that greater specificity is provided as to some categories of risk, is not intended to limit the scope of indemnification under any other provisions.



2.144 Patent/Copyright Infringement Indemnification

To the extent permitted by law, the Contractor must indemnify, defend and hold harmless the State from and against all losses, liabilities, damages (including taxes), and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties) incurred in connection with any action or proceeding threatened or brought against the State to the extent that the action or proceeding is based on a claim that any Service (excluding the provision of third-party products) supplied by the Contractor or its subcontractors infringes any United States patent, copyright, trademark or trade secret of any person or entity, which is enforceable under the laws of the United States.

In addition, should the Service become or in the State's or Contractor's opinion be likely to become the subject of a claim of infringement, the Contractor must at the Contractor's sole expense (i) procure for the State the right to continue using the Service or, if the option is not reasonably available to the Contractor, (ii) replace or modify to the State's satisfaction the same with Service of equivalent function and performance so that it becomes non-infringing, or, if the option is not reasonably available to Contractor, (iii) accept its return by the State with appropriate credits to the State against the Contractor's charges and reimburse the State for any losses or costs incurred as a consequence of the State ceasing its use and returning it.

Notwithstanding the foregoing, the Contractor has no obligation to indemnify or defend the State for, or to pay any costs, damages or attorneys' fees related to, any claim based upon (i) Services developed based on written specifications of the State; (ii) use of the Services in a configuration other than implemented or approved in writing by the Contractor, including, but not limited to, any modification of the equipment by the State; or (iii) the combination, operation, or use of the Services with Services not supplied by the Contractor under this Contract.

2.145 Continuation of Indemnification Obligations

The Contractor's duty to indemnify under this Section continues in full force and effect, notwithstanding the expiration or early cancellation of the Contract, with respect to any claims based on facts or conditions that occurred before expiration or cancellation.

2.146 Indemnification Procedures

The procedures set forth below must apply to all indemnity obligations under this Contract.

- (a) After the State receives notice of the action or proceeding involving a claim for which it shall seek indemnification, the State must promptly notify Contractor of the claim in writing and take or assist Contractor in taking, as the case may be, any reasonable action to avoid the imposition of a default judgment against Contractor. No failure to notify the Contractor relieves the Contractor of its indemnification obligations except to the extent that the Contractor can prove damages attributable to the failure. Within 10 days following receipt of written notice from the State relating to any claim, the Contractor must notify the State in writing whether Contractor agrees to assume control of the defense and settlement of that claim (a "Notice of Election"). After notifying Contractor of a claim and before the State receiving Contractor's Notice of Election, the State is entitled to defend against the claim, at the Contractor's expense, and the Contractor will be responsible for any reasonable costs incurred by the State in defending against the claim during that period.
- (b) If Contractor delivers a Notice of Election relating to any claim: (i) the State is entitled to participate in the defense of the claim and to employ counsel at its own expense to assist in the handling of the claim and to monitor and advise the State about the status and progress of the defense; (ii) the Contractor must, at the request of the State, demonstrate to the reasonable satisfaction of the State, the Contractor's financial ability to carry out its defense and indemnity obligations under this Contract; (iii) the Contractor must periodically advise the State about the status and progress of the defense and must obtain the prior written approval of the State before entering into any settlement of the claim or ceasing to defend against the claim and (iv) to the extent that any principles of Michigan governmental or public law may be involved or challenged, the State has the right, at its own expense, to control the defense of that portion of the claim involving the principles of Michigan governmental or public law. But the State may retain control of the defense and settlement of a claim by notifying the Contractor in writing within 10 days after the State's receipt of Contractor's information requested by the State under clause (ii) of this paragraph if



the State determines that the Contractor has failed to demonstrate to the reasonable satisfaction of the State the Contractor's financial ability to carry out its defense and indemnity obligations under this Section. Any litigation activity on behalf of the State, or any of its subdivisions under this Section, must be coordinated with the Department of Attorney General. In the event the insurer's attorney represents the State under this Section, the insurer's attorney may be required to be designated as a Special Assistant Attorney General by the Attorney General of the State of Michigan.

- (c) If Contractor does not deliver a Notice of Election relating to any claim of which it is notified by the State as provided above, the State may defend the claim in the manner as it may deem appropriate, at the cost and expense of Contractor. If it is determined that the claim was one against which Contractor was required to indemnify the State, upon request of the State, Contractor must promptly reimburse the State for all the reasonable costs and expenses.

2.150 Termination/Cancellation

2.151 Notice and Right to Cure

If the Contractor breaches the contract, and the State in its sole discretion determines that the breach is curable, then the State shall provide the Contractor with written notice of the breach and a time period (not less than 30 days) to cure the Breach. The notice of breach and opportunity to cure is inapplicable for successive or repeated breaches or if the State determines in its sole discretion that the breach poses a serious and imminent threat to the health or safety of any person or the imminent loss, damage, or destruction of any real or tangible personal property.

2.152 Termination for Cause

(a) In the event that Contractor breaches any of its material duties or obligations under this Contract, which are either not capable of or subject to being cured, or are not cured within the time period specified in the written notice of breach provided by the State (such time period not to be less than thirty (30) days), or pose a serious and imminent threat to the health and safety of any person, or the imminent loss, damage or destruction of any real or tangible personal property, the State may, having provided written notice of termination to Contractor, terminate this Contract in whole or in part, for cause, as of the date specified in the notice of termination.

(b) In the event that this Contract is terminated for cause, in addition to any legal remedies otherwise available to the State by law or equity, Contractor shall be responsible for all costs incurred by the State in terminating this Contract, including but not limited to, State administrative costs, reasonable attorneys' fees and court costs, and any reasonable additional costs the State may incur to procure the Services/Deliverables required by this Contract from other sources. Re-procurement costs shall not be considered by the parties to be consequential, indirect or incidental damages, and shall not be excluded by any other terms otherwise included in this Contract.

(c) In the event the State chooses to partially terminate this Contract for cause, charges payable under this Contract will be equitably adjusted to reflect those Services/Deliverables that are terminated and the State shall pay for all Services/Deliverables provided up to the termination date. Services and related provisions of this Contract that are terminated for cause shall cease on the effective date of the termination.

(d) In the event this Contract is terminated for cause pursuant to this Section, and it is determined, for any reason, that Contractor was not in breach of contract pursuant to the provisions of this section, that termination for cause shall be deemed to have been a termination for convenience, effective as of the same date, and the rights and obligations of the parties shall be limited to that otherwise provided in this Contract for a termination for convenience.

2.153 Termination for Convenience

The State may terminate this Contract for its convenience, in whole or part, if the State determines that a termination is in the State's best interest. Reasons for the termination must be left to the sole discretion of the State and may include, but not necessarily be limited to (a) the State no longer needs the Services or products specified in the Contract, (b) relocation of office, program changes, changes in laws, rules, or regulations make implementation of the Services no longer practical or feasible, (c) unacceptable prices for Additional Services or New Work requested by the State, or (d) falsification or misrepresentation, by inclusion or non-inclusion, of



information material to a response to any RFP issued by the State. The State may terminate this Contract for its convenience, in whole or in part, by giving Contractor written notice at least 30 days before the date of termination. If the State chooses to terminate this Contract in part, the charges payable under this Contract must be equitably adjusted to reflect those Services/Deliverables that are terminated. Services and related provisions of this Contract that are terminated for convenience must cease on the effective date of the termination.

2.154 Termination for Non-Appropriation

- (a) Contractor acknowledges that, if this Contract extends for several fiscal years, continuation of this Contract is subject to appropriation or availability of funds for this Contract. If funds to enable the State to effect continued payment under this Contract are not appropriated or otherwise made available, the State must terminate this Contract and all affected Statements of Work, in whole or in part, at the end of the last period for which funds have been appropriated or otherwise made available by giving written notice of termination to Contractor. The State must give Contractor at least 30 days advance written notice of termination for non-appropriation or unavailability (or the time as is available if the State receives notice of the final decision less than 30 days before the funding cutoff).
- (b) If funding for the Contract is reduced by law, or funds to pay Contractor for the agreed-to level of the Services or production of Deliverables to be provided by Contractor are not appropriated or otherwise unavailable, the State may, upon 30 days written notice to Contractor, reduce the level of the Services or change the production of Deliverables in the manner and for the periods of time as the State may elect. The charges payable under this Contract shall be equitably adjusted to reflect any equipment, services or commodities not provided by reason of the reduction.
- (c) If the State terminates this Contract, eliminates certain Deliverables, or reduces the level of Services to be provided by Contractor under this Section, the State must pay Contractor for all Work-in-Process performed through the effective date of the termination or reduction in level, as the case may be and as determined by the State, to the extent funds are available. This Section shall not preclude Contractor from reducing or stopping Services/Deliverables or raising against the State in a court of competent jurisdiction, any claim for a shortfall in payment for Services performed or Deliverables finally accepted before the effective date of termination.

2.155 Termination for Criminal Conviction

The State may terminate this Contract immediately and without further liability or penalty in the event Contractor, an officer of Contractor, or an owner of a 25% or greater share of Contractor is convicted of a criminal offense related to a State, public or private Contract or subcontract.

2.156 Termination for Approvals Rescinded

The State may terminate this Contract if any final administrative or judicial decision or adjudication disapproves a previously approved request for purchase of personal services under Constitution 1963, Article 11, § 5, and Civil Service Rule 7-1. In that case, the State shall pay the Contractor for only the work completed to that point under the Contract. Termination may be in whole or in part and may be immediate as of the date of the written notice to Contractor or may be effective as of the date stated in the written notice.

2.157 Rights and Obligations upon Termination

(a) If this Contract is terminated by the State for any reason, Contractor shall (a) stop all work as specified in the notice of termination, (b) take any action that may be necessary, or that the State may direct, for preservation and protection of Deliverables or other property derived or resulting from this Contract that may be in Contractor's possession, (c) return all materials and property provided directly or indirectly to Contractor by any entity, agent or employee of the State, (d) in the event that the Contractor maintains title in Deliverables that is intended to be transferred to the State at the termination of the Contract, Contractor will transfer title in, and deliver to, the State, unless otherwise directed, all Deliverables intended to be transferred to the State at the termination of the Contract and which are resulting from the Contract (which shall be provided to the State on an "As-Is" basis except to the extent the amounts paid by the State in respect of such items included compensation to Contractor for the provision of warranty services in respect of such materials), and (e) take any action to mitigate and limit any potential damages, or requests for Contractor adjustment or



termination settlement costs, to the maximum practical extent, including terminating or limiting as otherwise applicable those subcontracts and outstanding orders for material and supplies resulting from the terminated Contract.

(b) In the event the State terminates this Contract prior to its expiration for its own convenience, the State shall pay Contractor for all charges due for Services provided prior to the date of termination and, if applicable, as a separate item of payment pursuant to this Contract, for Work In Process, on a percentage of completion basis to be mutually agreed upon. All completed or partially completed Deliverables prepared by Contractor pursuant to this Contract shall, at the option of the State, become the State's property, and Contractor shall be entitled to receive equitable fair compensation for such Deliverables. Regardless of the basis for the termination, the State shall not be obligated to pay, or otherwise compensate, Contractor for any lost expected future profits, costs or expenses incurred with respect to Services not actually performed for the State.

(c) Upon a good faith termination, the State shall have the right to assume, at its option, any and all subcontracts and agreements for services and deliverables provided under this Contract, and may further pursue completion of the Services/Deliverables under this Contract by replacement contract or otherwise as the State may in its sole judgment deem expedient.

2.158 Reservation of Rights

Any termination of this Contract or any Statement of Work issued under it by a party must be with full reservation of, and without prejudice to, any rights or remedies otherwise available to the party with respect to any claims arising before or as a result of the termination.

2.160 Termination by Contractor

2.161 Termination by Contractor

If the State breaches the Contract, and the Contractor in its sole discretion determines that the breach is curable, then the Contractor will provide the State with written notice of the breach and a time period (not less than 30 days) to cure the breach. The Notice of Breach and opportunity to cure is inapplicable for successive and repeated breaches.

The Contractor may terminate this Contract if the State (i) materially breaches its obligation to pay the Contractor undisputed amounts due and owing under this Contract, (ii) breaches its other obligations under this Contract to an extent that makes it impossible or commercially impractical for the Contractor to perform the Services, or (iii) does not cure the breach within the time period specified in a written notice of breach. But the Contractor must discharge its obligations under **Section 2.160** before it terminates the Contract.

2.170 Transition Responsibilities

2.171

Reserved

2.172 Contractor Personnel Transition

In the event this Contract is terminated, for convenience or cause, dissolved, voided, rescinded, nullified, expires or is otherwise rendered unenforceable, the Contractor agrees to comply with direction provided by the State to assist in the orderly transition of equipment, services, software, leases, etc. to the State or a third party designated by the State. In the event of termination or the expiration of this Contract, the Contractor agrees to make all reasonable efforts to effect an orderly transition of services within a reasonable period of time that in no event will exceed ninety (90) days. These efforts shall include, but are not limited to, the following:

(a) Personnel - The Contractor shall work with the State, or a specified third party, to develop a transition plan setting forth the specific tasks and schedule to be accomplished by the parties, to effect an orderly transition. The Contractor shall allow as many personnel as practicable to remain on the job to help the State, or a specified third party, maintain the continuity and consistency of the services required by this Contract. In addition, during or following the transition period, in the event the State requires the Services of the Contractor's subcontractors or vendors, as necessary to meet its needs, Contractor agrees to reasonably,



and with good-faith, work with the State to use the Services of Contractor’s subcontractors or vendors. Contractor will notify all of Contractor’s subcontractors of procedures to be followed during transition.

(b) Information - The Contractor agrees to provide reasonable detailed specifications for all Services/Deliverables needed by the State, or specified third party, to properly provide the Services/Deliverables required under this Contract. The Contractor will provide the State with asset management data generated from the inception of this Contract through the date on which this Contractor is terminated in a comma-delineated format unless otherwise requested by the State. The Contractor will deliver to the State any remaining owed reports and documentation still in Contractor’s possession subject to appropriate payment by the State.

(d) Software. - The Contractor shall reasonably assist the State in the acquisition of any Contractor software required to perform the Services/use the Deliverables under this Contract. This shall include any documentation being used by the Contractor to perform the Services under this Contract. If the State transfers any software licenses to the Contractor, those licenses shall, upon expiration of the Contract, transfer back to the State at their current revision level. Upon notification by the State, Contractor may be required to freeze all non-critical changes to Deliverables/Services.

(e) Payment - If the transition results from a termination for any reason, reimbursement shall be governed by the termination provisions of this Contract. If the transition results from expiration, the Contractor will be reimbursed for all reasonable transition costs (i.e. costs incurred within the agreed period after Contract expiration that result from transition operations) at the rates specified by **Attachment 3 – Cost Tables Table 4 – Rate Card**. The Contractor will prepare an accurate accounting from which the State and Contractor may reconcile all outstanding accounts.

2.173

Reserved

2.174

Reserved

2.175

Reserved

2.176 State Transition Responsibilities

In the event that this Contract is terminated, dissolved, voided, rescinded, nullified, or otherwise rendered unenforceable, the State agrees to reconcile all accounts between the State and the Contractor, complete any pending post-project reviews and perform any others obligations upon which the State and the Contractor agree.

- (a) Reconciling all accounts between the State and the Contractor;
- (b) Completing any pending post-project reviews.

2.180 Stop Work

2.181 Stop Work Orders

The State may, at any time, by written Stop Work Order to Contractor, require that Contractor stop all, or any part, of the work called for by the Contract for a period of up to 90 calendar days after the Stop Work Order is delivered to Contractor, and for any further period to which the parties may agree. The Stop Work Order must be identified as a Stop Work Order and must indicate that it is issued under this **Section**. Upon receipt of the stop work order, Contractor must immediately comply with its terms and take all reasonable steps to minimize incurring costs allocable to the work covered by the Stop Work Order during the period of work stoppage. Within the period of the stop work order, the State must either: (a) cancel the stop work order; or (b) terminate the work covered by the Stop Work Order as provided in **Section 2.182**.

2.182 Cancellation or Expiration of Stop Work Order



The Contractor shall resume work if the State cancels a Stop Work Order or if it expires. The parties shall agree upon an equitable adjustment in the delivery schedule, the Contract price, or both, and the Contract shall be modified, in writing, accordingly, if: (a) the Stop Work Order results in an increase in the time required for, or in Contractor's costs properly allocable to, the performance of any part of the Contract; and (b) Contractor asserts its right to an equitable adjustment within 30 calendar days after the end of the period of work stoppage; provided that, if the State decides the facts justify the action, the State may receive and act upon a Contractor proposal submitted at any time before final payment under the Contract. Any adjustment will conform to the requirements of **Section 2.024**.

2.183 Allowance of Contractor Costs

If the Stop Work Order is not canceled and the work covered by the Stop Work Order is terminated for reasons other than material breach, the termination shall be deemed to be a termination for convenience under **Section 2.153**, and the State shall pay reasonable costs resulting from the Stop Work Order in arriving at the termination settlement. For the avoidance of doubt, the State shall not be liable to Contractor for loss of profits because of a Stop Work Order issued under this Section.

2.190 Dispute Resolution

2.191 In General

Any claim, counterclaim, or dispute between the State and Contractor arising out of or relating to the Contract or any Statement of Work must be resolved as follows. For all Contractor claims seeking an increase in the amounts payable to Contractor under the Contract, or the time for Contractor's performance, Contractor must submit a letter, together with all data supporting the claims, executed by Contractor's Contract Administrator or the Contract Administrator's designee certifying that (a) the claim is made in good faith, (b) the amount claimed accurately reflects the adjustments in the amounts payable to Contractor or the time for Contractor's performance for which Contractor believes the State is liable and covers all costs of every type to which Contractor is entitled from the occurrence of the claimed event, and (c) the claim and the supporting data are current and complete to Contractor's best knowledge and belief.

2.192 Informal Dispute Resolution

(a) All disputes between the parties shall be resolved under the Contract Management procedures in this Contract. If the parties are unable to resolve any dispute after compliance with the processes, the parties must meet with the Director of Purchasing Operations, DTMB, or designee, to resolve the dispute without the need for formal legal proceedings, as follows:

(1) The representatives of Contractor and the State must meet as often as the parties reasonably deem necessary to gather and furnish to each other all information with respect to the matter at issue which the parties believe to be appropriate and germane in connection with its resolution. The representatives shall discuss the problem and negotiate in good faith in an effort to resolve the dispute without the necessity of any formal proceeding.

(2) During the course of negotiations, all reasonable requests made by one party to another for non-privileged information reasonably related to the Contract shall be honored in order that each of the parties may be fully advised of the other's position.

(3) The specific format for the discussions shall be left to the discretion of the designated State and Contractor representatives, but may include the preparation of agreed upon statements of fact or written statements of position.

(4) Following the completion of this process within 60 calendar days, the Director of Purchasing Operations, DTMB, or designee, shall issue a written opinion regarding the issue(s) in dispute within 30 calendar days. The opinion regarding the dispute must be considered the State's final action and the exhaustion of administrative remedies.

(b) This Section shall not be construed to prevent either party from instituting, and a party is authorized to institute, formal proceedings earlier to avoid the expiration of any applicable limitations period, to preserve a superior position with respect to other creditors, or under Section 2.193.

(c) The State shall not mediate disputes between the Contractor and any other entity, except state agencies, concerning responsibility for performance of work under the Contract.



2.193 Injunctive Relief

The only circumstance in which disputes between the State and Contractor shall not be subject to the provisions of **Section 2.192** is where a party makes a good faith determination that a breach of the terms of the Contract by the other party is that the damages to the party resulting from the breach shall be so immediate, so large or severe and so incapable of adequate redress after the fact that a temporary restraining order or other immediate injunctive relief is the only adequate remedy.

2.194 Continued Performance

Each party agrees to continue performing its obligations under the Contract while a dispute is being resolved except to the extent the issue in dispute precludes performance (dispute over payment must not be deemed to preclude performance) and without limiting either party's right to terminate the Contract as provided in **Section 2.150**, as the case may be.

2.200 Federal and State Contract Requirements

2.201 Nondiscrimination

In the performance of the Contract, Contractor agrees not to discriminate against any employee or applicant for employment, with respect to his or her hire, tenure, terms, conditions or privileges of employment, or any matter directly or indirectly related to employment, because of race, color, religion, national origin, ancestry, age, sex, height, weight, and marital status, physical or mental disability. Contractor further agrees that every subcontract entered into for the performance of this Contract or any purchase order resulting from this Contract will contain a provision requiring non-discrimination in employment, as specified here, binding upon each Subcontractor. This covenant is required under the Elliot Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101, et seq., and the Persons with Disabilities Civil Rights Act, 1976 PA 220, MCL 37.1101, et seq., and any breach of this provision may be regarded as a material breach of the Contract.

2.202 Unfair Labor Practices

Under 1980 PA 278, MCL 423.321, et seq., the State shall not award a Contract or subcontract to an employer whose name appears in the current register of employers failing to correct an unfair labor practice compiled under Section 2 of the Act. This information is compiled by the United States National Labor Relations Board. A Contractor of the State, in relation to the Contract, shall not enter into a contract with a Subcontractor, manufacturer, or supplier whose name appears in this register. Under Section 4 of 1980 PA 278, MCL 423.324, the State may void any Contract if, after award of the Contract, the name of Contractor as an employer or the name of the Subcontractor, manufacturer or supplier of Contractor appears in the register.

2.203 Workplace Safety and Discriminatory Harassment

In performing Services for the State, the Contractor shall comply with the Department of Civil Services Rule 2-20 regarding Workplace Safety and Rule 1-8.3 regarding Discriminatory Harassment. In addition, the Contractor shall comply with Civil Service regulations and any applicable agency rules provided to the Contractor. For Civil Service Rules, see <http://www.mi.gov/mdcs/0,1607,7-147-6877---,00.html>.

2.204 Prevailing Wage

Wages rates and fringe benefits to be paid each class of individuals employed by the Contractor, its subcontractors, their subcontractors, and all persons involved with the performance of this Contract in privity of contract with the Contractor shall not be less than the wage rates and fringe benefits established by the Michigan Department of Licensing and Regulatory Affairs, Wage and Hour Division, schedule of occupational classification and wage rates and fringe benefits for the local where the work is to be performed. The term Contractor shall include all general contractors, prime contractors, project managers, trade contractors, and all of their contractors or subcontractors and persons in privity of contract with them.

