

Camelot Illinois

Request for Proposal for Tel-Sell Telephony
Service

March 12, 2018

1 Introduction

Camelot Illinois is a leading technology and services provider that supports the Illinois lottery.

The **Illinois State Lottery** www.illinoislottery.com awarded the Private Management Agreement (PMA) to Camelot Illinois on September 22, 2017 following a bid submission. Following the Notice of Award, the PMA was executed on October 13, 2017.

Camelot Illinois, as part of an overall business strategy to grow revenue for the Illinois Lottery, has plans as part of a Technology Transformation program, to roll out a new, robust and engaging iLottery website that will help grow the number of registered players over the term of the PMA, while still growing the retail channel in parallel.

The Technology Transformation program, which will be managed by Camelot Global on behalf of Camelot Illinois, aims by December 2018 to replace or upgrade the existing draw games central system, retail hardware, communications network and the iLottery channel (website and mobile apps).

To support the transition and growth plans Camelot Illinois requires a telephony system to support a telephony team (Tel-Sell) supporting the retailer estate (approximately 7,700) with ordering of instant tickets and point of sale material and consumables. The telephony system is intended to support employees of the Illinois State Lottery and Camelot Illinois. The system will interface with an inbound IVR (Interactive Voice System), an outbound software based “click-to-dial” feature and must have call transfer functionality.

The service provider will be expected to engage with Camelot Illinois project teams and take an active part in creating the procedures that support users of the service. Camelot Illinois will be responsible for the ongoing service and all issue escalation and service enhancement will be managed by that entity.

2 Instructions

This document invites your organization to submit a proposal for the supply of Tel-Sell Telephony service, to Camelot Illinois.

Requirements are set out in Section 7.

2.1 Timetable

Your proposal should be submitted by **April 16, 2018 at 5pm CST** to the attention of:

Email: procurement_services@camelotillinois.com

The headline RFP milestones are as follows:

Issue RFP	March 12, 2018
Last Date for Vendor Questions	March 26, 2018 by 5pm CST
Question responses	by April 02, 2018
Intention to Bid Confirmation	April 03, 2018
RFP submission date	April 16, 2018 by 5pm CST
Presentations (TBD)	April 24, 2018 - April 30, 2018
Estimated Date of Award <i>(subject to contract)</i>	by May 04, 2018

Camelot Illinois reserves the right to make any necessary amendments to the above timetable. Any such changes will be posted on the Illinois Lottery website and respondents will be notified in writing of any changes to these dates. Responses submitted late will not be considered.

2.2 Contacts

Please communicate any questions via email to procurement_services@camelotillinois.com. Questions regarding the RFP must be emailed before March 26, 2018 at 5pm CST. A consolidated response to any questions will be posted on the Illinois Lottery website under the Business/Procurement Opportunities tab ¹ and will be made available to all respondents without identifying the supplier that asked the question. Camelot Illinois reserves the right to decline to answer specific questions.

2.3 Intention to Respond

If our business is of interest to you, and you intend to submit a proposal, respondents are required to submit their intention to respond via email to procurement_services@camelotillinois.com by April 03, 2018 at 5pm CST.

¹ http://www.illinoislottery.com/en-us/Business_Procurement_Opportunities.html

2.4 Response Format

Please provide the following information on the cover page of your response document and ensure that your organization's name appears on each subsequent page of the document:

- Supplier Name
- Supplier Address
- Contact Name
- Contact Job Title
- E-mail Address
- Telephone Number

Ensure that your response follows our format (numbering your answers in the format of this document). Failure to do so may result in your answer being misinterpreted or missed. Please answer all questions fully. Responses should be delivered in electronic format via email to procurement_services@camelotillinois.com

The proposal should explain how you could support Camelot Illinois in the achievement of its objectives.

Where possible, the proposal should also include:

- Innovative ideas on meeting Camelot Illinois requirements
- Why Camelot Illinois should choose you as a supplier, and
- How your service offering differs from the competition

2.5 Supplier Meeting / Site Visit

Those suppliers selected to go forward may be given the opportunity to demonstrate their ability to meet Camelot Illinois requirements through supplier meetings and, if appropriate, site visits to their premises. The supplier must at such meetings/visit be able to demonstrate the end to end processes and systems employed to provide an efficient service. All meetings will be limited to 2 hours or less and apportioning of time should take this into account.

