

**CITY OF PEORIA  
C O N T R A C T**

32-19

This agreement, made and entered into this 1<sup>st</sup> day of October, A.D., 2019 by and between the City of Peoria, a municipal corporation, party of the first part, and Group O Inc., 4905 77<sup>th</sup> Avenue, Milan, IL 61264, his/their executors, administrators, successors or assigns, party of the second part.

WITNESSETH: That for and in consideration of the payments and agreements mentioned in the proposal hereto attached, to be made and performed by the party of the first part, and according to the terms expressed in the bond referring to these presents, the party of the second part agrees with said party of the first part, at his/their own proper costs and expense to furnish and deliver all the work, materials and supplies in accordance with the specifications contained in said proposal, and in full compliance with all of the terms of this agreement.

IT IS UNDERSTOOD AND AGREED that the instructions to bidders, proposal, and bid and specifications are component parts of this contract and shall be deemed a part hereof. It is also understood and agreed that the contractor shall not assign, transfer, convey or otherwise dispose of this contract, or his right to execute it, or his right, title or interest in or to it or any part thereof, unless the previous written consent of the City Manager of the City of Peoria shall first be obtained thereto.

IN WITNESS WHEREOF, the said parties have executed these presents on the date above mentioned.

In accordance with the attached specifications, proposal, and pricing Group O Inc. will provide Call Center Services for the City of Peoria.

Rates are figured in accordance with amounts listed in the attached proposal #32-19 (Page 8) beginning October 1, 2019 and ending March 31, 2020.

**THE CITY OF PEORIA**

By \_\_\_\_\_

City Manager

**PARTY OF THE SECOND PART**

Group O

(Name of individual, firm, or corporation)

By \_\_\_\_\_

(Member of firm or officer of corporation)

**APPROVED FINANCE DEPARTMENT**

By \_\_\_\_\_

(James Scroggins)

**APPROVED LEGAL DEPARTMENT**

By \_\_\_\_\_

(Don Leist)

**APPROVED USING DEPARTMENT**

By \_\_\_\_\_

(James Scroggins)



# City of Peoria

## Council Communication

Agenda Date : 9/24/2019

File #: 19-304, Version: 1

### ACTION REQUESTED:

Communication from the City Manager and Finance Director/Comptroller with a Request to APPROVE and Authorize the City Manager to Enter into a CONTRACT with GROUP O, INC. to Provide CALL CENTER SERVICES for the City of Peoria Relating to the Public Safety Pension Fee for a Six Month (6) Period with an Estimated Beginning date of October 1, 2019, in an Amount Estimated at \$90,000.00.

**BACKGROUND:** As part of the 2019 Revised Annual Budget, the City implemented a Public Safety Pension Fee to assist in the funding of the City's Police and Fire Pension Funds. In October the City will send out in excess of 45,000 bills to all non-governmental properties assessing the Public Safety Pension Fee. Based upon previous experience regarding new fees, establishing a call center to answer questions from citizens when the bill is received will provide the most prompt, professional and efficient solution to responding to citizens questions. The initial program will be for six (6) months with an option to extend if necessary.

A Request for Proposal (RFP) was issued on August 16, 2019 for Call Center Services. The City received ten (10) responses. The responses were evaluated independently by five (5) raters from the Treasurer's office, Finance Department and Information Systems based on the following criteria:

Approach to the Project (40 Points) - Describe your understanding of the project, critical elements, and goals

Previous Experience (25 points) - Include detailed relevant experience of similar work, with appropriate references.

Pricing (Costs) (25 Points)

MBE/WBE Participation (10 Points) - Describe your firm's efforts to achieve a diverse workforce.

Based upon the above criteria, the evaluators selected Group O, Inc. in Milan, Illinois. Attached is a summary of ratings by evaluator for the ten (10) responses.

Group O, Inc. is a 100% Hispanic-owned National Minority Supplier Development Council (NMSDC) certified MBE and is recognized as one of the largest Hispanic-owned businesses in the United States and the largest in the State of Illinois. While we do not anticipate the need, Group O utilizes other W/MBEs whenever possible to assist in providing Group O and their clients with the necessary products and services, better, faster and more cost effectively.

**FINANCIAL IMPACT:** The cost of collecting the public safety pension fee was included in the Police and Fire Pension Fund as part of the 2019 Revised Annual Budget.

**NEIGHBORHOOD CONCERNS:** None

**IMPACT IF APPROVED:** The City will retain Group O, Inc. to provide call center services for the City to address citizen's questions regarding the Public Safety Pension fee in a prompt, professional and efficient

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**File #: 19-304, Version: 1**

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manner.

**IMPACT IF DENIED:** The city will not have a call center to answer numerous calls regarding the Public Safety Pension Fee which would rely on limited City staff to answer calls and return calls causing longer response time to the citizens and additional frustration. The City's phone system is not equipped to handle the volume of anticipated calls.

**ALTERNATIVES:** Hire additional employees to answer numerous calls regarding the Public Safety Pension Fee and enhance the City's phone system to accommodate the anticipated volume of citizen calls.