The Contractor, its subcontractors, their subcontractors and all persons involved with the performance of this Contract in privity of contract with the Contractor shall keep posted on the work site, in a conspicuous place, a copy of all wage rates and fringe benefits as prescribed in the Contract. Contractor shall also post, in a



conspicuous place, the address and telephone number of the Michigan Department of Labor and Economic Development, the agency responsible for enforcement of the wage rates and fringe benefits. Contractor shall keep an accurate record showing the name and occupation of the actual wage and benefits paid to each individual employed in connection with this contract. This record shall be available to the State upon request for reasonable inspection.

If any trade is omitted from the list of wage rates and fringe benefits to be paid to each class of individuals by the Contractor, it is understood that the trades omitted shall also be paid not less than the wage rate and fringe benefits prevailing in the local where the work is to be performed.

2.210 Governing Law

2.211 Governing Law

The Contract shall in all respects be governed by, and construed according to, the substantive laws of the State of Michigan without regard to any Michigan choice of law rules that would apply the substantive law of any other jurisdiction to the extent not inconsistent with, or pre-empted by federal law.

2.212 Compliance with Laws

Contractor shall comply with all applicable state, federal, and local laws and ordinances ("Applicable Laws") in providing the Services/Deliverables.

2.213 Jurisdiction

Any dispute arising from the Contract shall be resolved in the State of Michigan. With respect to any claim between the parties, Contractor consents to venue in Ingham County, Michigan, and irrevocably waives any objections it may have to the jurisdiction on the grounds of lack of personal jurisdiction of the court or the laying of venue of the court or on the basis of forum non conveniens or otherwise. Contractor agrees to appoint agents in the State of Michigan to receive service of process.

2.220 Limitation of Liability

2.221 Limitation of Liability

The Contractor's liability for damages to the State shall be limited to one times the value of the Contract or \$200,000 whichever is higher. The foregoing limitation of liability shall not apply to claims for infringement of United States patent, copyright, trademarks or trade secrets; to claims for personal injury or damage to property caused by the gross negligence or willful misconduct of the Contractor; to claims covered by other specific provisions of this Contract calling for liquidated damages; or to court costs or attorney's fees awarded by a court in addition to damages after litigation based on this Contract.

The State's liability for damages to the Contractor shall be limited to the value of the Contract.

Neither the Contractor nor the State shall be liable to each other, regardless of the form of action, for consequential, incidental, indirect, or special damages. This limitation of liability shall not apply to claims for infringement of United States patent, copyright, trademark or trade secrets; to claims for personal injury or damage to property caused by the gross negligence or willful misconduct of the Contractor; to claims covered by other specific provisions of this Contract calling for liquidated damages; or to court costs or attorney's fees awarded by a court in addition to damages after litigation based on this Contract.

2.230 Disclosure Responsibilities

2.231 Disclosure of Litigation

Contractor must disclose to the State on an annual basis, within ten (10) days after the public availability of Contractor's Form 10-K (Annual Report) on file with the U.S. Securities and Exchange Commission, any material legal proceedings arising out of Contractor's business dealings with governmental or public entities ("Proceedings"), as such Proceedings are set forth in such Form 10-K.

If any Proceeding disclosed to the State under this Section, or of which the State otherwise becomes aware, during the term of this Contract would cause a reasonable party to be concerned about:



- (a) the ability of Contractor (or a Subcontractor) to continue to perform this Contract according to its terms and conditions, or
- (b) whether Contractor (or a Subcontractor) in performing Services for the State is engaged in conduct which is similar in nature to conduct alleged in the Proceeding, which conduct would constitute a breach of this Contract or a violation of Michigan law, regulations or public policy. Then, the Contractor must provide the State all reasonable assurances requested by the State to demonstrate that:
 - (1) Contractor and its Subcontractors will be able to continue to perform this Contract and any Statements of Work according to its terms and conditions, and
 - (2) Contractor and its Subcontractors have not and will not engage in conduct in performing the Services which is similar in nature to the conduct alleged in the Proceeding.
- (c) Contractor will notify State regarding the change in ownership to Accenture LLP and/or its Affiliates that are directly engaged on the project.

2.232 Contact center Disclosure

Contractor and/or all subcontractors involved in the performance of this Contract providing call or contact center services to the State shall disclose the location of its call or contact center services to inbound callers. Failure to disclose this information is a material breach of this Contract.

2.233 Bankruptcy

The State may, without prejudice to any other right or remedy, terminate this Contract, in whole or in part, and, at its option, may take possession of the "Work in Process" and finish the Works in Process by whatever appropriate method the State may deem expedient if:

- (a) the Contractor files for protection under the bankruptcy laws;
- (b) an involuntary petition is filed against the Contractor and not removed within 30 days;
- (c) the Contractor becomes insolvent or if a receiver is appointed due to the Contractor's insolvency;
- (d) the Contractor makes a general assignment for the benefit of creditors; or
- (e) the Contractor or its affiliates are unable to provide reasonable assurances that the Contractor or its affiliates can deliver the services under this Contract.

Contractor will fix appropriate notices or labels on the Work in Process to indicate ownership by the State. To the extent reasonably possible, materials and Work in Process shall be stored separately from other stock and marked conspicuously with labels indicating ownership by the State.

2.240 Performance

2.241 Time of Performance

- (a) Contractor shall use commercially reasonable efforts to provide the resources necessary to complete all Services and Deliverables according to the time schedules contained in the Statements of Work and other Exhibits governing the work, and with professional quality.
- (b) Without limiting the generality of **Section 2.241**, Contractor shall notify the State in a timely manner upon becoming aware of any circumstances that may reasonably be expected to jeopardize the timely and successful completion of any Deliverables/Services on the scheduled due dates in the latest State-approved delivery schedule and must inform the State of the projected actual delivery date.
- (c) If the Contractor believes that a delay in performance by the State has caused or will cause the Contractor to be unable to perform its obligations according to specified Contract time periods, the Contractor must notify the State in a timely manner and must use commercially reasonable efforts to perform its obligations according to the Contract time periods notwithstanding the State's failure. Contractor will not be in default for a delay in performance to the extent the delay is caused by the State.

2.242 Service Level Agreement (SLA)

- (a) SLAs will be completed with the following operational considerations:
 - (1) SLAs will not be calculated for individual Incidents where any event of Excusable Failure has been determined; Incident means any interruption in Services.



- (2) SLAs will not be calculated for individual Incidents where loss of service is planned and where the State has received prior notification or coordination.
- (3) SLAs will not apply if the applicable Incident could have been prevented through planning proposed by Contractor and not implemented at the request of the State. To invoke this consideration, complete documentation relevant to the denied planning proposal must be presented to substantiate the proposal.
- (4) Time period measurements will be based on the time Incidents are received by the Contractor and the time that the State receives notification of resolution based on 24x7x365 time period, except that the time period measurement will be suspended based on the following:
 - (i) Time period(s) will not apply where Contractor does not have access to a physical State Location and where access to the State Location is necessary for problem identification and resolution.
 - (ii) Time period(s) will not apply where Contractor needs to obtain timely and accurate information or appropriate feedback and is unable to obtain timely and accurate information or appropriate feedback from the State.
- (b) Chronic Failure for any Service(s) will be defined as three unscheduled outage(s) or interruption(s) on any individual Service for the same reason or cause or if the same reason or cause was reasonably discoverable in the first instance over a rolling 30 day period. Chronic Failure will result in the State's option to terminate the effected individual Service(s) and procure them from a different vendor for the chronic location(s) with Contractor to pay the difference in charges for up to three additional months. The termination of the Service will not affect any tiered pricing levels.
- (c) Root Cause Analysis will be performed on any Business Critical outage(s) or outage(s) on Services when requested by the Contract Administrator. Contractor will provide its analysis within two weeks of outage(s) and provide a recommendation for resolution.
- (d) All decimals must be rounded to two decimal places with five and greater rounding up and four and less rounding down unless otherwise specified.

2.243 Liquidated Damages

Unauthorized Removal of any Key Personnel

It is acknowledged that an Unauthorized Removal will interfere with the timely and proper completion of the Contract, to the loss and damage of the State, and that it would be impracticable and extremely difficult to fix the actual damage sustained by the State as a result of any Unauthorized Removal. Therefore, Contractor and the State agree that in the case of any Unauthorized Removal in respect of which the State does not elect to exercise its rights under **Section 2.152**, the State may assess liquidated damages against Contractor as specified below.

For the Unauthorized Removal of any Key Personnel designated in the applicable Statement of Work, the liquidated damages amount is \$25,000.00 per individual if the Contractor identifies a replacement approved by the State under **Section 2.060** and assigns the replacement to the Project to shadow the Key Personnel who is leaving for a period of at least 30 days before the Key Personnel's removal.

If Contractor fails to assign a replacement to shadow the removed Key Personnel for at least 30 days, in addition to the \$25,000.00 liquidated damages for an Unauthorized Removal, Contractor must pay the amount of \$833.33 per day for each day of the 30 day shadow period that the replacement Key Personnel does not shadow the removed Key Personnel, up to \$25,000.00 maximum per individual. The total liquidated damages that may be assessed per Unauthorized Removal and failure to provide 30 days of shadowing must not exceed \$50,000.00 per individual.

2.244 Excusable Failure

Neither party will be liable for any default, damage or delay in the performance of its obligations under the Contract to the extent the default, damage or delay is caused by government regulations or requirements (executive, legislative, judicial, military or otherwise), power failure, electrical surges or current fluctuations, lightning, earthquake, war, water or other forces of nature or acts of God, delays or failures of transportation, equipment shortages, suppliers' failures, or acts or omissions of common carriers, fire; riots, civil disorders; strikes or other labor disputes, embargoes; injunctions (provided the injunction was not issued as a result of



any fault or negligence of the party seeking to have its default or delay excused); or any other cause beyond the reasonable control of a party; provided the non-performing party and its Subcontractors are without fault in causing the default or delay, and the default or delay could not have been prevented by reasonable precautions and cannot reasonably be circumvented by the non-performing party through the use of alternate sources, workaround plans or other means, including disaster recovery plans.

If a party does not perform its contractual obligations for any of the reasons listed above, the non-performing party will be excused from any further performance of its affected obligation(s) for as long as the circumstances prevail. But the party must use commercially reasonable efforts to recommence performance whenever and to whatever extent possible without delay. A party must promptly notify the other party in writing immediately after the excusable failure occurs, and also when it abates or ends.

If any of the above-enumerated circumstances substantially prevent, hinder, or delay the Contractor's performance of the Services/provision of Deliverables for more than 10 Business Days, and the State determines that performance is not likely to be resumed within a period of time that is satisfactory to the State in its reasonable discretion, then at the State's option: (a) the State may procure the affected Services/Deliverables from an alternate source, and the State is not be liable for payment for the unperformed Services/ Deliverables not provided under the Contract for so long as the delay in performance continues; (b) the State may terminate any portion of the Contract so affected and the charges payable will be equitably adjusted to reflect those Services/Deliverables terminated; or (c) the State may terminate the affected Statement of Work without liability to Contractor as of a date specified by the State in a written notice of termination to the Contractor, except to the extent that the State must pay for Services/Deliverables provided through the date of termination.

The Contractor will not have the right to any additional payments from the State as a result of any Excusable Failure occurrence or to payments for Services not rendered/Deliverables not provided as a result of the Excusable Failure condition. Defaults or delays in performance by Contractor which are caused by acts or omissions of its Subcontractors will not relieve Contractor of its obligations under the Contract except to the extent that a Subcontractor is itself subject to an Excusable Failure condition described above and Contractor cannot reasonably circumvent the effect of the Subcontractor's default or delay in performance through the use of alternate sources, workaround plans or other means.

2.250 Approval of Deliverables

2.251 Delivery of Deliverables

A list of the Deliverables to be prepared and delivered by Contractor including, for each Deliverable, the scheduled delivery date and a designation of whether the Deliverable is a document ("Written Deliverable") or a Custom Software Deliverable is attached, if applicable. All Deliverables shall be completed and delivered for State review and written approval and, where applicable, installed in accordance with the State-approved delivery schedule and any other applicable terms and conditions of this Contract.

Prior to delivering any Deliverable to the State, Contractor will first perform all required quality assurance activities, and, in the case of Custom Software Deliverables, System Testing to verify that the Deliverable is complete and in conformance with its specifications. Before delivering a Deliverable to the State, Contractor shall certify to the State that (1) it has performed such quality assurance activities, (2) it has performed any applicable testing, (3) it has corrected all material deficiencies discovered during such quality assurance activities and testing, (4) the Deliverable is in a suitable state of readiness for the State's review and approval, and (5) the Deliverable/Service has all Critical Security patches/updates applied.

In discharging its obligations under this Section, Contractor shall be at all times (except where the parties agree otherwise in writing) in compliance with Level 3 of the Software Engineering Institute's Capability Maturity Model for Software ("CMM Level 3") or its equivalent.

2.252 Contractor System Testing



Contractor will be responsible for System Testing each Custom Software Deliverable in Contractor's development environment prior to turning over the Custom Software Deliverable to the State for User Acceptance Testing and approval. Contractor's System Testing shall include the following, at a minimum, plus any other testing required by CMM Level 3 or Contractor's system development methodology:

Contractor will be responsible for performing Unit Testing and incremental Integration Testing of the components of each Custom Software Deliverable.

Contractor's System Testing will also include Integration Testing of each Custom Software Deliverable to ensure proper inter-operation with all prior software Deliverables, interfaces and other components that are intended to inter-operate with such Custom Software Deliverable, and will include Regression Testing, volume and stress testing to ensure that the Custom Software Deliverables are able to meet the State's projected growth in the number and size of transactions to be processed by the Application and number of users, as such projections are set forth in the applicable Statement of Work.

Contractor's System Testing will also include Business Function Testing and Technical Testing of each Application in a simulated production environment. Business Function Testing will include testing of full work streams that flow through the Application as the Application will be incorporated within the State's computing environment. The State shall participate in and provide support for the Business Function Testing to the extent reasonably requested by Contractor. Within ten (10) days before the commencement of Business Function Testing pursuant to this Section, Contractor shall provide the State for State review and written approval Contractor's test plan for Business Function Testing.

Within five (5) Business Days following the completion of System Testing pursuant to this **Section**, Contractor shall provide to the State a testing matrix establishing that testing for each condition identified in the System Testing plans has been conducted and successfully concluded. To the extent that testing occurs on State premises, the State shall be entitled to observe or otherwise participate in testing under this Section as the State may elect.

2.253 Approval of Deliverables, In General

All Deliverables (Written Deliverables and Custom Software Deliverables) require formal written approval by the State, in accordance with the following procedures. Formal approval by the State requires that the Deliverable be confirmed in writing by the State to meet its specifications which, in the case of Custom Software Deliverables, will include the successful completion of State User Acceptance Testing, to be led by the State with the support and assistance of Contractor. The parties acknowledge that the approval process set forth herein will be facilitated by ongoing consultation between the parties, visibility of interim and intermediate Deliverables and collaboration on key decisions.

The State's obligation to comply with any State Review Period is conditioned on the timely delivery of Deliverables being reviewed. If Contractor fails to provide a Deliverable to the State in a timely manner, the State will nevertheless use commercially reasonable efforts to complete its review or testing within the applicable State Review Period.

Before commencement of its review or testing of a Deliverable, the State may inspect the Deliverable to confirm that all components of the Deliverable (e.g., software, associated documentation, and other materials) have been delivered. If the State determines that the Deliverable is incomplete, the State may refuse delivery of the Deliverable without performing any further inspection or testing of the Deliverable. Otherwise, the review period will be deemed to have started on the day the State receives the Deliverable and the applicable certification by Contractor in accordance with **Section 2.080**.

The State will approve in writing a Deliverable upon confirming that it conforms to and, in the case of a Custom Software Deliverable, performs in accordance with, its specifications without material deficiency. The State may, but shall not be required to, conditionally approve in writing a Deliverable that contains material deficiencies if the State elects to permit Contractor to rectify them post-approval. In any case, Contractor will be responsible for working diligently to correct within a reasonable time at Contractor's expense all deficiencies in the Deliverable that remain outstanding at the time of State approval.



If, after three (3) opportunities (the original and two repeat efforts), Contractor is unable to correct all deficiencies preventing State approval of a Deliverable, the State may: (i) demand that Contractor cure the failure and give Contractor additional time to cure the failure at the sole expense of Contractor; or (ii) keep this Contract in force and do, either itself or through other parties, whatever Contractor has failed to do, in which event Contractor shall bear any excess expenditure incurred by the State in so doing beyond the Contract price for such Deliverable and will pay the State an additional sum equal to ten percent (10%) of such excess expenditure to cover the State's general expenses without the need to furnish proof in substantiation of such general expenses; or (iii) terminate this Contract for default, either in whole or in part by notice to Contractor (and without the need to afford Contractor any further opportunity to cure). Notwithstanding the foregoing, the State shall not use, as a basis for exercising its termination rights under this Section, deficiencies discovered in a repeat State Review Period that could reasonably have been discovered during a prior State Review Period.

The State, at any time and in its own discretion, may halt the UAT or approval process if such process reveals deficiencies in or problems with a Deliverable in a sufficient quantity or of a sufficient severity as to make the continuation of such process unproductive or unworkable. In such case, the State may return the applicable Deliverable to Contractor for correction and re-delivery prior to resuming the review or UAT process and, in that event, Contractor will correct the deficiencies in such Deliverable in accordance with the Contract, as the case may be.

2.254 Process for Approval of Written Deliverables

The State Review Period for Written Deliverables will be the number of days set forth in the applicable Statement of Work following delivery of the final version of the Written Deliverable (failing which the State Review Period, by default, shall be five (5) Business Days for Written Deliverables of one hundred (100) pages or less and ten (10) Business Days for Written Deliverables of more than one hundred (100) pages). The duration of the State Review Periods will be doubled if the State has not had an opportunity to review an interim draft of the Written Deliverable prior to its submission to the State. The State agrees to notify Contractor in writing by the end of the State Review Period either stating that the Written Deliverable is approved in the form delivered by Contractor or describing any deficiencies that must be corrected prior to approval of the Written Deliverable (or at the State's election, subsequent to approval of the Written Deliverable). If the State delivers to Contractor a notice of deficiencies, Contractor will correct the described deficiencies and within five (5) Business Days resubmit the Deliverable in a form that shows all revisions made to the original version delivered to the State. Contractor's correction efforts will be made at no additional charge. Upon receipt of a corrected Written Deliverable from Contractor, the State will have a reasonable additional period of time, not to exceed the length of the original State Review Period, to review the corrected Written Deliverable to confirm that the identified deficiencies have been corrected.

2.255 Process for Approval of Custom Software Deliverables

The State will conduct UAT of each Custom Software Deliverable in accordance with the following procedures to determine whether it meets the criteria for State approval – i.e., whether it conforms to and performs in accordance with its specifications without material deficiencies.

Within thirty (30) days (or such other number of days as the parties may agree to in writing) prior to Contractor's delivery of any Custom Software Deliverable to the State for approval, Contractor shall provide to the State a set of proposed test plans, including test cases, scripts, data and expected outcomes, for the State's use (which the State may supplement in its own discretion) in conducting UAT of the Custom Software Deliverable. Contractor, upon request by the State, shall provide the State with reasonable assistance and support during the UAT process.

For the Custom Software Deliverables provided as part of Section 1.104 Base Support and Major Enhancement services, the State Review Period for conducting UAT will be as indicated in the applicable project plan for Base Support services or SOW for Major Enhancements. For any other Custom Software Deliverables, the State Review Period shall be the number of days agreed in writing by the parties (failing which it shall be forty-five (45) days by default). The State Review Period for each Custom Software Deliverable will begin when Contractor has delivered the Custom Software Deliverable to the State



accompanied by the certification required by **Section 2.250** and the State's inspection of the Deliverable has confirmed that all components of it have been delivered.

The State's UAT will consist of executing test scripts from the proposed testing submitted by Contractor, but may also include any additional testing deemed appropriate by the State. If the State determines during the UAT that the Custom Software Deliverable is not working according to specifications, the State will notify Contractor of the deficiency by making an entry in an incident reporting system available to both Contractor and the State. Contractor will modify promptly the Custom Software Deliverable to correct the reported deficiencies, conduct appropriate System Testing (including, where applicable, Regression Testing) to confirm the proper correction of the deficiencies and re-deliver the corrected version to the State for re-testing in UAT. Contractor will coordinate the re-delivery of corrected versions of Custom Software Deliverables with the State so as not to disrupt the State's UAT process. The State will promptly re-test the corrected version of the Software Deliverable after receiving it from Contractor.

Within three (3) business days after the end of the State Review Period, the State will give Contractor a written notice indicating the State's approval or rejection of the Custom Software Deliverable according to the criteria and process set out in this **Section 2.080**.

2.256 Final Acceptance

"Final Acceptance" shall be considered to occur when the Custom Software Deliverable to be delivered has been approved by the State and has been operating in production without any material deficiency for fourteen (14) consecutive days. If the State elects to defer putting a Custom Software Deliverable into live production for its own reasons, not based on concerns about outstanding material deficiencies in the Deliverable, the State shall nevertheless grant Final Acceptance of the Project.

2.260 Ownership

2.261 Ownership of Work Product by State

The State owns all Deliverables, as they are work made for hire by the Contractor for the State. The State owns all United States and international copyrights, trademarks, patents or other proprietary rights in the Deliverables.

2.262 Vesting of Rights

The Contractor shall assign, and upon creation of each Deliverable automatically assigns, to the State, ownership of all United States and international copyrights, trademarks, patents, or other proprietary rights in each and every Deliverable, whether or not registered by the Contractor, insofar as any such Deliverable, by operation of law, may not be considered work made for hire by the Contractor for the State. From time to time upon State's request, the Contractor and/or its personnel shall confirm such assignment by execution and delivery of the assignments, confirmations of assignment, or other written instruments as the State may request. The State shall have the right to obtain and hold in its own name all copyright, trademark, and patent registrations and other evidence of rights that may be available for Deliverables.

2.263 Rights in Data

The State is the owner of all data made available by the State to the Contractor or its agents, Subcontractors or representatives under the Contract. The Contractor will not use the State's data for any purpose other than providing the Services, nor will any part of the State's data be disclosed, sold, assigned, leased or otherwise disposed of to the general public or to specific third parties or commercially exploited by or on behalf of the Contractor. No employees of the Contractor, other than those on a strictly need-to-know basis, have access to the State's data. Contractor will not possess or assert any lien or other right against the State's data. Without limiting the generality of this Section, the Contractor must only use personally identifiable information as strictly necessary to provide the Services and must disclose the information only to its employees who have a strict need-to-know the information. The Contractor must comply at all times with all laws and regulations applicable to the personally identifiable information.