Arrangements will be made following receipt of the RFP Response.

3 Conditions of the RFP

3.1 General Considerations

The issuing of this RFP does not constitute a legal offer capable of acceptance.

Camelot Illinois reserves the right to reject any or all of the proposals submitted, or to withdraw the RFP at any time. Camelot Illinois also reserves the right to accept a proposal from suppliers in part only.

Camelot Illinois will not be liable for any costs incurred by any company in connection with the preparation of a response to this RFP, or for any costs incurred for attendance at meetings, presentations, clarifications or demonstrations.

The numbering of the RFP is an important aid in the evaluation process. Please utilize it within your response as this may affect our evaluation of your response.

Prospective suppliers shall take no advantage of any apparent error or omission in the RFP documents. In the event that any errors or omissions are discovered, a supplier shall notify Camelot Illinois immediately.

Please provide complete and accurate information against the specification contained within this RFP. If you are unable to meet any requirements, then this should be clearly noted in the appropriate response section(s). Any assumptions within your response to the RFP should be clearly stated.

Any commitment made in response to this RFP will be binding on the Supplier. A commitment includes any guarantee or representation made in the RFP response, accompanying documentation or subsequent negotiation.

3.2 Confidentiality

Subject to Appendix A - Private Manager Agreement Incorporated Terms, of this RFP, any information disclosed in, or in connection with the RFP becomes the property of Camelot Illinois subject to supplier's redaction of confidential, proprietary and other sensitive material in accordance with the PMA and State Policies and Rules. Such information will be available to the public in accordance with State Policies and Rules. However, the failure to designate any materials as "proprietary and confidential" at the time of delivery of such information to Camelot Illinois does not prohibit the supplier from subsequently designating any information as proprietary and confidential. However, this designation does not necessarily exempt such information from disclosure under the Illinois' Freedom of Information Act.

3.3 Employment

From the time this RFP is issued until either (i) six (6) months after the award of a contract or (ii) the rejection of all proposals received by Camelot Illinois, suppliers are prohibited from officially or unofficially making any employment offer or proposing any business arrangement with Camelot Illinois' employees.

3.4 Compliance

Failure to comply with any specific instruction(s) detailed in this RFP may, at Camelot Illinois' discretion, exclude the supplier from further consideration in the process.

3.5 Selection of supplier

Any response that fails to meet the requirements set out in this RFP will be disqualified.

The table below defines the evaluation criteria and the relative importance of each criteria that will be used to evaluate the responses received. Requirements are identified in Section 7.

Response Elements	Relates to requirements	Maximum # of Points Possible
Background and Experience	C-1 to C-9	10
Completeness of the Service	R-1 to R-21	20
Account & Relationship Management	R-41 to R-43	10
Staff, Training, Monitoring	R-61 to R-63	10
Systems, Security	R-81 to R-90	20
Adaptability, Integration	R101 to R-102	10
Overall price, pricing model and value for money	P-4 to P-7	20
	Total	100

Camelot Illinois does not represent that these are the sole criteria and reserves the right to adjust selection criteria until April 02, 2018. Any such changes will be posted on the Illinois Lottery website, no later than April 02, 2018 to permit any necessary refinement of their proposal prior to submission.

Camelot Illinois' decision on the winning bidder will be determined by the highest overall score achieved based on the above criteria, scored following submission and, if appropriate, updated following any presentations. Camelot Illinois' decision will be final.

3.6 Terms and Conditions

Respondents should note that any contract/purchase order award will also be subject to Camelot Illinois' terms and conditions.

Camelot Illinois operates within a regulated environment and it is a requirement of the PMA that suppliers will be vetted or approved by the State regulator in advance. Accordingly, the prospective awardee must complete State disclosures and certification documents. For further information about this requirement, please email procurement_services@camelotillinois.com.

Camelot Illinois and the State of Illinois Department of the Lottery now have in effect a signed PMA in which Camelot Illinois is the Private Manager of the Illinois State Lottery. The PMA requires Camelot Illinois to pass through various non-negotiable provisions to all suppliers. We will achieve this by including a separate schedule titled Private Manager Agreement Incorporated Terms into the successful respondent's contract. This will take priority over any conflicting term in the rest of the contract. Refer to Appendix A for a final version of the Private Manager Agreement Incorporated Terms.