**EEO CERTIFICATION NUMBER:** Will be assigned upon approval of the contract.

**WHICH OF THE GOALS IDENTIFIED IN THE COUNCIL'S 2017 - 2032 STRATEGIC PLAN DOES THIS RECOMMENDATION ADVANCE?**

1. Financially Sound City
2. Safe Peoria

**WHICH CRITICAL SUCCESS FACTOR(S) FROM THE COMPREHENSIVE PLAN DOES THIS RECOMMENDATION IMPLEMENT?**

1. Have an efficient government.
2. Keep taxes and fees competitive.

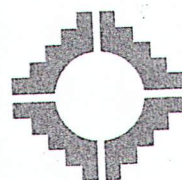
**DEPARTMENT:** Finance

Call Center Services Proposal

for

# City of Peoria Special Billing

September 3, 2019



**GROUP O<sup>®</sup>**

# REQUEST FOR PROPOSALS

Call Center Services  
City of Peoria Special Billing  
**# 32-19**



**ISSUED BY**  
**DIVISION OF PURCHASING**  
**CITY OF**  
**PEORIA, ILLINOIS**

**Sealed proposals will be received at the office of the  
PURCHASING MANAGER  
ROOM 108, City Hall,**

**419 Fulton Street, Peoria, Illinois until 2:00 P.M.**

**Tuesday, September 3, 2019**

**for furnishing the materials, or services  
described herein.**

**PLEASE RETURN ENTIRE  
DOCUMENT AS YOUR PROPOSAL.**

**SUBMITTED BY:**

**See Instructions to Proposers**

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## INSTRUCTIONS TO PROPOSERS

### Request for Proposal (RFP)

**ACCEPTANCE OF PROPOSALS** - The right is reserved, as the interest of the City may require, to reject any or all proposals and to waive any nonmaterial informality or irregularity in the responses received. All such responses will be in English. The City will select a Proposer as described below or reject all Proposals within one sixty (60) calendar days from the date the responses are opened.

**ADDITIONAL COPIES OF RFP** - Proposers may secure additional copies of the RFP documents from the City of Peoria's Finance Department Purchasing Division.

**RFP ENVELOPE IDENTIFICATION** - Proposers shall submit their response in a sealed envelope which shall be clearly labeled with the organization/individual name and address. Proposers are requested to indicate in the LOWER LEFT HAND CORNER OF THEIR ENVELOPE THE ITEM BEING REQUESTED, REQUEST NUMBER, DATE AND TIME THE REQUEST IS DUE.

**MAILING OF PROPOSALS** - One (1) original and Two (2) copies of all responses are to be mailed or delivered to the City of Peoria Purchasing Department, Room 108, City Hall, 419 Fulton Street, Peoria, Illinois, 61602-1276. Proposals will not be accepted by FAX, e-mail, internet, telephone or telegraphic means. Information regarding the proposal can be obtained by calling the Purchasing Manager at (309) 494-8582.

**CLOSING TIME** - The Proposal closing time will be based upon Central Standard Time or Central Daylight Time, whichever is in effect on the date the proposal is due.

**SELECTION** - The proposal selected will be that which best meets the needs of the City of Peoria as expressed in the RFP. Said Selection will be made as per the guidelines created by the City of Peoria's Selection Committee. The content of the proposal, the experience of the firm/individuals and the result of any scheduled interview(s) may be considered in making the selection.

**WITHDRAWAL OF PROPOSALS** - Proposers may withdraw their proposals at any time prior to the RFP closing time by telephone, fax or written request. A telephone request must be confirmed in writing within 24 hours of the call and prior to closing time. No Proposers shall withdraw its response for a period of sixty (60) calendar days from the RFP opening date. Negligence on the part of the Proposer in preparing a response confers no right of withdrawal or modification of a proposal after it has been opened. No response will be opened which has been received after the closing time specified in the RFP document and it will be returned unopened to the Proposer.

**ALTERNATE RESPONSES** - The RFP describes the service and level of experience/expertise, which the City feels are necessary to meet the performance requirements of the City. Proposers desiring to submit a response on items which deviate from these specifications, but which they believe to be equivalent, are requested to submit alternate responses. However, **ALTERNATE TENDERS MUST BE CLEARLY INDICATED AS SUCH AND DEVIATIONS FROM THE APPLICABLE SPECIFICATIONS PLAINLY NOTED.** The response must be accompanied by complete specifications of the items offered.

**AWARD** - An award will be made to the lowest qualified (responsive and responsible) proposal that complies with the terms and conditions of the specifications provided that it is in the best interest of the City to accept the proposal. Awards will be made on per item basis unless otherwise stated. The quality of the articles to be supplied, their conformity with specifications, their suitability to the requirements of the City and the delivery terms will be taken into consideration in making the award. By signing this document Vendor/Contractor/Consultant is **certifying they have not been barred from bidding by Federal, State or Local governments and has not been suspended or debarred from receiving federal funding.**

**COSTS** - Unit costs must be clearly identified for each component requested by the RFP document or otherwise submitted by the Proposer. All costs shall be stated in U.S. dollars. In case of mistake in extension of cost, unit cost shall govern. All costing must be typewritten or written in ink. No erasures are permitted. Mistakes must be crossed out and corrections typewritten or written in ink adjacent thereto and initialed in ink by the party signing the proposal or his authorized representative.

**SIGNATURES** - Each proposal must be signed by the Proposer with its usual signature. Proposals by partnerships must be signed with the partnership name by one of the members of the partnership, or by an authorized representative, followed by the signature and title of the person signing. Proposals by corporations must be signed with the name of the corporation, followed by the signature and title of person authorized to bind it on the matter. All signatures must be in ink.