The State is the owner of all State-specific data under the Contract. The State may use the data provided by the Contractor for any purpose. The State will not possess or assert any lien or other right against the Contractor's data. Without limiting the generality of this Section, the State may use personally identifiable information only as strictly necessary to utilize the Services and must disclose the information only to its employees who have a strict need to know the information, except as provided by law. The State must comply at all times with all laws and regulations applicable to the personally identifiable information. Other material developed and provided to the State remains the State's sole and exclusive property.

2.264 Ownership of Materials

State and Contractor will continue to own their respective proprietary technologies developed before entering into the Contract. Any hardware bought through the Contractor by the State, and paid for by the State, will be owned by the State. Any software licensed through the Contractor and sold to the State, will be licensed directly to the State.

Notwithstanding the forgoing or any provision of this Contract to the contrary, any preexisting work or materials including, but not limited to, any routines, libraries, tools, methodologies, processes or technologies (collectively, the "Development Tools") created, adapted or used by the Contractor in its business generally, including any and all associated intellectual property rights, shall be and remain the sole property of the Contractor, and the State shall have no interest in or claim to such preexisting work, materials or Development Tools, except as necessary to exercise its rights in the Deliverables created under this Agreement. If any pre-existing work or materials are incorporated into any Deliverables, the State shall receive an irrevocable, nonexclusive, worldwide, royalty-free license to (1) use, execute, reproduce, display, perform, distribute internally and prepare derivative works based upon the preexisting works, and (2) authorize or sublicense others from time to time to do any or all of the foregoing to other governmental agencies.

2.265 Standard Software

If applicable and necessary, all Standard Software used in performing the Services shall be provided to the State under a separate license agreement between the State and the owner (or authorized licensor) of such software.

2.266 General Skills

The Contractor and its subcontractors shall be free to use and employ their general skills, knowledge and expertise, and to use, disclose, and employ any generalized ideas, concepts, knowledge, methods, techniques or skills gained or learned during the course of performing the services under this Contract, so long as the Contractor or its subcontractors acquire and apply such information without disclosure of any confidential or proprietary information of the State, and without any unauthorized use or disclosure of any Work Product resulting from this Contract.

2.267 Contractor License in Deliverables

The State grants to the Contractor, a royalty-free, world-wide, non-exclusive right and license under any Deliverable and/or Derivative Work now or in the future owned by the State, or with respect to which the State has a right to grant such rights or licenses, to the extent required by the Contractor to market the Deliverables and/or Derivative Work and exercise its full rights in the Deliverables and/or Derivative Work, including, without limitation, the right to make, use and sell products and services based on or incorporating such Deliverables and/or Derivative Work.

2.270 State Standards

2.271 Existing Technology Standards

The Contractor will adhere to all existing standards as described within the comprehensive listing of the State's existing technology standards at <http://www.michigan.gov/dit>.

2.272 Acceptable Use Policy



To the extent that Contractor has access to the State computer system, Contractor must comply with the State's Acceptable Use Policy, see <http://www.michigan.gov/ditservice>. All Contractor employees must be required, in writing, to agree to the State's Acceptable Use Policy before accessing the State system. The State reserves the right to terminate Contractor's access to the State system if a violation occurs.

2.273 Systems Changes

Contractor is not responsible for and not authorized to make changes to any State systems without written authorization from the Project Manager. Any changes Contractor makes to State systems with the State's approval must be done according to applicable State procedures, including security, access and configuration management procedures.

2.280 Extended Purchasing

2.281 MiDEAL (Michigan Delivery Extended Agreements Locally)

Public Act 431 of 1984 permits DTMB to provide purchasing services to any city, village, county, township, school district, intermediate school district, non-profit hospital, institution of higher education, community, or junior college. A current listing of approved program members is available at: www.michigan.gov/buymichiganfirst. Unless otherwise stated, the Contractor must ensure that the non-state agency is an authorized purchaser before extending the Contract pricing.

The Contractor will supply Contract Services and equipment to these local governmental agencies at the established State of Michigan Contract prices and terms to the extent applicable and where available. The Contractor must send its invoices to, and pay the local unit of government, on a direct and individual basis.

To the extent that authorized local units of government purchase quantities of Services and/or equipment under this Contract, the quantities of Services and/or equipment purchased will be included in determining the appropriate rate wherever tiered pricing based on quantity is provided.

Please Visit Mi DEAL at www.michigan.gov/buymichiganfirst under MiDeal.

Estimated requirements for authorized local units of government are not included in the quantities shown in this RFP.

2.282 State Employee Purchases

RESERVED.

2.290 Environmental Provision

2.291 Environmental Provision

Energy Efficiency Purchasing Policy: The State seeks wherever possible to purchase energy efficient products. This includes giving preference to U.S. Environmental Protection Agency (EPA) certified 'Energy Star' products for any category of products for which EPA has established Energy Star certification. For other purchases, the State may include energy efficiency as one of the priority factors to consider when choosing among comparable products.

Environmental Purchasing Policy: The State of Michigan is committed to encouraging the use of products and services that impact the environment less than competing products. The State is accomplishing this by including environmental considerations in purchasing decisions, while remaining fiscally responsible, to promote practices that improve worker health, conserve natural resources, and prevent pollution. Environmental components that are to be considered include: recycled content and recyclables; energy efficiency; and the presence of undesirable materials in the products, especially those toxic chemicals which are persistent and bioaccumulative. The Contractor should be able to supply products containing recycled and environmentally preferable materials that meet performance requirements and is encouraged to offer such products throughout the duration of this Contract. Information on any relevant third party certification (such as Green Seal, Energy Star, etc.) should also be provided.



Hazardous Materials: For the purposes of this Section, "Hazardous Materials" is a generic term used to describe asbestos, ACBMs, PCBs, petroleum products, construction materials including paint thinners, solvents, gasoline, oil, and any other material the manufacture, use, treatment, storage, transportation or disposal of which is regulated by the federal, state or local laws governing the protection of the public health, natural resources or the environment. This includes, but is not limited to, materials the as batteries and circuit packs, and other materials that are regulated as (1) "Hazardous Materials" under the Hazardous Materials Transportation Act, (2) "chemical hazards" under the Occupational Safety and Health Administration standards, (3) "chemical substances or mixtures" under the Toxic Substances Control Act, (4) "pesticides" under the Federal Insecticide Fungicide and Rodenticide Act, and (5) "hazardous wastes" as defined or listed under the Resource Conservation and Recovery Act.

- (a) The Contractor shall use, handle, store, dispose of, process, transport and transfer any material considered a Hazardous Material according to all federal, State and local laws. The State shall provide a safe and suitable environment for performance of Contractor's Work. Before the commencement of Work, the State shall advise the Contractor of the presence at the work site of any Hazardous Material to the extent that the State is aware of the Hazardous Material. If the Contractor encounters material reasonably believed to be a Hazardous Material and which may present a substantial danger, the Contractor shall immediately stop all affected Work, notify the State in writing about the conditions encountered, and take appropriate health and safety precautions.
- (b) Upon receipt of a written notice, the State will investigate the conditions. If (a) the material is a Hazardous Material that may present a substantial danger, and (b) the Hazardous Material was not brought to the site by the Contractor, or does not result in whole or in part from any violation by the Contractor of any laws covering the use, handling, storage, disposal of, processing, transport and transfer of Hazardous Materials, the State shall order a suspension of Work in writing. The State shall proceed to have the Hazardous Material removed or rendered harmless. In the alternative, the State shall terminate the affected Work for the State's convenience.
- (c) Once the Hazardous Material has been removed or rendered harmless by the State, the Contractor shall resume Work as directed in writing by the State. Any determination by the Michigan Department of Community Health or the Michigan Department of Environmental Quality that the Hazardous Material has either been removed or rendered harmless is binding upon the State and Contractor for the purposes of resuming the Work. If any incident with Hazardous Material results in delay not reasonable anticipatable under the circumstances and which is attributable to the State, the applicable SLAs for the affected Work will not be counted in a time as mutually agreed by the parties.
- (d) If the Hazardous Material was brought to the site by the Contractor, or results in whole or in part from any violation by the Contractor of any laws covering the use, handling, storage, disposal of, processing, transport and transfer of Hazardous Material, or from any other act or omission within the control of the Contractor, the Contractor shall bear its proportionate share of the delay and costs involved in cleaning up the site and removing and rendering harmless the Hazardous Material according to Applicable Laws to the condition approved by applicable regulatory agency(ies).

Labeling: Michigan has a Consumer Products Rule pertaining to labeling of certain products containing volatile organic compounds. For specific details visit http://www.michigan.gov/deq/0,1607,7-135-3310_4108-173523--,00.html

Refrigeration and Air Conditioning: The Contractor shall comply with the applicable requirements of Sections 608 and 609 of the Clean Air Act (42 U.S.C. 7671g and 7671h) as each or both apply to this contract.

Environmental Performance: Waste Reduction Program - Contractor shall establish a program to promote cost-effective waste reduction in all operations and facilities covered by this contract. The Contractor's programs shall comply with applicable Federal, State, and local requirements, specifically including Section 6002 of the Resource Conservation and Recovery Act (42 U.S.C. 6962, et seq.).

2.300 Deliverables

2.301 Software

Reserved



2.302 Hardware

Reserved

2.310 Software Warranties

2.311 Performance Warranty

The Contractor represents and warrants that Deliverables, after Final Acceptance, will perform and operate in compliance with the requirements and other standards of performance contained in this Contract (including all descriptions, specifications and drawings made a part of the Contract) for a period of ninety (90) days. In the event of a breach of this warranty, Contractor will promptly correct the affected Deliverable(s) at no charge to the State.

2.312 No Surreptitious Code Warranty

The Contractor represents and warrants that no copy of licensed Software provided to the State contains or will contain any Self-Help Code or any Unauthorized Code as defined below. This warranty is referred to in this Contract as the "No Surreptitious Code Warranty."

As used in this Contract, "Self-Help Code" means any back door, time bomb, drop dead device, or other software routine designed to disable a computer program automatically with the passage of time or under the positive control of a person other than the licensee of the software. Self-Help Code does not include Software routines in a computer program, if any, designed to permit an owner of the computer program (or other person acting by authority of the owner) to obtain access to a licensee's computer system(s) (e.g. remote access via modem) for purposes of maintenance or technical support.

As used in this Contract, "Unauthorized Code" means any virus, Trojan horse, spyware, worm or other Software routines or components designed to permit unauthorized access to disable, erase, or otherwise harm software, equipment, or data; or to perform any other such actions. The term Unauthorized Code does not include Self-Help Code. Unauthorized Code does not include Software routines in a computer program, if any, designed to permit an owner of the computer program (or other person acting by authority of the owner) to obtain access to a licensee's computer system(s) (e.g. remote access via modem) for purposes of maintenance or technical support.

In addition, Contractor will use up-to-date commercial virus detection software to detect and remove any viruses from any software prior to delivering it to the State.

2.313 Calendar Warranty

The Contractor represents and warrants that all software for which the Contractor either sells or licenses to the State of Michigan and used by the State prior to, during or after the calendar year 2000, includes or shall include, at no added cost to the State, design and performance so the State shall not experience software abnormality and/or the generation of incorrect results from the software, due to date oriented processing, in the operation of the business of the State of Michigan.

The software design, to insure calendar year rollover compatibility, shall include, but is not limited to: data structures (databases, data files, etc.) that provide 4-digit date century; stored data that contain date century recognition, including, but not limited to, data stored in databases and hardware device internal system dates; calculations and program logic (e.g., sort algorithms, calendar generation, event recognition, and all processing actions that use or produce date values) that accommodates same century and multi-century formulas and date values; interfaces that supply data to and receive data from other systems or organizations that prevent non-compliant dates and data from entering any State system; user interfaces (i.e., screens, reports, etc.) that accurately show 4 digit years; and assurance that the year 2000 shall be correctly treated as a leap year within all calculation and calendar logic.

**2.314 Third-party Software Warranty**

The Contractor represents and warrants that it will disclose the use or incorporation of any third-party software into the Deliverables. At the time of Delivery, the Contractor shall provide in writing the name and use of any Third-party Software, including information regarding the Contractor's authorization to include and utilize such software. The notice shall include a copy of any ownership agreement or license that authorizes the Contractor to use the Third-party Software.

2.315 Physical Media Warranty

Contractor represents and warrants that each licensed copy of the Software, excluding, however, third party Software, provided by the Contractor is free from physical defects in the media that tangibly embodies the copy. This warranty does not apply to defects discovered more than thirty (30) days after that date of Final Acceptance of the Software by the State. This warranty does not apply to defects arising from acts of Excusable Failure. If the Contractor breaches this warranty, then the State shall be entitled to replacement of the non-compliant copy by Contractor, at Contractor's expense (including shipping and handling).

2.320 Software Licensing**2.321 Cross-License, Deliverables Only, License to Contractor**

Reserved

2.322 Cross-License, Deliverables and Derivative Work, License to Contractor

Reserved

2.323 License Back to the State

Reserved

2.324 License Retained by Contractor

Reserved

2.325 Pre-existing Materials for Custom Software Deliverables

Reserved

2.330 Source Code Escrow**2.331 Definition**

Reserved

2.332 Delivery of Source Code into Escrow

Reserved

2.333 Delivery of New Source Code into Escrow

Reserved

2.334 Verification

Reserved

2.335 Escrow Fees

Reserved

2.336 Release Events

Reserved



2.337 Release Event Procedures

Reserved

2.338 License

Reserved

2.339 Derivative Works

Reserved



Glossary

Days	Means calendar days unless otherwise specified.
24x7x365	Means 24 hours a day, seven days a week, and 365 days a year (including the 366th day in a leap year).
Additional Service	Means any Services/Deliverables within the scope of the Contract, but not specifically provided under any Statement of Work, that once added will result in the need to provide the Contractor with additional consideration.
Audit Period	See Section 2.110
Business Day	Whether capitalized or not, shall mean any day other than a Saturday, Sunday or State-recognized legal holiday (as identified in the Collective Bargaining Agreement for State employees) from 8:00am EST through 5:00pm EST unless otherwise stated.
Blanket Purchase Order	An alternate term for Contract as used in the States computer system.
Business Critical	Any function identified in any Statement of Work as Business Critical.
Chronic Failure	Defined in any applicable Service Level Agreements.
Deliverable	Physical goods and/or commodities as required or identified by a Statement of Work
DTMB	Michigan Department of Technology, Management and Budget
Environmentally preferable products	A product or service that has a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. Such products or services may include, but are not limited to, those that contain recycled content, minimize waste, conserve energy or water, and reduce the amount of toxics either disposed of or consumed.
Excusable Failure	See Section 2.244.
Hazardous material	Any material defined as hazardous under the latest version of federal Emergency Planning and Community Right-to-Know Act of 1986 (including revisions adopted during the term of the Contract).
Incident	Any interruption in Services.
ITB	A generic term used to describe an Invitation to Bid. The ITB serves as the document for transmitting the RFP to potential bidders
Key Personnel	Any Personnel designated in Article 1 as Key Personnel.
New Work	Any Services/Deliverables outside the scope of the Contract and not specifically provided under any Statement of Work, that once added will result in the need to provide the Contractor with additional consideration.
Ozone-depleting substance	Any substance the Environmental Protection Agency designates in 40 CFR part 82 as: (1) Class I, including, but not limited to, chlorofluorocarbons, halons, carbon tetrachloride, and methyl chloroform; or (2) Class II, including, but not limited to, hydro chlorofluorocarbons
Post-Consumer Waste	Any product generated by a business or consumer which has served its intended end use, and which has been separated or diverted from solid waste for the purpose of recycling into a usable commodity or product, and which does not include post-industrial waste.
Post-Industrial Waste	Industrial by-products that would otherwise go to disposal and wastes generated after completion of a manufacturing process, but do not include internally generated scrap commonly returned to industrial or manufacturing processes.
Recycling	The series of activities by which materials that are no longer useful to the generator are collected, sorted, processed, and converted into raw materials and used in the production of new products. This definition excludes the use of these materials as a fuel substitute or for energy production.
Deleted – Not Applicable	Section is not applicable or included in this RFP. This is used as a placeholder to maintain consistent numbering.
Reuse	Using a product or component of municipal solid waste in its original form more than once.



RFP	Request for Proposal designed to solicit proposals for services
Services	Any function performed for the benefit of the State.
Source reduction	Any practice that reduces the amount of any hazardous substance, pollutant, or contaminant entering any waste stream or otherwise released into the environment prior to recycling, energy recovery, treatment, or disposal.
State Location	Any physical location where the State performs work. State Location may include state-owned, leased, or rented space.
Subcontractor	A company Contractor delegates performance of a portion of the Services to, but does not include independent contractors engaged by Contractor solely in a staff augmentation role.
Unauthorized Removal	Contractor's removal of Key Personnel without the prior written consent of the State.
Waste prevention	Source reduction and reuse, but not recycling.
Waste reduction and Pollution prevention	The practice of minimizing the generation of waste at the source and, when wastes cannot be prevented, utilizing environmentally sound on-site or off-site reuse and recycling. The term includes equipment or technology modifications, process or procedure modifications, product reformulation or redesign, and raw material substitutions. Waste treatment, control, management, and disposal are not considered pollution prevention, per the definitions under Part 143, Waste Minimization, of the Natural Resources and Environmental Protection Act (NREPA), 1994 PA 451, as amended.
Work in Progress	A Deliverable that has been partially prepared, but has not been presented to the State for Approval.
Work Product	Refers to any data compilations, reports, and other media, materials, or other objects or works of authorship created or produced by the Contractor as a result of an in furtherance of performing the services required by this Contract.

List of Acronyms

Acronym	Description
ACD	Automatic Call Distribution
ADA	Americans with Disabilities ACT
ASA	Average Speed of Answer
BAFO	Best and Final Offer
CMM	Capability Maturity Model
CMS	Call Management System
COTS	Commercial Off The Shelf
CRM	Customer Relationship Management System
CRS	Challenge Response System
CSC	DTMB Client Service Center
CSR	Customer Service Representative
CTI	Computer Telephone Integration
DEQ	Department of Environmental Quality
DHS	Department of Human Services
DNR	Department of Natural Resources
DTMB	Department of Technology, Management and Budget
EAC	Environmental Assistance Center
EAP	Environmental Assistance Program
EIM	Enterprise Integration Manager



Acronym	Description
EPA	Environmental Protection Agency
FAP	Food Assistance Program
FOIA	Michigan Freedom of Information Act
GVP	Genesys Voice Portal
ICHAT	Michigan State Police Background checks
IDL	Inbound Document Linker
IT	Information Technology
IVR	Interactive Voice Response
IW	Interaction Workspace
JRS	Judges Retirement System
LARA - BHP	Licensing and Regulatory Affairs - Bureau of Health Professionals
LDAP	Lightweight Directory Access Protocol
LOV	List of Values
MARCS	The Treasury Collection System
MCSC	Michigan Civil Service Commission
MDIT	Michigan Department of Technology
MDOS	Michigan Department of State
MGA	Michigan Guaranty Agency
MI HR	Michigan Human Resources
MiDEAL	Michigan Delivery Extended Agreements Locally
MiECC	Michigan Enterprise Contact Center
MPERS	Michigan Public Schools Retirement System
MS	Microsoft
NCIC	National Crime Information Center
ODM	Operational Data Mart
OEM	Original Equipment Manufacturer
OPPCA	Office of Pollution Prevention and Compliance Assistance
ORS	DTMB Office of Retirement Services
PCI	Payment Card Industry
PCS	Hazardous Materials
PIN	Personal Identification Number
PM	Project Manager
PO	Purchase Order
RFP	Request for Proposal
SEM	Systems Engineering Methodology
SER	State Emergency Relief
SERS	State Employee Retirement System
SLA	Service Level Agreement
SME	Subject Matter Expert
SOW	Statement of Work
SPOC	Single Point of Contact
SPRS	State Police Retirement System



Acronym	Description
SSL	Secure Socket Layer
SUITE	State Unified Information Technology Environment
TTS	Text to Speech
UAT	User Acceptance Testing
URL	Uniform Resource Locator
VAR	Voice Application Reporter
VB	Visual Basic
WAS	Websphere Application Server



Attachment 1: Service Level Agreement and Return to Service Goals

The State’s Remedy ticket system will be used to initiate and manage break/fix and maintenance requests. Remedy tickets may be created by business users or the contractor and will identify the problem to be fixed. Tickets will be classified as follows, with the following Service Level Agreement (“SLA”):

Classification	Service Level Standard
<p style="text-align: center;">HIGH</p> <p>The problem renders the product inoperable for a majority of the users of a specific (or multiple) contact centers. For example, the Siebel eService application for Treasury is not accessible by the taxpayers. Level High problems are assigned the highest priority and are considered to be a business emergency situation. Mission Critical to the business as the application is critical to the organization's operation. Criteria: (1) Affects end customers' or agency's revenue base (2) server down; (3) Critical infrastructure components; (4) Network outage affects users; (5) Application unavailable/down; (6) Downtime leads to non-recoverable consequences.</p>	<p>Acknowledged within 15 minutes from time of receipt of ticket during contact center business hours and within 30 minutes during non-business hours.</p> <p>First status report within 2 hours of receipt of ticket, usually with a workaround. Resolution dependent upon the nature of the issue. Additional Progress Reports have a 1 hour interval or as agreed upon by the agency.</p> <p>Return to Service Goal of 4 business hours 90% of the time.</p>
<p style="text-align: center;">Medium</p> <p>The problem has a significant impact to the system’s ability to perform, but a workaround is available or operations can continue in a degraded state. For example, the data retrieval to a Siebel screen is slow for a large number of users. A Medium problem reflects a situation where many users and/or customers are directly impacted. Considered Mission Important/ Process Critical to the business as the application is critical to the organization's operations, but the impact to the customer may not be visible. Criteria: (1) Affects end customers' or agency's revenue base, (2) Application unavailable/down; (3) Several users down; (4) Downtime is recoverable.</p>	<p>Acknowledged within 1 business hour(s) from time of receipt of ticket during contact center business hours and within 2 hours during non-business hours.</p> <p>First status report within 4 hours of receipt of ticket, usually with a workaround. Resolution dependent upon the nature of the issue. Additional Progress Reports as agreed upon by the agency.</p> <p>Return to Service Goal of 8 business hours 90% of the time</p>



Classification	Service Level Standard
<p style="text-align: center;">Low</p> <p>The problem slightly impacts the system’s ability to perform. For example, a Siebel password needs to be reset or single user related issues or ad-hoc query requests. A Low problem reflects a situation where one or more users are affected. Problems are Process Important to the business as the application is critical to the business operations but the impact to the customer is not visible. Criteria: (1) Single User Down; Processing can still exist without impacting data integrity; (3) Downtime has internal consequences only.</p>	<p>Acknowledged within 8 business hour(s) from time of receipt of ticket during contact center business hours.</p> <p>First status Report within 2 days of receipt of ticket.</p> <p>Additional Progress Reports as agreed upon by the agency.</p> <p>Return to Service Goal of 16 business hours 90% of the time.</p>



Attachment 2: Work Requirements

Section 1 through 8 is part of Base Service. Section 9 is part of Major Enhancements.

