January 27, 2021

To Whom It May Concern:

Calhoun Community College will receive sealed proposals for Contact Center Services, RFP #21-07, in its Business Office until **Tuesday, March 2, 2021 at 1:00 PM** for the item(s) described and specified on the attached sheet(s). All proposals received after this time will not be considered. The proposals will be publicly opened and read aloud. A **Mandatory Pre-Proposal Conference will be held on Tuesday, February 16, 2021 at 1:00 PM in Room 150 of the Math, Science, & Administration Building on the Tanner, AL campus.**

General Conditions and Instructions to Vendors:

1. All proposals are to be in sealed envelopes with the **opening date and RFP number to be on the outside of the envelope.** Proposals should be mailed to: Calhoun Community College, ATTN: Vanessa Looney, P.O. Box 2216, Decatur, AL 35609 or 6250 U.S. Highway 31 North, Tanner, AL 35671. If you have questions regarding this RFP, contact Vanessa Looney, Director of Purchasing & Accounts Payable @ 256-306-2686. We will not accept proposals that are faxed or emailed. Proposals must be **received** by the time and date listed above, not postmarked. Please note that Fed-Ex, UPS, and USPS have experienced delivery delays due to COVID-19. Proposals delivered by Federal Express, Airborne Express, and all other delivery services must be labeled with “RFP enclosed” along with the opening date and RFP number on the **outside** of the delivery service’s envelope.

Proposals may be hand delivered to Vanessa Looney in the Business Office on the third floor of the Math, Science, and Administration Building on the Tanner campus between the hours of 8:00 a.m. and 4:30 p.m., Monday through Thursday (except holidays) or may be brought to the RFP opening meeting. Masks are required while on campus. If vendors would like to attend the RFP opening and hand deliver their proposal, only ONE (1) representative from each company will be allowed to attend the RFP opening in order to maintain social distancing guidelines due to COVID-19. Masks will be required at the RFP opening. Note the location of the RFP opening meeting and allow sufficient time for parking and arrival to the RFP opening on time; no proposals will be accepted on the date of the RFP opening after the hour specified for the meeting to begin. The RFP opening will begin **at 1:00 PM on Tuesday, March 2, 2021 in Room 150 of the Math, Science, & Administration Building.**

2. Only written modifications to proposals will be accepted.

3. The College reserves the right to accept proposals in any combination, or reject any proposal or part thereof and to waive any technicality in the RFP which in its sole
discretion is in the best interest of the College. The College expressly reserves the right to reject all proposals if, in its sole discretion, the College believes the rejection of all proposals would be in the best interests of the College. Awards may be issued to multiple vendors.

4. **Attendance at the Mandatory Pre-Proposal Conference on Tuesday, February 16, 2021 at 1:00 PM in Room 150 of the Math, Science, & Administration Building on the Main Decatur Campus is required in order to submit a proposal and it be considered.** See Section on Mandatory Pre-Proposal Conference for additional guidelines.

5. After the proposals are opened, all proposals become the property of the College and will be made available for public inspection.

6. The proposal is to be made without connections with any other person, company, or party making a proposal and is to be in all respects fair and in good faith, without collusion or fraud.

7. Calhoun Community College may cancel any agreement with a successful vendor at any time with a 30-day written notice. In the event that the vendor wishes to not renew the contract, vendor must give a sixty (60) day written notice before the end of the contract.

8. Nonresident Bidder Information: Section 39-3-5 of the Alabama code provides as follows:

(a) In the letting of public contracts in which any state, county, or municipal funds are utilized, except those contracts funded in whole or in part with funds received from a federal agency, preference shall be given to resident contractors, and a nonresident bidder domiciled in a state having laws granting preference to local contractors shall be awarded Alabama public contracts only on the same basis as the nonresident bidder’s state awards contract to Alabama contractors bidding under similar circumstances; and resident contractors in Alabama, as defined in Section 39-2-12, be they corporate, individuals, or partnerships, are to be granted preference over nonresidents in awarding of contracts in the same manner and to the same extent as provided by the laws of the state of domicile of the nonresident.

(b) A summary of this law shall be made a part of the advertised specifications of all projects affected by this law. (Acts 1984, No. 84-228, p. 348; Act 2001-637, §1.)

9. **Alabama laws require that, as a condition for the award of a contract by a college to a business entity or employer with one or more employees working in Alabama, the business entity or employer must provide documentation of enrollment in the E-Verify program. During the performance of the contract, the business entity or employer shall participate in the E-Verify program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. The contractor’s E-Verify Memorandum of Understanding must be**
included with the proposal. If you do not believe these requirements are applicable to your entity, include an explanation justifying such exemption. An entity can obtain the E-Verify Memorandum of Understanding upon completion in the E-Verify enrollment process located at the federal web site www.uscis.gov/everify.

The Alabama Department of Homeland Security (http://immigration.alabama.gov) has also established an E-Verify employer agent account for any business entity or employer with 25 or fewer employees that will provide a participating business entity or employer with the required documentation of enrollment in the E-Verify program. An Employer Identification Number (EIN), also known as a Federal Tax Identification Number, is required to enroll in E-Verify or to establish an E-Verify employer agent account.

10. In submitting a proposal, the vendor agrees to execute a contract incorporating the General Conditions and Instructions to Vendors for any and all items which collectively shall constitute the contract, and if deemed required to execute Payment and Performance Bonds. Failure to do so shall result in forfeiture of RFP security.

11. RFP awards are subject to change or cancellation due to unanticipated decrease in funding (including tuition, local, state, or federal). RFP awards are also subject to change or cancellation due to changes in local, state, federal laws, regulations or policies or in changes in the policies of the Alabama State Board of Education or the Department of Postsecondary Education.