**INVESTIGATION** - Proposer shall make all investigations necessary to thoroughly inform itself regarding the supplies and/or service to be furnished in accordance with the RFP. No plea of ignorance by the Proposer, of conditions that exist or that may hereafter exist as a result of failure or omission on the part of the Proposer to make the necessary examinations and investigations, will be accepted as a basis for varying the requirements of the City or the compensation to the Proposer.

**EQUAL EMPLOYMENT OPPORTUNITY** – To be awarded a contract all Suppliers, Vendors, Contractors to the City of Peoria, County of Peoria and/or the Peoria Park District **must** be registered in the City of Peoria's Contract Compliance Program and have a current EEO Certification number. This program is unrelated to any State and Federal program. The number is secured by completing and submitting, under notary seal, an Employer Report Form CC-1 (with required sexual harassment policy attached) to the City's Equal Opportunity Office. *Please note that the Certificate of Compliance is valid for one year and must be annually renewed.* The form may be requested on-line from the City's website ([www.peoriagov.org](http://www.peoriagov.org)). Click on Department Focus, Equal Opportunity Office, Forms, then select "Employer Report" or "Renewal". The forms can also be obtained by writing or calling:

**City of Peoria  
Equal Opportunity Office  
419 Fulton St.  
Peoria, IL 61602  
(309) 494-8530 Voice  
(309) 494-8532 TTY**

In accordance with Chapter 17 of the Peoria Municipal Code, a fifty-dollar (\$50.00) processing fee will be charged with each original submission of the Employer Report Form Cc-1 that results in an approved certificate as well as the Annual Renewal Application. The only exception to payment of the processing fee is neighborhood associations.

**Although all vendors are encouraged to obtain Equal Employment Opportunity Certification, vendors do not need an Equal Opportunity Certification to respond to a proposal. The EEO Certification Number is only required prior to the award of the contract.**

**SAMPLES** - Samples of items, when required, must be submitted within the time specified and at no expense to the City; and if not destroyed in testing, they will be returned at the Respondent's request and expense. Samples, which are not requested for return within thirty (30) days, will become the property of the City.

**RESPONSES** – A response is requested of all Proposers even if it is a "no response".

#### **CONTRACT TERMS**

**TAXES** - The City is exempt, by law, from paying State and City Retailers Occupation Tax, State Service Occupation Tax, State Use Tax and Federal Excise Tax. The City will execute tax exemption certificates whenever required. The unit prices should be exclusive of all taxes. In the event the unit price includes taxes, the Proposer must show the amount of tax included in the unit price.

**CITY'S AGENT**- The City of Peoria's Purchasing Manager shall represent and act for the City in all matters pertaining to the RFP and contract in conjunction thereto.

**PATENTS** - The successful Proposer agrees to protect, defend and save the City harmless against any demand for payment for the use of any patented material process, article or device that may enter into the manufacture, construction or form a part of the work covered by the contract.



**HUMAN RIGHTS ACT** - The contract will be subject to and governed by the rules and regulations of the Illinois Human Rights Act 775ILCS5/1-101 et seq. and as amended. And the provision of Chapter 775 of the Illinois Compiled Statutes 5/2-105 on Sexual Harassment policies.

**NON-COLLUSION** - With the executing of this RFP, the Proposer is certifying to non-collusion in the preparation and submittal. The response must be properly executed by the Proposer or the response will not be considered for selection.

**DEFAULT** - In case of default by the contractor, the City will procure the articles or services from other sources and hold the contractor responsible for any excess cost incurred.

**CANCELLATION** - The City reserves the right to cancel the whole or any part of the contract, if the contractor fails to perform any of the provisions in the contract or fails to make delivery within the time stated. The cancellation notice will be written and delivered by certified mail to contractors address on record. In the event the contract is canceled, the vendor may be declared an irresponsible vendor by the City manager...and as a result may be disqualified from doing business with the City for the period of one year in accordance with City Ordinance Section 10-102. The contractor will not be liable to perform if situations arise by reason of strikes, acts of God or the public enemy, acts of the City, fires or floods.

**PRICES SPECIFIED** – The successful vendor agrees to furnish the material or services according to the City's plans, specifications and conditions and at prices specified herein.

**DELINQUENT PAYMENT** - By the signing of this RFP, the Proposer is certifying that the company is not delinquent in the payment of any indebtedness, tax, fee, liens, and fines owed or accruing to the City of Peoria or in the payment of any tax administered by the Illinois Department of Revenue and is in compliance with the terms and conditions of Section 10-109 of the Peoria City Code; and Chapter 65 of the Illinois Compiled Statutes, Section 5/11-42.1-1.

**PERMITS AND LICENSES** - The successful Proposer shall obtain, at its own expense, all permits and licenses which may be required to complete the contract.

**INSURANCE** – The successful Proposer shall obtain, at its own expense, all necessary insurance with regard to its fiduciary responsibility to the City of Peoria. Said Proposer shall indemnify and hold harmless the City of Peoria, its officials, officers, directors, employees, heirs and assigns from any and all actions, claims, demands or suits at law or equity for damages, costs, loss or other injury as a result of the contract.

The City does not assume any liability for acts or omissions of contractor and such liability rests solely with contractor.

**Contractor's Insurance** – The contractor and all subcontractors shall secure and maintain such insurance policies as will protect the contractor or subcontractors from claims for bodily injuries, death or property damage which may arise from operations under this Contract whether such operations be by contractor or anyone employed by contractor directly or indirectly. The following insurance policies are **required**:

- Statutory Worker's Compensation
- Comprehensive General Liability
  - Combined Single Limit \$1,000,000.00
  - Property Damage \$1,000,000.00
- Automobile Public Liability and Property Damage
  - Combined Single Limit \$1,000,000.00
  - Property Damage \$1,000,000.00

**Insurance Inclusions** – The comprehensive general liability insurance shall include independent contractors' protective liability, products and completed operations broad form property damage coverage. The completed operations and products liability shall be maintained for two years after final payment.