From the time the RFP is issued until the end of the contract term, supplier represents and warrants that (i) it shall not be debarred or prohibited from doing business within the State of Illinois for any reason; nor, (ii) likely to have a material and/or adverse effect on the interests of the Lottery.

Camelot Illinois is looking to establish a contract for an initial term of five (5) years with an option to renew based on supplier's performance and Camelot Illinois' evolving requirements and strategy, this will be subject to negotiations during the contracting stage.

3.7 Validity of Proposal

Proposals should be left open for acceptance or non-acceptance for a period of 90 days from the date the proposal is submitted.

4 Estimated Timings

4.1 Start of Tel-Sell Telephony Service

A phased approach will be taken to Camelot Illinois' responsibilities as Private Manager. This RFP relates to provisioning of the Tel-Sell Telephony Service that is timed to support the launch of changes to the Retail environment. This is currently estimated to commence around December 2018.

The successful bidder for Tel-Sell Telephony Service will be expected to remain engaged with Camelot Illinois during the development period and ensure that the service goes live with procedures and processes agreed and operational.

5 Response Approach and Format

Respondents are requested to provide:

- A completed version of the Company Information section, with brief responses;
- A completed version of the Requirements section with full responses against each requirement (where applicable);
- A completed pricing schedule with any variation included at the end.

Where necessary, respondents may supplement responses with additional material, but should ensure that material is focused on the information requested and referenced to the section for which they apply. (Camelot Illinois may be unable to search through generic material to attempt to find relevant information).

If the respondent needs to exclude some requirements from their full-service proposal, this should be accompanied by a clear statement of which items are excluded and why.

If the respondent feels that additional services, not mentioned in the requirements, should be provided in order to supply a full-service solution, please provide a clear statement of which additional items are included and why.

6 Company Information

Please provide the following information about your company:

#	Background and Experience	Response
C-1	Company Name	Answer in Full
C-2	Company Background, including details of Ownership	Answer in Full
C-3	Relevant Examples of similar implementations	Answer in Full
C-4	Current number of employees	Answer in Full
C-5	Staff Retention. Annual turnover rate for each of last 3 years	Answer in Full
C-6	Current number of part time employees	Answer in Full
C-7	Please summarize your experience relevant to the requirements	Answer in Full
C-8	Strengths and points of difference from your competitors	Answer in Full
C-9	<p>Please describe the resources which will be allocated to support Camelot Illinois, and your overall organizational structure.</p> <p>(If your organization is selected to make a presentation the people who would have day to day involvement should make up a significant part of the presentation team).</p>	Answer in Full

7 Requirements

Please provide responses on the following general requirements:

For the Acknowledge Only requirements (R1-R22), respondents shall Acknowledge the following requirements by either Accepting or Rejecting the requirement. If a respondent Rejects a requirement, then any mitigating circumstances or alternative approaches may be offered, however these may not be accepted as compliant. For the remainder of the requirements, please provide a full response.

#	Completeness of the Service	Response
R-1	System must be able to support a minimum of 25 simultaneous users, located throughout the office space.	Acknowledge Only
R-2	System must be able to scale up or down, as needed, with appropriate notice.	Acknowledge Only
R-3	System will receive calls from an inbound IVR (Interactive Voice Response) system	Acknowledge Only
R-4	System will be expected to integrate to the Tel-Sell ordering system and operate as an outbound click-to dial service.	Acknowledge Only
R-5	System must be caller-id compliant for inbound calls.	Acknowledge Only
R-6	System must be available during operational hours and must support an “off-hours” message. Upgrades must only occur outside of operational hours.	Acknowledge Only
R-7	System must support automated opening and closing functions.	Acknowledge Only
R-8	The agents using this phone system will be physically located in the Springfield, IL region.	Acknowledge Only
R-9	Phone/Internet security solution must be included.	Acknowledge Only
R-10	Provider must be available for on-site walkthrough and on-site training.	Acknowledge Only
R-11	System must be able to record all inbound and outbound calls.	Acknowledge Only
R-12	System must have document and recording retention capabilities. Retention rules and schedules will be managed by Camelot Illinois.	Acknowledge Only
R-13	System must allow the ability for live monitoring of calls for training and quality assurance.	Acknowledge Only
R-14	System should capture reporting metrics and support a real-time display of call data.	Acknowledge Only
R-15	System should support on-demand and scheduled reporting.	Acknowledge Only
R-16	All recorded data and generated reports are property of Camelot Illinois.	Acknowledge Only
R-17	System must support call-transfer ability, within the system, back to the IVR (Interactive Voice Response) system, and to other options within the IVR system.	Acknowledge Only