12. Act 2001-955 requires the Disclosure Statement (included with this RFP) be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of $5,000.00.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
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<tbody>
<tr>
<td>January 27, 2021</td>
<td>Issue RFP</td>
</tr>
<tr>
<td>February 11, 2021</td>
<td>Deadline for Questions to be Submitted</td>
</tr>
<tr>
<td>February 16, 2021</td>
<td>Mandatory Pre-Proposal Conference</td>
</tr>
<tr>
<td>March 2, 2021</td>
<td>Proposals Due/RFP Opening</td>
</tr>
<tr>
<td>March 3-17, 2021</td>
<td>Evaluation/Vendor Presentations/Selection of Vendor</td>
</tr>
<tr>
<td>April 1, 2021</td>
<td>Contract Commencement</td>
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Contact Center Services

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Evaluation Criteria
Calhoun Community College

Request for Proposal #21-07
Contact Center Services

Proposals will be evaluated in accordance with the following criteria:

1. Points can be assigned as follows:
   1. Excellent 30
   2. Good 20
   3. Fair 10
   4. Poor 5
   5. Unacceptable 0

2. Each category weighted by importance and compared to similar size institutions where applicable:

<table>
<thead>
<tr>
<th>Category</th>
<th>Weight Factor</th>
</tr>
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<tbody>
<tr>
<td>Qualification</td>
<td>30</td>
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<tr>
<td>• Higher Education Experience</td>
<td></td>
</tr>
<tr>
<td>• Demonstrated Knowledge of CALHOUN</td>
<td></td>
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<tr>
<td>Ease of implementations/customizations</td>
<td>10</td>
</tr>
<tr>
<td>Reporting Features</td>
<td>15</td>
</tr>
<tr>
<td>Proposed charge for system</td>
<td>15</td>
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<tr>
<td>References (3 similar size institutions w/multiple campus locations)</td>
<td>10</td>
</tr>
<tr>
<td>Implementation Plan</td>
<td>5</td>
</tr>
<tr>
<td>Staff Training (both Calhoun and Vendor)</td>
<td>15</td>
</tr>
</tbody>
</table>

EXAMPLE: 1. Qualification
Good Rating 20 x 30(weighting) =600 points

2. Staff Training
Poor Rating 5 x 15 (weighting) =75 points
## Evaluation Criteria Worksheet

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting Factor</th>
<th>Points Assigned</th>
<th>Total</th>
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<tbody>
<tr>
<td>1. Qualification</td>
<td>30</td>
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<td>2. Ease of</td>
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<td>4. Proposed charge</td>
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<td>5. References (3</td>
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<td>6. Implementation</td>
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<td>Plan</td>
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<tr>
<td>7. Staff Training</td>
<td>15</td>
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</table>
1. Purpose

The purpose of this RFP is to establish a contract for a Contact Center Services partnership with Calhoun Community College. The contact center requirements are contained in the Scope of Services and Specifications of the RFP.

2. Commitment of the Community College

Calhoun Community College (CALHOUN) reserves the right to withdraw this RFP at any time and for any reason. Receipt of proposal materials by the College or submission of a proposal to the College confers no rights upon the proposer nor obligates the College in any manner.

A contract, based on this RFP, may or may not be awarded. Any contract resulting in an award from the RFP is invalid until properly approved and executed by the Chancellor or approved designee, Calhoun Community College. Any agreements shall be construed and interpreted according to the laws of the State of Alabama.

3. Issuing Office

This RFP is being issued by and sealed proposals are to be submitted to:
   Vanessa Looney (Vanessa.Looney@calhoun.edu)
   310G MSA Building
   Calhoun Community College
   6250 US Hwy. 31 North
   Tanner, AL 35671

4. Form of Contract

The successful vendor shall submit a proposed agreement, the scope and terms of the contract shall consist of the RFP, any amendments thereto, and the contractor's proposal in response to the Request for Proposal. In the event that an issue is addressed in one document that is not addressed in the other documents, no conflict in language shall be deemed to have occurred. However, the College reserves the right to clarify any contractual relationship in writing with the concurrence of the Contractor, and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the Contractor's proposal. In all other matters not affected by the written clarification, if any, the RFP shall govern.

No modifications or changes in any provision in the contract shall be made, or construed to have been made, unless such modification is mutually agreed to, in writing, by the Contractor.
and the College and incorporated as a written amendment to the contract. Memoranda of understanding and correspondence shall not be construed as amendments to the contract.

The contract shall be construed according to the laws of the State of Alabama. Any legal proceedings against the College regarding this RFP, or any resultant contract, shall be brought in the State of Alabama.

5. **Deviations from the Form of Contract**

The stated requirements appearing elsewhere in the RFP shall become a part of the terms and conditions of any resulting contract. Any deviations, must be specifically defined by the Contractor in the proposal.

6. **Execution of Contract**

The Contractor to whom the RFP is awarded shall, within ten (10) days after prescribed documents are presented for signature, execute and deliver to CALHOUN the contract in substantial form, and include those items added or deleted during negotiations. The Contractor shall also provide satisfactory evidence of all required insurance coverage, bonds, and proof satisfactory to CALHOUN, of the authority of the person executing the contract on behalf of the Contractor.

The above documents must be furnished, executed, and delivered before the contract will be executed by CALHOUN. The contract will not be binding upon CALHOUN until it has been executed by CALHOUN and a copy of such fully executed contract is deliverable to the Contractor.

The contract shall be for a term of one year with successive one year renewal options not to exceed a total of five (5) years.

7. **Contract Requirements**

**VENDOR DISCLOSURE FORMS:**  
State of Alabama Act 2001-955 requires that the Vendor Disclosure statement be completed and filed with all proposals, bids, contracts or grant proposals to the State of Alabama in excess of $5,000.00. A vendor disclosure statement is not required for contracts for gas, water, and electric services, where no competition exists, or where rates are fixed by law or ordinance. In circumstances where a contract is awarded by competitive bid, the disclosure statement shall be required only from the person receiving the contract and shall be submitted within ten (10) days of the award. A new vendor disclosure statement is required for each purchase in excess of $5,000.00 regardless of prior purchases. A current vendor disclosure statement must be on file before invoices can be processed for payment.
8. **Mandatory Pre-Proposal Conference**

The vendor is encouraged to carefully examine all related Request for Proposal documents to become fully informed of the requirements and preferred features of the system to be provided. The vendor is responsible for collecting all necessary data required for developing its proposal for the described services.