**Contractual Liability** – The insurance required above shall include contractual liability insurance coverage for the contractor's obligations under the section below entitled, "Hold Harmless and Indemnification Agreement".

**Certificates of Insurance** – Certificates of insurance acceptable to the City indicating insurance required by the Contract is in force shall be filed with the City prior to contract approval by the City. These certificates shall contain a provision that coverage afforded under the policies will not be canceled until at least thirty (30) days prior written notice has been given to the City.

**PRECEDENCE** - Where special conditions are written in the specifications, these conditions shall take precedence over any conditions listed under the "Instructions to Proposers".

**GOVERNING** – This contract will be governed by the laws of the State of Illinois. The contractor/vendor agrees that Chapter 10 of the Code of the City of Peoria is hereby incorporated by reference, as if set out verbatim."

**AFFIRMATIVE ACTION REQUIREMENTS** - "The contractor/vendor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual harassment, ancestry, national origin, place of birth, age or a physical or mental handicap which would not interfere with the efficient performance of the job in question. The contractor/vendor will take affirmative action to comply with the provision of this division and will require any subcontractor to submit to the City written commitment to comply with this division. The contractor/vendor will distribute copies of this commitment to all persons who participate in recruitment, screening, referral and selection of job applicants, prospective job applicants, member or prospective subcontractors."

"The contractor/vendor agrees that the provision of Division 4 of Article III of Chapter 17 of the Code of the City of Peoria is hereby incorporated by reference, as if set out verbatim."

**EMPLOYEE EMPLOYMENT RESTRICTIONS – THE CONTRACTOR**

**THE CONTRACTOR** (hereinafter referred to as "SERVICE PROVIDER") agrees, as a condition of accepting this contract with the City of Peoria, that, for a period of one (1) year following completion of this contract, it shall be prohibited from hiring, directly or indirectly, any City employee or official who was involved, directly or indirectly in: (1) the selection and/or recommendation to select the SERVICE PROVIDER for performance of this contract; (2) coordinating the efforts of the SERVICE PROVIDER in the consummation or completion of this contract; or (3) monitoring or determining the performance of the SERVICE PROVIDER. The SERVICE PROVIDER further acknowledges and agrees that, upon the City's determination that a violation of this provision has occurred, the penalty imposed, at the sole discretion of the City, may include one or more of the following: (1) cancellation of any other contract(s) between the City of Peoria and the SERVICE PROVIDER; (2) disqualification of the SERVICE PROVIDER from bidding or being awarded future contracts with the City of Peoria for a period of two [2] years; and/or (3) payment of liquidated damages to the City of Peoria in the amount of TWENTY FIVE THOUSAND DOLLARS (\$25,000.00).

**REFERENCE** - All of the contract terms shall be incorporated by reference into any written contract.

**Contact Information for Proposal:** Chris Switzer, City of Peoria, Purchasing Manager  
419 Fulton Street, Room 108, Peoria, IL 61602  
(309) 494-8507 [cswitzer@peoriagov.org](mailto:cswitzer@peoriagov.org)



**REQUEST FOR PROPOSAL (RFP)**

#32-19

**Call Center Services City of Peoria Special  
Billing**

**AUGUST 16, 2019**

**CITY OF PEORIA  
419 FULTON ST. ROOM 108  
PEORIA, IL 61602  
(309)494-8582  
(309)494-8510 (FAX)  
WWW.PEORIAGOV.ORG**

## **REQUEST FOR PROPOSAL (RFP)**

### Call Center Services City of Peoria Special Billing

#### **STATEMENT OF PURPOSE**

The purpose of this process is to solicit proposals from qualified call centers to handle inbound calls for the City of Peoria.

The City of Peoria will begin collecting a new fee and anticipate calls from citizens questioning this fee.

This project is scheduled to begin October 1, 2019.

#### **QUALIFIED APPLICANTS**

Selection of the successful call center will be determined based on the response of the specific criteria outlined therein.

#### **OPPORTUNITY**

The successful proposer will handle incoming calls from citizens questioning the new fee.

We anticipate:

- Approximately 100 calls per day (significantly more calls the first two months of contract)
- Average Handling Time of 5 Minutes per call
- Time frame of October 2019 – February 2020, with a six month extension if needed.
- City to provide training and material before launch.

**I. EXPERIENCE (REFERENCES)**

The proposer must demonstrate previous experience in call center operations.

Please list two (2) past projects.

1. Project Name:
2. Location (Address, City, State):
3. Project Dates:
4. Please provide contact information:
  - a. Contact Name:
  - b. Contact Address:
  - c. Contact Phone Number:
5. Describe in detail the specific work performed as it relates to opportunity section above:

1. Project Name:
2. Project Location (Address, City, State):
3. Project Dates:
4. Please provide contact information:
  - a. Contact Name:
  - b. Contact Address:
  - c. Contact Phone Number
5. Describe in detail the specific work performed as it relates to opportunity section above:

## II. DEMONSTRATED CAPACITY and PROJECT PROPOSAL (Approach to Project)

Please supply a general information statement that briefly describes your company's background, size, projects, scope, and nature of service (brochures and other marketing material can be included). Include a statement on how you will work with the City to handle the inbound calls including but not limited to, your hours of operation, number of employees to handle calls, callback systems, telecommunication technology involved, use of a local number, how hearing impaired citizens are accommodated, languages spoken, and training of employees. Also, describe your firm's efforts to achieve a diverse workforce.