1. General requirements

#	Detailed Requirement	Comments
G1	The contractor must follow State's SUITE methodology and SEM process which includes deliverables.	Contractor agrees.
G2	The contractor must follow State's Enterprise IT Policies, Standards and Procedures.	Contractor agrees.
G3	The contractor must follow State's Enterprise IT Security Policy and Procedures and Treasury's additional security requirements as described in Appendix K.	Contractor agrees.
G4	The Contractor shall provide ongoing technical system support.	Contractor agrees to provide technical support for in scope software. See (G8)
G5	The Contractor shall provide online technical system documentation in a location designated and accessible by State staff.	Contractor agrees.
G6	The Contractor shall provide on-site technical support.	Contractor agrees.
G7	The Contractor must provide an escalation process for technical support.	For software technical support, Contractor shall escalate through the vendors support channels via the State maintenance contracts. Contractor shall continue to follow the SOM/DTMB escalation process for day to day technical issues as needed.
G8	The contractor must provide technical support in the following tools -	
	a. Siebel	Contractor agrees.
	b. Siebel interfaces	Contractor agrees to support the in scope Siebel Interfaces.
	c. Batch (from Oracle legacy extract to Siebel Base)	Contractor agrees to support the Siebel Batch jobs from the History tables to Siebel Base through Siebel EIM tables.
	d. Genesys GVP	Contractor agrees.
	e. Genesys CTI-Gplus Adapter	Contractor agrees.
	f. Genesys WFM	Contractor agrees.
	g. Virtual Hold (VHT)	Contractor agrees.
	h. NICE	Contractor agrees to provide backup system administration functions for NICE environment.
	i. FileNet Capture.	Contractor agrees to support the Scan and Index Form. The Capture product installations on desktops in the Treasury Scanning room shall continue to be supported by DTMB.
	j. FileNet CIS	Contractor agrees to provide technical support for the FileNet CIS connectors.
	k. Opalis	Contractor agrees to run and modify Opalis jobs in scope for the Treasury contact center, but shall not provide Opalis software technical support.



#	Detailed Requirement	Comments
	I. Tidal	Contractor agrees to request Tidal job updates to DTMB. DTMB shall provide the Tidal software technical support.
	m. Real Time (MDOS Hotkey)	Contractor agrees to provide technical support for HotKeys. DTMB shall support the web service.
G9	The contractor must communicate with the DTMB Program Manager and the business areas about problems that may affect operation of the agency's call center.	Contractor agrees.
G10	All maintenance shall be performed by qualified personnel who are familiar with the systems.	Contractor agrees.
G11	The Contractor shall provide backup resources.	Contractor agrees.
G12	The Contractor shall provide one point of contact to report system malfunction whether malfunction is due to software or is of unknown origin. The Contractor shall be responsible for providing the appropriate remedy to the issue.	Contractor agrees.
G13	The contractor must provide a one-year (or 18 months) rolling plan for each call center identifying activities being carried out, and activities to be carried out, by the team.	Contractor agrees.
G14	The contractor must conduct separate monthly meetings with each agency's business managers to discuss the technical performance of the call center. A summary of all maintenance activity must be provided as a part of monthly status reports	Contractor agrees.
G15	Individual agencies have certain periods in the year when functionality is frozen and no releases are implemented. For example, Treasury prefers not to implement during income tax filing season. The contractor will learn about these timelines during knowledge transfer period. The contractor must adhere to individual agency timelines for application changes.	Contractor agrees.
G16	Different agencies have different maintenance windows. For example, DTMB-ORS is 3rd Sunday of the month, 6AM to noon. DHS is every Sunday 7:30 AM to 12:30 PM. The contractor must adhere to individual agency maintenance windows for application changes.	Contractor agrees.
G17	Assist the program management office for all contact center implementations in the State.	Contractor agrees.



2. Break fix and Troubleshooting requirements

#	Detailed Requirement	Comments
B1	Respond, with DTMB assistance, to problems in 24 X 7 customer self-service channels as defined in Attachment 1 SLA.	Contractor agrees.
B2	The Contractor will provide fixes of bugs and breaks meeting requirements for Service Level Agreement and return to service goals as detailed in Attachment 1.	Contractor agrees.
B3	Once support is assigned, the Contractor must maintain a continuous effort to resolve reported high and medium severity problems. The Contractor shall commit sufficient resources to resolve any high severity level problems in as short a timeframe as possible.	Contractor agrees.
B4	If the Contractor determines it cannot correct the problem within the return to service goals as defined in Attachment 1 SLA, the Contractor shall promptly initiate an escalation procedure to assign sufficiently skilled personnel to resolve the problem. Additionally: Contractor staff shall notify senior Contractor management and DTMB IT/agency management that a reported problem has not been corrected. Status reports shall be provided as identified by the State on problem correction activities	Contractor agrees.
B5.	Contractor shall utilize State's Remedy system to record/log all maintenance services performed.	Contractor agrees.
B6.	For HIGH priority tickets, the Contractor must fill out a Root Cause Analysis report in State's prescribed format. The report must be submitted to the State's project manager and customer agency's business manager.	Contractor agrees.

3. Product/Software Upgrades and Patches requirements

#	Detailed Requirement	Comments
P1	The contractor must identify the known problems and compatibility issues for the product Upgrades and report it to the business units so that the business can decide on Upgrades.	Contractor agrees.



#	Detailed Requirement	Comments
P2	The contractor must keep all software in sync with state's standard of current software versions by upgrading the software as needed.	Contractor agrees.
P3	DTMB is expecting the following Upgrades in next 2-3 years; the contractor must be able to perform these Upgrades.	Contractor shall work with DTMB and agencies to schedule Upgrades as part of the Contact Call Center and Agency Enhancement Plan update processes.
	a. Siebel 7.8 to Siebel 8.x	Contractor agrees.
	b. GVP 7.6 to GVP 8.x	Contractor agrees.
	c. Genesys CIM Platform 7.6 to 8.x	Contractor agrees.
	d. Genesys T Server 7.x to 8.x	Contractor agrees.
	e. Oracle 10g to Oracle 11g (Consult/Assist)	Contractor agrees.
	f. FileNet 4.0/Image Services/Capture/Inbound Document Linker (IDL) to P8 platform. Scanning/Indexing application, which is currently in VB custom code on FileNet Capture, may require a rewrite, which the contractor will be responsible for as part of Base Support.	Contractor agrees as defined in Section 1.104.
	g. PBX switch Upgrade – Avaya 3.1 to 5.x /6.x, AES 4.2 to 6.x (Consult/Assist)	Contractor agrees.
P4	All Upgrades and patches must be communicated using state's change management process.	Contractor agrees.

4. Application/Technical monitoring requirements

#	Detailed Requirement	Comments
A1	Contractor must be able to monitor application performance.	Contractor agrees.
A2	Contractor must be able to monitor the volume of application usage.	Contractor agrees.
A3.	Contractor must actively participate in monitoring SAN space usage.	Contractor agrees.

5. Minor Enhancement requirements

#	Detailed Requirement	Comments
E1.	All Minor Enhancements will be prioritized by the business managers. The Contractor must use a release planning process. The contractor should seek to bundle a number of enhancements that fit logically together into a new point release for each contact center that can be implemented within a 3 or 4 month time period. The contractor must describe their release planning process.	Contractor agrees.
E2.	The contractor will produce a detailed project plan showing requirements, design, development and testing.	Contractor agrees.



#	Detailed Requirement	Comments
E3	The contractor must get sign off from the business manager on the high level requirements.	Contractor agrees.
E4	The contractor must record all Minor Enhancement requests the State's Remedy ticket system.	Contractor agrees.
E5	Contractor shall provide minor application enhancements to the system each year. For any major implementation of new functionality, the contractor must submit a separate SOW.	Contractor agrees.
E6	The business managers from each call center will prioritize the tasks to be completed in their own work plan. Contractor shall define a process to maintain agreed upon support levels in the event of competing priorities and resource contention from the task that the business managers have prioritized. Include a description of the prioritization and contention resolution process in your response.	Contractor agrees.

6. Research and analysis requirements

#	Detailed Requirement	Comments
R1	Contractor must be able to research and suggest solution to customer needs or work request as it relates to contact center IT services.	Contractor agrees.
R2	Contractor must be <u>able</u> to perform data analysis, study the trend and use predictive modeling to offer pro-active solutions for business issues.	Contractor agrees to be able to perform data analysis, study the trend and use predictive modeling. Depending on level of effort and SEM guidelines, contractor may provide this service as part of mutually agreed upon SOW.
R3	Often problems are not frequently repeatable or happening only for a small set (1-3) of users. Contractor must be able to research issues related to these hard to find problems.	Contractor agrees.
R4	Sometimes other vendors implement specific contact center technologies which are later supported by MiECC. Contractor must be able to consult and assist in evaluating proposals from other vendors for implementation of new technologies.	Contractor agrees.
R5	At the request of DTMB, assist/advise other State contact centers on joining enterprise contact center support from MiECC.	Contractor agrees.



7. Testing Requirements

#	Detailed Requirement	Comments
T1	Contractor shall perform complete and comprehensive system tests in accordance with the COTS software installation manuals and recommendations.	Contractor agrees.
T2	Contractor must be able to do regression testing and system integration testing to ensure the system operations.	Contractor agrees.
T3	Contractor must be able to perform volume testing and IVR load testing.	Contractor agrees to be able to perform volume testing and IVR load testing. Depending on level of effort and SEM guidelines, contractor may provide this service as part of mutually agreed upon SOW.
T4	Contractor will conduct a Performance Readiness Review (PRR), which is to commence a minimum of two weeks prior to any cut-over to a new production ready system, providing a period of overlap with the existing system. The PRR must demonstrate and simulate the full production environment.	Contractor agrees.
T5	Any deficiencies or defects found during the PRR must be corrected by Contractor prior to cut-over, unless otherwise accepted in writing by the State.	Contractor agrees.

8. Assistance of Infrastructure Upgrades Requirements

#	Detailed Requirement	Comments
H1	Contractor must be able to assist in replacing or upgrading existing hardware.	Contractor agrees.
H2	Contractor must be able to port the application to the new hardware.	Contractor agrees.
H3	Contractor must be able to leverage the existing hardware to create enterprise hardware infrastructure.	Contractor agrees.

9. Major Enhancement requirements

#	Detailed Requirement	Comments
N1	For major implementation requests during the Contract period, the contractor will be provided a detailed statement of work by the agency and the contractor will provide a separate cost quote for each major implementation. The contractor will ensure that they identify the skilled resources and rate cards that would be used to complete these implementations.	Contractor agrees.
N2	Contractor must capture and document the contact center business requirements with input from State business and technical Subject Matter Experts.	Contractor agrees.



#	Detailed Requirement	Comments
N3	Contractor must provide a detailed description of the infrastructure requirements for the software proposed.	Contractor agrees.
N4	Contractor must assist with any infrastructure redesign effort.	Contractor agrees.
N5	Contractor must build the application design documents.	Contractor agrees.
N6	Contractor ensures the contact center software is developed meeting the business needs.	Contractor agrees.
N7	Contractor must provide training to the end users for new applications or changes in existing application	For SOW services, contractor agrees as agreed upon in SOW. For Base Support services, contractor agrees as mutually agreed upon with agency.
N8	Contractor will identify the need of training for COTS software applications.	Contractor agrees.



Attachment 3: Cost Tables

The Project Cost summary, and all associated tables, Identify all information related, directly or indirectly, to the Contractor’s proposed charges for services and deliverables including, but not limited to, costs, fees, prices, rates, bonuses, discounts, rebates, or the identification of free services, labor or materials.

Table 1: Summary of the Project Cost

No.	Project Cost(s)	Cost (\$)	Comments
A.	Knowledge Transfer cost Give breakdown in Table 2		0) 1) Accenture is supporting all of the Contact centers in scope. No KT costs are charged to the State for these contact centers.
B.	Base Service Cost Breakdown provided in Table 3	\$ 10,248,815.40	2) Per request, removed NICE support and IVR discretionary enhancement from scope. This is consistent with the level of support on the current contract. 3) Accenture had absorbed expense increases internally and has offered this price. 4) Process efficiencies are incorporated in Y2 onwards of the term, to provide net reduction of base support costs to the State
C.	Major Enhancements cost Breakdown provided in Table 4	\$11,751,184.60	5) This is only the provisional 'spend' budget for the nearly 84,000 hours of SoW work sought by the State 6) Assumed equal spending of this effort over all 5 years of contract term 7) Price absorbs COLA increases so that State is insulated from these variations
	Total Project Cost	\$22,000,000.00	

Provisions:

10. If, after the Contract is signed, it is determined that information provided by the State of Michigan to the bidders is inaccurate or incomplete in any material manner, the parties will negotiate an adjustment in the project schedule and the fees and expenses, as applicable, per the Contract’s change order process.
11. Contractor's fixed price is based on delivery of the fixed scope of services in Contract. The scope of the services as documented will remain unchanged, except as the parties may agree in writing. All other work, including schedule extensions not approved by Contractor (or within Contractor's responsibility per the Contract), will require the parties to agree upon a change order to the Contract.
12. Contractor's performance of the Contract is dependent on the State of Michigan's prompt and effective performance of its responsibilities, including timely decisions and approvals.
13. The State of Michigan will commit resources and management involvement as described in the Contract or as required by the work effort in order to support Contractor’s delivery of the services and to perform the agreed upon acceptance procedures in a timely manner.
14. The State of Michigan will be responsible for its operation and use of Contractor’s deliverables upon acceptance, subject to applicable warranties and indemnities, if any, and for determining whether the services and deliverables provided by Contractor under the Contract, including any revised business processes implemented pursuant to the Contract, meet the State of Michigan's business requirements and applicable internal guidelines.
15. The State of Michigan will obtain all consents necessary from its third parties (*i.e.*, those not under contract with Contractor) required for Contractor to perform its obligations under this Contract. The State of Michigan will be responsible for the contractual relationship with such third parties and for facilitating their cooperation with Contractor. Contractor will not have any responsibility for the performance of other contractors or vendors engaged by the State of Michigan (other than Contractor’s subcontractors) or delays caused by them. There are no third party beneficiaries to this Contract.
16. The State of Michigan will be responsible for obtaining, at no cost to Contractor, consents for Contractor’s use of any State of Michigan Furnished Property necessary to perform its obligations hereunder. Unless otherwise agreed to by the parties in writing, the State of Michigan will provide all software and hardware necessary for Contractor to perform its obligations under the Contract.



17. Each party will retain responsibility for its compliance with any laws, regulations, or other authorities, in effect on the date of submission of our proposal, including those areas on which it relies on the other party's performance under the Contract.
18. Use of the term "ensure" is defined to mean that both parties will use all reasonable and commercial efforts to accomplish their legal responsibilities under the terms of the Contract.



Table 2: Knowledge Transfer cost

There is no knowledge transfer cost as Contractor is already supporting this contract.

No.	Agency	Month 1	Month 2	Month 3	Total by agency
A.	Civil Service Commission (MCSC)	\$0	\$0	\$0	\$0
D.	DTMB-Client Service Center (CSC)	\$0	\$0	\$0	\$0
C.	DTMB-Office of Retirement Services (ORS)	\$0	\$0	\$0	\$0
D.	Environmental Quality (DEQ)	\$0	\$0	\$0	\$0
E.	Human Services (DHS)	\$0	\$0	\$0	\$0
F.	LARA - Bureau of Health Professions (BHP)	\$0	\$0	\$0	\$0
G.	State (MDOS)	\$0	\$0	\$0	\$0
H.	Treasury	\$0	\$0	\$0	\$0
	Total by month	\$0	\$0	\$0	\$0
	Total Knowledge Transfer Cost, for 3 months (the sum of the column, Total by Agency)	\$0	\$0	\$0	\$0



Table 3: Base Service Cost

No	Agency	Year 1 (12 months)	Year 2 (12 months)	Year 3 12 months	Year 4 (12 months)	Year 5 (12 months)	Total 5 year cost by agency
A.	Civil Service Commission (MCSC)						
D.	DTMB-Client Service Center (CSC)						
C.	DTMB-Office of Retirement Services (ORS)						
D.	Environmental Quality (DEQ)						
E.	Human Services (DHS)						
F.	LARA - Bureau of Health Professions (BHP)						
G.	State (MDOS)						
H.	Treasury						
	Costs per year	2,049,763.08	2,049,763.08	2,049,763.08	2,049,763.08	2,049,763.08	
	Number of months in that year	12	12	12	12	12	
	Cost per month	170,813.59	170,813.59	170,813.59	170,813.59	170,813.59	
	Total Base Service Cost (sum of total 5 year cost by agency)						10,248,815.40

Note: All prices are in US\$.



Table 4: Rate Card

No.	Staffing Category	Firm Fixed Hourly Rate	Est. Hours (5 year total)	Extended Price (hourly rate X estimated hours)
	Project Manager	\$ 181.00	500	\$ 90,500.00
	Systems Architect	\$ 145.00	500	\$ 72,500.00
	Business Analyst	\$ 138.00	7,500	\$ 1,035,000.00
	Siebel Lead	\$ 130.00	5,000	\$ 650,000.00
	Siebel Developer	\$ 113.00	16,000	\$ 1,808,000.00
	Computer Telephony Specialist	\$ 167.00	5,500	\$ 918,500.00
	Genesys Specialist	\$ 267.00	5,000	\$ 1,335,000.00
	IVR Developer	\$ 113.00	14,000	\$ 1,582,000.00
	NICE Analyst	\$ 113.00	5,000	\$ 565,000.00
	Tester	\$ 152.00	5,000	\$ 760,000.00
	Other (Please specify) TBD	\$ 150.00	19,564.56	\$ 2,934,684.60
	Total Major Enhancement Cost			\$ 11,751,184.60

Notes:

5. Hourly rates quoted are firm, fixed rates for the duration of the contract. Travel and other expenses will not be reimbursed. "Estimated Hours" and "Extended Price" are non-binding and will be used at the State's discretion to determine best value to the State. The State will utilize the fully loaded hourly rates detailed above for each staff that will be used as fixed rates for responses to separate statements of work.
6. The State intends to establish funding for up to the estimated hours. Actual funding for enhancements will occur on a yearly basis, and there is no guarantee as to the level of funding, if any, available to the project. The initial rate card funding will be \$2 million, with additional amounts added as funding and needs are defined.
7. The parties agree that the Services/Deliverables to be rendered by Contractor using the future enhancements/rate card on this Contract will be defined and described in detail in separate Statements of Work. Contractor shall not be obliged or authorized to commence any work to implement a Statement of Work until authorized via a purchase order issued against this Contract.
8. Other skills/roles suggested by the bidder should also show the hourly rate. The bidder can assume 0 hours for these skills for the purpose of computation.



Attachment 4: Personnel Requirements

IT Classifications/Skills Sets & Tasks

A complete list of the required IT Classification and skill sets is defined below. The overriding requirement is that the individual must possess the skills, knowledge, and experience required to perform the duties effectively and efficiently at the level specified in the contract.

It is anticipated that the required experience and skill requirements will changed over the course of the contract. The contractor(s) will be notified in writing of these changes and will be required to provide personnel satisfying the experience and skill requirements, as modified, which includes skills sets which identifies knowledge of any future versions of software. Since it is anticipated that the skill sets will change over the course of the contract, additional skills sets may be defined and added to the contract.

Assigned tasks will vary according to the specific project needs that exist at any time during the term of this contract. The number of development and maintenance projects will vary throughout the Contract period, as will the required tasks. The task to be performed by the Contract personnel include, but are not limited to those identified with each classification.

Resources must comply with:

- Regular reporting requirements
- Track time against project plans
- Ensure that all work conforms to State Uniform Information Technology Environment (SUITE), project management, systems engineering methodology, and other IT standards in effect for DTMB agency services personnel.

The table below lists the IT classifications to be provided under this RFP.

IT Classification
Project Manager (Service Delivery)
Project Manager
Systems Architect
Business Analyst
Siebel Lead
Siebel Developer
Computer Telephony Specialist
Genesys Specialist
IVR Developer
NICE Analyst

IT Classification/Skill Sets

Project Manager (Service Delivery)

- Minimum 5 year experience of service delivery in shared IT services for multiple contact centers.
- Minimum 5 years experience in project management skills utilizing formal methodologies, including change management, risk identification/mitigation, issue escalation and status reporting.
- PMP certification highly desired.
- 5 years experience in contact center IT projects, using Siebel and Genesys.
- 3-5 years experience with project management tools such as MS Project, NIKU/Clarity.
- Experience with CMM project methodologies
- Considerable knowledge of structured programming methodology and techniques.
- Must have experience with development projects utilizing Oracle or SQL Server



- Ability to effectively make oral and written reports and presentations and prepare clear and concise metrics graphs and charts.
- Ability to maintain records, prepare reports and conduct correspondence related to the work.
- Ability to communicate technical terminology at a level appropriate to the audience.

Project Manager (Service Delivery) Tasks:

- Manage all defined Contractor responsibilities in this Scope of Services.
- Manage and integrate end-to-end service delivery across all in-scope service lines.
- Monitor service delivery against predefined SLA and Return to Service goals listed in Attachment 1
- Manage Contractor's subcontractors, if any
- Develop the project plan and schedule, and update as needed
- Serve as the point person for all project issues
- Coordinate the design and delivery of system enhancements
- Coordinate and oversee the day-to-day project activities of the project team
- Assess and report project feedback and status
- Escalate project issues, project risks, and other concerns
- Review all project deliverables and provide feedback
- Proactively propose/suggest options and alternatives for consideration. Recommend enhancements and identify value opportunities for the agencies.
- Utilize change control procedures
- Prepare project documents and materials
- Manage and report on the project's budget

Project Manager

- Minimum 5 years experience in project management skills utilizing formal methodologies, including change management, risk identification/mitigation, issue escalation and status reporting.
- 3-5 years experience with project management tools such as NIKU/Clarity, MS Project.
- PMP certification highly desired.
- Experience with CMM project methodologies
- Considerable knowledge of structured programming methodology and techniques.
- Experience desired in contact center IT projects, preferably Siebel and Genesys.
- Experience with development projects utilizing Oracle or SQL Server
- Ability to effectively make oral and written reports and presentations and prepare clear and concise metrics graphs and charts.
- 2 years experience in verbal and written communication with clients in English
- Ability to maintain records, prepare reports and conduct correspondence related to the work.
- Ability to communicate technical terminology at a level appropriate to the audience.