A pre-proposal conference will be held on February 16, 2021 at 1:00 PM in Room 150 of the Math, Science, & Administration Building on the Decatur Campus at Tanner, AL. **Attendance at the pre-proposal conference is mandatory. Failure to attend this pre-proposal conference will eliminate your proposal from consideration.** Questions will only be answered at the pre-proposal conference. Please email questions to Vanessa.Looney@calhoun.edu by February 11, 2021.

Due to COVID-19 and in order to comply with social distancing guidelines, only ONE (1) representative from each company is allowed to attend the pre-proposal conference. Masks will be required. Vendors may teleconference into the pre-proposal conference if unable to attend due to COVID-19. If teleconference attendance is needed, please contact Vanessa Looney at Vanessa.Looney@calhoun.edu no later than 48 hours prior to the pre-proposal conference.

Vendors must submit two hardcopy original documents that contain the proposal. The original documents will become the property of CALHOUN.

Sealed proposals will be received until 1:00 P.M. Central Time on March 2, 2021 at which time proposals will be publicly opened. Proposals received after the date and time specified will not be accepted.

Sealed Proposals should be either mailed or delivered to:
Calhoun Community College
Vanessa Looney, Director of Purchasing and Accounts Payable
P.O. Box 2216, Decatur, Alabama 35609 or
6250 Highway 31 North, Tanner, Alabama 35671

The outside cover should be clearly marked as:
Proposal for Contact Center Services
**RFP #21-07**
Name of Company
March 2, 2021

9. **Proposal Addenda and Rule for Withdrawal**

Prior to the deadline date specified for receipt of proposals, a proposal may be withdrawn by submitting a written request for its withdrawal to the address listed above. Unless requested by the College, it will not accept any addenda, revisions, or alterations to proposals after the proposal due date. Any submitted proposal shall remain valid for six (6) months after the proposal due date.
10. Rejection of Non-Responsive Proposals

Proposals shall be considered non-responsive if they contain omissions, alterations of unacceptable conditions or limitations, or other irregularities of any kind. CALHOUN may reject proposals considered non-responsive.

11. Oral Commitments

Potential vendors should clearly understand that any verbal representations made or assumed to be made during any oral discussions held between representatives of potential vendors and any Calhoun Community College personnel are not binding on Calhoun Community College, unless confirmed in writing by Ms. Vanessa Looney.

Any oral clarifications of substance shall be reduced in writing by the proposer when requested by CALHOUN.

12. Offer of Gratuities

By submission of a proposal, the proposer certifies that no official or employee of the College has or will benefit financially or materially from this contract. The contract may be terminated by the College if it is determined that gratuities of any kind were either offered to, or received by, any official or employee of the Community College from the potential vendor, his agent, or employees.

13. Vendor Presentation/Demonstration

Vendors who submit a proposal in response to this Request for Proposal will be required to make a presentation/demonstration of their proposal based on selection by Calhoun Community College. Only those vendors selected by Calhoun Community College will be required to present. These presentations and demonstrations must show the College the “live” system functioning on a computer based system. It cannot consist of a demonstration not actually running on a computer system. For example, a simple PowerPoint presentation will not be sufficient. The demonstration must actually exercise the system in real-time via connection to a vendor supplied hosted software solution. The presentation/demonstration may use vendor data of their own choosing.

14. Restrictions on Communicating with Community College Staff

From the issue date of the Request for Proposal, until a Contractor is selected and selection is announced, vendors are not allowed to communicate with any College staff. Questions will only be answered at the mandatory pre-proposal conference. Please email to Vanessa.Looney@calhoun.edu by February 11, 2021.

The College shall reserve the right to reject a proposal for violation of this provision.
15. RFP Addenda

Addenda to this Request for Proposal may be necessary prior to the closing date and will be furnished by email to all prospective vendors. Failure to acknowledge receipt of addenda in accordance with instructions contained in the addendum may result in the proposal not being considered. No changes 24 hours before opening date.

16. Compliance with the Law

Contractor shall comply with all applicable laws, ordinances, rules and regulations relating to the Services provided under this Agreement.

17. Insolvency

In addition to all other rights herein, either party hereto may terminate this Agreement without prior notice should the other party become insolvent, voluntarily file for bankruptcy or receivership, or make any assignment for the benefit of creditors, or should the other party have commenced against it any proceeding, suit or action in bankruptcy or receivership provided such proceeding, suit or action is not dismissed within thirty (30) days.

CALHOUN's financial status depends directly upon appropriations from the State of Alabama. Therefore, this agreement, and its continuation, is hereby expressly made contingent upon CALHOUN actually receiving from the State of Alabama an appropriation in sufficient amount so as to allow CALHOUN to meet its financial obligations. Such determination shall be made solely by CALHOUN and such determination shall be final and binding upon both parties. If at any time CALHOUN shall determine that its appropriation is not adequate to allow it to meet its obligations, then in such event CALHOUN shall be allowed to terminate this Agreement, upon 90 days written notice to Contractor, with all other termination and final settlement provisions remaining applicable hereto.

18. Trade Secrets and Proprietary Information

During the term of this Agreement, Contractor and College may have access to certain proprietary materials of each other. In the case of Contractor, proprietary information shall include management guidelines and procedures, faculty data, student data, staff data, operating manuals, and similar compilations regularly used in Contractor's business operations ("Trade Secrets"). Neither College nor Contractor shall disclose any of the other party's Trade Secrets or other proprietary information, directly or indirectly, during or after the term of this Agreement. The parties shall not photocopy or otherwise duplicate any such material without the prior written consent of the originator. All Trade Secrets and other proprietary information shall remain the exclusive property of its originator and shall be returned thereto immediately upon termination of this Agreement.

As a reminder, all student data must be protected under the provisions of FERPA (Family Educational Rights and Privacy Act). The successful vendor must demonstrate the security mechanisms in place to protect against data loss or security breaches. Also, evidence of
FERPA training and certification of all vendor employees servicing the CALHOUN account must be provided prior to contract initiation.

19. Assignment

This Agreement, or any portion thereof, may not be assigned by either party without the written consent of the other.