## III. PRICING

Please provide pricing:

Per Logged Hour: \$ \_\_\_\_\_

Per Handled Minute \$ \_\_\_\_\_

Set up Fee's \$ \_\_\_\_\_

Training Costs \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

City to choose between per logged hour or per handled minute.

#### IV. TIMELINE/AVAILABILITY

Please describe your proposed implementation schedule including number of employees, dates, training schedule and other pertinent information (as noted above the City would like this project to begin October 2019).

#### V. RFP EVALUATION AND SELECTION

The City of Peoria Finance, Information Systems, and City Manager's Offices will evaluate all submitted Requests for Proposals and make a selection based on the responses. Successful candidates will have submitted all required documents and completed each category outlined therein. Preference will be given to applicants who have a local office. The proposer must be prepared to launch the program in a timely fashion after the proposal has been selected and approved.

##### Evaluation Criteria

- Approach to Project (40 Points) – Describe your understanding of Project, Critical Elements and Goals [Section 2 and 4]
- Previous Experience (25 Points) – Include detailed relevant experience of similar work, with appropriate references. [Section 1]
- Pricing (Costs) (25 Points) – Fill Out Page 10 Pricing Section. [Section 3]
- MBE/WBE Participation (10 Points) – Describe your firm's efforts to achieve a diverse workforce. [Section 2]

The City will review and analyze each proposal, and reserves the right to select the proposer who offers the best value. The City shall select the vendor which, in the City's opinion, has made a proposal best suited to the needs and goals of the City and deemed to be in compliance with the terms of this RFP.

## VI. SUBMISSION REQUIREMENTS AND DEADLINE

Please submit one (1) clearly marked original RFP and (2) copies to the following address:

The City of Peoria  
Purchasing Division  
Finance Department  
419 Fulton St., RM 108  
Peoria, IL 61602  
(309) 494-8507

All proposals submitted in response to this solicitation must be received by 2:00 P.M. September 3, 2019 by mail or hand-delivery. Faxed transmissions will not be accepted. The City of Peoria will not consider any responses received after the date and time indicated above. All submissions become the property of The City of Peoria and will not be returned.

### Each Submission to include:

1. Completed and signed Request for Proposal (RFP) packet.
2. Completed Experience Forms (Section 1) - *Experience 25 Points*
3. Completed Capacity and Project Proposal (Section 2) and Timeline/Availability Statement (Section 4) - *Approach to Project 40 Points*
4. MBE/WBE Participation (Section 2) – *MBE/WBE Participation 10 Points*
5. Pricing for Project (Section 3) – *Pricing (Costs) 25 Points*



## VII. GENERAL CONDITIONS

The City of Peoria reserves the right to reject any or all proposals and to waive any informalities in the proposal process.

The City of Peoria reserves the right to make an award based solely on the proposals or to negotiate further with one or more contractors. Past performances with the City of Peoria will also attribute to the validity of the proposal. The City's decision is final; there is no appeal process.

The City of Peoria reserves the right to terminate vendors from the list for unsatisfactory performance or such other justifiable causes. In the event the vendor is performing unsatisfactorily, a thirty-day (30) prior written notice shall be given to rectify any outstanding issues concerning the contract with the option of termination for causes such as loss or reduction in availability of funding.

The vendor shall protect, defend, indemnify, and save harmless The City of Peoria against any and/or all claims that may result or arise from performance of this contract.

**All Vendor must obtain a Peoria Equal Opportunity Certificate.** See Information above in the EQUAL EMPLOYMENT OPPORTUNITY Section above on page 4.

Contact for RFP:

Chris Switzer, City of Peoria, Purchasing Manager  
419 Fulton Street, Room 108, Peoria, IL 61602  
(309) 494-8507 [cswitzer@peoriagov.org](mailto:cswitzer@peoriagov.org)

# CITY OF PEORIA

## REQUEST FOR PROPOSALS

The executing of this form certifies understanding and compliance with the total proposal package.

### PROPOSAL SUBMITTED BY:

Group O, Inc.  
**Company**

#To be obtained upon award #36-3823680  
 Peoria EEO Certificate of Compliance Number Employer Identification # (EIN)

4905 77<sup>th</sup> Avenue  
**Address**

Milan Illinois 61621 202 417 4166  
**City** **State** **Zip** **Daytime Telephone #**

202 417 4166 Debra Jefferson  
 After Hour Telephone # **Contact Person (Please print or type)**

Robert Marriott CFO  
**Name of Authorized Agent or Officer** **Title**

*Robert Marriott* 8/30/19  
**Signature of Authorized Agent or Officer** **Date**

**PLEASE MARK ENVELOPE: RFP # 32-19**





# End-to-End Solutions Provider

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### Confidentiality Notice:

This document and its contents are confidential and proprietary to Group O. They may not be distributed in whole or in part in any form without the express written permission of:

Bob Marriott  
Chief Financial Officer  
Group O  
309.736.8310  
bob.marriott@groupo.com



# End-to-End Solutions Provider

## Experience & References

Group O's Marketing Solutions division is an industry leader in providing call center, incentive and fulfillment solutions for Fortune 100 companies in various industries, including, telecommunications, government, energy, automotive, and consumer goods. Each year, we manage hundreds of customer campaigns and handle millions of omni-channel customer interactions. We assist our clients in reaching their operational and financial goals and objectives while maintaining a high level of quality, predictability, reliability, consistency, and transparency. Our delivery of care is at a premier level and drives customer satisfaction to peak levels.

