



USDA Forest Service
Customer Contact Center

PRE-PROPOSAL BIDDERS' CONFERENCE

16 August 2007

Washington, DC

Solicitation: AG-7604-S-07-0017





ADMINISTRATIVE INFORMATION

BONNIE GILBERT • CONTRACTING OFFICER

- ❑ Today's Bidder's Conference is scheduled from 1:00 to 5:00 PM; we will take one break.
- ❑ Sign-up sheet, which is important for the Government record, is provided outside the entrance to the room.
- ❑ Restrooms are located to the right of this room
- ❑ Emergency exits are in either corner of this floor
- ❑ Sign language interpretation is being provided.
- ❑ The Hyatt has a coffee shop & gift shop at the street level.
- ❑ Parking is at the Bidder's expense.
- ❑ To allow for an appropriate deliberative process we will NOT take questions during this Bidder's Conference; questions can be submitted by index card or via email.
- ❑ The Forest Service is supported by a Contractor under an NDA.



AGENDA

BONNIE GILBERT

- ❑ Welcome and Opening Remarks
- ❑ Contracting Officer Remarks
- ❑ About the Bidder's Conference
- ❑ Objectives of the new Customer Contact Center
- ❑ Overview of the Forest Service IT environment
- ❑ The Information Solutions Organization (ISO)
- ❑ Contact Statistics
- ❑ Requirements Overview
- ❑ Performance Basis
- ❑ Proposal Format
- ❑ Evaluation Factors
- ❑ Next Steps



WELCOME AND OPENING REMARKS

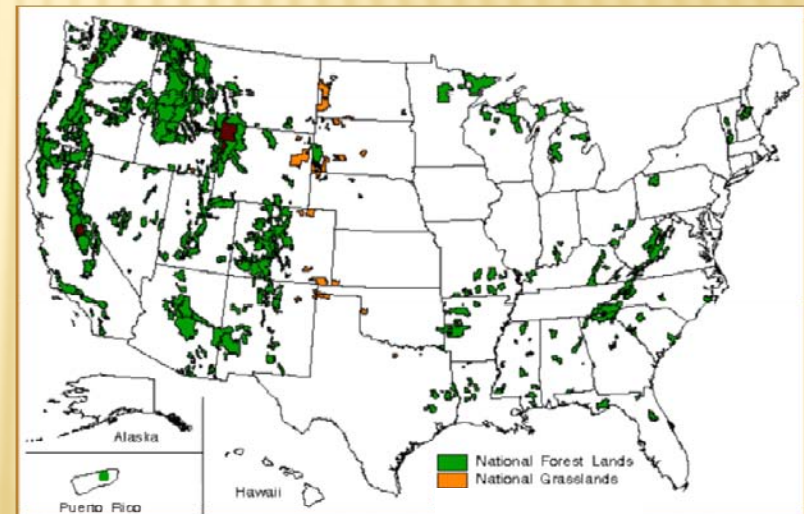
JOAN GOLDEN
FOREST SERVICE DEPUTY CIO



ABOUT THE FOREST SERVICE

JOAN GOLDEN • FOREST SERVICE DEPUTY CIO

- ❑ Steward for over 193 million acres of public lands in national forests and grasslands, known collectively as the National Forest System (NFS), in 44 States, Puerto Rico, and the Virgin Islands
- ❑ Workforce of approximately 42,000 end users with diverse skills and responsibilities distributed among:
 - Nine NFS Regions (“Regions”)
 - Seven Research and Development Stations (“Stations”)
 - Northeastern Area State and Private Forestry
 - The International Institute of Tropical Forestry
 - National headquarters in Washington, D.C. (the Washington Office (WO))
 - Forest Service Research
- ❑ Most offices have fewer than 45 people
- ❑ Largest agency (bureau) in the USDA
- ❑ Fire season – March through October





FOCUS ON THE CUSTOMERS

JOAN GOLDEN

SITUATION	GOAL
Forest Service employees are hard-working, motivated, and focused on their critical role of managing our national forest assets	<i>Optimizing the customer IT support experience with an emphasis on first contact resolution is our primary goal.</i>
Our customers work in unique and diverse work environments; large and very small offices, in the forest collecting samples and doing research, fighting fires, etc.	<i>Timely, professional, and effective response to varying customer requirements is critical.</i>
Information technology, radios, and telecommunications are the critical tools they MUST have to work effectively -- sometimes that work <u>saves lives</u> and <u>protects property</u> .	<i>An agile and flexible Service Provider who can adjust quickly to changes in the IT infrastructure is vital.</i>



FOCUS ON THE CUSTOMERS *CONT'D*

JOAN GOLDEN

SITUATION

We operate a multi-source environment which requires the Customer Contact Center to work in very close partnership with the Information Solutions Organization (ISO) and other Tier 2 and Tier 3 organizations to serve the customer with an integrated experience.

The Customer Contact Center is the “face” of IT support (and Information Resources Management(IRM)) and provides the critical first impression.

GOAL

Bringing mature yet flexible process and technology is critical to a successful collaboration with the other support organizations.

The quality of the Customer Contact Center (CCC) experience is a primary influencer of Customer opinion of IRM and the CCC Contractor.



TODAY'S PRESENTERS

JOAN GOLDEN

- ❑ Joan Golden – Forest Service Deputy CIO
- ❑ Bonnie Gilbert – Contracting Officer
- ❑ Ron Copstead – Customer Contact Center Project Lead
- ❑ Alan Flesh – Deputy Chief Technology Officer, IRM
- ❑ Douglas Nash – Director, Information Solutions Organization (ISO)



CONTRACTING MATTERS

BONNIE GILBERT
CONTRACTING OFFICER



CONTRACTING OFFICER REMARKS

BONNIE GILBERT • CONTRACTING OFFICER

- ❑ This Pre-proposal Bidder's Conference is conducted in accordance with FAR 15.201.
- ❑ The information presented is a summary of much of the information in the current Request for Quote to be released on or about 10 September.
- ❑ In the event of a discrepancy, the information in the Final RFQ takes precedence over any information presented here.
- ❑ This Conference is being videotaped for the Government record.
- ❑ The PowerPoint briefing you are about to see, together with a transcript, will be posted at http://www.fs.fed.us/business/computer_base on 20 August.



CONTRACTING OFFICER REMARKS *CONT'D*

BONNIE GILBERT • CONTRACTING OFFICER

- ❑ We encourage potential Bidders to submit questions and comments at the end of the session (via index card) or via email to CCC2007@fs.fed.us no later than 5PM EDT, 22 August.
- ❑ The Forest Service does NOT anticipate responding to specific questions during, or at the end of, the event to accommodate our deliberative process.
- ❑ Responses to select questions may be posted within ten (10) business days; others will be reflected in the Final RFQ.



ACQUISITION STRATEGY

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- ❑ A Request for Information (RFI) was issued and based on that market research the GSA schedule will provide maximum competition.
- ❑ The Forest Service intends to award a single-award Blanket Purchase Agreement (BPA) and the associated BPA Calls against GSA Schedule 70, SIN 132.51 (Information Technology Services).
- ❑ BPA Calls will be issued for (1) Transition Management and (2) on a Fiscal Year basis.
- ❑ The BPA Period of Performance is sixty three months (five years plus three-month Transition).
- ❑ Evaluation will be Best Value considering:
 - Management Approach;
 - Technical Approach;
 - Key Personnel;
 - Past Performance; and
 - Oral Presentation/Tool Demonstrations.