20. Catastrophe

Neither Contractor nor CALHOUN shall be liable for failure to perform its respective obligations hereunder when such failure is caused by fire, explosion, water, act of God, civil disorder or disturbance, strikes, vandalism, war, sabotage, weather and energy related closings, governmental rules or regulations, failure of third parties to perform their obligations with respect to the Services, or like causes beyond the reasonable control of such party, or for real or personal property or damaged due to such causes.

It is required by the College that the successful vendor speak to their disaster recovery/backup methodology in order for the vendor supplied contact center to remain operational in a disaster situation. The College requires that the vendor demonstrate routine exercise of their disaster recovery plan and provide reports to the Community College of those exercises. Failure to provide adequate disaster recovery/backup mechanisms in order to mitigate vendor downtime could result in the termination of the contract by CALHOUN should the deficiency not be corrected. Remediation of the disaster recovery/backup facilities would be required in a mutually agreed to time frame by the vendor and Community College.

21. Severability

If any term or provision of this Agreement or the application hereof to any person or circumstance shall, to any extent or for any reason be invalid or unenforceable, the remainder of this Agreement and the application of such term or provision to any person or circumstance other than those as to which it is held invalid or unenforceable shall not be affected thereby, and each remaining term and provision of this Agreement shall be valid and enforceable to the fullest extent permitted by law.

22. Amendments to Agreement

All provisions of this Agreement shall remain in effect throughout the term hereof unless the parties agree, in a written document signed by both parties, to amend, add or delete any provision. This Agreement contains all agreements of the parties with respect to matters covered herein, superseding any prior agreements and may not be changed other than by an agreement in writing signed by the parties hereto.

23. Entire Agreement

This Agreement and its attachments and other documents specifically incorporated by reference herein contains the entire understanding and agreement of the parties concerning the
matters contained herein, and supersedes and replaces any prior or contemporaneous oral or written contracts or communications concerning the matters contained herein.

24. Additional Terms

Any contract awarded under this request or proposal shall include the following additional terms and conditions:

**The following provisions shall take precedence over any and all contrary or conflicting provisions of the agreement between the parties and shall govern the rights and obligations of the parties:**

This agreement shall be governed by and construed in accordance with the laws of the State of Alabama without giving effect to any choice- or conflict- of- laws, provisions, or rules (whether of the State of Alabama or any other jurisdiction) that would cause the application of the laws of any jurisdiction other than those of the State of Alabama.

It is further agreed that the terms and commitments contained herein shall not constitute a debt of the State of Alabama in violation of Section 213 of the Constitution of Alabama of 1901, as amended by Amendment Number 26. If any provision of this agreement shall contravene any statute or constitutional provision, either now in effect or which may be enacted during the term of this agreement, then the conflicting provision of this agreement shall be deemed null and void.________________________understands, acknowledges, and agrees that its sole and exclusive remedy for any claim which may arise from or relate to this agreement is to file a claim with the Board of Adjustment of the State of Alabama.

By signing this contract, the contracting parties affirm, for the duration of this agreement, that they will not violate federal immigration law or knowingly employ, hire, for employment, or continue to employ an unauthorized alien within the State of Alabama. Furthermore, a contracting party found to be in violation of this provision shall be deemed in breach of this agreement and shall be responsible for all damages resulting there from.

This agreement constitutes the sole and entire agreement of the parties to this agreement with respect to the subject matter contained herein, and supersedes all prior and contemporaneous understandings, negotiations, and agreements, both oral and written, with respect to such subject matter.

In accordance with the recommendations of the Governor and the Attorney General of the State of Alabama, the parties shall consider settling all disputes arising from or related to this agreement by using appropriate forms of non-binding alternative dispute resolution. In the event of proration of the fund from which payment under which this agreement is to be made, the agreement will be subject to termination.

This agreement may be executed in counterparts, each of which shall be deemed and original, but all of which together shall be deemed to be one and the same agreement.
Response Format
Calhoun Community College
Contact Center Services

Proposals shall be submitted in the format contained in the Request for Proposal. This material must be in sequence and related to the Request for Proposal. The College will make no reimbursement for the cost of developing or presenting proposals in response to this Request. Only information specifically related to this type of project will be evaluated. Proposals must present the following information.

Section A: Company Profile: A brief narrative describing the company’s history, corporate resources, management team, company philosophy, approach to providing services, qualifications, higher education experience, total number of years in business, relevant experience and benefit CALHOUN will receive through contracting with the firm.

The College requires a listing of all higher education institutions served that are similar in demographics and multi-campus education delivery. In addition at least three account references from this list should be included that contains liaison names, telephone numbers, physical addresses, email addresses, and a description of services provided, and dates of the services.

Section B: System Features: A complete description of the contact center services and all of the features of the center should be included. The services available and described can extend beyond the requested services in this proposal.

Section C: Secure Contact Center Hosting Facility Profile: Physical location of contact center site, number of years in business, number of clientele housed in this location, emergency preparedness/disaster recovery methodology and plan, detailed schematic of infrastructure and fail-over sites.

Section D: Scalability: Methodology employed by the facility/vendor used to address peak times or cyclical trends related to high-volume, high-access call volume. Also, costs associated with any other components necessary for addressing increased demand on systems.

Section E: Implementation Plan: Describe the process used to implement the contracted services, including any customization or transition period that will be required. Provide a listing of events and timeframes for accomplishing the implementation. All contact center services must be operational on the first day of the contract initiation period.

Section F: Reporting Features: Describe how the contact center services will be reported and accessed. Training related to the use of the reporting features is a required component of the proposal.
Section G: CALHOUN Staff Training/Development: Describe the training and development program that the vendor will implement at CALHOUN for CALHOUN staff. Include a detailed instruction plan and the number of hours of training required, as well as a description of any services that would be provided specifically for CALHOUN.

Section H: Vendor Staff Training/Development: Provide a specific description of the training and development that the vendor will provide for their employees. Describe the detailed instruction plan, the number of hours of instruction, method of presentation, and exactly how vendor personnel will be schooled on the support needs of CALHOUN.

Section I: Research and Development Capabilities: The vendor must have the research and development capabilities needed to remain aware of changing industry technologies for contact center technologies. A brief description of the vendor’s research and development capabilities must be included in the RFP response.