### AT&T



1. **Project Name:** AT&T Incentive Programs
2. **Location (Address, City, State):** Nationwide
3. **Project Dates:** 2005 to present
4. **Please provide contact information:**
  - **Contact Name:** Paul Radosevici, Assistant Vice President, Mobility & Channel Marketing
  - **Contact Address:** Los Angeles, CA
  - **Contact Phone Number:** 847.271.6824 (cell)
5. **Describe in detail the specific work performed as it relates to opportunity section above:**

#### *Scope of Work*

End-to-end solution for AT&T incentive programs; including program management, print, website and application development and hosting, reward fulfillment, **call center support and reporting, and analytics**. We are highlighting this project to demonstrate our ability to manage very large call support services and experience in seeking out and leveraging technology improvements that deliver sustained customer service excellence.

#### *Engagement Overview*

Since 2005, Group O has managed AT&T's Consumer Wireline Reward program with more than 150 annual campaigns. Over the last 15 years, we developed deep technical knowledge of AT&T systems and integrated several of their customer ordering systems. Additional program enhancements developed by Group O give customers visibility to their reward status, and the ability to self-serve. We continually identify opportunities to provide cost-effective, superior customer experience including adding emerging reward platforms such as mobile and SMS text delivery.

Over the last three years, Group O has delivered an average of more than 3 million rewards and more than 5 million redemption emails/letters/postcards annually. In support of these programs, the **Group O Call Center has handled more than 2.5 million customer interactions including calls, emails, and web chats annually.**



# End-to-End Solutions Provider

In 2013, Group O began offering upsell/cross-sell services for AT&T Rewards customers to further elevate the customer experience and drive savings to their home telecom services. We have delivered hundreds of thousands of additional new product sales for AT&T across all product lines including Wireless, Video and Broadband services.

Our customer care and sales services provided to AT&T have earned Group O designation as an AT&T Supplier of the Year as well as numerous industry recognition for use of technology and levels of customer satisfaction.

## Results

Recent Call Center performance metrics for AT&T services include:

- For more than 7 years, **95%** of AT&T Reward customers rate Group O call center agents as "Satisfied" or "Extremely Satisfied" in professionalism and helpfulness as well as **overall satisfaction**.
- Call Center exceeded contractual expectations for Service Level, Avg. Speed of Answer, and Abandon Rate, for more than 7 years consecutively
- Deployment of AI-driven Interactive Virtual Agent software has created natural language self-servicing for over 20% of AT&T callers
- Average Handle Time for live agent calls lowered 30% through use of agent desktop automation
- Group O has averaged a QA score of greater than 96% for the past 5 years

Over the past 3 years, since AT&T's acquisition of DIRECTV, rewards for all consumer product lines were consolidated to Group O. Based on our proven performance in managing AT&T's reward business, Group O has been recognized by key leaders at AT&T as outperforming their own call centers.

## DTE Energy

1. **Project Name:** DTE Energy - One-Call Resolution Support Program

2. **Location (Address, City, State):** Greater Detroit area

3. **Project Dates:** January 2018 to present

4. **Please provide contact Information:**

- **Contact Name:** Nancy M. Holz, Principal Marketing Specialist
- **Contact Address:** Detroit, Michigan
- **Contact Phone Number:** 313-235-4674

5. **Describe in detail the specific work performed as it relates to opportunity section above:**

**Scope of Work:** Tier 1 call center and appointment scheduling responsibilities



**DTE Energy**



# End-to-End Solutions Provider

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## ***Engagement Overview***

Group O worked closely with DTE Energy during the **quick 45-day transition of their Customer Contact Call Center support** for all Energy Efficiency programs and provided a high quality implementation exceeding project goals, enhancing the already successful programs, and elevating the value added to customers through first call resolution metrics.

Services includes **management of inbound calls and email communications** in support of energy efficiency programs for DTE Energy. Our agents assist residential customers in scheduling appointments for appliance pickups and home energy consultations. These same agents also handle inquiries regarding other energy efficiency programs for DTE Energy such as their mobile Insight app, rebate programs for windows and insulation, home energy reports and low income assistance. Group O creates a CRM case for every inquiry that provides DTE with a history of care for each customer that they can review, and facilitates any additional follow-up needed with Tier 2 implementation contractors. To-date we have successfully handled over 150K customer interactions in servicing DTE Energy's programs and have posted the best servicing metrics in their program's history with extremely high customer and client satisfaction. Survey scores from customers reflect the world-class performance of Group O's call center, and DTE's program owners are collaborating with our team on ways to drive more of their customers through our team to ensure they share this great experience.

## ***Results***

Our unique technical expertise and customer-centric approach has brought significant improvements to DTE's customer care offering and the best service results in their history Group O has successfully exceeded all SLA metrics for servicing and Quality with stellar customer satisfaction scores during the first year of supporting DTE's customers and every sign points to further consolidation of care work within DTE's broader customer service enterprise. Group O's commitment to continuous improvements will undoubtedly be rewarded with an extended work agreement with DTE for years to come.