CLIN STRUCTURE

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ITEM #	DESCRIPTION		
1001-A	Contact Band A (0 - 15,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-B	Contact Band B (15,001 - 25,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-C	Contact Band C (25,001 - 30,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-D	Contact Band D (30,001 - 35,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-E	Contact Band E (35,001 - 40,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-F	Contact Band F (40,001 - 45,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-G	Contact Band G (45,001 - 50,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-H	Contact Band H (50,001 - 55,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-I	Contact Band I (55,001 - 60,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-J	Contact Band J (60,001 - 65,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-K	Contact Band K (65,001 - 70,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
1001-L	Contact Band L (70,001 - 75,000 contacts per month) - Year 1 - Firm Fixed Price (FFP)		
Year 2: 2001-A...2001-L	Year 3: 3001-A...3001-L	Year 4: 4001-A...4001-L	Year 5: 5001-A...5001-L
6001	Transition Management - Firm Fixed Price (FFP)		
7001	Special Projects - Time and Materials (T&M)		
8001	GOTS Training - Time and Materials (T&M)		
9001	Other Direct Costs (ODC) - Time and Materials (T&M)		
9002	Travel (not to exceed Federal Travel Regulations)		



SCHEDULE OF KEY EVENTS *ALL DATES SUBJECT TO CHANGE*

BONNIE GILBERT

EVENT	DATE
Release of the RFQ	10 September 2007
Questions due from Bidders	17 September 2007
Answers posted by the Forest Service	21 September 2007
Initial Proposals due	12 October 2007
Competitive Range established and Bidders notified	2 November 2007
Bidder Meetings	26 to 30 November 2007
Request for Final Revised Proposal (FRP)	26 to 30 November 2007
Final Revised Proposal due	4 to 12 December 2007
BPA award	20 December 2007
Issue of BPA Call 0001	9 January 2008



OVERVIEW OF THE BIDDER'S CONFERENCE

RON COPSTEAD
CUSTOMER CONTACT CENTER PROJECT LEAD



OBJECTIVES OF THE BIDDER'S CONFERENCE

RON COPSTEAD

- ❑ Engage potential bidders in a dialogue to ensure a better understanding of Forest Service requirements and industry capabilities.
- ❑ Ensure a level playing field for all competitors through consistent information sharing.
- ❑ Maximize transparency and clarity of Forest Service objectives, critical success factors, challenges, requirements, and constraints.
- ❑ Preview the near-final requirements to gather feedback and recommendations for improvement.



ENGAGING INDUSTRY

RON COPSTEAD

- ❑ The Forest Service has engaged industry in refining the Customer Contact Center requirement through:
 - Request for Information (RFI)
 - Draft Request for Quote (RFQ)
 - Pre-Proposal Bidder's Conference
- ❑ The Forest Service has invested heavily in reviewing industry feedback and recommendations and has incorporated much of the input into the RFQ.
- ❑ The Forest Service believes its Customers will be best served by a true partnership with industry and is structuring the RFQ accordingly.



OVERVIEW OF THE REQUIREMENT

RON COPSTEAD

- ❑ Provide a Tier 0/1, multi-channel, single-point-of-contact (SPOC) for Customers for resolution of information technology, radio, and telephone incidents;
- ❑ Respond to Customer incidents submitted through **any channel**;
- ❑ Resolve the maximum number of incidents upon **first contact**;
- ❑ Generate **high-quality, detailed ticket/incident** information for use by Tier 2 and Tier 3 service providers;
- ❑ Provide **timely, proactive, courteous, and competent** responses;
- ❑ Integrate **industry best practices** for Contact Center tools and technologies;
- ❑ Shorten resolution times and **proactively resolve Customer problems**;
- ❑ Utilize Forest Service-provided enterprise management tools for **enterprise wide monitoring** of the network and systems infrastructure; and
- ❑ Provide maximum **Situational Awareness** of the state of Tier 0/1 support.



CUSTOMER CONTACT CENTER OBJECTIVES

RON COPSTEAD

- Maximize the Forest Service Customer community's satisfaction with the timeliness, quality, and responsiveness of the Tier 0/1 service provided by the CCC by;
 - Minimizing the amount of time Forest Service customers are impacted by technology outages, failures, and interruptions;
 - Focusing on solving user problems, minimizing the focus on the process, and maximizing user satisfaction with technology tools and the support thereof;
 - Implementing a proactive and helpful single-point-of-contact (SPOC) for all Forest Service Customer inquiries whether for computing, radio, telephone technologies, or other IT services;
 - Deploying highly-trained Customer Service Representatives able to address the majority of Customer incidents in a proactive, helpful, cooperative fashion;



CUSTOMER CONTACT CENTER OBJECTIVES *CONT'D*

RON COPSTEAD

- Reduce the total cost of Customer support (defined as the sum of Tiers 0, 1, 2, and 3 plus other direct and indirect costs) to the extent possible through maximum leverage of alternative, lower cost channels (e.g., Self-help Knowledge Management, Web Chat, etc.), by maximizing First Call Resolution at Tiers 0/1, and:
 - **Maximizing alignment of an incident** with the Service Provider resources best able to address the incident in the most efficient and effective manner possible;
 - **Optimizing the handling of customer contacts** such that incidents (including service requests) of varying complexity are addressed by the support channel (e.g., Tier 0, Tier 1, Tier 2, Tier 3) best equipped and staffed to address the specific incident towards the goal of overall reduction of Total Cost to the Forest Service;
 - **Continuous integration of industry best practices** for Contact Center tools and technologies that enhance the productivity of the Contact Center personnel, thereby driving down support costs for the Forest Service;
 - **Proactive root cause analysis** to generate infrastructure improvements, reduce contact volume and raise customer satisfaction accordingly;
 - **Inclusion of maximum scope in the Customer Contact Center BPA** so as to provide a predictable cost, obtained under **maximum price competition**;



CUSTOMER CONTACT CENTER OBJECTIVES *CONT'D*

RON COPSTEAD

- Maximize the manageability of the BPA and BPA Calls and the effectiveness of the Service Recipient/Service Provider interface through:
 - Implementation of ITIL-compliant processes to embed **standardized, efficient, effective, best-practice processes** throughout the support organization and in the interfaces between Service Providers;
 - Execution of a **flexible and agile Contract Change Management** process that permits rapid and effective design, approval, and implementation of changes to the BPA and BPA Calls with minimum Forest Service and CCC Contractor effort and cost;
 - Proactive and **rigorous root cause analysis** of repeating and systemic problems by the CCC Contractor to address incidents at the source;
 - Provision of enhanced technologies that **speed resolution times** and proactively eliminate end-user problems, thus improving the Forest Service employee's productivity;
- An excellent overall Customer support experience at the lowest possible contract, management, and administration cost.