Project Manager Tasks:

- Define and develop integrated project plans for all aspects of assigned projects including scope, time, cost, communication, risk, procurement, quality and human resource areas, to meet the project goals and objectives.
- Coordinate and direct the project team and the project team's activities to deliver on-time, on-budget projects that meet customer requirements.
- Practice Change Management, maintaining project scope and manage project changes to ensure changes are beneficial to the project and that the quality of the IT product meets customer requirements.
- Apply configuration management and quality assurance techniques to assure correctness and completeness of project deliverables, including all project related documentation.
- Communicate and coordinate with business clients, team members, external DTMB partners, vendors to meet project goals and objectives.



- Assure project and product deliverable quality by adhering to standards, maintaining change control, providing quality control measurements, participating in quality audits and managing work results acceptance, including acceptance of vendor deliverables.
- Provide project management products, i.e., information, status reports, presentations, etc., as required to business clients, team members and others.
- Provide leadership to the project team, including development of team member roles and responsibilities, development of team members' technical abilities where appropriate, and evaluation of team members' performance.
- Manage the introduction of the project's product into implementation and provide support for transition into maintenance.
- Manage and coordinate project close-out activities, including post-project implementation review, financial close-out, Contract close-out, records retention, etc.

System Architect

- 5 years experience in the Siebel administration.
- Certified Oracle Siebel Consultant Expert highly desired.
- 5 years experience in technical design and implementation of Siebel solutions including architecture, infrastructure, interfaces, data architecture, access control, and security compliance.
- Understanding of the fundamentals of various hardware components in a server based environment (servers, switches, routers, SAN, NAS) and communication protocols.
- 5 years experience with Oracle/SQL Server.
- 3 year experience of Genesys IVR implementation.
- 3 year experience in Siebel interfaces (Genesys CTI, FileNet etc.)
- Experienced in centralized enterprise call recording and monitoring - 2 years experience in administration of NICE Perform 3.1 or above.
- Experience in Java.
- Experience in logical program and system design, project management methodology and change management methodology is desirable.
- Ability to read, comprehend, and write technical documents related to the above technologies.
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment

System Architect Tasks:

- Design the solution and build the system architecture.
- Consult/assist in developing the solution.
- Develop, maintain and upgrade automated test scripts and architectures for application products.
- Document testing status – write test documentation, including test plans, test defects, and defect logs
- Configuration management of multiple development environments,
- Provide definition of support processes, technical documentation, 3rd party SW Upgrade management.
- Define\maintain appropriate processes for the customer agency's Infrastructure and Operations Support Services.
- Suggest areas where process improvements and quality controls could be implemented, designed and documented.
- Create\maintain clear and usable documentation for technical support activities performed by DTMB

**Business Analyst**

- 5 years experience analyzing business requirements for Siebel CRM, generating project specifications, converting specifications into code, and applying knowledge of computer programming techniques and computer languages.
- Oracle Siebel CRM Business Analyst certification highly desired.
- 5 years experience performing extensive analysis and design working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- 5 years experience working with application/solution architects to set direction of design and development for application development projects.
- 5 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- 5 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.
- 5 years experience reviewing technical designs and specifications for completeness and conformance to quality standards, especially as a mentor to less experienced developers.
- 5 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.
- 5 years experience working with System Development Life Cycle (SDLC) concepts
- 5 years experience conducting system test
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment
- Experience in troubleshooting, problem solving and debugging.
- Ability to work under pressure and in tight dead lines.

Business Analyst Tasks:

- Analyze business requirements in Siebel CRM, generate project specifications, and develop technical designs in consultation with other technical experts.
- Model Business Processes (As-Is and To-Be), Use Cases, Activity Diagrams, User and Functional Requirements, Non-Functional Requirements; for requests related to Siebel CRM and CTI.
- Develop unit test plans, test data and scripts for application validation and verification.
- Perform extensive analysis and design working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- Work with programmer analysts/developers to set direction of design and development for application development projects.
- Evaluate user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- Perform peer reviews of developed solutions and code to insure conformity to standards and design best practices.
- Review technical designs and specifications for completeness and conformance to quality standards, especially as a mentor to less experienced developers.

Siebel Lead

- 5 years experience analyzing business requirements, generating project specifications, converting specifications into code, and applying knowledge of computer programming techniques and computer languages.
- Certified Oracle Siebel Consultant Expert highly desired.



- 5 years experience in technical design and implementation of Siebel solutions including architecture, infrastructure, interfaces, data architecture, access control, and security compliance.
- 5 years experience developing technical designs in consultation with other technical experts.
- 5 years development experience in Siebel (including eServices) and Genesys CTI.
- 3 years development experience in one or more of the following areas:
 - ✓ Java/.NET/VB
 - ✓ Web services
 - ✓ Siebel FileNet interfaces.
- 5 years experience on one or more of the following development and design tools or equivalent;
 - ✓ Serena Prototype Composer
 - ✓ Microsoft Visio
- 5 years experience in RDBMS developing data model database triggers, procedures, packages and functions in a combination of any of the following:
 - ✓ Oracle
 - ✓ Microsoft SQL Server
- 5 years experience developing unit and system test plans, test data and scripts for application validation and verification.
- 5 years experience performing extensive analysis and design working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- 5 years experience working with application/solution architects to set direction of design and development for application development projects.
- 5 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- 5 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.
- 5 years experience reviewing technical designs and specifications for completeness and conformance to quality standards, especially as a mentor to less experienced developers.
- 5 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.
- 5 years experience working with System Development Life Cycle (SDLC) concepts
- 5 years experience conducting system test
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment
- Experience in troubleshooting, problem solving and debugging.
- Ability to work under pressure and in tight deadlines.

Siebel Lead Tasks:

- Analyze business requirements, generate project specifications, and convert specifications into code, and develop technical designs in consultation with other technical experts
- Code Solutions following technical design and apply knowledge of computer programming techniques and computer languages.
- Develop unit test plans, test data and scripts for application validation and verification.
- Perform extensive analysis and design working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- Work with application/solution architects to set direction of design and development for application development projects.



- Evaluate user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- Perform peer reviews of developed solutions and code to insure conformity to standards and design best practices.
- Review technical designs and specifications for completeness and conformance to quality standards, especially as a mentor to less experienced developers.

Siebel Developer

- 3 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.
- 3 years experience developing technical designs in consultation with other technical experts.
- 1 year development experience in Siebel.
- 1 year development experience in one or more of the following areas:
 - ✓ Genesys CTI
 - ✓ Java/.NET/VB
 - ✓ Web services
 - ✓ Siebel FileNet interfaces
- 3 years experience on one or more of the following development and design tools or equivalent;
 - ✓ Serena Prototype Composer
 - ✓ Microsoft Visio
- 3 years experience in RDBMS developing data model database triggers, procedures, packages and functions in a combination of any of the following:
 - ✓ Oracle
 - ✓ Microsoft SQL Server
- 3 years experience developing and following unit test plans, test data, and scripts for application validation and verification.
- 3 years experience performing extensive analysis and design by working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- 3 years experience working with application/solution architects to set direction of design and development for application development projects.
- 3 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- 3 years experience developing solutions, following design documents and use cases
- 3 years conducting unit test
- 3 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.
- 3 years experience reviewing technical designs and specifications for completeness and conformance to quality standards.
- 3 years experience working with System Development Life Cycle (SDLC) concepts
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment
- Experience in trouble shooting, problem solving and debugging
- Ability to work under pressure and tight deadline



Computer Telephony Specialist

- 2 year experience working with Avaya PBX API's most notably AES.
- Understanding of the fundamentals of the telephone switches and communication protocols.
- Experience with both Avaya and Cisco PBX components, programming and general telephony feature capabilities.
- Understanding of Avaya Vector Programming CTI commands.
- Education and experience working with Telephony Time Division Multiplexing (TDM) facilities and their integration to Dialogic interface boards.
- Education and experience working with Session Initiation protocol (SIP), SIP Trunks and their interface to IVR Servers, and/or Media Gateway Servers.
- Education and Experience working with Cisco Telephony API's for CTI
- Experience in logical program and system design, project management methodology and change management methodology is desirable.
- Ability to read, comprehend, and write technical documents related to the above technologies.
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment

Computer Telephony Specialist Tasks:

- Design the solution and build the system architecture.
- Develop, maintain and upgrade design documents, test scripts, test documentation and architectures for application products
- Provide definition of support processes, technical documentation, 3rd party SW upgrade management.
- Define\maintain appropriate processes for the customer agency's Infrastructure and Operations Support Services.
- Suggest areas where process improvements and quality controls could be implemented, designed and documented.
- Create\maintain clear and usable documentation for technical support activities performed by DTMB

Genesys Specialist

- 5 years experience in Genesys solutions planning, implementation, configuration and maintenance.
- Understanding of Genesys T-Server messaging and its integration to the Telephony environment.
- 5 years experience in the Genesys IVR implementation.
- Genesys Certified System Consultant (Inbound voice routing or GVP) highly desired.
- Understanding of the fundamentals of the telephone switches and communication protocols.
- 3 year of development experience in the following areas:
 - ✓ Genesys Enterprise Routing Strategy development, implementation, troubleshooting, maintenance and optimization.
 - ✓ Genesys Framework configuration, modification and maintenance.
 - ✓ Genesys Reporting solutions and their specific configuration to a customer's routing solution and IVR application.
- 3 years experience in one or more of the following areas.
 - ✓ Java/.NET
 - ✓ Web services
 - ✓ VXML
- Education and Experience in the integration of Genesys solutions components to different customer premise telephony equipment (CPE) and media types. Strong emphasis on Avaya and Cisco (CPE).



- Experience with both Avaya and Cisco PBX components, programming and general telephony feature capabilities.
- 1 year experience working with Avaya PBX API's most notably AES.
- Strong skills and knowledge in utilization of Time Division Multiplexing (TDM), Session Initiation Protocol (SIP), SIP trunks and their interface to IVR Servers, and/or Media Gateway Servers.
- Experience in logical program and system design, project management methodology and change management methodology is desirable.
- Ability to read, comprehend, and write technical documents related to the above technologies.
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment

Genesys Specialist Tasks:

- Design the solution and build the system architecture.
- Develop, maintain and upgrade design documents, test scripts, test documentation and architectures for application products
- Configuration management of multiple development environments,
- Provide definition of support processes, technical documentation, 3rd party SW upgrade management.
- Define\maintain appropriate processes for the customer agency's Infrastructure and Operations Support Services.
- Suggest areas where process improvements and quality controls could be implemented, designed and documented.
- Create\maintain clear and usable documentation for technical support activities performed by DTMB

IVR Developer

- 3 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.
- 3 years experience developing technical designs in consultation with other technical experts.
- 1 year experience of developing call flow diagrams and building IVR solutions.
- 1 year development experience in Genesys and its reporting tools.
- 1 year development experience in one or more of the following areas:
 - ✓ Java/.NET
 - ✓ Web services
 - ✓ VXML
- 3 years experience on one or more of the following development and design tools or equivalent;
 - ✓ Serena Prototype Composer
 - ✓ Microsoft Visio
- 3 years experience developing and following unit test plans, test data, and scripts for application validation and verification.
- 3 years experience performing extensive analysis and design by working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- 3 years experience working with application/solution architects to set direction of design and development for application development projects.
- 3 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- 3 years experience developing solutions, following design documents and use cases
- 3 years conducting unit test



- 3 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.
- 3 years experience reviewing technical designs and specifications for completeness and conformance to quality standards.
- 3 years experience working with System Development Life Cycle (SDLC) concepts
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment
- Experience in trouble shooting, problem solving and debugging
- Ability to work under pressure and tight deadline.

NICE Analyst

- 3 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.
- 3 years experience developing technical designs in consultation with other technical experts.
- 3 year experience in centralized enterprise call recording and monitoring.
- 1 year experience of NICE Perform 3.1 or above.
- 3 years experience on one or more of the following development and design tools or equivalent:
 - ✓ Serena Prototype Composer
 - ✓ Microsoft Visio
- 3 years experience developing and following unit test plans, test data, and scripts for application validation and verification.
- 3 years experience performing extensive analysis and design by working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.
- 3 years experience working with application/solution architects to set direction of design and development for application development projects.
- 3 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.
- 3 years experience developing solutions, following design documents and use cases
- 3 years conducting unit test
- 3 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.
- 3 years experience reviewing technical designs and specifications for completeness and conformance to quality standards.
- 3 years experience working with System Development Life Cycle (SDLC) concepts
- 2 years experience in verbal and written communication with clients in English
- Experience working with mature CMM or CMMI project methodologies
- Experience working with MS Office applications
- Experience working with project management tools such as MS Project or NIKU
- Experience working in a team environment
- Experience in trouble shooting, problem solving and debugging
- Ability to work under pressure and tight deadline

NICE Analyst Tasks:

- Manage, coordinate and administer where necessary the implementation of NICE Recording platforms, their expansion and any programming modifications associated with telephony interface changes.



- Develop, maintain and upgrade design documents, test scripts, test documentation and architectures for application products
- Provide System Administrative programming and design support for new user IP address, stations and CTI interfaces.
- Provide System Administrative programming and design support for database integration additions, modifications and removals.
- Provide definition of support processes, technical documentation, 3rd party SW upgrade management.
- Define\maintain appropriate processes for the customer agency's Infrastructure and Operations Support Services.
- Suggest areas where process improvements and quality controls could be implemented, designed and documented.
- Create\maintain clear and usable documentation for technical support activities performed by DTMB



Attachment 5: Resume Template

The Contractor must complete and submit Résumés for:

- Single Point Of Contact (SPOC)
- Project Manager - Service Delivery
- System Architect
- Siebel Lead
- Genesys Specialist
- Non Key Personnel

The Contractor must use the Résumé Summary Templates provided in this attachment. Résumés for these Personnel should not exceed four (4) pages each in length.

Resumes for all key positions must be provided with relevant skills, experience, and references provided.

The State may evaluate such criteria as time spent by the personnel directly supporting the proposed solution, and comparable size, scope and complexity of implementations accomplished.

The Contractor must submit a Letter of Commitment for the key personnel who will be assigned to the Contract, signed by the identified resource, stating their commitment to work for the contractor on this project contingent. If the identified personnel are currently assigned to a State project the contractor must provide a letter signed by the State Program Manager releasing the individual from the project upon execution of the contract



Proposed Resource Name:	
Proposed Classification:	A. Single Point of Contact
Key Personnel:	Yes <input type="checkbox"/> or No <input checked="" type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Required Skills	Bidder's Response
5 years supporting customers and contractual obligations, facilitating dispute resolution, and advising clients of performance under the terms and conditions of the Contract.	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience: <i>Example: 10 yrs. exp with (vendor name) implementing multimillion-dollar, statewide implementations of intelligence management and analysis systems</i></p> <p>Name of project(s) and year(s) experience was obtained: <i>Example: Michigan Infinity Project – 1995 to 1998</i> <i>Ohio Intelligence Center Project – 1998 to present</i></p>
<ul style="list-style-type: none"> At least 5 years experience in reviewing project plans, reporting on status and issues of projects, coordinating access to facilities and necessary resources needed for delivery of services, facilitate coordination between various external contractors departments/divisions, escalate outstanding/high priority issues and document and archive all important project decisions. 	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
Education: BS degree Computer Science or equivalent work experience	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If education is based on previous work experience, please elaborate that work experience.</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (3) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s, and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: <i>1998</i>
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: <i>1994</i>
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



The Bidder must submit a letter of commitment for Key Personnel, signed by the identified resource, stating their commitment to work for the bidder/subcontractor on this project contingent on award of the bid. If the identified personnel are currently assigned to a State project the bidder must provide a letter signed by the State Project Manager releasing the individual from the project.



Proposed Resource Name:	
Proposed Classification:	B. Project Manager - Service Delivery
Key Personnel:	Yes <input checked="" type="checkbox"/> or No <input type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Required Skills	Bidder's Response
Minimum 5 years experience in Siebel/Genesys project management skills utilizing formal methodologies, including change management, risk identification/mitigation, issue escalation and status reporting.	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience: <i>Example: 5 yrs exp with (vendor name) implementing multimillion-dollar, statewide implementations of Siebel/Genesys call center.</i></p> <p>Name of project(s) and year(s) experience was obtained: <i>Example: Michigan CSIP project 2003-2008.</i></p>
<ul style="list-style-type: none"> 3-5 years experience with project management tools such as NIKU/Clarity, MS Project, and experience with CMM project methodologies. 	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>5 years supporting customers and contractual obligations, facilitating dispute resolution, and advising clients of performance under the terms and conditions of the Contract.</p> <p>Ability to effectively make oral and written reports and presentations, and prepare clear and concise metrics graphs and charts.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Experience with development projects utilizing Oracle, DB2 or SQL Server database.</p> <p>Considerable knowledge of structured programming methodology and techniques.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
Education: BS degree in Computer Science or equivalent work experience.	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If education is based on previous work experience, please elaborate that work experience.</i></p>
Desired Certification: Project Management Professional (PMP)	<p>Does resource have this desired skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If yes, provide copy of certification.</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (5) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s , and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: <i>1998</i>
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: <i>1994</i>
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



The Bidder must submit a letter of commitment for Key Personnel, signed by the identified resource, stating their commitment to work for the bidder/subcontractor on this project contingent on award of the bid. If the identified personnel are currently assigned to a State project the bidder must provide a letter signed by the State Project Manager releasing the individual from the project.



Proposed Resource Name:	
Proposed Classification:	C. System Architect
Key Personnel:	Yes <input checked="" type="checkbox"/> or No <input type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Required Skills	Bidder's Response
<p>5 years experience in the Siebel administration.</p> <p>5 years experience in technical design and implementation of Siebel solutions including architecture, infrastructure, interfaces, data architecture, access control, and security compliance.</p> <p>Understanding of the fundamentals of various hardware components in a server based environment (servers, switches, routers, SAN, NAS) and communication protocols.</p> <p>5 years experience with Oracle/SQL Server.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>3 year experience of Genesys IVR implementation.</p> <p>3 year experience in Siebel interfaces (Genesys CTI, FileNet etc.)</p> <p>Experienced in centralized enterprise call recording and monitoring - 2 year's experience in administration of NICE Perform 3.1 or above.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Experience in Java.</p> <p>Experience in logical program and system design, project management methodology and change management methodology is desirable.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>



<p>Ability to read, comprehend, and write technical documents related to the above technologies.</p> <p>2 year's experience in verbal and written communication with clients in English</p> <p>Experience working with mature CMM or CMMI project methodologies</p> <p>Experience working with MS Office applications.</p> <p>Experience working with project management tools such as MS Project or NIKU</p> <p>Experience working in a team environment</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Education: BS degree in Computer Science or equivalent work experience</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If education is based on previous work experience, please elaborate that work experience.</i></p>
<p>Desired Certification: Certified Oracle Siebel Consultant Expert.</p>	<p>Does resource have this desired skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If yes, provide copy of certification</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (3) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s , and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: 1998
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: 1994
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



The Bidder must submit a letter of commitment for Key Personnel, signed by the identified resource, stating their commitment to work for the bidder/subcontractor on this project contingent on award of the bid. If the identified personnel are currently assigned to a State project the bidder must provide a letter signed by the State Project Manager releasing the individual from the project.



Proposed Resource Name:	
Proposed Classification:	D. Siebel Lead
Key Personnel:	Yes <input checked="" type="checkbox"/> or No <input type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Required Skills	Bidder's Response
<p>5 years experience analyzing business requirements, generating project specifications, converting specifications into code, and applying knowledge of computer programming techniques and computer languages.</p> <p>5 years experience developing technical designs in consultation with other technical experts.</p> <p>5 years experience in technical design and implementation of Siebel solutions including architecture, infrastructure, interfaces, data architecture, access control, and security compliance.</p> <p>5 years development experience in Siebel (including eServices) and Genesys CTI.</p> <p>3 years development experience in one or more of the following areas: Java/.NET/VB Web services Siebel FileNet interfaces.</p> <p>5 years experience on one or more of the following development and design tools or equivalent: Serena Prototype Composer Microsoft Visio</p> <p>5 years experience in RDBMS developing data model database triggers, procedures, packages and functions in a combination of any of the following:</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>



<p>Oracle/Microsoft SQL Server</p> <p>5 years experience developing unit and system test plans, test data and scripts for application validation and verification.</p> <p>5 years experience performing extensive analysis and design working on projects of all sizes that require exposure to all aspects of the project life cycle and creating and maintaining documentation in conformance with established standards.</p> <p>5 years experience working with application/solution architects to set direction of design and development for application development projects.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>5 years experience evaluating user requests for new programs or modified program components to determine feasibility, cost and time required, compatibility with current systems, and computer capabilities.</p> <p>5 years experience performing peer reviews of developed code to insure conformity to standards and design best practices.</p> <p>5 years experience reviewing technical designs and specifications for completeness and conformance to quality standards, especially as a mentor to less experienced developers.</p> <p>5 years experience analyzing business requirements, generating project specifications and converting them into code, and applying knowledge of computer programming techniques and computer languages.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>5 years experience working with System Development Life Cycle (SDLC) concepts.</p> <p>5 years experience conducting system test.</p> <p>2 years experience in verbal and written communication with clients in English</p> <p>Experience working with mature CMM or CMMI project methodologies</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Education: BS degree in Computer Science or equivalent work experience</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If education is based on previous work experience, please elaborate that work experience.</i></p>
<p>Desired Certification: Certified Oracle Siebel Consultant Expert</p>	<p>Does resource have this desired skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If yes, provide copy of certification</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (3) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s , and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: 1998
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: 1994
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



The Bidder must submit a letter of commitment for Key Personnel, signed by the identified resource, stating their commitment to work for the bidder/subcontractor on this project contingent on award of the bid. If the identified personnel are currently assigned to a State project the bidder must provide a letter signed by the State Project Manager releasing the individual from the project.