# End-to-End Solutions Provider

## Demonstrated Capacity & Project Proposal

### Group O Overview

In 1974, Bob Ontiveros saw an opportunity to live the American dream and build a company for himself and his family. More than 45 years after the packaging company was originally founded out of the back of his station wagon, Group O is ranked by the United States Hispanic Chamber of Commerce as one of the top five Latino-owned businesses in the country. The Ontiveros' entrepreneurial spirit and continuous interest in emerging technologies have taken Group O from a \$49M company in 1999 to the thriving \$900M multi-faceted enterprise it is today. Group O has gained prestige from helping companies like AT&T, Samsung, Michelin, Caterpillar and PepsiCo turn their most complex business challenges into centers of profitability and efficiency.

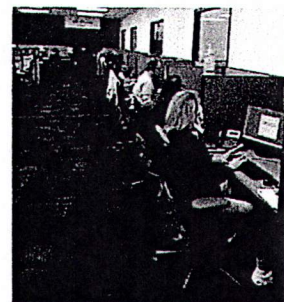
Headquartered in Milan, Illinois, Group O is a 100% minority-owned company that employs over 1,200 people and continues to grow under the leadership of Gregg Ontiveros as President and CEO.



Group O's extensive experience in call center services, spanning nearly three decades, provides our clients with unique solutions to fit any marketing objective. Below is a brief summary of unique characteristics that set Group O apart from other call center providers.

#### Call Center Highlights:

- 2.5+ million customer contacts annually through live agent calls, IVR, Chat, SMS text, and email
- 15% bilingual Spanish speaking workforce plus additional languages support with translation services
- Extensive use of robotics desktop automation to drive efficiency and accuracy
- Continuous process and technology improvements aimed at delivering significant ROI
- Integration of Interactive Virtual Agent (IVA) software to provide customer self-service options and lower costs
- Scalable operations based to handle surge volumes or expansion of program requirements



#### High-touch, Brand and Customer-centric, World-class Services include:

- Omni-channel (calls, email, Chat, SMS text)
- Additional care options through web forms, efax, paper mail
- At-home agent pool supplements physical sites to extend coverage hours and assist with redundancy
- Customer satisfaction surveys delivered via IVR, websites, mobile devices
- Outbound robo-call and robo-text services available for customer outreach and mass communications
- IVR automation, self-service enabled and customized messaging
- Interactive Virtual Agent (IVA) technology providing AI-driven natural language option to lower costs



# End-to-End Solutions Provider

As an industry leader in customer support programs, Group O is committed to developing our people and technologies to deliver a premier customer experience in the three key areas:

1. **Improve operational performance** with a focus on first contact resolution and a high accuracy rate in providing accurate and timely program guidance. At Group O, quality and performance matter and our focus at all times is on delivering the best experience possible for your consultants; eliminating as much confusion as we can along with reducing the need to call back are primary goals of each interaction. Through all channels of customer care, from calls to email and chat, our agents are trained to anticipate callers' needs and provide proactive support to all concerns that might arise. This approach ensures expediency in providing resolution to callers, and the growth in proficiency of our agents allows us to quickly diagnose and deliver answers to your consultants.
2. Collaborate with clients to **strategize areas for improvement and cost reductions**. Group O relishes the opportunity to strategize and execute improvements to the programs we support. These improvements will bring about reduced costs, enhanced consultant experiences, and greater efficiency in all aspects of the work we perform. Our execution model enables Group O to deliver dramatic results as proven by our track record of efficiency and quality results with all of our clients. We deliver unique forecasting applications to help clients manage their programs and also monitor their budget-spend (planned vs. actual). We provide detailed savings analysis based on actual program performance and recommend program modifications to reduce cost and optimize the consultant experience.
3. **Gain proactive insights** regarding program participation and training, and outreach needs through timely reporting, trends, and findings. Group O continually monitors the work that we do and gathers direct feedback from your consultants to provide trending and insights on what is affecting your programs. We also ensure that our agents are thoroughly trained and kept up to date on all relevant program details and changes. As an extension of our program oversight, we review performance metrics and implement quality objectives to propose more effective and efficient processes to our clients that will ultimately improve overall customer experience. We strive to exceed client and customer expectations always and ensure that our observations and results are communicated quickly.



## Program Approach

For this opportunity, Group O proposes use of our call center in Milan, Illinois. This 250-seat call center is centrally located adjacent to the Quad Cities, affording us a very stable recruiting base for new agents and a tenured call center management team. We have current capacity that will accommodate the City of Peoria's initial and ongoing staffing needs for this program. We would anticipate training 5-7 total agents to ensure a staffing level of 3-5 agents to handle ongoing inquiries. The initial pool of agents that are trained will continue to rotate into the program and remain available to assist during periods of higher volumes.





# End-to-End Solutions Provider

Our Milan facility serves as Group O's corporate headquarters and is home to our Call Center IT department that deploys and maintains the technology needed for our call center enterprise. We have extensive call center systems that provide desktop automation for agents and self-servicing applications for callers. Group O is flexible when it comes to hours of operation and can extend coverage up to 24x7. Our standard hours of operation are Monday through Friday, 7am-7pm Central Time, and we will work with the City of Peoria to determine optimal hours of coverage for your citizens.