FOREST SERVICE IT ENVIRONMENT

ALAN FLESH
DEPUTY CTO, INFORMATION RESOURCES MANAGEMENT (IRM)



ABOUT THE FOREST SERVICE IRM

ALAN FLESH

- ❑ Forest Service Information Resources Management is Responsible for:
 - Providing the technology, applications, services, governance, and support necessary to support the FS mission.
 - Managing Service Level Agreements to ensure products and services are delivered as agreed.
- ❑ IRM maintains Customer Relations Management (CRM) Teams that work with customers and help monitor customer satisfaction.



FOREST SERVICE SITES

ALAN FLESH

- ❑ More than 900 Forest Service office locations and approximately 3,000 remote field/wildland non-office sites, including unstaffed locations such as mountain tops.
- ❑ These locations range from densely populated urban areas to sparsely populated rural or wilderness sites.
- ❑ User populations at the office sites span a range:
 - Large (hundreds of individuals at headquarters, regional or station offices); to
 - Very small (fewer than 10 individuals in small district offices, research labs, or remote work centers); and
 - Individuals working under 'work-at-home' agreements and teams working in field locations or 'on-travel' away from offices.



FOREST SERVICE IT ENVIRONMENT • CURRENT

ALAN FLESH

- Forest Service IT Enterprise Architecture includes:
 - More than 33,000 desktop PCs and 8,000 laptops;
 - More than 1,000 Unix®-based (AIX®) and over 200 Linux based X-86 servers;
 - Multiple data and voice networks;
 - Extensive radio infrastructure comprised of tens of thousands of portable, handheld, and mobile radios and associated base stations, repeaters, and other equipment;
 - Desktop and laptop computers connect to the Agency's Distributed Computing Environment/Distributed File System (DCE/DFS) environment through Fast Connect for AIX;
 - Over 7,000 networked output devices (printers, plotters, and digitizers) including over 6,000 laser printers connected to the network;



FOREST SERVICE IT ENVIRONMENT • CURRENT

ALAN FLESH

- Forest Service Enterprise Architecture includes: (cont'd)
 - A variety of software and hardware devices (“adaptive aids”) including Braille printers, speech synthesizers, video magnifiers, and other equipment;
 - Adaptive technology software packages including Dragon NaturallySpeaking® Professional Software, OpenBook, MAGic, Jaws® for Windows; and
 - Significant numbers of handheld computers including, but not limited to, Windows CE® (Pocket PC), Palm®-based systems, and Blackberry OS in both office and field/outdoor ruggedized configurations.

The Forest Service IT Environment is complex and dynamic. A responsive and nimble contractor is needed to support this environment.

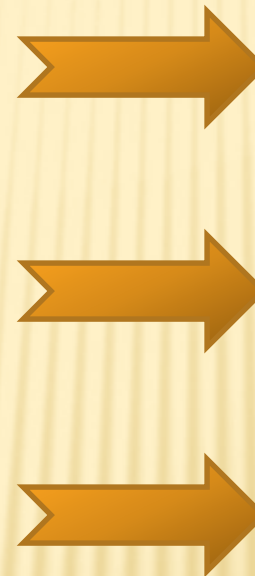


IT TRANSFORMATION

ALAN FLESH

TODAY

Servers	Unix®-based (AIX®) Mid-Range servers, located in over 150 locations
Mail / Messaging	Lotus Notes/Domino Mail and databases
Operating System	Windows 2000



FUTURE

X-86 server and Linux architecture located in two data centers
Microsoft Exchange <i>(by October 2008)</i>
Windows XP <i>(ongoing)</i>

Throughout the solicitation the Forest Service has described its future plans in the most accurate fashion possible based on the plans available at the time. Future IT planning may change; the Forest Service will endeavor to be transparent and timely in its communication of planning changes.



COMMERCIAL OFF THE SHELF (COTS) SOFTWARE

ALAN FLESH

Supported with Knowledge Documents provided by the CCC Contractor

- ADOBE
 - Adobe Acrobat Reader
 - Adobe (Macromedia) Flash Player
- APPLE
 - Apple Quicktime
- ARCTIC
 - BitTorrent
- CISCO
 - Cisco Security Agent
 - Cisco VPN Client
 - Remote Access VPN
- COMMONTIME
 - mNotes
- COREL
 - WinDVD
- ESRI
 - ArcGIS with Seagate Crystal Reports
 - ArcView
- FREEDOM SCIENTIFIC
 - JAWS
 - MAGic Professional
 - OpenBook
- HUMMINGBIRD
 - Exceed
 - Exceed 3D

Commercial-off-the-Shelf Software incidents should be resolved almost exclusively by Tier 1



COMMERCIAL OFF THE SHELF SOFTWARE *CONT'D*

ALAN FLESH

Supported with Knowledge Documents provided by the CCC Contractor (cont'd)

□ LOTUS

- iNotes Access for Outlook
- Lotus Notes (with Collaboration) (client)
- Lotus EasySync
- Lotus Notes for Messaging (client)
- Lotus Notes Minder
- Lotus Sametime (client)
- Sametime Meeting
- Notes Webmail (Web Access)

□ MICROSOFT

- Microsoft Windows Operating System (including Internet Explorer)
- Microsoft Office Access
- Microsoft Office Excel

□ MICROSOFT (cont'd)

- Microsoft Office FrontPage
- Microsoft Office Outlook
- Microsoft Office Photo Editor
- Microsoft Office PowerPoint
- Microsoft Office Project
- Microsoft Office Publisher
- Microsoft Office Visio
- Microsoft Office Visio Viewer
- Microsoft Office Word
- Microsoft Pocket PC
- Microsoft Windows Mobile
- Windows Media Player

Commercial-off-the-Shelf Software incidents should be resolved almost exclusively by Tier 1



COMMERCIAL OFF THE SHELF SOFTWARE *CONT'D*

ALAN FLESH

Supported with Knowledge Documents provided by the CCC Contractor (cont'd)

- ❑ MICROSOFT (cont'd)
 - Windows Movie Maker
 - Microsoft ActiveSync with mNotes (for Pocket PC or Windows Mobile)
- ❑ NUANCE
 - Dragon Naturally Speaking
- ❑ OPEN SOURCE
 - Ghostscript
 - Gsview
 - PDF Creator
 - PuTTY Secure Shell
 - WinSCP (SSH_SCP)
- ❑ ORACLE
 - Oracle Client
- ❑ PALM
 - Palm Hotsync with mNotes
 - Palm OS
- ❑ PC-DOCTOR
- ❑ REAL
 - Real Player
- ❑ ROXIO
 - Roxio Easy CD Creator
 - Roxio Easy Media Creator
- ❑ SONIC
 - CinePlayer
- SUN
 - Java Runtime Environment

Commercial-off-the-Shelf Software incidents should be resolved almost exclusively by Tier 1



COMMERCIAL OFF THE SHELF SOFTWARE *CONT'D*

ALAN FLESH

Supported with Knowledge Documents provided by the CCC Contractor (cont'd)

- SYMANTEC
 - Symantec Antivirus
 - Symantec Live Update
- THINKVANTAGE
 - Rescue & Recovery
 - Productivity Center
 - Productivity Center Supplement
 - Access Connections
- TIVOLI
 - Tivoli Endpoint Health
- WinZip