Section J: Exceptions to Request for Proposal: The vendor must address any and all exceptions to the Request for Proposal. These should be referenced by subsection.

Section K: Additional Explanations and Interpretations: Any explanation desired regarding the meaning or interpretation of the Request for Proposal, attachments, specifications, etc. must be addressed at the mandatory pre-proposal conference.

Any information given to prospective vendors concerning the Request for Proposal will be furnished/addressed at the mandatory pre-proposal conference or provided in an addendum to the Request for Proposal.

Section L: Acknowledgement of Amendment or Addendum to Request for Proposal: Receipt by a vendor of an amendment or addendum to the Request for Proposal must be acknowledged by inserting a copy in the vendors' proposal.

Section M: Further Information: All proposals received in response to this Request for Proposal will be evaluated and ranked in accordance with the evaluation criteria stated in Section 2. Vendors are cautioned that the College will not accept after the closing date for receipt of proposal, data that is essential for a complete and thorough evaluation of the proposal. The College expects to award a contract based on the initial offer, therefore all proposals should be submitted on the most favorable and complete price, and terms, including scope of services based on our stated criteria, that vendor can submit to the College.

Section N: Proprietary Information: After the award of the contract, all proposals will be opened for public inspection. Trade secrets, test data and similar proprietary information will remain confidential, provided such material is clearly marked. However, net cost information will not be considered confidential.
Section O: ADA Section 508 Compliant: Each vendor must certify that its proposal and the services offered are in full compliance with the Americans with Disabilities Act Section 508. Specific data related to the vendor's compliance methodology would be beneficial.
Scope of Services

GENERAL INFORMATION

Objective

Calhoun Community College (CALHOUN) is soliciting proposals for contact center services that must include a scalable business model and focuses on timely responsiveness, outreach, and world class customer service. CALHOUN seeks to ensure that the contact center services provided results in increased caller satisfaction due to the use of a robust quality assurance model. CALHOUN’s objectives include, but are not limited to, answering incoming calls, web chats, emails, constituent initiated ticket system requests, and provide robust and comprehensive reports related to all calls at appropriate intervals. Also, outbound services including prospective student contact should be provided. The contact center should be prepared to manage two types of contacts: problem/solution resolution and recruitment/enrollment management services.

The successful vendor will act as a help desk for answering student questions about Financial Aid and Admissions & Records. The successful vendor should possess proficiency and expertise in the support of members of the military and their dependents. Also, familiarity with staff and faculty, detailed knowledge of all web sites and familiarity with the physical layout of the various sites and campuses, schedules, marketing and promotional programs is required.

Background

Calhoun Community College serves 10,500+ students at its three campuses in Alabama (Tanner, Huntsville and Downtown Decatur) and on-line. Accredited by the Commission on Colleges of the Southern Association of Colleges and Schools, of the 10,500 students enrolled at CALHOUN, many are online learners enrolled in nine-week terms and are serviced by the Community College’s on-line division. CALHOUN is focused on providing world class service to students and all constituents, therefore, the contact center services are a critical support unit to the Community College.

The key performance indicators for the successful vendor will include but is not limited to:

- Average Speed of Answer – Less than 90 seconds
- Abandonment Rate – Less than 5% of all contacts
- Customer Satisfaction Rate – 95% or higher
CALHOUN CONTACT CENTER SERVICE REQUIREMENTS

Management Services

1. The successful vendor must provide competent managerial staff that is experienced in planning and project management. Full disclosure regarding the proposed managerial staff and their work background and experience must be included.

2. The successful vendor must provide a dedicated manager for the CALHOUN Contact Center who will work closely with CALHOUN’s contract management team. The vendor may include other managerial and staff members for the initial contract set-up and/or for the ongoing operations of the contact center as it deems necessary to succeed in the contract.

3. The vendor’s management staff must be willing and able to attend meetings at CALHOUN’s various locations for initial planning, quarterly contact reviews and whenever deemed necessary by the CALHOUN contract management team. At least one time annually a site visit by the offsite contact center management team is required.

4. The successful vendor must provide normal and emergency contact information for each of their key personnel. It is highly desirable for the vendor’s key personnel to attend emergency meetings in person, via video conferencing or web meetings. Contact center services must be available 24/7 including web chats.

5. It is anticipated that the initial contract will be for 1 year and renewable annually for the next four succeeding years should the College choose to do so.

6. The contract will commence on April 1, 2021.

Contact Center Capability

The contact center representatives must be able to answer questions in the following areas of Financial Aid and Admissions & Records:

- Holds (What kind of hold do I have? and How do I get it removed?)
- College service hours.
- Navigation through Web Services that are impacted by Financial Aid and Admissions & Records.
- Assisting students with using Financial Aid TV and Admissions & Records online resources.
- Be familiar with Financial Aid and Admissions & Records policies (both Federal and State of Alabama) that apply to military personnel, veterans and dependents.
- Respond to calls requesting financial aid services such as how to apply for financial aid, loans, scholarships, grants, and work study.
- Respond to calls requesting Admissions & Records services such as how to apply for admission, request enrollment verifications, and transcripts.
Examples of questions students ask with regards to our Financial Aid and Admission & Records processes:

- Can someone make a payment on a student’s behalf without a FERPA on file?
- Can I verify that my child (student) is going to class?
- Are dual enrollment students covered under FERPA?
- I just applied to your school; how do I find out my student ID number?
- How do I get my student ID card?
- How do I access my online account?
- I’m having trouble submitting my admissions application, can you help me?
- I was just accepted to your school – what is my next step?
- I was previously enrolled and stopped attending. Do I need to reapply?
- Am I required to live on campus?
- Do you offer online degree programs?
- How do I change my major/program?
- How long does it take for the system to show that I have changed my major/program?
- Do you offer double majors?
- How can I dispute my residency status?
- Does it matter if my name on my transcript is different than my current name?
- Will you receive my transcript if I submitted it before I completed my admissions application?
- Will I be able to transfer my credits from another college?
- Can I send my transcript electronically?
- Can I pick up a transcript in the office?
- What do I need to do to graduate? Isn’t it automatic?
- Is there a fee for graduation?
- Is there a graduation ceremony (commencement) each semester?
- Where do I go to purchase a cap and gown?
- When will I receive my diploma?
- If I lost my diploma, can I order a replacement diploma?
- What is the status of my aid?
- Has my refund been sent to me?
- How do I apply for Financial Aid?
• What other requirements do I need to satisfy for Financial Aid?
• Has my tuition and fees been paid?
• What is the reason my Financial Aid has not been applied to my account?
• Why did my classes get dropped?
• Why do I have to do an appeal (SAP)?
• Why do I have a HOLD on my account and how do I get it removed?
• How do I perform Terms/Conditions and Authorization to Pay?
• Will Financial Aid pay for my certificate program?
• Will Financial Aid pay for ‘mini-mesters’?
• How do I get my books for classes?
• Why do I have a balance since I have been awarded a Pell Grant?
• What is selected for verification?
• Why was I selected for verification?
• Above list of questions is representative and not all inclusive.
Contact Center Service Expectations

1. Contact center representatives (CCRs) must be trained to promptly answer all student service requests received by telephone, email, and web-based chats. The CCRs must be trained in the use of the knowledge base self-help portal that can be provided for assistance.

2. The contact center (and any emergency backup center) must have sufficient telecommunications infrastructure to have dedicated access (T-1 or better) to the internet, a toll-free phone number for all United States students.

3. The successful vendor must be able to provide a smooth and seamless transition for transfer calls to Calhoun.

4. The contact center must have a robust call handling and/or tracking system and be able to license it to CALHOUN, if needed, to share data and call statistics. CALHOUN requires that the contact center adopts and use the ticketing system approved by CALHOUN. Additionally, any customer relationship management software adopted by CALHOUN must be used by the contact center. The contact center must be willing and able to submit tickets on behalf of the students/constituents.

5. The contact center must be willing to change their workflow to mirror the College adopted ticketing system even if changes or alterations are made to the ticketing system.

6. The successful vendor will be able to provide, on-demand and routinely scheduled reports as requested by CALHOUN. On-demand reports should be furnished to Calhoun within 24 hours after Calhoun files a written request through email. Scheduled reports should be received 48 hours after the ending date of the reporting period.

7. An Interactive Voice Response (IVR) system or Enhanced Call Routing (ECR) system may be proposed if either can improve customer service to CALHOUN callers. For instance, callers could be presented with a prerecorded message with different options to be connected based on the area of support. Also, should the student/constituent not wish to hold, an option for a callback should be provided. Once the caller has chosen to speak to a CCR, the call should then be answered in accordance with the Service Level Agreement (SLA) referenced later in this document.

8. CALHOUN requires the capability to offer pertinent prerecorded announcements for students/constituents to hear while awaiting a call to be answered.

9. The successful vendor will be solely responsible to warrant and ensure that all technology and procedures used by the contact center comply with the regulations of the FCC and State Telemarketing laws. CALHOUN will not accept responsibility for contractor's failure to not follow these requirements.
10. The successful vendor will provide comprehensive reports of all call activity regardless of the disposition of the call response. All activity will be reported as frequently as daily and in a form that will allow for the analysis of call by subject and point of origination.

11. Reminder call to students prior to the start of the term/semester that have Financial Aid or Admissions issues.

12. Welcome call to enrolled students after the beginning of the term.
Contact Center Representatives (CCRs)

1. The successful vendor must provide professional CCRs that are pleasant, courteous, patient and helpful. CALHOUN would prefer CCRs with a minimum of three years' experience in a contact center environment. The CCRs must possess excellent oral and written communication skills to effectively screen callers and provide basic information prior to escalating the call, email, or web chat to a CALHOUN internal contact center or to a CALHOUN staff member. All students/constituents must be treated with courtesy and respect. While all CALHOUN students are required to speak English, CCRs may have to effectively assist some callers with strong accents or who have other difficulty communicating over the phone. All CCRs will expend every effort to meet or exceed the expectations of the caller before escalating the inquiry to CALHOUN.

2. The successful vendor must complete background checks on all Contact Center Representatives hired and working on the CALHOUN account. The background check should be used to screen potential CCR’s from working on the CALHOUN account where sensitive and personally identifiable information is stored. Documentation certifying successful screening of the candidates must be provided to CALHOUN whenever a CCR is placed on the CALHOUN account. The cost of the screening will be borne by the successful vendor.

3. The successful vendor will provide a dedicated internal trainer or team of trainers to train CCRs to handle calls, emails, web chats, and to submit work request tickets. These trainer(s) need to immediately update the CCRs on changes within CALHOUN, issues or concerns, or other actionable items that could impact the quality of the service being provided. CALHOUN’s contract management team will assist, as needed, in training CCRs initially and throughout the contract term specifically regarding new enhancements and features of CALHOUN. However, it is the responsibility of the contact center to thoroughly train all newly hired CCRs. CALHOUN reserves the right to review, critique and ask for changes to training materials developed by the vendor.

4. CALHOUN requires that all CCRs be trained in providing service to irate or upset callers and understand how to diffuse a volatile situation. If the CCR is unable to satisfy the caller, the CCR must follow established escalation procedures.

5. The successful vendor acknowledges and understands that it is required to protect certain confidential information from disclosure under applicable law, including but not limited to, the Family Educational Rights and Privacy Act (FERPA), the Gramm Leach Bliley Act (GLBA), and other governing laws in order to protect personally identifiable information. All members of the vendor’s organization that service the CALHOUN account must be trained, certified and documented in regards to these requirements. CCRs and all members of the vendor’s staff must consider their interactions with students as confidential. CCRs and the vendor’s organization must not provide any student email addresses, phone numbers or otherwise personally identifiable information to third parties.
6. The successful vendor will have quality assurance measures in place to ensure CCRs continually provide excellent customer service. This will include recorded interactions between the CCR and the student/constituent. Quality assurance measures must include periodic surveys of customers to assess compliance with pre-determined measures. These periodic surveys should be described in the proposal.

7. CALHOUN requires that the successful vendor remove from the CALHOUN account any CCR or management team member at the Community College’s request. The reasons for the request for removal will be discussed with the successful vendor. This discussion does not presume agreement between CALHOUN and the vendor that the removal action is warranted.