Proposed Resource Name:	
Proposed Classification:	E. Genesys Specialist
Key Personnel:	Yes <input checked="" type="checkbox"/> or No <input type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Required Skills	Bidder's Response
<p>5 years experience in Genesys solutions planning, implementation, configuration and maintenance.</p> <p>Understanding of Genesys T-Server messaging and its integration to the Telephony environment.</p> <p>5 years experience in the Genesys IVR implementation.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Understanding of the fundamentals of the telephone switches and communication protocols.</p> <p>3 year of development experience in the following areas:</p> <ul style="list-style-type: none"> • Genesys Enterprise Routing Strategy development, implementation, troubleshooting, maintenance and optimization. • Genesys Framework configuration, modification and maintenance. • Genesys Reporting solutions and their specific configuration to a customer's routing solution and IVR application. <p>3 years experience in one or more of the following areas.</p> <ul style="list-style-type: none"> • Java/.NET • Web services • VXML 	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>



<p>Education and Experience in the integration of Genesys solutions components to different customer premise telephony equipment (CPE) and media types. Strong emphasis on Avaya and Cisco (CPE).</p> <p>Experience with both Avaya and Cisco PBX components, programming and general telephony feature capabilities.</p> <p>1 year experience working with Avaya PBX API's most notably AES.</p> <p>Strong skills and knowledge in utilization of Time Division Multiplexing (TDM), Session Initiation Protocol (SIP), SIP trunks and their interface to IVR Servers, and/or Media Gateway Servers.</p> <p>Experience in logical program and system design, project management methodology and change management methodology is desirable.</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Ability to read, comprehend, and write technical documents related to the above technologies.</p> <p>2 years experience in verbal and written communication with clients in English</p> <p>Experience working with mature CMM or CMMI project methodologies</p> <p>Experience working with MS Office applications</p> <p>Experience working with project management tools such as MS Project or NIKU</p> <p>Experience working in a team environment</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
<p>Education: BS degree in Computer Science or equivalent work experience</p>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/> <i>If education is based on previous work experience, please elaborate that work experience.</i></p>
<p>Desired Certification: Genesys Certified System Consultant (Inbound voice routing or GVP).</p>	<p>Does resource have this desired skill: Yes <input type="checkbox"/> or No <input type="checkbox"/> <i>If yes, provide copy of certification.</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (3) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s , and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: 1998
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: 1994
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



The Bidder must submit a letter of commitment for Key Personnel, signed by the identified resource, stating their commitment to work for the bidder/subcontractor on this project contingent on award of the bid. If the identified personnel are currently assigned to a State project the bidder must provide a letter signed by the State Project Manager releasing the individual from the project.



Proposed Resource Name:	
Proposed Classification:	Non-Key Personnel (Specify Role)
Key Personnel:	Yes <input type="checkbox"/> or No <input checked="" type="checkbox"/>
If resource is associated with a subcontractor provide name of company:	
Percentage of time resource will be allocated to project:	

Bidder: List the skills and experience that qualify the individual for the duties and responsibilities on this project for the proposed role. Provide the name of the project(s) and the year(s) the experience was obtained.

The experience requirements detailed in Attachment 4 are restated as follows:

Skills	Bidder's Response
<<Bidders should fill in the skills required from Attachment 4>>	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p>Description of skills and experience:</p> <p>Name of project(s) and year(s) experience was obtained:</p>
Education: BS degree in Computer Science or equivalent work experience	<p>Does resource have this required skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If education is based on previous work experience, please elaborate that work experience.</i></p>
Certification:	<p>Does resource have this skill: Yes <input type="checkbox"/> or No <input type="checkbox"/></p> <p><i>If yes, provide copy of certification</i></p>



List client references for work performed to meet the requirements stated above, and all projects the proposed resource has worked on in the last three (3) years. A minimum of three (3) references are required. By submission of this information, the bidder and identified key person authorize the State of Michigan to contact references and previous employers provided to verify the accuracy of the information. Provide the identified information for each:

Start Date: <i>date started on project</i>	End Date: <i>date rolled off project</i>
Client/Project: <i>Client, with contact information (i.e.: address, phone #s , and email address), and project name</i>	
Employer: <i>identify employer at the time of experience</i>	
Title/Percentage of time: <i>title of role on project and percentage of time spent on project</i>	
Description: <i>brief description of responsibilities for the project. Include software version</i>	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

Start Date:	End Date:
Client/Project:	
Employer:	
Title/Percentage of time:	
Description:	

EDUCATION

Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Master in Engineering</i>	Year Completed: 1998
Program	<i>Major(s) area of study: Computer Science</i>	
University	<i>(include address) Example: MSU – East Lansing, Michigan</i>	

Additional Education		
Degree (i.e. PhD, Master's, Bachelors)	<i>Example: Bachelors' in Business Administration</i>	Year Completed: 1994
Program	<i>Major(s) area of study: Example: Management</i>	<i>Minor area of study: Example: Economics</i>
University	<i>(include address) Example: Central MI University, Mt. Pleasant, MI</i>	

TRAINING – Provide any relevant technical or professional training related to the role resource will be providing on this project.

Technical or Professional Training	
Course Name	
Topic	<i>(include credit hours if applicable)</i>
Date taken	

Certifications/Affiliations	
Name	
Topic/Description	
Date completed	



Attachment 6: List of Approved Subcontractors

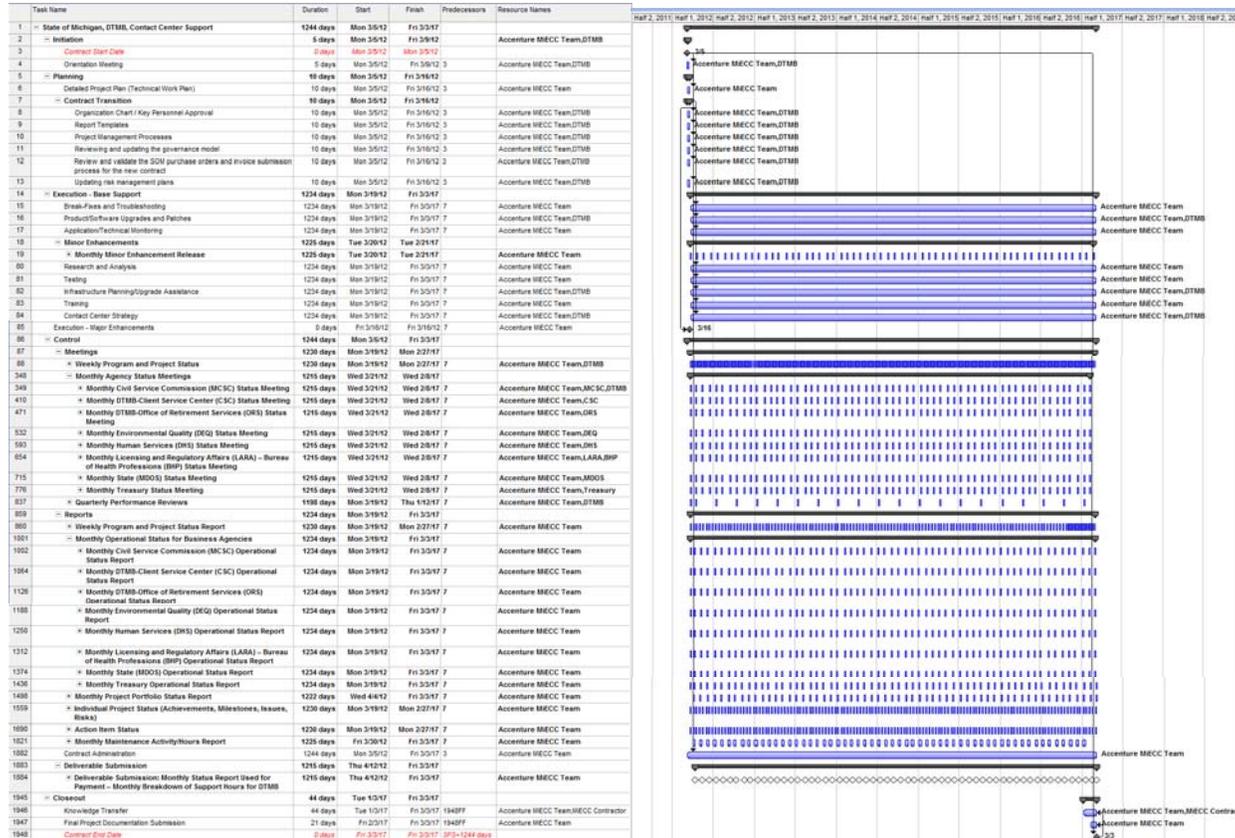
The following represent the list of Subcontractors approved by State for use under this Contract:

- Empirix,
- Genesys, and
- Actium Consulting.



Attachment 7: Preliminary Work Plan

The Contractor submits the following Preliminary Work Plan per requirements set forth in Section 1.301 Project Plan Management:





Attachment 8: Agency Background Information

Agency Background – in alphabetical order

Civil Service Commission

Background

This service center has approximately 30 Customer Service Representatives (CSRs) and was established in August 2004 to service State employees with specific Human Resource (HR) issues. It consists of a 1-800 telephone service center receiving up to 500 calls per day and an Internet knowledge base. CSRs answer telephone inquiries by guiding the employee to relevant pages on the knowledge base or by accessing the Civil Service HRMN legacy system. If the CSR is unable to resolve the inquiry on the phone, a detailed service request is created which is then passed to a Subject Matter Expert (SME). The SME will work the case and call the employee back with the resolution.

Operation

a. Phone

CSRs staff the contact center Monday to Friday 7.00am to 6.00pm. Employees calling into the contact center are initially presented with several telephone menu choices. The contact center uses computer telephone integration (CTI) wherein employees may enter their employee ID or social security number and using Genesys the information is passed as a screen pop to the CSR in Siebel with the employee information contact log auto populated. Incoming callers who identify themselves as wanting employment verification, are in need of self service support, or are retirees of the State of Michigan will select those options and that will auto populate in Siebel with a predefined customer contact number. The CSR records the primary and secondary reason for the inquiry and, if necessary, creates a Siebel Service Request before closing the call. CSRs can also access the web knowledge base during the phone call to help answer the employee's inquiry.

b. Web

Employees access the knowledge base site using the Internet and login by entering their user name and password, which has been supplied to them through a separate process. The resultant displayed content has been tailored to match the specific details of the employee's bargaining group or agency.

c. Paper Channel - Inbound

CSRs in the contact center process up to 400 inbound documentation and correspondence items per day when not answering the phones. This is currently a manual process in which correspondence is batched and distributed to CSRs who answer the inquiries and where necessary update the legacy system. Completed transactions are tracked using a Microsoft (MS) Access database that in turn is used to automatically generate an email to State of Michigan employees notifying them that their paper transaction was received and completed. Documentation and correspondence are sent out for scanning, and uploaded for viewing by CSR's in FileNet.

d. Paper Channel - Outbound

MI HR Service Center sends several hundred outbound letters per day. Using several different methods of generation these letters provide benefit enrollment or document compliance information to employees.

e. Email

The MI HR Service Center processes approximately 500 emails from three email sites. Auto acknowledgements are sent and then emails are captured and worked through the Siebel application using a series of predefined responses. Contact logs are generated in Siebel for each email sent and received.

Quality Assurance

Call monitoring and quality assurance is provided by the NICE software which captures and archives both voice and screen data. Calls are statistically sampled, evaluated and reviewed with staff by a supervisor. A



series of quality assurance reports are run by team, question and CSR to trend short and long range performance and to identify areas where training may be required. CSRs also have the option of recording calls on demand.

Data entry on transactions is audited manually by quality assurance analysts. Each day a standard percentage of each CSR's batch work is pulled audited and reviewed. Statistical reports are run by week, month year to identify areas of concern and improvement.

Customer Satisfaction

MI HR Service center utilizes the Siebel activity log to generate an email to employees immediately following contact with the service center. This email requests that employees take the time complete a brief customer satisfaction survey by clicking on the embedded link. Satisfaction scores, comments, and reports are generated monthly and provide information by employee, CSR, and over response rate.

Reports

Management reports in MS Excel are produced using extracted data from the Avaya CMS system and the Qwest 1-800 provider web site. Key metrics used by management include the Average Speed of Answer (ASA), Abandon Rate in the queue and Average Talk Time. In addition, there are several manual spreadsheet reports that track a variety of contact center statistics on productivity, accuracy and completion rates.

Future Strategy

- a. Utilize Siebel and FileNet workflow to route, work, and track transaction documentation throughout their lifecycles.
- b. Leverage technology to generate automated reminders to employees who need to submit supporting documentation.
- c. Leverage the current implementation of electronic document management capacity to enable the agency to handle additional paper based processes and correspondence with a greater level of efficiency both within MIHR and across the Commission.
- d. The current system uses basic implementations of IVR and CTI. Civil Service would like to expand and enhance implementation of these technologies where cost benefit analysis indicates increased value.
- e. Upon request, resources able to perform a cost/benefit analysis for extending the Siebel application to other groups within Civil Service should be included as a part of in-scope Minor Enhancements (see Section 1.104 I A - Base Support). This may be classified as a major implementation depending on the scope.

DTMB-Client Service Center (CSC)

Background

This service center has approximately 30 Customer Service Technicians/Representatives and was established at the creation of MDIT to service State employees with IT issues. It consists of a 1-800 telephone contact center receiving between 600 and 1,800 calls per day.

Technicians answer telephone inquiries by first verifying Client information and entering the nature of the call in the Remedy system. Technicians leverage a SharePoint site to adhere to procedures and established analysis techniques. If a technician is unable to resolve the inquiry on the phone, a transfer to a Subject Matter Expert (SME) may be appropriate prior to the call ending. If the nature of the call warrants a visit from an onsite technician, then the detailed work order is assigned to Field Services for follow-up. DTMB-CSC is presently implementing a Genesys CTI solution with IVR self-service, CTI routing and soft phone equipment.

Operation

a. Phone

Technicians staff the contact center 7 days a week, 24 hours a day. Employees calling into the contact center are initially presented with several telephone menu choices, one of which provides a self-service



opportunity for Network Password re-sets. The menu choices define the nature of the call, which is then routed to an available technician with the corresponding skill set. This contact center has computer-telephone integration screen pops, so the technician on receiving the call is presented with the State employee's identification number and can retrieve the employee's contact information based on the employee id. The technician records the primary reason for the inquiry and, if able remediates the incident, and creates a Remedy Service Request before resolving the call or transferring it to an SME. Technicians can also access the SharePoint knowledge base during the phone call to help answer the employee's inquiry.

b. Intranet

Employees access the SharePoint knowledge base site using the Intranet.

Automated Password Re-sets

The caller can choose selections which allow for automated password re-set of the caller's network password. Verification occurs via a previously arranged PIN number held in a secure Challenge Response System, CRS. If the caller successfully enters the PIN, then authorization to re-set the password is sent to Active Directory for the re-set and the transaction is recorded in a Remedy Service Request.

Quality Assurance

Calls are statistically sampled, evaluated and reviewed with staff by a supervisor. A series of quality assurance reports are run by team and long range performance areas are identified where departmental training may be required.

Customer Satisfaction

Phone customers are emailed a link to a customer satisfaction survey on the State of Michigan web site where they are asked to answer some questions. Responses are analyzed by the service center management and a quality report created.

Reports

Management reports in MS Excel are produced using extracted data from the Avaya CMS system, only at this writing. Key metrics used by management include the Average Speed of Answer (ASA), Abandon Rate in the queue and Average Talk Time. In addition, there are several manual spreadsheet reports that track a variety of contact center statistics on productivity, accuracy and completion rates.

DTMB – Office of Retirement Services (ORS)

Background

The Michigan Office of Retirement Services has approximately 54 Customer Service Representatives (CSRs) that field approximately 250,000 calls per year. The contact center services members of 4 Retirement Systems – Michigan Public Schools Retirement System (MPERS), State Employees Retirement System (SERS), State Police Retirement System (SPRS) and the Judges Retirement System (JRS). Calls are routed through a 1-800 number to the consolidated contact center.

Operations

a. Phone

CSRs staff the contact center Monday to Friday 8:30am through 5:00pm. Customers calling the contact center are prompted to enter member identification and are then presented with several menu choices through the Genesys IVR. The choices selected, in combination with the type of account represented by their entry, then determine how that call is routed to agents through Genesys Skills Based Routing.

Skills Based Routing allows for the assignment of agent availability for several Genesys virtual queues. As agents receive appropriate training, they are assigned skill levels for each virtual queue. When a caller is routed based on the criteria listed above, the Genesys strategy then routes the call to the next available agent with the highest skill level in that queue area.



b. Web

Currently there is no direct link between the contact center applications. CSR staff use the state website to assist with answering customer questions.

c. Paper Channel

CSRs can initiate tickets between the Siebel application and the retirement main line of business application known as Clarety. Unrelated to the contact center technology, CSRs also process inbound correspondence and transactions that are generated in Clarety and FileNet.

d. Message Board

CSRs also respond to message board requests through the member self-service application known as miAccount. This is a secure message board that allows authenticated users to get specific account information securely through the web. This information is not currently linked to the Siebel implementation, but this is a future enhancement that ORS would like to implement.

Quality Assurance

Call monitoring and quality assurance is provided by the NICE software. Calls are statistically sampled, evaluated and reviewed with staff by a quality analyst or supervisor. While screen capture calls are randomly sampled, audio is captured for every call.

Environment Quality

Background

The Department of Environmental Quality, Office of Environmental Assistance (OEA) has three customer service representatives in the Environmental Assistance Center (EAC) which serve collectively as a single point of contact into the Department of Environmental Quality (DEQ) and the Department of Natural Resources (DNR). The public can contact the DEQ and DNR via a toll free telephone number and/or electronic mailbox. The EAC provides fast, direct, one-on-one assistance and, if needed, referral to an OEA program specialists or DEQ/DNR program staff within the regulatory divisions. The contact center provides critical navigation support and is an integral component of the DEQ day to day compliance assistance and pollution prevention efforts. The EAC offers a direct public resource by linking callers to the correct DEQ and DNR staff and resources to answer their questions, facilitate voluntary compliance and pollution prevention activities, and enhance natural resource use and management decisions geared at maintaining, enhancing, protecting and preserving the environment and human health. The contact center averages about 19,000 calls per year and the peak "season" is March through October.

Operation

Customer service representatives within the EAC are available Monday through Friday from 8:00 am to 4:30 pm. People calling into the contact center are presented directly to a customer service representative unless all lines are in use, in which case they hear a recorded message for 2 minutes and are prompted to leave voice mail if desired. The EAC staff log in caller inquiry information and search system program, contact, and county assignments to direct inquiries to the DEQ and DNR staff assigned to handling the topic or program in the caller's geographic area. The system also serves to track resolution of the call and has a knowledge base that is provides a knowledge resource for system users to answer frequently asked questions. The system has two tiers of users: the EAC customer service representatives and the OEA program specialists. The EAC can resolve or assign inquiries to OEA specialists. When a call is directed to regulatory program staff person, EAC staff closes and resolves the inquiry.

Quality Assurance

Due to the small size of the contact center, computerized call monitoring is not necessary for evaluating the quality of the service. System reports are generated to evaluate the quality of the services provided and the quality of data entry.

Customer Satisfaction



Inquiries prompting an e-mail response provide customers with a link to complete a customer satisfaction survey. The system also allows system users to enter in positive or negative feedback for all inquiries along with specific details regarding the customer's feedback on the level of service provided.

Reports

Management reports are scheduled monthly and are used to generate DEQ metrics. The reports identify the type and number of inquiries, whether the DEQ response was timely, positive and negative customer feedback received, and the sectors serviced through the contact center.

Human Services

Background

The Michigan Department of Human Services (DHS) provides client self-service capability that supports online application for the Food Assistance and Low Income Home Energy Assistance Program (LIHEAP) State Emergency Relief. This web front-end (MI Bridges) captures client information and posts to the Bridges eligibility system for processing and final determination. Clients can also use a telephone based Interactive Voice Response (IVR) system to check on the status of a food assistance filing, and other details like their upcoming appointments, Case Worker information, pending verification details. In summary, Michigan currently offers these online services as part of the Bridges self-service module in both English and Spanish. Currently Interactive Voice Response system (IVR) receives 4,500 plus calls daily.

Michigan Department of Human Services is expanding existing MI Bridges functionality both online and IVR functionality by adding more programs like Cash Assistance, Medical Assistance, Child Development and Care and State Emergency Relief (SER) (Energy and Non Energy) assistance programs by the end of September 2011 in English and Spanish. IVR system will also be available in Arabic by the end of March 2012. It is expected that daily call volumes will go up at least by two to three folds.

Vision

Provide timely and accurately program benefit status along with other details to their users.

Values

Customer Focus
Continuous Service Improvement
Service and Proficiency

Operation

a. Telephony Gateway Infrastructure:

Users can call 1-800 telephone number to access the MiBridges IVR system. Using Genesys 8.1 Integration and Reporting and advanced routing IVR is capable of handling 84 concurrent calls. The maximum number of consecutive calls is limited to the eight inbound T1's. It also uses Nuance TTS to convert text to speech; for example the benefit amount of an individual is always dynamic in nature and differs person to person. This amount is retrieved from the database and converted to a sound for playback.

The Telephony Gateway Infrastructure consists of:

- I. Telephony Provider (Qwest)
- II. Gateway
- III. IVR Servers
- IV. IVR Management Server
- V. IVR Reporting Server

A call flows from the Telephony Provider (Qwest) to the IVR Server through the Gateway. IVR Servers are controlled by the Management Server. Reporting Server takes inputs from the IVR Application and the IVR Servers and reports the same in a user readable format.

b. Web Channel



Michigan Department of Human Services Clients can log on to the MiBridges Internet website and can create their login accounts and password to view their benefits and other details like pending verifications, upcoming appointments, status of their submitted applications, previous two months and one future month benefit details, their available correspondences (expected September 2011), also they can report any changes (expected December 2011) related to address, income etc.

Quality Assurance

Since this is a complete automated process, these calls are not handled through any contact centers or customer service representatives. No features like call sampling and recording.

Reports

Management reports in PowerPoint are produced daily using extracted data from Genesys Reporting server. During the expansion process these reports will be generated automatically using existing Bridges Reporting procedure.

Licensing and Regulatory Affairs - Bureau of Health Professions

Background:

The Department of Licensing and Regulatory Affairs – Bureau of Health Professions Licensing Division operates a contact center for Health Professionals. The contact center staff has approximately five (5) agents and is primarily responsible for issuing Health Professionals licenses. The customer inquiries can originate from a variety of channels (phone, internet, email, and white mail correspondence). The contact center services approximately 500 calls per day.

Operations:

Phone-

Basic Siebel Contact center Application with Genesys Voice Portal (GVP) Interactive Voice Response System (IVR) using a 1-800 telephone service.

Quality Assurance (Future):

Call monitoring and quality assurance as provided by the NICE software.

Customer Satisfaction (Future):

Provide email link to a customer satisfaction survey on the State of Michigan web site with responses analyzed by service center management and creation of a quality report.

Reports (Future):

The contact center will use Genesys CCPulse for real time reporting.

State (MDOS)

Background

The Michigan Department of State has approximately 70 CSRs and began a project in August 2005 to consolidate their telephone contact centers. By the end of September 2006, public calls made to branch offices, regional contact centers or the information center all route through a 1-888 number to a consolidated contact center. Calls from branch office staff route through a separate 1-877 number. The public line is staffed from 8:30AM to 5:00PM, Monday through Friday. The branch office line is staffed from 8:00am to 5:30pm, Monday, Tuesday, Thursday and Friday; 9:00am to 7:30pm on Wednesday; and 9:00am to 12:30pm on Saturday.