Group O utilizes a hosted Unified Internet Protocol (UIP) ACD system, which includes a robust IVR package. Calls can be routed to Group O's IVR through assigned toll-free numbers or forwarded from a local line that the City of Peoria owns. Group O's IVR allows customers to select routing options, including internal routing to live agents and external routing to other toll-free numbers for designated departments, if needed. The UIP can route callers directly to agents, to a specific call queue or voice-mail, and provide a level of self-servicing that allows the caller to complete interaction without assistance from a live agent. Group O can dynamically change scripting and messages in the IVR during live production time without disruption to call delivery. This enables Group O to pass updates from your organization for program level changes or other critical information as needed. Our call back system leverages the UIP call delivery platform to gather call back requests and automatically schedule call backs as needed for citizens. Though typically not needed for short-run programs, an additional interactive virtual agent application can also be developed and deployed if needs change.

Group O uses TTY equipment within our call center to ensure the ability for designated agents to communicate with hearing impaired citizens. And to ensure all callers can use their preferred language when communicating with our team, Group O maintains a core team of English and bilingual-Spanish agents, with all other languages supported by utilizing our 3rd party translation service, Language Line.



Group O recognizes the critical need for thorough training and preparation of staff for support of the City of Peoria's program. We are committed to ensuring all agents, management staff and Support personnel are educated, informed and engaged and can deliver a high-quality member experience with every interaction. We have built a dynamic Training department that supports a diverse set of industries and clients.

We will collaborate with the City of Peoria staff to build the most effective curriculum possible and ensure facilitation of all materials and practical application of agents' knowledge in advance of taking live calls. Our Training Manager and Trainers will also work regularly with you to review and refine training and ensure it meets all standards of excellence while enriching the comprehension and application of knowledge required of our call center agents and staff. Training does not simply occur once, but continues through ongoing refresher training. We will continually follow-up with updates to your program and supplemental soft skill training that emphasizes customer satisfaction.



# End-to-End Solutions Provider

## Workforce Diversity

Group O is a 100% Hispanic-owned National Minority Supplier Development Council (NMSDC) certified MBE and is recognized as one of the largest Hispanic-owned businesses in the United States and the largest in the State of Illinois. As 1 of 82 nationally certified Corporate Plus members of the NMSDC, we value and strive for diversity in all facets of our business, including our 1,200 employees, our vendors and suppliers. We are committed to working with local, regional and national Development Councils and Chambers so we can directly help shape the global supply diversity landscape.

Group O makes ongoing efforts to market our career opportunities within the communities we work, making specific recruiting outreach through organizations like the Hispanic Chamber of Commerce and other organizations to help attract diverse individuals. Results of these efforts within our call center operations have been very successful with 49% of our staff being of diverse ethnicity.

In addition to Group O being one of the largest Hispanic-owned businesses, we also maintain an active Supplier Diversity Program. Our goal is to utilize other W/MBEs whenever possible to assist in providing Group O and our clients with the necessary products and services better, faster and more cost effectively.





# End-to-End Solutions Provider

## Pricing

Group O is pleased to provide the City of Peoria and its citizens with the best customer care experience possible at a reasonable price, without having to sacrifice quality, transparency, or program accountability. Based on information provided in the RFP, we offer our services as priced below. The following assumptions were used when compiling the estimate for the Special Billing Call Center Services program:

- Approximately 100 calls per day, with significantly more calls during the first two months of the contract.
- Average Handle Time is 5 minutes.
- Initial program will be for 6 months (October 2019 - February 2020), with the option to extend if needed.
- The City of Peoria will provide training and material before launch.
- The City of Peoria will choose between per logged hour or per handled minute rates for the entirety of the program.
- Billing Rates are stated in U.S. Dollars.
- Hourly Billing Rates will remain fixed for the term of the contract.
- Hourly Billing Rates include all labor costs.

**Per Logged Hour:                    \$36 / hour**

**Per Handled Minute:            \$0.65 / minute**

**Set up Fees:                         \$850**

**Training Costs:                    \$2,000**

**Other:                                 n/a**

The prices quoted above are guaranteed for 90 days from the proposal date. Solutions and prices are based upon information supplied at the Request for Proposal. Group O reserves the right to re-quote based on changes or additions to scope. Unless stated otherwise above, shipping and/or applicable sales tax is not included in the quoted price. Standard payment terms are Net 30 from date of invoice.



# End-to-End Solutions Provider

## Timeline & Availability

In deploying any call center solution, Group O works side-by-side with our clients to determine processes and procedures to ensure consistency with all expectations of service delivery. We accomplish this by focusing on several areas:

- Branding ourselves and immersing our staff in our client's brand
- Attending train-the-trainer sessions that prepare our staff to support ongoing training
- Acquainting our staff with all resources and materials associated with the work we are supporting
- Holding weekly meetings with clients to discuss trends and any needed changes
- Running call calibration sessions to monitor effectiveness of customer care efforts and customer experience

Group O will work directly with City of Peoria to identify all needed points of integration and will focus on the key points of execution that fall within the defined scope of City of Peoria's programs. Group O's disciplined project management methodology to receive all interaction types includes a thorough onboarding checklist and project plan ensuring seamless integration of program elements. This plan brings City of Peoria and Group O team members together to collaboratively prepare our agents for handling all citizen interactions. The plan's primary focus will be on system and technical setup and overall training. Group O's Operations Manager assigned to the relationship will be responsible for coordinating the onboarding activities, and will work towards the ultimate delivery of services on the scheduled date for live production to begin. This individual will schedule regular calls and internal meetings to keep stakeholders and process owners on track, and will publish regular updates on progress. This approach allows for a smooth transition, especially when coordinating a quick launch timeline.

With a program award date of September 6th, Group O agents will be prepared to start taking calls as early as October 1, 2019.