Commercial-off-the-Shelf Software incidents should be resolved almost exclusively by Tier 1



COMMERCIAL OFF THE SHELF SOFTWARE *CONT'D*

ALAN FLESH

Supported with Knowledge Documents provided by the Forest Service

□ AIX Support

- C for AIX
- AIX Maintenance
- AIX 5.3 Support
- AIX 5.1 New Defect

□ CISILION

- Netforensics

□ LEICA

- ERDAS

□ SAS

- Statistical Analysis Software

□ TIVOLI

- Tivoli Framework for Client
- Tivoli Provisioning Manager Client
- Tivoli Inventory for Client
- Tivoli Remote control for Client or NT server
- Tivoli Manager for Lotus Notes

□ UNICENTER

- Desktop DNA

Resolution of Commercial-off-the-Shelf Software incidents for the above applications should be attempted by Tier 1 where Knowledge Documents are provided by the Forest Service



GOVERNMENT OFF THE SHELF SOFTWARE

ALAN FLESH

Supported with Knowledge Documents provided by the Forest Service

- ❑ ALP/NILS - Automated Lands Project/National Integrated Lands System
- ❑ ATSA - Automated Timber Sale Accounting Avue Digital Service (ADS)
- ❑ ConnectHR Dashboard
- ❑ Correspondence Database
- ❑ EaTIS - Equipment and Training Inventory System
- ❑ EERA - Emergency Equipment Rental Agreement
- ❑ FedTravel.com
- ❑ FEPMIS - Federal Excess Property Management Information System
- ❑ Forest Service Administrative Services
- ❑ Forest Service AgLearn
- ❑ Forest Service HCM Shared Services
- ❑ Forest Service IP Configurator
- ❑ Forest Service Leica GeoSystems Image Processing Modules
- ❑ Forest Service MS Office 2000 Templates
- ❑ Forest Service PC Travel Application
- ❑ Forest Service Remote Access
- ❑ Forest Service Senior Enrollee Tracking System (SETS)
- ❑ Forest Service System Information
- ❑ FVS - Forest Vegetation Simulator
- ❑ HDT - Human Dimensions Toolkit
- ❑ IIAS - Integrated Acquisition System Production Implementation
- ❑ IMPLAN

Where Knowledge Documents are provided, Tier 1 shall attempt to resolve; where Knowledge Documents are not provided, Government off the Shelf software is supported by the ISO and application-specific helpdesks



GOVERNMENT OFF THE SHELF SOFTWARE *CONT'D*

ALAN FLESH

Supported with Knowledge Documents provided by the Forest Service

- ❑ LEIMARS - Law Enforcement Investigations Management and Attainment Reporting System
- ❑ Lotus Notes Desktop DNA Repair Tool
- ❑ LSTP - Lean Six-sigma Transaction Processing
- ❑ Mail-in (Mailroom) Database
- ❑ NATCRS - National Timber Cruise
- ❑ National Financial Applications
- ❑ NRM - Natural Resource Manager
- ❑ Operational Loads Management System
- ❑ Paycheck
- ❑ PALS - Planning, Appeals and Litigation System
- ❑ PAS - Performance Accountability System
- ❑ PC Rename Utility
- ❑ SAVRemover Tool
- ❑ SDMS - Standard Data Management System
- ❑ Spectrum
- ❑ TEUI Toolkit - Terrestrial Ecological Unit Inventory Geospatial Toolkit
- ❑ VIPR - Virtual Incident Procurement
- ❑ WebDET
- ❑ WFRP - Wildlife Fish & Rare Plants Management System
- ❑ WorkPlan
- ❑ USDA eAuthentication

Where Knowledge Documents are provided, Tier 1 shall attempt to resolve; where Knowledge Documents are not provided, Government off the Shelf software is supported by the ISO and application-specific helpdesks



HARDWARE DEVICES *REPRESENTATIVE*

ALAN FLESH

Desktops

- Dell
 - Optiplex GX, Precision, Dimension
- IBM
 - 6578, 6792, 6794, 6862, 6892, 6833, 6840
- Lenovo
 - Think Centre

Laptops

- Dell
 - C400, C600, C800, D400, D600, D800, M50, M60, X300
- IBM
 - 2530, 2626, 2828, 2652, 2662
- Lenovo
 - ThinkPad T60

High End Workstations

- IBM
 - 7043-240



HARDWARE DEVICES *REPRESENTATIVE - CONT'D*

ALAN FLESH

Servers

- Dell Power Edge
 - Model 1650, 1750, 2600, 2650, 2850, 6650
- IBM RS/6000 7019, 7013, 7015, 7030
 - Model C20, 590, 620, J40, R40, 9076
- IBM eServer xSeries
 - Model 330, 345, 346,
- IBM Server
 - 7028, 7029, 7038, 7043, 7044, 7046, 9111, 9113, 9117
- IBM PPS (Personal Power System)

Network Printers

- Hewlett Packard Laser Jet
 - Model 1XXX, 2XXX, 3XXX, 4XXX, 5XXX, 8XXX, 9XXX, 5M
- Lexmark Optra
 - Series C, S, T, W
- Xerox Phaser
 - Model 3450, 4XXX, 5XXX, 6XXX, 7XXX
- Xerox
 - WorkCenter Pro
- Others
 - Approximately 15%



HARDWARE DEVICES *REPRESENTATIVE - CONT'D*

ALAN FLESH

Radio

- Forest Service radio assets are distributed across 150 National Forests. In general, the Forest Service radio system includes:
 - 3,000 Backbone Radio Sites with Towers;
 - 300 dispatch centers;
 - 900 dispatch consoles/seats;
 - 1,000 single-channel radios;
 - 2,750 repeaters;
 - 122 microwave links;
 - 57,000 handheld radios;
 - 30,000 mobile (vehicle) radios;
 - 4,500 Remote Controls located across 1,200 Forest Service zones

Telecomm

- Migrating to VoIP network
- Legacy PBX infrastructure
- 30% currently VoIP

Network

- Cisco based data network
- USDA MPLS cloud to integrate backbone to supervisor office
- Additional complexity at the lowest level of the organization



MONITORING AND MANAGEMENT

ALAN FLESH

Network Operations Center

- ✓ Two (2) Network Operations Centers for redundancy – one in Albuquerque, NM and one in Portland, OR;
- ✓ NOCs monitor continuous Big Brother and Concord e-Health status;
- ✓ MRTG to check specific connections when troubleshooting problems; and
- ✓ Additional tools in-use today include Spectrum and Cisco Works 2000.

Security Operations

- ✓ Responsible for security operations and computer incident response, 24x7;
- ✓ Responsible for following computer incidents from their inception through successful incident resolution;
- ✓ Uses IDS, NetForensics, ISS Internet Scanner and Cisco Security agent, soon to be monitored from geographically disparate locations 24x7; and
- ✓ Responsible for the interface between the Forest Service and the FS' ISP; including development of firewall rules for the Forest Service's ISP using Cisco PIX and CIRT integration.