Operations

a. Phone Channel

The contact center receives an average of 11,000 calls a day and utilizes customer service representatives located in two geographically separate locations. Citizens are offered an opportunity for self-service



through the IVR and also have the option of speaking to a CSR. The CSRs are divided into three main groups: tier 1, tier 2 and tier 3, with each agent having a specific skill set stored in Genesys. Calls are routed to agents based on that skill set. However, in the main, tier 1 agents will get all initial calls from citizens unless there is a pre-existing service request on file or the customer is identified as a driver assessment customer by the IVR, in which case the citizen will be immediately directed to a tier 2 agent. Tier 2 agents also get all calls that cannot be answered by a tier 1 agent. Tier 3 agents solely handle phone calls from staff at the branch offices. There is a separate phone channel for staff located at branch offices allowing these calls to by-pass the main IVR and be routed directly to a tier 3 CSR.

All citizens wishing to speak to an agent will be asked for their Drivers License Number in the IVR and this is used to screen pop their personal identification information from the Siebel database and their contact log history on to the CSRs screen when the call is connected. The IVR and Genesys CTI determine the nature of the call and route the caller to the most appropriate, available, skilled agent using call routing strategies. Note: A similar screen pop function is also in place for vehicle registrations; however this functionality is currently turned off due to the inability of the speech recognition application to reliably and accurately identify alpha characters spoken by the caller.

All branch office staff will enter their employee number as well as a branch identifier at an Avaya prompt and this will be used by Genesys to screen pop the appropriate records when a tier 3 agent answers the call.

b. Web Channel

Branch office employees can log on to a Siebel eService application through an Intranet connection. They will login with a user name and password allowing them to create a service request or review progress on previous service requests. New service requests will result in receipt of an auto-acknowledgement and an instruction to visit the web site in a specified number of days for an answer. This service has also been made available to the MDOS Traffic Safety Division/Admin Hearing Section in the MDOS Legal and Regulatory Services Administration.

Reports

The contact center will use Genesys CCPulse for real time reporting. Monthly Siebel Actuate reports show the Service Request performance of the contact center. However, the Siebel Actuate reports are not currently being used by MDOS contact center management.

Future Strategy

a. Quality Assurance

The contact center would like to implement NICE call monitoring and quality assurance. In order to minimize costs, the agency would like to look at the possibility of leveraging the existing State NICE implementations.

b. Enhanced IVR

When MDOS implemented a Genesys-based IVR menu on its toll-free public line, the contractor at the time recommended that MDOS move the old Octel based menu structure into the IVR as is and then revamp/rewrite the menu system at a later date. The rewrite was never done and current menu structure is cumbersome for customers causing many to opt out of the system and speak with a customer service representative. Enhancing the IVR to make it more streamlined and user friendly is needed. Additionally, MDOS would like to explore incorporating the Record Lookup Unit ECP into the IVR to provide for a more efficient and cost effective system

c. Citizen Self Service over the Web

MDOS would like to consider the possibility of opening up web access for citizens. This might include allowing citizens to create their own service requests and then be able to revisit the site to retrieve the responses.

d. Expansion of Siebel to Other Divisions in Agency



There may be opportunities for other divisions to use the Siebel product. This could include other contact centers that could use the current application with the addition of some new roles and responsibilities and other areas where a new configuration is required.

e. White Mail

MDOS would like to consider enhancement of the system for the addition of a white mail channel for managing incoming correspondence the same as other customer contacts, utilizing an imaging component such as FileNet. This was a feature that MDOS wanted to have included in its original contact center design but was postponed for budgetary reasons. However, MDOS is currently scanning some of the white mail and attaching to Siebel service requests.

f. Knowledge Management Base

MDOS wants to expand and build upon the knowledge base being built into its initial contact center design, to add searchable documents and other resources and content, for its CSRs and other agency employees as well.

g. Virtual Hold

MDOS would like to consider incorporation of Virtual Hold technology (or a similar application) to improve the customer's experience when wait times become high. This technology would allow a customer to hang up the phone while still maintaining their place in the phone queue. When the caller gets near the top of the queue the system places an outbound call to the individual and directs them to the next available service representative.

The MDOS Consolidated Contact Center has primary goals of maximizing customer service with the use of a single toll-free line for channeling all incoming calls, while reducing wait times, and providing more timely, accurate information with a higher rate of first call resolution. A secondary goal is to provide this better service in an efficient and cost-effective manner, offering convenient options for customer self-service wherever possible. MDOS is also looking toward continuous improvement, with an eye toward adding future enhancements that will improve the customer's experience when contacting MDOS by phone.

Treasury

Background

The Treasury Customer Contact Division provides the contact point for taxpayers seeking account specific information and answers to Michigan tax questions. The division has a vision and values statement:

Vision

Provide superior customer service to taxpayers.

Values

Customer Focus

Continuous Service Improvement

Staff Quality, Service and Proficiency

Treasury has over 200 users. The Customer Contact Division operates a multi-channel contact center managing phone, IVR, email, web, inbound correspondence and certain outbound correspondence. It includes an on-site imaging and indexing operation. Customers are business and individual income taxpayers

The Michigan Guaranty Agency (MGA), also part of the Department of Treasury, administers the Federal Family Education Loan Program (FFELP) which includes the Subsidized Federal Stafford Loan Program, the Unsubsidized Federal Stafford Loan Program, the Federal PLUS Loan Program, and the Federal Consolidation Loan Program. It does so by guaranteeing the purchase of defaulted loans from FFELP lenders across Michigan. During its nearly 45-year history with the FFELP, MGA has guaranteed over \$14 billion in loans. Beginning July 1, 2010, no new loans are guaranteed under the FFELP, however, MGA has \$4 billion in outstanding loans that must be monitored, claims processed, or default payments collected. MGA also provides services to postsecondary institutions that include outreach activities aimed at



postsecondary students, technical support, workshops and other training opportunities. Services to borrowers are done through borrower information programs, financial literacy training, and customer assistance with all aspects of repayment.

Operation

a. Phone Channel

A combination of Avaya vector routing, Genesys IVR and Genesys CTI work to determine the nature of the call and route the caller to the most appropriate service, either with self-service or an agent. The peak call volume during tax filing season is in excess of 20,000 per day. The maximum number of consecutive calls is limited to the eight inbound T1's, but during 2010 this was never exceeded.

The Genesys IVR platform is capable of handling 192 concurrent calls, and currently supports three separate IVR operations (business taxes, income tax and MGA). The IVR includes a system to verify account specific information for Michigan Business Tax, Sales, Use and Withholding Taxes and Individual Income Tax and student loan collection status. Information such as the status of correspondence, refunds and returns, expected refund date, estimated payment verification, prior year return information, requests for copies of forms and licenses, copies of completed returns and paid refund checks is available. The IVR functions 24 x 7 and routes calls to agents during business hours.

There are three phone numbers in effect for customer use, one number for all business taxes, one for Individual Income tax customers and a separate number for MGA customers.

b. Web Channel

Business and Individual taxpayers log on to the Siebel eService application through a link from Treasury's web site. They enter a user name and shared secrets (i.e. account information specific to the return period) allowing them to access detailed account information. The web self-service feature allows them to create a Service Request, which will result in receipt of an auto-acknowledgement and an instruction to visit the web site when their answer is ready.

Taxpayer Siebel eService includes information similar to that found in the IVR application, including refund or return status, expected refund date, estimated payments, prior year returns status, status of correspondence, request address changes and request copies of forms, completed returns, and paid refund checks. Taxpayers can also ask account specific questions.

This channel has experienced rapid growth since its establishment, with 35% year to date increases between 2010 and 2011.

c. Paper Channel - Inbound

Inbound correspondence and some tax returns are batched, scanned and indexed using a FileNet Capture and IDL (Inbound Document Linker) applications augmented with a custom Visual Basic (VB) program written and supported by the current MiECC contractor. Documents are grouped into types and classes prior to scanning. Images are then loaded into the FileNet Image Servers. A look ahead into Siebel is made during indexing to ensure the account number entered manually for the image is a valid number in Siebel. All images create Siebel contacts and, in the case of inbound correspondence, open service requests are created. In addition, Collection Division billing correspondence indexes are electronically transferred to CRM, where a contact log and service request linked to the related CRM account are created through an Enterprise Integration Manager (EIM) Process. All service requests are routed to the appropriate CRM work groups.

d. Paper Channel – Outbound

Selected outbound mail is imaged by taking a copy of the print file from the print queue. The Xenos product is used to convert the print file into a tiff image and indexes, such as the key account number, are created by extracting this data automatically from the print file. The subsequent images are loaded to FileNet, then Siebel contacts are created for each account.

e. Email



Emails are received into various email boxes by tax type. The taxpayers receive auto-acknowledgements from the email software and the emails become work items in Siebel CRM that are routed to various work groups. In general, email is a channel experiencing declining volumes largely due to the security issues around sending account specific information via email. See above b., Web Channel.

Universal Queue

Genesys Universal Queuing has been configured to workflow inbound phone calls and Siebel service requests. This includes skills based routing to determine the attributes of telephone callers, selecting various call handling options and routing the call to the most appropriate agent. Currently only phone calls are actually pushed to the agents' desktops. Siebel service requests are categorized by different areas and are then selected manually by staff within their respective teams using queries.

Quality Assurance

Call and outbound correspondence quality assurance is supported by NICE software. Calls are randomly recorded then scored for adherence to quality standards by a pool of evaluators. Customer Service Representatives (CSR's) also have the option of recording calls on demand. NICE is also used by Customer Contact to evaluate outbound correspondence.

Reports

The contact center uses Genesys CCPulse for real time reporting of inbound calls. Avaya's CMS (Call Management System), which is supported by DTMB Telecom, is used for some weekly and monthly reporting although the agency would like to consider replacing these CMS reports with reporting from CCPulse to eliminate the additional costs of CMS.

Monthly Siebel and Oracle SQL reports show the Service Request performance of the contact center. Ad hoc SQL reports have been created by the contractor to analyze data recorded in Siebel. Reports are run and e-mailed out by the Opalis and Tidal schedulers



Attachment 9: Agency Environment Information

Contact Centers IT Technical Description – in alphabetical order

The descriptions represent the applications as they are at Contract execution.

1. Civil Service Commission

Overview

The MIHR contact center could be described as a mostly “out-of-the-box” Siebel Contact center 7.8 configuration. There is a custom-coded Websphere Application Server (WAS) knowledge base. There are 30 Customer Service Representatives on the phones, receiving approximately 500 calls per day, and up to 5 staff who act as tier 2 agents dealing with service requests.

Siebel

Currently, the Siebel base tables are updated via a series of custom programs on a nightly basis with key data provided by output files from the HRMN system. This process updates the Siebel Enterprise Integration Manager (EIM) tables using Perl and Java script programs. The Operational Data Mart (ODM) Enterprise Application is used to store employee, company, location, translation, department and job code in ODM Database and also used to upload data to the EIM tables in the Siebel Database. These programs allow only changes made to the employee data in the past day to be passed through to the Siebel EIM tables. However, once a month, a program completely refreshes all employee data in Siebel. This process also includes a direct insert into a Siebel base table.

Knowledge base

The content owners enter content into a Vignette 6 project. Content changes are migrated through a two-step process to the WAS application server that stores the content in XML format. Content is accessed through the Internet by State employees. Access credentials are captured by the login page and passed to a Lightweight Directory Access Protocol (LDAP) directory for authentication.

Telephony

Employees calling into the contact center are initially presented with several telephone menu choices. The contact center uses computer telephone integration (CTI) wherein employees may enter their employee ID or social security number and using Genesys the information is passed as a screen pop to the CSR in Siebel with the employee information contact log auto populated. Incoming callers who identify themselves as wanting employment verification, are in need of self service support, or are retirees of the State of Michigan will select those options and that will auto populate in Siebel with a predefined customer contact number.

eMail

The MI HR Service Center processes approximately 500 emails from three email sites. Auto acknowledgements are sent and then emails are captured and worked through the Siebel application using a series of predefined responses. Contact logs are generated in Siebel for each email sent and received.

Hardware

There are 3 hardware environments: production, test and development.

Reports

Management use reports from Qwest, the Avaya CMS system NICE QA reports, Access and Excel tracking reports and customized reports from Siebel.

2. DTMB-Client Service Center (CSC)

Overview

Avaya

The inbound 1-800 and local calls terminate on the Capital switch. They are routed to Genesys for processing. As an emergency provision, vectors have been written that, if Genesys is not working, the calls are routed to agents using a set of Avaya vectors.



Genesys

Genesys provides the IVR, screen pop and call routing functionality.

The IVR takes calls from the switch and routes via various menu options. The caller is asked for his/her employee id which forms the basis for the screen pop. In one scenario, the caller may choose to perform an automated network password re-set. In all other scenarios, the call is routed using skills-based routing to the most appropriately skilled agent. At the same time, the employee id lookup occurs in Microsoft Active Directory for the State of Michigan Domain. If a valid employee id has been provided, then information pertinent to the ID (identifying the caller) is provided in a screen pop to the agent. This information is used by the agent to search Remedy for caller information, existing cases or to start a new case.

Genesys creates the virtual call center. Genesys Interaction Workspace (IW) is used as the client application for the agents. CSC tier 1 agents are located primarily in Lansing and Detroit. Additional Field Service agents use IP Soft phone technology to access the Genesys system through the Capital switch. Tier 2 staff is located at the Operations Center in Dimondale, MI.

Interfaces

Automated network password re-sets

When a caller chooses to use the automated network password re-set option, he/she has 3 chances to do so successfully before being routed to an agent. If routed to an agent, then the agent accesses an existing Challenge Response System (CRS) database for questions and answers specific to the individual whom the caller purports to be. If the caller answers the questions accurately, then the agent uses adequate credentials to change the password on the associated account. A ticket is generated and closed to document the transaction. If any complications occur, such as no data is available in the CRS, then the agent will refer the caller to an authorized requestor for validation.

If a caller has previously registered a PIN in CRS, then automated re-set can be successful. In this case, the caller is asked to enter the numeric 4 digit PIN. The HRMN ID and PIN are validated in CRS. If valid, then the process continues with a Positive status being sent with the HRMN ID to Active Directory. The network account associated with that HRMN ID has its password re-set. The caller is told of the successful transaction and a new password. Additionally, data is sent to Remedy to document the re-set. Based on the HRMN ID, also stored in Remedy, the case is opened, documented as a successful network password re-set and resolved. The Remedy system automatically generates an email to the associated email of the account of the re-set.

The Genesys system integrates with the Symon Wallboard for displaying of contact center statistics that includes queue level statistics.

Hardware

There are 2 hardware environments: production and test.

Reports

Genesys CCPulse will be used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Avaya CMS, CRS and Remedy queries.

3. DTMB-Office of Retirement Services (ORS)

Overview:



The ORS contact center has Siebel as the core product with significant functionality also supplied by Genesys and Avaya components. At peak, there are over 50 customer service agents on the phone with another set of agents answering non-real time work items on Siebel. The current estimate of daily call volume that will use the 1-800 numbers is in excess of 3000 calls.

Siebel

The Siebel application uses mostly the out-of-the-box functionality from the Siebel Enterprise Contact center 7.8.2.16 product. Contact and Organization information in Siebel, refreshed from the Clarety every night, is used as the main person identifier and forms the basis for the screen pop at the CSRs desktop when they receive a call. Clarety is the Line of Business (LOB) Web application used by ORS to support Membership and Retirement processing. Siebel is used by staff to track communications with Members and Organizations, as well as to create and track Interactions/Service Requests (Activities/Tickets). Calls that cannot be answered by a tier 1 agent are transferred to a tier 2 agent.

Siebel-Clarety GUI Links

Siebel has secure connections to view the backend Clarety system for contact center agents. The type of information Siebel can query in Clarety is related to FileNet images, benefit information, demographic and worksite information.

As a front-end CRM system, service request may be created in Siebel. If the work requires transactions to be completed in Clarety, these requests are created in Siebel. The work originated in Siebel may also be enforced with Service Level Agreements, Prioritization Criteria, and/or Assignment and Due dates prior to being passed to Clarety. Updates to work statuses are passed back from Clarety to Siebel in real-time.

Siebel Virtual Business Components

Additional data elements originated and owned by Clarety are readily available to agents working in Siebel. This is accomplished by using a number of mechanisms including Virtual Business Components and Smart (context-aware) Links. The purpose is not to replicate all data, but to make it readily available in both systems. Virtual Business Components are read-only views providing access to real-time Clarety data using Siebel.

Telephony Call Flow:

Calls coming from the 1-800 Qwest T1 lines terminate on the General Office Building (GOB) switch. Avaya PBX directs customer calls to the Genesys IVR where callers are provided with self-service opportunities such as the Member Application Status transactions. Callers wishing to talk to an agent can opt out of the IVR and are asked for their ID, which is used to screen-pop the customer's information on the CSRs desktop when the call is answered.

Genesys: Computer Telephony Integration (CTI)

ORS' telecommunications applications improve Agent efficiency through the use of the Siebel-integrated Genesys CTI and Genesys GVP (Genesys Voice Portal). When ORS customers call, they are routed through the IVR and prompted to enter identifying information. This information is then processed by Genesys (CTI application) and produces a "screen pop" within Siebel, which assist the Agent in identifying the customer. Agents are also provided with Genesys soft phone toolbar capabilities in order to control call activity from their PC desktop.

ORS employs the Genesys 7.6 ERS Framework components in combination with AES, Gplus Adapter, and Siebel Communications Server in order to deliver "screen-pops" to Contact center agents using Siebel. This set of functions draws data from the Genesys GVP (Genesys Voice Portal) 48 Port IVR units connected to the existing ORS distributed Avaya Definity PBX/ACD switch.

VHT

ORS is currently implementing VHT for the contact center operations.

NICE System: (Monitoring and Recording System)

ORS uses the NICE Perform 3.1 Application Suite as its digital multimedia monitoring and recording solution. This hardware includes a NICE Logger for Voice Storage; Screen Capture and Logger for navigation recording; and the NICE Call Logging System (CLS) for storage of call details. The software components include NICE



Universe, Scheduler, Forms Designer & List Editor, Evaluator, Monitor, Web Reporter, and Record on Demand.

In order to gather business call details that are not provided by the switch, the NICE Systems are integrated with Genesys TServer to obtain the data from the IVR.

Avaya

The inbound 1-800 calls terminate on the Avaya PBX switch. They are routed depending on the Dialed Number Identification Switch (DNIS) number to different vectors and then, where appropriate, adjunct routed to Genesys. However, the vectors have been written that, if Genesys does not pick up the calls in a certain period of time, the calls are routed to agents using a set of Avaya vectors.

Legacy Interface:

Siebel EIM- Enterprise Integration Manager: EIM is used to bring data from Legacy systems (Clarety) and other sources into temporary staging tables, where business rules are applied before the data uploads or updates Siebel-resident data.

EAI – Enterprise Application Integration: EAI is used with Siebel to send or receive real-time updates from other applications. At ORS, EAI is used to send and receive real-time updates between Siebel and Clarety.

Microsoft SQL Server Transactional Replication: A subscriber database uses this mechanism to receive synchronized data from Clarety, and the data is then normalized or de-normalized to Siebel's required format.

Siebel Workflow/Business Services/HTTP Post Method: The combination of these mechanisms is currently used to send information inserts and updates from Siebel to Clarety.

Security Integration: ORS currently uses authentication mechanisms external to "The System" (Clarety and Siebel). Both applications are setup to use a common LDAP (ADSI) server, allowing for common authentication. Transactions between these applications use header authorization acquired from the LDAP server.

Other Data Source

Virtual Business Components are read-only views providing access to real-time Clarety data using Siebel. VBC views in the contacts business object pull information from an outside source (Clarety) using a VBC connection. VBC connections are to a SQL Server database that stores Member information created by the Clarety System.

Hardware

There are 3 hardware environments: production, DR/test and UAT/development.

Reports

Genesys CCPulse is used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics. Genesys VAR is used for IVR reporting.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Qwest, Avaya CMS, Siebel Actuate, and SQL Queries.

Workforce Management System

ORS uses the Genesys Workforce Management Application Suite to forecasting, employee scheduling, monitoring of real-time agent-adherence and intra-day contact-center performance. The software components include Genesys Web/Supervisor module and WFM Configuration Utility.

4. Environment Quality

Overview



The DEQ-EAC contact center is mostly “out-of-the-box” Siebel CRM Base 7.8 configuration

Siebel

The Standard Siebel Call Center Application with the following capabilities is used - service requests, solutions (knowledge base), program contacts, staff, home page and administration. The knowledge base provides a knowledge resource for system users to answer frequently asked questions. The system has two tiers of users: the EAC customer service representatives and the OEA program specialists.

Telephony

There is no Genesys call routing used for DEQ-EAC

Email

DEQ uses an Outlook email mailbox to track and assign in coming tasks for in-coming calls; emails are only attached to Siebel records as a source reference to ticket/case

Hardware

There are three hardware environments: Production, QA, and Development

Reports

Siebel pre-built reports are used for reporting and these are exported to MS Excel file.

5. Human Services

Overview

The architecture of the MI Bridges / IVR system is an n-tier design that separates the application into tiers or layers that are architecturally independent of the other. The MI Bridges / IVR system consists of a presentation tier, business logic tier and a persistence tier.

Presentation (Web) Tier

Also known as the Web tier, or presentation layer, this governs what the users see at their workstation, but in case of the IVR it governs what users experience on the telephone. A HTTP server hosts the display interface. The developed Graphical User Interface (GUI) must be compliant with the Americans with Disabilities Act (ADA) and is geared to those of varying backgrounds, languages and skill levels. The Web tier for MI Bridges and IVR is specifically developed to capture information, not process it. It allows information to pass through it to the Business Tier, or application layer, where multiple processors stacks route the data and link to data.

Business Tier

The Business Tier is the layer where business logic is run. The processing for check my benefits, apply for benefits and report my changes is performed within the Business Tier.

This layer is the most critical to the solution and is broken apart from the Web tier to allow the State to grow the application component of the solution as needed without interfering with, or having to rebuild, the front end—the Web tier.

Developer tools, such as IBM Rational Software Architect/Modeler in combination with J2EE executing on IBM WebSphere Application Server provide ready-to-use application components that would otherwise have to be custom built for integration. Isolation and integration are key elements of the overall solution.