8. CALHOUN requires that the successful vendor be equipped to manage outbound calls, email contacts, SMS text messaging contact, RSS feeds, and Tweeter contact.

9. CALHOUN requires that the successful vendor be knowledgeable of all military tuition and veterans’ benefits and policies.

Default Prevention Services – Delinquency Management

Vendor should be able to provide CALHOUN with certain Default Prevention Services for all of the CALHOUN’S delinquent student borrowers in the federal fiscal cohort population specified by CALHOUN.

Default Prevention Services should include the following:

- Up to nine (9) live agent campaigns which include up to twenty-seven (27) call attempts
- Up to eight (8) email/mail contacts
- Live agent three-way calls with applicable servicer for right party contact
- Skip tracing
- Other contact or tracking means deemed necessary by the vendor to resolve delinquency
- A toll-free number for College borrowers to use.
Service Level Agreements (SLAs)

The successful vendor will provide world class excellent customer service that meets or exceeds agreed upon SLAs (predetermined performance metrics). CALHOUN’s minimum SLAs are shown below, but the vendor is encouraged to propose additional or more stringent metrics. Due to the continuing development of CALHOUN’s online academic programs and services and growth in future technologies, the vendor agrees to renegotiate, amend or add to the initial Service Level Agreements when requested by Calhoun.

The following is a table of minimum service level expectations:

<table>
<thead>
<tr>
<th>Task</th>
<th>Service Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Support by Phone (ASA)</td>
<td>100% less than 90 seconds calculated on a monthly basis</td>
</tr>
<tr>
<td>Abandonment Ratio</td>
<td>Less than 5% calculated on a monthly basis</td>
</tr>
<tr>
<td>Web Chat</td>
<td>Acknowledged within 60 seconds calc. on a monthly basis</td>
</tr>
<tr>
<td>E-mail</td>
<td>Estimated Time of Response – 8 hours or less calc. on a monthly basis</td>
</tr>
<tr>
<td>CCRs keep computerized notes so that a client history is maintained.</td>
<td>Each customer that requests a service or describes a problem that goes beyond an immediate resolution.</td>
</tr>
<tr>
<td>Call Escalation</td>
<td>If student cannot be served immediately, calls will be escalated in one of two ways. Calls concerning Financial Aid and Admissions &amp; Records will be escalated via a CALHOUN Financial Aid and Admissions &amp; Records call log. All other calls will be escalated to a qualified Calhoun instructor/staff member. No service fees will be incurred once escalation has been completed.</td>
</tr>
<tr>
<td>Ticket Resolution</td>
<td>Vendor must complete ticket requests within 24 hours or escalate to CALHOUN.</td>
</tr>
<tr>
<td>Reporting</td>
<td>Statistical Information and Ticket data; accessible online (daily/weekly/monthly).</td>
</tr>
</tbody>
</table>

The SLA’s will be measured as noted in the chart above. If any one of the Service Level measurements are not met, then a 10% adjustment in the monthly payment will occur. If the contract is not renewed for a second year then the SLA reduction fee will be sent to the Community College in the form of a refund.
Emergency Planning/Disaster Recovery

The contact center must have adequate back-up measures in place to quickly overcome system failures due to hardware problems, carrier problems, electrical outages, etc.

The contact center must have emergency contingency plans in place to allow another backup location(s) to provide services to CALHOUN customers in case of natural disasters, fires, or manmade disasters, etc.

CALHOUN personnel will inspect the contact center facilities at any time of its choosing. This will include reviewing the contact center’s disaster recovery procedures and exercising the system to prove its functionality.

Preferred Services

If the successful vendor has the ability to provide high quality services for outbound calls and emails, Calhoun may purchase these services from time to time. Examples of such outbound services would be surveys, outreach or follow-up contacts for student or alumni.

Additional Information

The contact center proposal should provide the following additional information:

1. History of the company to include: higher education experience and number of years in business.
2. Physical location of contact centers. (All locations are expected to be in the United States.)
3. Average contact center representative tenure.
4. What CRM system is used? (Is the same CRM system used for all clients or is the system linked to the clients’ software?)
5. Call recording methodology?
6. How will cyclical trends associated with CALHOUN’s volume be managed?
7. Documentation of technology platforms.
8. CCR recruitment, training, and quality assurance processes.
9. The largest volume of annual calls received on behalf of a single client.
10. References.
11. A cost matrix which explains the basis of billing for each service provided. At least two alternate pricing structures should be provided by the vendor:
   - Annual flat rate pricing
   - Per incident fee based on call duration/tickets/emails required for resolution
RFP #21-07
NO-PROPOSAL RESPONSE FORM

NAME OF COMPANY

AUTHORIZED SIGNATURE

ADDRESS

PRINTED NAME

CITY, STATE ZIP

TITLE

TELEPHONE

DATE

EMAIL

I HEREBY SUBMIT THIS AS A "NO PROPOSAL" FOR THE REASONS CHECKED BELOW:

___ Insufficient time to respond

___ We do not offer the product or service requested

___ Our schedule will not permit us to respond to this RFP

___ Keep our company on the list for future RFPs

___ Remove our company name from the list for future RFPs

Other (describe briefly) ____________________________________________________________
Collusion/Fraud Statement
RFP #21-07

I certify that I have read the General Conditions and Instructions to Vendors of the RFP and this offer is made without prior understanding, or connection with any entity or person submitting a proposal for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I am authorized to sign this RFP for the vendor. I agree to abide by all conditions of this RFP.

Name of Company (please type or print in ink)

Authorized Signature (sign in ink)

Complete Address for Mailing Purchase Order and Payment

Typed/Printed Name of Signature Above

City State Zip Code

Title (please type)

Telephone Number

Fax Number

NOTARIZATION

Sworn and subscribed before me this the ____ day of ______________, ____.

______________________________
Notary Public Signature

My commission expires (date)

SEAL

MINORITY INFORMATION

If this business is minority owned, please list the qualification status below:
To Whom It May Concern:

According to Act 2001-955, Calhoun Community College cannot enter into any contract or appropriate any public funds until the college is in receipt of the attached disclosure form. The following is information and instructions for completing the vendor disclosure form.