Enterprise Operations Center

- ✓ Monitors the IT infrastructure including network, services, critical services, business applications, radio and telephone components;
- ✓ Tracks performance against service levels;
- ✓ Provides 24X7 support through the combined resources of the EOC and Duty officer Process; and
- ✓ Service include Incident Management , Problem Management , Change Management, Availability Management, Release Management.



SUPPORTING AN EVER-CHANGING ENVIRONMENT

ALAN FLESH

- ❑ Successful support of the Forest Service customer is dependent on:
 - A mutually constructive relationship between the Forest Service and the CCC Contractor;
 - Clear definition of the Forest Service expectations of the CCC Contractor, and vice versa; and
 - Flexibility and agility in the support provided by the CCC Contractor.
- ❑ Ever changing technology, however, challenges this relationship – new software versions, new hardware support needs, future trends we cannot anticipate today.
- ❑ The pricing strategy and leverage of Knowledge Documentation is intended to establish that all contacts should be equal from the CCC Contractors perspective -- what changes with an evolving environment are:
 - CCC Contractor training needs
 - CCC Knowledge Documentation acquisition



ENABLING FLEXIBILITY

ALAN FLESH

- ❑ COTS software support:
 - The BPA establishes support at N-1 (retail-shelf and one prior Major version)
 - This “rolling” approach helps the Offeror cost the future expenses based on a knowledge of software vendor release schedules.
- ❑ Hardware support:
 - In general, industry-standard hardware and four to six year refresh cycle
- ❑ Additional CLINs:
 - For Transition Management
 - For Training costs
 - For Other Direct Costs
 - For Special Projects

The “Rule of Thumb”:
If there is a Knowledge Document the Tier 1 CCC should solve the Customer’s problem
If there is no Knowledge Document, and the Customer Service Representative cannot address the issue, escalation to the Tier 2 or Tier 3 is appropriate



BREAK

For more information

For this presentation, transcript, and attendee list:

FedBizOpps: Solicitation AG-7604-S-07-0017

and

http://www.fs.fed.us/business/computer_base

Send comments and questions to email:

CCC2007@fs.fed.us



INFORMATION SOLUTIONS ORGANIZATION (ISO)

DOUGLAS NASH
DIRECTOR, INFORMATION SOLUTIONS ORGANIZATION (ISO)



FOREST SERVICE IT INFRASTRUCTURE SUPPORT

DOUGLAS NASH • DIRECTOR, INFORMATION SOLUTIONS ORGANIZATION (ISO)

- ❑ Provided by the Information Solutions Organization (ISO)
 - Provides operational, Tier 2 and 3, architecture and engineering services, and project management
- ❑ Part of the CIO organization.
- ❑ The Customer Contact Center is the primary interface for customers.
- ❑ Service delivery success is highly dependent on tight integration and coordination with helpdesk service provider.
- ❑ ISO provides management and oversight of the Customer Contact Center service provider, through an Operating Level Agreement (OLA.)



ISO OPERATING ENVIRONMENT

DOUGLAS NASH

- ❑ Enterprise organization managed by single leadership team
- ❑ Performance based, A-76 MEO
- ❑ Lead for infrastructure support and service delivery
 - ISO serves as the integrator for IT services
- ❑ Scope of work and program of work governed by Contract / Letter of Obligation (LOO)
- ❑ Support provided 24x7 consistent with Customer Contact Center
- ❑ Performance measured by external group
- ❑ Customer Board oversees ISO performance, customer feedback, and requirements
- ❑ Business application (GOTS) managed by a separate group with the CIO organization



ISO ORGANIZATION

DOUGLAS NASH

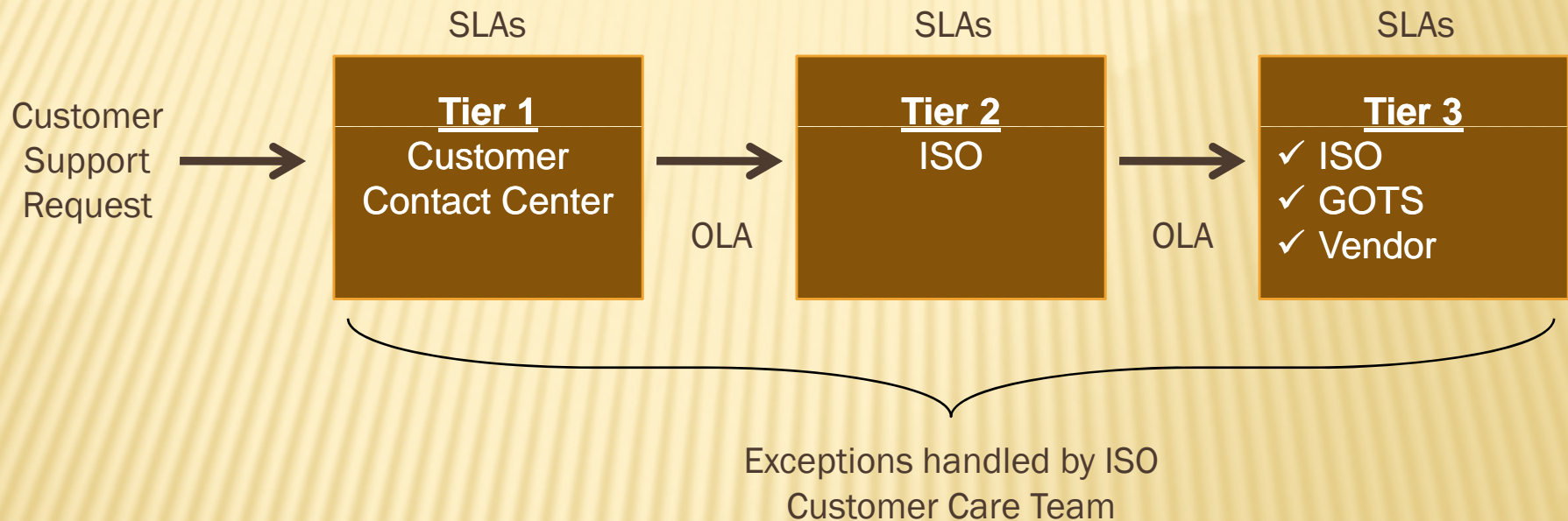
- ❑ Desktop
- ❑ Application Hosting
- ❑ Radio
- ❑ Voice
- ❑ Network
- ❑ Technical Architecture
- ❑ Engineering
- ❑ Project Management Office
- ❑ Service Level Attainment
- ❑ Security
- ❑ Enterprise Operations Center
- ❑ Testing/Release Management
- ❑ Administrative
- ❑ Business and Investment Group

Specialization, Standardization, Centralization



CUSTOMER SUPPORT WORKFLOW

DOUGLAS NASH



The ISO has accountability for end-to-end Customer satisfaction



STRATEGY AND REQUIREMENTS

RON COPSTEAD
CUSTOMER CONTACT CENTER PROJECT LEAD



SUPPORT STRATEGY

RON COPSTEAD • CUSTOMER CONTACT CENTER PROJECT LEAD

- ❑ To maximize Customer satisfaction and minimize cost the Forest Service has formulated a focused support strategy:
 - Focus on an integrated end-to-end, Customer experience;
 - Forest Service and Contractor investment in Knowledge Management tools and documentation;
 - Promote adoption of lower cost, self-help channels;
 - Maximize first call resolution;
 - Leverage mature, ITIL-compliant processes; and
 - Tier 1 feedback to the ISO for infrastructure improvements.
- ❑ In general, if a Knowledge Document exists the Tier 1 CCC is expected to resolve the Customer's issue.