R-18	System must support call-routing protocols across the agent pool.	Acknowledge Only
R-19	System must provide remote secure access to allow a technician to address upgrades and/or outages.	Acknowledge Only
R-20	System must be in compliance with all relevant provisions of the Americans with Disabilities Act (ADA), the Illinois Information Technology Accessibility Act (IITAA), and all other applicable state and federal laws which apply to the telephony and information systems, as required in Private Manager Agreement Incorporated Terms (PMA) located in Appendix A.	Acknowledge Only
R-21	Vendor must understand and accept the Private Manager Agreement Incorporated Terms located in Appendix A.	Acknowledge Only

#	Account & Relationship Management	Response
R-41	Describe the approach to scaling up (or scaling down) number of simultaneous users.	Answer in Full
R-42	Describe the timing / lead time needed for scale up or scale down scenarios.	Answer in Full
R-43	Please attach your standard SLA related to system availability, performance, and maintenance.	Answer in Full
#	Staff, Training, Monitoring	Response
R-61	Describe call recording capabilities.	Answer in Full
R-62	Describe processes related to real-time call monitoring, both remote, and on premises.	Answer in Full
R-63	Explain approach and past experiences with training on implemented systems.	Answer in Full
#	Systems, Security	Response
R-81	Include proposed High-Level Architecture Document.	Answer in Full
R-82	Describe approach to “click to dial”, where an agent can click a button on their computer screen and the phone system will auto-dial.	Answer in Full
R-83	Attach Standard Security Policy Document	Answer in Full
R-84	Describe methods used for retention of recorded data, retrieval, archival, and deletion of such material.	Answer in Full
R-85	Provide examples of real-time display of call metrics.	Answer in Full
R-86	Provide examples of standard call metrics reporting.	Answer in Full
R-87	Describe process for non-standard call metrics reporting.	Answer in Full
R-88	Describe process of Call Flow Management and how “busy” Agent situations are managed.	Answer in Full
R-90	List Internet Browsers supported by proposed solution.	Answer in Full

#	Adaptability, Integration	Response
R-101	Describe approach to integrating with 3rd Party Systems.	Answer in Full
R-102	Describe approach to managing change initiated by 3rd Party Systems.	Answer in Full

8 Price

8.1 Pricing assumptions

All prices should be quoted in USD.

Pricing must be based on the volume assumptions below. Please provide as much background as possible on the pricing, including any explicit assumptions related to these metrics, the requirements and any factors outside of this document.

It is anticipated that requirements may change to meet service needs over time, so any limits, constraints and areas where flexibility is included in the pricing schedule should be highlighted.

Volume & Performance Estimations

The metrics below are based on previous year performance. It is expected that call volumes will be lower overnight but may peak based on seasonality and the issuance of new games.

#	Overall price, pricing model and value for money	
P-1	Average number of representatives on system concurrently	17
P-2	Average daily call volume	7000 calls
P-3	Primary active hours	7:00am - 7:00pm CT

8.2 Pricing Schedule

Section	Area, including but not limited to these tasks.	Assumptions / basis of pricings (Please indicate whether one-off or recurring for each price).	Price (USD)
P-4	Itemized list of potential telephony hardware necessary, including unit price and price extension.		
P-5	Itemized list of potential telephony software necessary, including unit price and price extension.		
P-6	Installation		
P-7	Training		

Appendix A - Private Manager Agreement Incorporated Terms

See separate pdf file available on the Illinois Lottery website, reference - Private Manager Agreement Incorporated Terms.pdf