Persistence (Database) Tier

The first two layers of the solution act like separate components of the overall solution that enable specific activities to occur before allowing the user to access the database where sensitive data resides. The Database Tier is designed to provide the State added security. It uses port 1521 for Oracle or as defined by the technical requirements and is hosted in Zone 3 a very highly secured environment. Roles providing access to the application are built into the MI Bridges system. The database environment, where data is read, updated and processed according to the business rules configured for operations, is accessed after a series of approvals and processing functions occur within the previous two layers of the system. Stored procedures and triggers within the Database Tier enable mass updates, deletes and other operations to occur quickly within this layer.



These are defined as a component of the application logic. The Oracle database component is necessary to provide the premium processing capabilities required by the State.

MI Bridges IVR Software Architecture:

The MI Bridges IVR application includes software that resides on standard desktops and servers. Examples of the desktop components include:

- Microsoft Windows XP,
- Microsoft Internet Explorer v5.5 or later (Secure Socket Layer (SSL) enabled with 128-bit encryption)
- Compatible with Firefox, Chrome and Safari browsers
- Adobe Acrobat Reader 8.1

Server-side software components include:

- Sun Solaris 10 Operating System
- Microsoft Windows 2003 Server Enterprise Edition Operating System
- MI Bridges IVR application
- Genesys GVP application
- Oracle Database 11.2g Enterprise Edition
- IBM WebSphere Application Server, v 7.0
- IBM HTTP Server, v 6.0.2.31
- IBM WebSphere Business Integration Software, v 7.5.0
- Novell eDirectory, v 8.8.2
- Informatica Power Center v 8.1.1
- SAP DQ XI (for address verification)

Tool Support Servers

Tool support servers that are Windows based have dual 3.4 GHz/2MB Cache Xeon processors and 70 GB hard drives. The following servers in the indicated environments require 2 GB memory:

- FAST4J Tool Server for Development
- Rational Tool Server for Development

The following servers in the indicated environments require 8 GB memory:

- Build Workstation attached to the SAN

The Rational data server resides in the Development environment and is a Sun Fire V240 with dual SPARC Ultra III processors and 32 GB memory.

Servers

DTMB and DHS utilize both Dell and the Sun family of servers for MI Bridges IVR project. For each server, different configurations of processors and memory are required depending on the environment in which it resides. All servers are updated to the most recent patch level required by the hardware contractor and contain the necessary anti-virus software as defined by the State. The Sun Fire servers, with the exception of the X4100, run the Solaris 10 operating system. The X4100 run the Windows operating system.

Virtualization

- State's Virtual server farm is used to host Virtual Machines (VM's) for MI Bridges Web servers and MI Bridges Application servers.
- Capacity of VM's in the Virtual Server farm is fed by multiple physical servers.
- SUSE Linux 10.2 Enterprise is the OS used in the VM's.
- VM's for Web/Application servers reside in Application DMZ Zone 1.49.
- Browser requests for MI Bridges are routed to a CISCO Load Balancer which resides in DMZ Zone 1 for Internet Access.
- Multiple VM's used by Web and Application servers for both Production and DR to achieve Load Balancing/Failover/Disaster Recovery.



- System upgrades/maintenance done on the feeding physical servers one by one in the virtual server farm. No downtime due to VM Motion.
- Compuware Vantage is used to monitor VM's in addition to other MI Bridges and IVR servers.
- Each of the Web server VMs has 1 GB of RAM and 1 vCPU (1 Virtual CPU Core); this can be increased based on stress testing and capacity planning.
- Each of the Application server VM has 4 GB of RAM and 2 vCPU (2 Virtual CPU Core).

Self-Service and IVR Networking Infrastructure:

The MI Bridges and IVR application is accessed via a wide-area TCP/IP compliant network infrastructure that is provided and maintained by the State. The infrastructure includes firewalls, fiber connections, telephony ports, SAN connections, workstation LANs, project file systems, etc.

MI Bridges and IVR physical environments housed within State facilities and use the existing State network infrastructure. Thus the architecture depends on this infrastructure to be the primary channel to deliver the MI Bridges and IVR application to users throughout the State.

Network monitoring services for the MI Bridges solution is provided by the State and includes trouble shooting assistance and reporting as needed by the project.

Telephony Gateway Infrastructure:

The Telephony Gateway Infrastructure consists of:

- Telephony Provider (Qwest)
- Gateway
- IVR Servers
- IVR Management Server
- IVR Reporting Server

A call flows from the Telephony Provider (Qwest) to the IVR Server through the Gateway. IVR servers are controlled by the Management server. Reporting server takes inputs from the IVR application and the IVR servers and reports the same in a user readable format.

The MiECC service to DHS is limited to maintaining the IVR software (Genesys) architecture and support - the IVR application and the web application are maintained by DTMB with another partner contractor.

6. Licensing and Regulatory Affairs - Bureau of Health Professions

Overview

The LARA-BHP contact center has Siebel as the core product with additional functionality provided by Genesys and NICE.

Siebel

The Siebel application uses out-of-the-box functionality. Telephone contact logs are created automatically by the system. User and backend interfaces are utilized to allow LARA-BHP to electronically log call activities and service requests. A data interface from backend systems is used to populate customer demographics data into the Siebel contact center database.

Genesys

Genesys provides interactive voice response (IVR) configured to utilize prompts and rules to allow backend data dip integration for self service. IVR error handling and global functionality, utilizing standard numeric operations (press 0, or press 9 to go back) is incorporated into processing.

NICE

NICE Perform has been configured to monitor and record agent calls.

Hardware

There are three hardware environments: production, test and development.

Reports



Future requirements to be determined.

7. State

Overview

The MDOS contact center has Siebel as the core product with significant functionality also supplied by Genesys and Avaya components. At peak, there are over 70 customer service agents on the phone with another 10-15 agents answering non-real time work items on Siebel. The current estimate of daily call volume that will use the 1-888 number is in excess of 10,300 calls. There may be up to 10 concurrent eService users from the branch offices using the system to create or review service requests.

Siebel

The Siebel application uses mostly the out-of-the-box functionality from the Public Sector Contact center 7.5.3 product. Driver and vehicle information in Siebel, refreshed from the mainframe every night, is used as the main account identifier and forms the basis for the screen pop at the CSRs desktop when they receive a call. Calls that cannot be answered by a tier 1 agent are transferred to a tier 2 agent and, if the call can still not be answered satisfactorily, a service request is created. Service requests are worked by non-phone staff and, after completion, the tier 2 agent calls the citizen back with the resolution.

There is an eService application that allows branch office staff and other work units in MDOS to login to Siebel and create a service request. Subsequently they can also use the application to review the status of their service request.

Telephone Call Flow

Calls coming from the 1-888 Qwest T1 lines terminate on the General Office Building (GOB) switch. There are two types of calls: one coming from a citizen and the other from branch office MDOS staff. Branch office staffs use a 1-877 number and this allows Avaya to differentiate the callers.

An Avaya vector directs citizen calls to the Genesys IVR where callers are provided with various self-service opportunities. Callers wishing to talk to an agent can opt out of the IVR and are asked for their Drivers License Number, which is used to screen-pop the citizen's information on the CSRs desktop when the call is answered. Note: A similar functionality exists for vehicle registration number; however this functionality is currently turned off in the IVR due to the systems inability to accurately recognize alpha characters.

Calls coming from branch office staff are directly routed to tier 3 agents after using a vector to capture the employee ID number and a branch identifier which is used to create a screen-pop on to an agent's desktop.

Genesys

Genesys provides the IVR, screen pop and call routing functionality.

The IVR takes citizen calls from the switch and routes the citizen through various self-service options. There are many points where the caller can opt out to speak to an agent. If the caller chooses to opt out, Genesys captures where opt out takes place and makes a determination, based on a series of business rules, which tier 1 agent skill level is required to answer the call. The call is routed using skills-based routing to the most appropriately skilled agent. In the process, the caller is asked for their Drivers License Number which forms the basis for the screen pop. Scansoft speech recognition software allows the caller to speak this number. At the same time, a data dip takes place into the Siebel database to determine if the caller already has an open service request. If one exists, Genesys routes the caller past the tier 1 agent straight to a tier 2 agent queue.

Genesys also picks up the branch office staff calls from a vector along with the collected employee ID number and routes these to a tier 3 agent queue. Tier 3 agents receiving the call get a screen pop of information related to that branch office employee.

Genesys creates the virtual call center. CSR tier 1 agents are located in both Lansing (GOB switch) and Detroit (Detroit Cadillac Place switch).

Avaya



The inbound 1-888 calls terminate on the GOB switch. They are routed depending on the Dialed Number Identification Switch (DNIS) number to different vectors and then, where appropriate, adjunct routed to Genesys. However, the vectors have been written that, if Genesys does not pick up the calls in a certain period of time, the calls are routed to agents using a set of Avaya vectors.

Legacy Interfaces

Mainframe

The MDOS mainframe interface is similar to that used by Treasury. The Databridge product is used to extract audit files from the mainframe and place the data into Oracle tables. PL/SQL statements are used to populate Siebel Enterprise Integration Manager (EIM) tables. Finally a Siebel EIM configuration file .ifb file runs and populates the Siebel base tables.

A series of “hot keys” have been created to import specific information from the mainframe into a Siebel applet using a .Net connector. The information coming through the connector is not stored in Siebel.

Other Data Sources

Some views in the contacts business object pull information from an outside source using a VBC connection. One VBC connection is to a Microsoft Access database that stores a record of letter correspondence generated in MDOS and sent to citizens.

Hardware

There are 3 hardware environments: production, test and development.

Reports

Genesys CCPulse will be used for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts. Genesys CCAnalyzer will be used for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Other Reports

There are several other sources used to supply management with operational and strategic data about the contact center. They include Qwest, Avaya CMS, Siebel Actuate, and SQL Queries.

8. Treasury

Overview

The Treasury contact center has Siebel Contact center 7.8 as the core product, but significant functionality is also supplied by Genesys, Avaya, NICE, FileNet, Tidal, Opalis and Xenos components. Although CSRs are only on the phones between 8:00 am and 4:45 pm, Monday through Friday, the IVR and Siebel eService for taxpayers is available 24 x 7. At peak, there are over 40 customer service representatives on the phone with another 180 staff working non-real time work items on Siebel. The annual contact volume (all channels) is in excess of 2.2 million contacts.

The support team provides break/fix response and more formal major scheduled release updates. The business user maintains some administrative functions within Siebel.

Siebel

Contacts in all channels (phone, IVR, web, email, white mail and walk-ins) are recorded in Siebel Contact center 7.8. Most telephone contact logs are created automatically by the system with agents choosing a reason and resolution code combination from a drop down list. Siebel populates the reason and resolution codes for IVR and self-service web contacts.

Non-real time work items are created automatically through the inbound correspondence channel or via the Siebel eService access by the taxpayer. Manual service requests can be created by any agent. The Siebel Communication tool bar controls the agent’s access to real time work items.

Taxpayers can sign into Siebel eService from the web to view account status information and create a service request. A security adapter has been built with the help of Siebel to facilitate the authentication process. The



Siebel eService application also has front-end tables built in that allow business user analysts to change certain responses such as the estimated date when a specific taxpayer's refund will be issued. .

The contractor is responsible for monitoring Siebel e-service site functionality 24/7.

FileNet

The FileNet Capture and IDL (Inbound Document Linker) software is configured and augmented with a custom VB program (written and supported by the contractor) to support the scanning and indexing operation. Xenos is used to capture print files and enable outbound correspondence to be stored in FileNet. Images are created for various classes of documents: inbound correspondence, outbound correspondence, tax returns and registration forms. Treasury staff access FileNet through Siebel or directly through FileNet. Each document class is treated differently for creation and routing of service requests in CRM.

a. Inbound Correspondence

Inbound correspondence is batched for different Treasury work groups and scanned. Images are indexed manually with the account number that is verified with a look ahead into the Siebel database to insure the account exists in Treasury's CRM database. Documents that are difficult to code are held open in FileNet and routed for indexing to separate groups of Subject Matter Experts. Once all documents in a batch are indexed, the images are then committed to FileNet Image services. A list of the images goes to the FileNet IDL product that has been configured and augmented with a custom VB program to create an inbound Siebel contact log and, when appropriate, an open Siebel service request. The Treasury legacy system requires notification of the receipt of certain classes of inbound mail and, therefore, a file is created in FileNet and sent directly to that system. Once inbound correspondence service requests are completed, Siebel creates a daily feedback to several legacy systems including TREAS, MARCS (the collection system) and SAP.

b. Outbound Correspondence

There are two routes for importing outbound correspondence into Siebel.

- i. Outbound correspondence that is produced by the tax legacy systems including SAP has been identified by the business to be stored in FileNet and attached to Siebel as an outbound contact. Xenos is used for this route and it captures the print file for each type of outbound correspondence and, based on pre-built templates, parses out some key data to create an index and stores the document image as a tiff file. FileNet IDL links the image to the Siebel account and creates a closed contact log.
- ii. Outbound correspondence that is in the form of a Word document (not generated by legacy systems) can be attached to the contact log/service request on an individual basis.

c. Tax Returns

The indexes of tax returns are stored in FileNet and made available to staff desktops via a FileNet Images Services look up or through Siebel CRM.

d. Historically Scanned Documents

Other documents (usually those with priority handling) are worked by CSR's and then imaged as historical documents in FileNet. Siebel workflow creates a closed contact log linked to the related CRM account with the appropriate reason and resolution codes for historical images.

Telephone Call Flow

Treasury has two main telephone contact center groups: Individual Income Tax (IIT) and Business Tax. The call flow includes 24 x7 access to the Genesys IVR. Several Genesys virtual call queues are created in front of the agents to allow specialized customer service. The Genesys configuration is done by the contractor. The Avaya ACD vectoring and programming is done by DTMB Telecom. The Avaya ACD messages for these vectors and the IVR are developed and recorded by Treasury business users.

MGA has one telephone call center group. The Genesys IVR for MGA has restricted hours due to the need to access Sallie Mae. MGA's IVR application is available Monday through Friday 7:30 AM -9:00 PM and Saturday 9:00 AM - 1:00 PM.



Genesys Screen Pop, Routing and Universal Queuing

Genesys Computer Telephony Integration (CTI) is used to provide basic screen pops for incoming and transferred telephone calls, and manage call waiting queues (on the switch) for Income Tax and the Business Tax lines. Account identifying data is captured in the IVR, and is passed to Genesys CTI, which queries the Siebel database to determine some pertinent characteristics of the caller. Genesys CTI then routes the call through various call treatments and ultimately to the most appropriate skilled agent. The Genesys Gplus adapter to Siebel allows the CSR to get the taxpayer account information on their screen in a screen pop when they answer the call. If Genesys IVR and CTI are not available the default Avaya vectors have been designed to provide an alternative routing to the agent.

Genesys has been configured to route non-real time items, although this functionality has currently been turned off. For example, Siebel service requests would be sent to Genesys and would effectively route them in much the same way as telephone calls are routed. Agents would have a work state that would make them available for either real time items (phone calls) or non-real time (service requests). To get non-real time items today, CSRs sign into an AUX code to work correspondence and pick service requests from their group's list of items.

Genesys Interactive Voice Response (IVR)

The IVR application has 5 production servers including two GVP servers, Eight T1 circuits behind the Avaya G3 switch. The test system includes two servers and one T1.

The IVR provides the taxpayer with self-service options that require authentication using shared secrets from the related account's CRM data. Credentials are collected in the IVR and passed to Siebel for verification. This connection is through an XML request over an HTTP connection to the Siebel application server. An approval returns taxpayer information in XML format to the IVR, which parses out the necessary data for the response to the taxpayer. Similarly, the MGA IVR collects credentials and passes the data to Sallie Mae for verification via web services. The web service passes back data from Sallie Mae necessary to complete the call. Data is exchanged in an XML format. Text-to-speech response functionality exists only for playing back. Many system responses requires messages, in which case the system picks from a number of pre-recorded messages that are played as required. The IVR application also has front-end tables built in that allow the business user analysts to change certain responses such as the estimated date when a specific taxpayer's refund will be issued.

Finally at the end of the call, when the taxpayer hangs up or pushes out to the agent call flow, a Siebel contact record is put into the Activity log.

Empirix services are used to monitor IVR functionality 24/7. This service is covered under a separate contract.

NICE Call Monitoring and Recording

The NICE Perform 3.X application has been configured to provide quality assurance and record on demand functionality. It monitors and records agent calls, forming an integral part of Treasury's quality system. The NICE window displays agent and channels, including real time information. Calls recorded contain voice and screen. Screens can be monitored/recorded/played.

Currently any changes or upgrades to this system are provided directly through NICE systems. NICE must connect to the Genesys T server via a pre-built connector installed by NICE.

Interfaces

a. Legacy

Siebel receives data each night from the Unisys mainframe. The Databridge product is used to extract audit files from the mainframe and place the data into Oracle tables. PL/SQL statements are used to populate Siebel EIM tables. Finally, an IFB process runs and populates the Siebel base tables.

b. SAP



Siebel receives data each night from SAP-XI which is initially loaded into temporary Oracle holding tables. PL/SQL statements are then used to populate Siebel EIM tables from there. Finally, an IFB process runs and populates the Siebel base tables.

c. Inbound Correspondence

Legacy system and SAP processes require immediate notification when a taxpayer responds to a Treasury request by submitting a letter or returning a completed form. To facilitate this requirement, a file is generated in FileNet from the imaged and indexed correspondence and sent to a legacy host.

d. Security Adapter

A detailed program has been created to capture credentials and authenticate taxpayers accessing the Siebel system through the web. This adapter has been approved and validated by Siebel.

e. Genesys

The Genesys Gplus adapter for Siebel is used to support communication between Genesys and Siebel. This supports many functions including screen pops and the Siebel communications tool bar that provides telephony control to agents at their desktop. Genesys does access Siebel directly to provide the data for routing decisions.

f. MARCS

Information about inbound correspondence received in the Collections/MARCS system is loaded into Siebel using the EIM process, creating Siebel service requests. A daily extract file is also created within Siebel containing updates on completed MARCS correspondence. This extract file is taken as an input into MARCS.

g. FileNet CIS

This product facilitates the communication between FileNet and Siebel. It allows service requests and contact logs to be created in Siebel and allows CSRs to access FileNet attachments by clicking on an icon within a Siebel window.

h. Scheduling Software

Tidal and Opalis are currently used to schedule interface data transfer. In the daily Treasury CSIP Refresh process, the data is extracted from the legacy and SAP systems and sent to the Siebel EIM tables. Scripts are used to load data from EIM tables to the Siebel Base tables. All scripts and processes necessary to refresh the Treasury data through to the Siebel Base tables, and all other automated scripts or reports will be automated to Opalis/Tidal job scheduler. DTMB supports the job scheduling programs.

i. Sallie Mae

The MGA IVR authenticates the caller and reads information back from the Sallie Mae system via web services. DTMB supports the web service for Sallie Mae.

j. Treasury Centralized Correspondence system (a.k.a. "the letter writer")

The MGA IVR offers the caller several options to receive correspondence (ex, paid in full letter, payoff quote, etc.). When the caller opts to receive correspondence the IVR generates a request to the Treasury Centralized Correspondence system via web services. DTMB supports this web service.

k. Centralized Electronic Payment Authorization System (CEPAS)

Beginning in August 2011, the MGA IVR will transfer callers who wish to make a payment to a new CEPAS IVR offered by vendor First Data Government Solutions (FDGS). This is a straightforward call transfer to a 1-800 number

Hardware

There are 3 hardware environments: production, test and development.



Reporting

Genesys CCPulse

Treasury utilizes the Genesys CCPulse application for real-time viewing of statistics for all virtual call queues, agent statistics, group statistics, and queue volume alerts.

Genesys CCAalyzer

Treasury utilizes the Genesys CCAalyzer application for historical reporting for all routing points, call queues, virtual call queues, agent statistics, group statistics, and Customer personalization call tracking statistics.

Genesys Voice Application Reporter (VAR)

Some business users obtain historical and real time IVR reporting information from the VAR application. This system provides information on customer call path utilization within the IVR and success rates for calls serviced within the IVR.

Avaya CMS (Call Management System)

Some business users still rely on CMS reports. CMS is supported and maintained by DTMB Telecom. If for some reason Genesys reporting is lost, CMS can provide some level of back up.

EDMS Metrics

There is a database that consists of a custom read-only MS Access application built to provide supervisors with statistical reports on FileNet imaged documents. This allows business users to confirm that all inbound and outbound correspondence put into the document imaging is ultimately received into Siebel and stored correctly in FileNet.

Other Reports

There are other sources used to supply management with operational and strategic data about the contact center. These include Avaya CMS, and Siebel and Oracle SQL Queries.

Development & Testing

Siebel CRM and eService, Genesys and FileNet component and system testing is performed by the contractor. There are CRM and Genesys development environments and a FileNet development/test environment. DTMB supports the related servers and applications for CRM, Oracle databases and security access controls for each environment.

Avaya ACD vectoring, programming and message assignment are supported by DTMB Telecom.

Dedicated business user teams of 2 to 4 analysts identify new enhancements, work with the contractor to develop business requirements, create wording for messages, and menus in the Avaya ACD, Genesys IVR and eService web screens. The business user creates test scripts with the assistance of the contractor, maintain the various channels test script libraries, assist in identifying new test data requirements and lead the user acceptance test teams for Siebel CRM, Siebel eService, Genesys, Avaya ACD, Genesys IVR, and FileNet. This user team also maintains the CRM administrative tables and selected Genesys administrative tables.

The heaviest development period occurs during June through December. Other Treasury CRM point releases occur during the rest of the year. Addition of new teams, classes and document types to FileNet occur throughout the year. Business owner signs off on enhancements / changes in all channels before they are moved to production.

Security

The contractor shall treat and handle Department of Treasury personal, confidential or sensitive data it receives in accordance with the terms of this Agreement, State of Michigan policies and the laws of the State of Michigan and the United states.

Future Development



- Treasury has started plans for development of replacement systems for Business Registration and combined Sales, Use and Withholding over the next few years. These replacement systems will require the rebuild of daily EIM refresh processes from these legacy systems and expansion of business account data elements in CRM.
- Consideration for the development of live chat and other “social media” contact methods such as text messaging is in the future. Security considerations are paramount, but infrastructure is not currently in place for these channels.
- Ability to add additional taxes and interface with COTS/ERP systems such as SAP. For the new Corporate Income Tax (CIT) and Flow Through Withholding, using the XI component to query the SAP production data real-time via Siebel/CRM
- Ability to add new taxes to IVR systems and provide enhanced information.
- Ability to interface with other telephony systems, including VOIP.
- Replace existing scheduling tool from OPALIS to TIDAL.
- Measurement of first contact resolution is also a desired outcome of any system enhancements.
- Ability to accept and log electronic documents sent from customers into FileNet such as electronic faxes and attachments to eService service requests.