OVERALL CALL VOLUME *PER MONTH*

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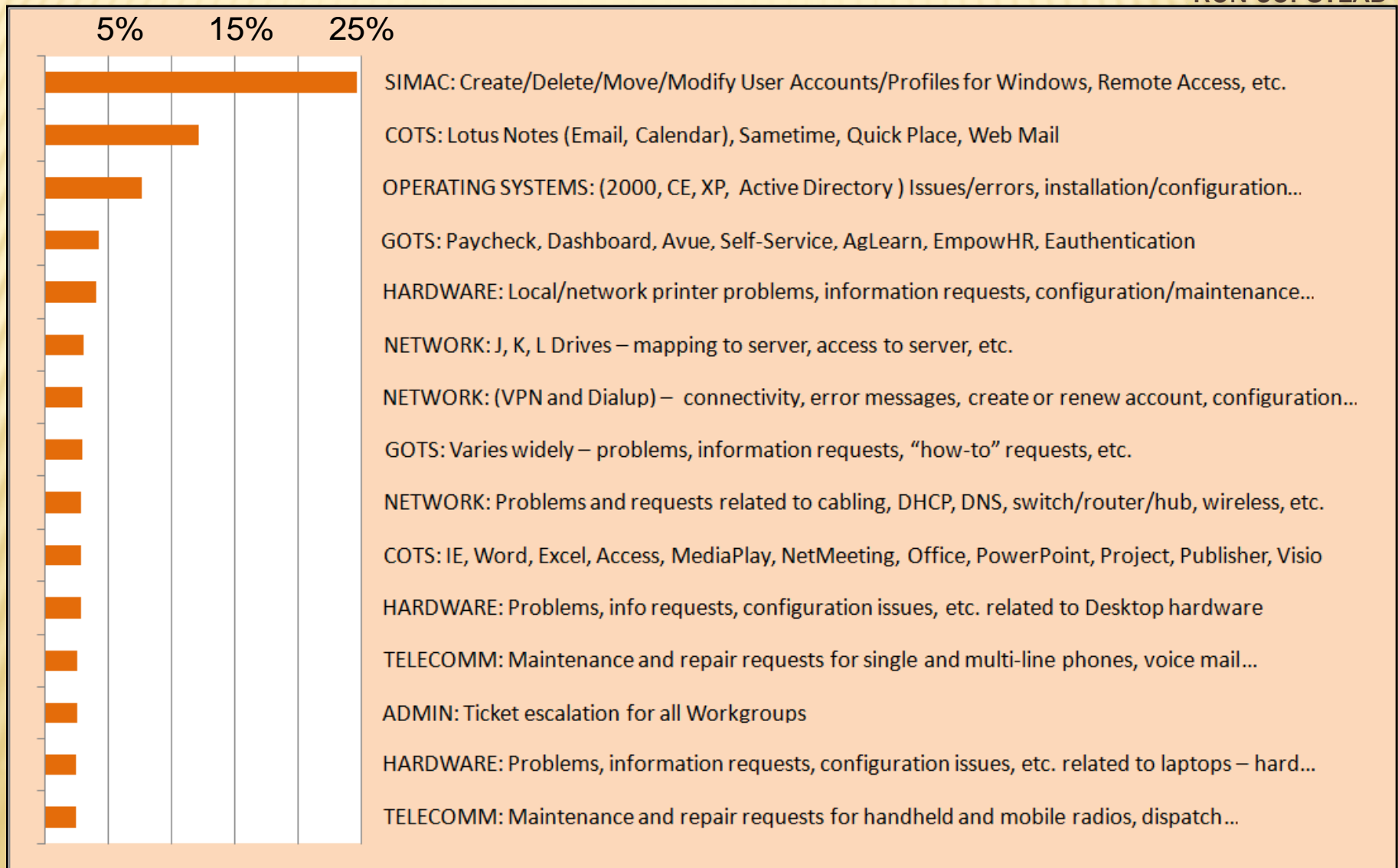
YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2003	21,901	14,283	14,505	15,421	16,294	21,331	18,458	23,086	18,533	17,373	12,680	13,282
2004	16,716	18,684	18,916	22,582	29,705	26,696	24,480	25,161	23,876	27,143	22,953	20,737
2005	26,566	25,731	31,362	31,571	37,858	36,740	31,721	44,442	30,442	28,712	29,272	22,144
2006	26,702	24,136	28,130	23,610	27,470	27,515	23,456	25,983	23,167	23,688	18,824	16,224
2007	20,904	22,854	28,718	28,181	37,080	34,225						



CALL VOLUME *BY TYPE*

Time Period: May 1, 2006 to April 30, 2007

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KNOWLEDGE DOCUMENTATION

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TYPE	RESPONSIBILITY	MODIFICATION	TESTING AND APPROVAL
COTS	✓ Provided by the CCC Contractor	✓ NA	✓ Tested by the CCC Contractor ✓ Approved by the Forest Service prior to deployment
Modified COTS	✓ COTS Knowledge Documentation Provided by the CCC Contractor	✓ The Forest Service shall modify the original Knowledge Document as required to accommodate the configuration, installation, or other changes	✓ Tested and approved by the Forest Service prior to deployment
GOTS	✓ Provided by the Forest Service	✓ CCC Contractor to recommend changes to Knowledge Documents where improvement or modification is needed ✓ Changes to the Knowledge Documents shall be made by the application group responsible for the GOTS application	✓ Tested and approved by the Forest Service prior to deployment



KNOWLEDGE DOCUMENTATION *CONT'D*

RON COPSTEAD

TYPE	RESPONSIBILITY	MODIFICATION	TESTING AND APPROVAL
Standard Hardware	✓ Provided by the CCC Contractor	✓ NA	✓ Tested and approved by the Forest Service prior to deployment
Non-standard Hardware	✓ Provided by the Forest Service	✓ CCC Contractor to recommend changes to Knowledge Documents where improvement or modification is needed ✓ Changes to the Knowledge Documents shall be made by the group responsible for the non-standard hardware	✓ Tested and approved by the Forest Service prior to deployment
Network Connectivity	✓ Network connectivity and basic end user configuration provided by the CCC Contractor	✓ NA	✓ Tested and approved by the Forest Service prior to deployment



TECHNOLOGY AND TOOLS

RON COPSTEAD

- ❑ Requirements are not intended to be overly prescriptive or to limit the effectiveness of the Offeror's best-practice solution;
- ❑ Offeror's proposed solution need not be structured as separate tools provided the requirements of the Forest Service are fully met;
- ❑ Offerors are expected to propose additional and/or alternative tools that align with their technical approach and maximize value and benefit to the Forest Service;
- ❑ The ISO and other support organizations will heavily leverage these tools in this multi-source environment;