Vendor Disclosure Statement Information and Instructions

Act 2001-955 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grants proposals to the State of Alabama in excess of $5,000.00.

The state of Alabama shall not enter into any contract or appropriate any public funds with any person who refuses to provide information required by Act 2001-955.

Pursuant to Act 2001-955, any person who knowingly provides misleading or incorrect information on the disclosure statement shall be subject to a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed $10,000.00. Also, the contract or grant shall be voidable by the awarding entity.

Definitions as Provided in Act 2001-955

Family Member of a Public Employee- The spouse or a dependent of the public employee.

Family Member of a Public Official- The spouse, a dependent, an adult child and his or her spouse, a parent, a spouse's parent, a sibling and his spouse, of the public official.

Family Relationship- A person has a family relationship with a public official or public employee if the person is a family member of the public official or public employee.

Person- An individual, firm, partnership, association, joint venture, cooperative, or corporation, or any other group or combination acting in concert.

Public Official and Public Employee- These terms shall have the same meaning ascribed to them in Sections 3-25-1(23) and 36-25-1(24), Code of Alabama 1975, (See below) except for the purposes of the disclosure requirements of this act, the terms shall only include persons in a position to influence the awarding of a grant or contract.
who are affiliated with the awarding entity. Notwithstanding the foregoing, these terms shall also include the Governor, Lieutenant Governor, members of the cabinet of the Governor, and members of the Legislature.

Section 36-25-1(23), Code of Alabama 1975, defines a public employee as any person employed at the state, county or municipal level of government of their instrumentalities, including governmental corporations and authorities, but excluding employees of hospitals or other health care corporations including contract employees of those hospitals or other health care corporations, who is paid in whole or in part from state, county, or municipal funds. For purposes of this chapter, a public employee does not include a person employed on a part-time basis whose employment is limited to providing professional services other than lobbying, the compensation for which constitutes less than 50 percent of the part-time employee's income.

Section 36-25-1(24), Code of Alabama 1975, defines a public official as any person elected to public office, whether or not that person has taken office, by the vote of the people at state, county, or municipal level of government or their instrumentalities, including governmental corporations. For purposes of this chapter, a public official includes the chairs and vice-chairs or the equivalent offices of each state political party as defined in Section 17-16-2, Code of Alabama 1975.

Instructions

Complete all lines as indicated in blue ink. If an item does not apply, denote N/A (not applicable). If you cannot include required information in the space provided, attach additional sheets as necessary. The form must be signed, dated and notarized prior to submission. Once you have completed the form, please return originals to:

Calhoun Community College
Attn: Accounts Payable
P.O. Box 2216
Decatur, Alabama 35609-2216

If you should need additional information, please contact me at (256) 306-2686.

Sincerely,

[Signature]
Vanessa Looney
Director of Purchasing
State of Alabama
Disclosure Statement
Required by Article 3B of Title 41, Code of Alabama 1975

ENTITY COMPLETING FORM

ADDRESS

CITY, STATE, ZIP

TELEPHONE NUMBER

STATE AGENCY/DEPARTMENT THAT WILL RECEIVE GOODS, SERVICES, OR IS RESPONSIBLE FOR GRANT AWARD
CALHOUN COMMUNITY COLLEGE

ADDRESS

PO BOX 2216

CITY, STATE, ZIP

TELEPHONE NUMBER

DECATUR AL 35609-2216 256-306-2500

This form is provided with:

☐ Contract  ☐ Proposal  ☐ Request for Proposal  ☐ Invitation to Bid  ☐ Grant Proposal

Have you or any of your partners, divisions, or any related business units previously performed work or provided goods to any State Agency/Department in the current or last fiscal year?

☐ Yes  ☐ No

If yes, identify the State Agency/Department that received the goods or services, the type(s) of goods or services provided, and the amount received for the provision of such goods or services.

<table>
<thead>
<tr>
<th>STATE AGENCY/DEPARTMENT</th>
<th>TYPE OF GOODS/SERVICES</th>
<th>AMOUNT RECEIVED</th>
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Have you or any of your partners, divisions, or any related business units previously applied and received any grants from any State Agency/Department in the current or last fiscal year?

☐ Yes  ☐ No

If yes, identify the State Agency/Department that awarded the grant, the date such grant was awarded, and the amount of the grant.

<table>
<thead>
<tr>
<th>STATE AGENCY/DEPARTMENT</th>
<th>DATE GRANT AWARDED</th>
<th>AMOUNT OF GRANT</th>
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1. List below the name(s) and address(es) of all public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

<table>
<thead>
<tr>
<th>NAME OF PUBLIC OFFICIAL/EMPLOYEE</th>
<th>ADDRESS</th>
<th>STATE DEPARTMENT/AGENCY</th>
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Page 1 of 2
2. List below the name(s) and address(es) of all family members of public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the public officials/public employees and State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

<table>
<thead>
<tr>
<th>NAME OF FAMILY MEMBER</th>
<th>ADDRESS</th>
<th>NAME OF PUBLIC OFFICIAL/ PUBLIC EMPLOYEE</th>
<th>STATE DEPARTMENT/ AGENCY WHERE EMPLOYED</th>
</tr>
</thead>
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</table>

If you identified individuals in items one and/or two above, describe in detail below the direct financial benefit to be gained by the public officials, public employees, and/or their family members as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

Describe in detail below any indirect financial benefits to be gained by any public official, public employee, and/or family members of the public official or public employee as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

List below the name(s) and address(es) of all paid consultants and/or lobbyists utilized to obtain the contract, proposal, request for proposal, invitation to bid, or grant proposal:

<table>
<thead>
<tr>
<th>NAME OF PAID CONSULTANT/ LOBBYIST</th>
<th>ADDRESS</th>
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</table>

By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. I further understand that a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed $10,000.00, is applied for knowingly providing incorrect or misleading information.

Signature  
Date  

Notary's Signature  
Date  
Date Notary Expires  

Article 3B of Title 41, Code of Alabama 1975 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of $5,000.