TECHNOLOGY AND TOOLS *CONT'D*

RON COPSTEAD

- At a minimum, the Government requires the Offeror provide tools or functionality equivalent to:
 - Forest Service Support Portal (FSSP)
 - Forest Service Situational Awareness System (FS-SAS)
 - Knowledge Management System (KMS)
 - Ticket Management System (TMS)
 - Automated Call Distributor (ACD)
 - Integrated Voice Response (IVR)
 - Reporting Tool
 - Self-Generated Ticket Systems (SGTS)
 - Secure Web Chat



TRAINING OF FOREST SERVICE ISO AND IRM

RON COPSTEAD

- ❑ The CCC Contractor shall provide training on it's provided tools/technology to the Forest Service IRM and ISO personnel. Forest Service personnel requiring training are:
 - Advanced training including functionality and “how-to”: 450 ISO staff, 50 IRM staff
 - Basic training including functionality overview: 100 ISO staff, 50 IRM staff

- ❑ Training shall be required for the Contractor-provided (1) Portal, (2) Knowledge Management System, (3) Situational Awareness System, (4) Ticket Management System, (5) Reporting Tool, and (6) Self-Generated Ticketing System, (7) Web chat.

- ❑ Acceptable methods of training include live, virtual training or interactive, classroom training



CONTRACT CHANGE MANAGEMENT

RON COPSTEAD

- CCC Contractor shall provide a contract Change Management process and integrated tool:
 - Based on best practices and industry standards;
 - For capturing proposed/actual Changes to the CCC Contract as a result of changing Forest Service needs;
 - Includes planning, scheduling, distribution, application & tracking of Contract Changes.



KEY DELIVERABLES

RON COPSTEAD

DELIVERABLE	DESCRIPTION	TIMING
Problem Report	✓ Submit to the Forest Service Contracting Officer or designee any problems or incidents that may hinder the ability of the Contractor to complete the tasks described in the Performance Work Statement.	✓ As needed, but no less than every month on the 15th day of the month, or the next working day.
Monthly Status Reports	✓ Provide Monthly status reports in written and oral form.	✓ Monthly
Monthly Operational Meeting	✓ Facilitate Monthly operations/status meetings in which Monthly Status Reports are presented and operational issues are discussed.	✓ Monthly
Monthly SLA/SLO Performance Reports	✓ SLA/SLO Performance reports on all SLAs and SLOs; includes a root-cause analysis for any failed SLA/SLO.	✓ Monthly
Final Transition Plan	✓ Final Transition Plan updating the Offeror's proposed draft Transition Plan.	✓ No later than thirty (30) calendar days after Work Start
Exit Plan	✓ Offeror's Exit Plan for disengagement at the end of the BPA period of performance.	✓ No later than 180 calendar days after Work Start
Final Program Management Plan	✓ Final Program Management Plan updating the draft Plan provided in the Offeror's proposal	✓ No later than sixty (60) calendar days after Work Start



ATTACHMENTS IN THE RFQ

RON COPSTEAD

- ❑ ATTACHMENT J-1 CONTRACT DATA REQUIREMENTS LIST
- ❑ ATTACHMENT J-2 PERFORMANCE BASIS
- ❑ ATTACHMENT J-3 DRAFT OPERATING LEVEL AGREEMENT
- ❑ ATTACHMENT J-4 FOREST SERVICE SECURITY POLICY
- ❑ ATTACHMENT J-5 TECHNICAL EXHIBIT WEBSITE
- ❑ ATTACHMENT J-6 TECHNICAL/MANAGEMENT PROPOSAL COMPLIANCE MATRIX
- ❑ ATTACHMENT J-7 HISTORICAL CALL VOLUMES
- ❑ ATTACHMENT J-8 REPRESENTATIVE STANDARD HARDWARE CONFIGURATION
- ❑ ATTACHMENT J-9 SAMPLE PROGRAM MANAGER SURVEY
- ❑ ATTACHMENT J-10 HISTORICAL TICKET VOLUME AND CATEGORIZATION – CALL TICKETS
- ❑ ATTACHMENT J-11 TICKET CATEGORY DESCRIPTIONS
- ❑ ATTACHMENT J-12 HISTORICAL TICKET VOLUME AND CATEGORIZATION – PHONE /RADIO
- ❑ ATTACHMENT J-13 REQUIREMENTS FOR SCRIPTED DEMONSTRATIONS
- ❑ ATTACHMENT J-14 PRICING TABLES
- ❑ ATTACHMENT J-15 BPA CALL 0001 BUILD-UP TEMPLATE
- ❑ ATTACHMENT J-16 WEB TICKET DATA
- ❑ ATTACHMENT J-17 TECHNICAL/MANAGEMENT PERFORMANCE COMPLIANCE MATRIX
- ❑ ATTACHMENT J-18 FOREST SERVICE TECHNOLOGY ROADMAP



TRANSITION AND PERFORMANCE BASIS

RON COPSTEAD

- Transition
 - Ninety (90) day Transition period
- Elements of the Performance Basis:
 - The CCC Contractor shall be required to propose an At-Risk Percentage no less than five percent (5%) and no more than fifteen percent (15%) of the CCC Contractor's Fixed Price in a given period.
 - Contractor "earn-back" of the "at-risk" amount is driven by SLA performance.
 - SLAs and Service Level Objectives (SLO) are "swappable" on a quarterly basis as performance against current SLAs and SLOs suggests will benefit the Forest Service.
 - "Swapping" shall occur effective the first day of the quarter and proactively, not retroactively.
- SLA Effectivity:
 - SLAs and SLOs will be measured and reported by the CCC Contractor beginning no later than the 91st calendar day after Work Start.
 - SLA incentives and disincentives will be calculated beginning on the 91st calendar day after Work Start.
 - SLA incentives and disincentives will be applied as of the first day of the 181st calendar day after Work Start.



SERVICE LEVEL AGREEMENTS (SLA)

RON COPSTEAD

SLA	DESCRIPTION	MEASURED	TARGET
Customer Satisfaction (Forest Service Key Stakeholders)	<ul style="list-style-type: none"> ✓ Measure of the Forest Service Key Stakeholders' satisfaction along critical performance dimensions 	<ul style="list-style-type: none"> ✓ Quality assessment completed by the Forest Service IRM Program Manager in consultation with key Forest Service Stakeholders 	<ul style="list-style-type: none"> ✓ Greater than 75 out of 100 points
First Contact Resolution (FCR)	<ul style="list-style-type: none"> ✓ Measure of First Contact resolution of Contact Center inquiries 	<ul style="list-style-type: none"> ✓ Number of Contacts in a month resolved on the first call or correctly escalated to Tiers 2 and 3 / total Contacts in the month = "Service Level Attained" ✓ Includes all Contacts in the denominator, regardless of "First Contact Resolvable." 	<ul style="list-style-type: none"> ✓ 70% for first two (2) calendar months after Transition is complete ✓ 5% monthly increases until first call resolution rate equals or exceeds 95%
Average Speed to Answer (ASA)	<ul style="list-style-type: none"> ✓ Measure of the average time between a caller making a selection in the IVR and speaking to CSR 	<ul style="list-style-type: none"> ✓ Number of calls answered in 40 seconds / total calls = "Service Level Attained" 	<ul style="list-style-type: none"> ✓ 90% of Calls in less than 40 seconds by a CSR



SERVICE LEVEL AGREEMENTS (SLA) *CONT'D*

RON COPSTEAD

SLA	DESCRIPTION	MEASURED	TARGET
Repeat Contact Incidents	✓ Measure of repeat Tier 1 contacts to CCC due to problem repeated after initial fix failed (logged less than 15 days after the initial contact.)	✓ Number of repeat Tier 1 Contacts / total Tier 1-resolved contacts = "Service Level Attained"	✓ Less than 3%
Incorrect Escalations to Tier 2 or Tier 3	✓ % of all escalations incorrectly referred by the CCC Contractor to Tier 2 or Tier 3	✓ Number of incorrect escalations to Tiers 2 or 3 / total escalations to Tiers 2 or 3 = "Service Level Attained" ✓ Data obtained through the Ticket Management System flag selected by the Tier 2 or Tier 3 technician.	✓ Less than 5%



SERVICE LEVEL AGREEMENTS (SLA) *CONT'D*

RON COPSTEAD

SLA	DESCRIPTION	MEASURED	TARGET
Customer Satisfaction (Customer)	✓ Measure of Customer satisfaction with Contact Center services provided	✓ Average of two measures: <ul style="list-style-type: none">▪ % of Customers rating the CCC on a 5 point scale against "Overall Customer Satisfaction" in the Annual survey▪ % of Customers rating the CCC on a 5 point scale against "Overall Customer Satisfaction" in the Closed Ticket survey	✓ An average of 95% of surveyed customers rate the performance of the Contractor greater than 4.0 in year 1, and greater than 4.2 in years 2 through 5



SERVICE LEVEL OBJECTIVES (SLO)

RON COPSTEAD

SLO	DESCRIPTION
Manage User Account: Establish individual user accounts (including email, as applicable)	✓ Acceptable time for creation of access authorizations and codes for user access to systems
Manage User Account: Password Reset (including email password, as applicable)	✓ Acceptable time for Password Reset based on Customer request.
Manage User Account: Delete user accounts (including email, as applicable)	✓ Acceptable time for deletion of access authorizations and codes.
Respond to Customer Contact: Email Ticket	✓ Acceptable time for response to a contact initiated by a Customer via email
Respond to Customer Contact: Web Ticket	✓ Acceptable time for response to a contact initiated by a Customer via the Web
Respond to Customer Contact: Fax Ticket	✓ Acceptable time for response to a contact initiated by a Customer via fax
Publishing Knowledge Documentation	✓ Adherence to agreed-upon timeframes for publishing Knowledge Documentations



PROPOSAL PROCESS

BONNIE GILBERT
CONTRACTING OFFICER



DISCUSSIONS AND DEMONSTRATIONS

BONNIE GILBERT • CONTRACTING OFFICER

❑ ORAL PRESENTATIONS

- Offerors to present their Technical and Management approach and the associated Quality Control Plan.

❑ TOOL DEMONSTRATIONS

- Offerors to present their proposed technical solution to addressing the Forest Service's Technology and Tool requirements.

❑ TECHNICAL Q&A

- Offerors afforded an opportunity to ask specific technical questions of key ISO and IRM technical representatives.

❑ DISCUSSIONS

- Discussions between the Government and Offerors with the intent of allowing the Offeror to revise its proposal.
- Focus on strengths, weaknesses, and past performance information.

* Bidder Meetings will be held at the discretion of the Forest Service



PROPOSAL STRUCTURE

BONNIE GILBERT

- Volume 1: Technical/Management Proposal *limited to one hundred (100) pages*
 - Section 1 – Executive Summary
 - Section 2 – Management Approach
 - Section 3 – Technical Approach
 - Section 4 – Key Personnel Resumes (not included in page limit)
 - Section 5 – Quality Control Plan
- Volume 2: Past Performance References
- Volume 3: Cost/Business Proposal



BASIS OF AWARD

BONNIE GILBERT

- Best value to the Government on the basis of:
 - **Capability of the Offeror.**
 - Management Approach
 - Technical Approach
 - Key Personnel
 - Past Performance.
 - **Price Reasonableness.** Reasonableness of the price of each Offeror will be evaluated but not scored as prescribed in FAR 15.403 and FAR 15.404.



EVALUATION FACTORS

BONNIE GILBERT

- ❑ **MANAGEMENT APPROACH.** Elements include:
 - Effectiveness of the Offeror's Management approach for addressing quality assurance, personnel resource management, business process execution, use of management tools, and team/subcontractor management;
 - Organization and management of the Offeror's team and the process by which the team will be enhanced and improved with changing Forest Service needs;
 - Effectiveness of the Offeror's proposed Transition In Plan and Transition Out Plan; extent of planned risk mitigation;
 - Corporate capabilities designated to accomplish the requirements stated in the PWS; and
 - Quality, comprehensiveness, and specificity of the Offeror's response.



EVALUATION FACTORS *CONT'D*

BONNIE GILBERT

- **TECHNICAL APPROACH.** Elements include:
 - Effectiveness, feasibility, and sustainability;
 - Use of innovative, best-practice, leading-edge technology, tools, and processes to reduce overall cost while maximizing Customer Satisfaction;
 - Demonstrated thought leadership and innovation; and
 - Quality, comprehensiveness, and specificity of the Offeror's response.

- **KEY PERSONNEL.** Elements include:
 - Quality, experience, expertise and engagement; and
 - Proposed continuity of Key Personnel during the first year of the BPA, demonstrating commitment to the Forest Service and preserving the Forest Service's investment in knowledge transfer to Contractor resources.



EVALUATION FACTORS *CONT'D*

BONNIE GILBERT

- ❑ **PAST PERFORMANCE.** Performance risk evaluation based upon the past performance of the offeror and its proposed major subcontractors as it relates to the probability of successfully performing the solicitation requirements.
 - Subfactors, equal in importance:
 - Quality of Services, Schedule, Cost Control, Business Relations, Management of Key Personnel, Demonstrated Effectiveness of Proposed Solution.
 - Offerors shall provide a minimum of five (5) Past Performance references (similar size, scope, and complexity) of current or Past Performance within the last three (3) years:
 - At least three (3) of the five (5) references must be for the Offeror as Prime Contractor;
 - At least two (2) of the five (5) references shall be for U.S. Federal Government clients; and
 - At least one (1) of the five (5) references shall be for a Commercial client.



NEXT STEPS

BONNIE GILBERT

- ❑ Questions and comments from industry will be evaluated and incorporated, as appropriate, into the Final Request for Quote
- ❑ The Forest Service anticipates release of the Final RFQ on or about 10 September
- ❑ Proposals will be due on or about 12 October



For this presentation, transcript, and attendee list:

FedBizOpps: Solicitation AG-7604-S-07-0017

and

http://www.fs.fed.us/business/computer_base

Send comments and questions to email:

CCC2007@fs.fed.us

USDA Forest Service

Customer Contact Center

PRE-PROPOSAL BIDDERS' CONFERENCE

16 August 2007

Washington, DC

Solicitation: AG-7604-S-07-0017

