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September 23, 2009

ADDENDUM #1 to the University of Florida Invitation to Negotiate (ITN)10CW-113 Call Center Management, scheduled to open on Friday, October 2, 2009, at 3:00 PM/ET at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

Attached are the questions submitted by vendors and answers provided by the University.

This addendum shall be considered part of the Contract Documents for the above mentioned ITN as though it had been issued at the same time and incorporated integrally therewith. Where provisions of the following supplementary data differ from those of the original document, this addendum shall govern and take precedence. All other terms, conditions, and regulations will apply.

Sincerely,

Carolyn T. Wimmer
Purchasing Coordinator II

Please acknowledge receipt of Addendum #1 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

Signature

Company Name

Company Address

City/State/Zip

Addendum #1

- Q1. Our database is used to track all calls; in addition, we record all calls. Especially considering the University of Florida's interest in "green" initiatives, as listed on page 10 of the ITN under the heading of Tab 11, are paper logs of all calls (as requested on page 28 of the ITN under Call Service, fourth bullet point) truly necessary? Paper logs of all calls would be more expensive, more time-consuming, less searchable, and more harmful to any "green" initiatives.**
- A1. Paper logs are not necessary; however, a backup system so that electronic data is not lost is essential.
- Q2. "Toll free number at no additional charge" (pg 28): does this mean we cannot pass through the actual cost of the number, or cannot charge anything above the actual cost?**
- A2. Call center firm cannot charge beyond actual cost of '800' number.
- Q3. "Call center set-up time must be within ten (10) consecutive days. Describe action plan for call center set-up." Question: Is this referring to 10 days from notification of a breach? If not, please elaborate.**
- A3. Once the call center firm receives notice that call center services are required, specific information about the breach will be shared. It is then the responsibility of the call center firm to prepare to manage the calls which conform to the breach issues. The firm must be prepared to answer calls on the eleventh day.
- Q4. "Relay incident-related information to callers from a script provided by the Chief Privacy Officer (CPO)" Question: What would be a sample script look like?**
- A4. See actual script used for 2008 breach:

University of Florida College of Dentistry Script

On October 3, 2008, while upgrading a computer server, UF's College of Dentistry staff discovered evidence that an intruder had accessed that server.

The server contained some restricted data, including a combination of names, addresses, birth dates, social security numbers and, in some cases, dental procedure information for College of Dentistry patients dating back to 1990. There is no evidence that the intruder viewed or downloaded any of this information. However, it is a possibility the data was accessed. For this reason, the university mailed letters to 336,234 people who had information on that server so they can take steps to protect themselves from identity theft or other illegal use of their personal information. There were 8,248 records without mailing addresses; the university is notifying the national media as an attempt to reach those people.

This data security breach is now part of an ongoing investigation by the FBI and the University of Florida Police Department, with full cooperation and support from the university and the College of Dentistry.

- Q5. "Maintain electronic and paper log of all phone calls. " We do not record any call on paper. All documentation is electronic for rapid dissemination and security purposes. Would this be acceptable?"**
- A5. Paper logs are not necessary; however, an electronic log backup system so that data is not lost is essential.

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Q6. "TTY support for callers who are hearing impaired." We do not provide TTY services. This is due to the fact that the vast majority of hearing impaired callers already possess the technology. Is this a requirement for your program?

A6. No.

Q7. What does a typical script look like?

A7. See Question 4 response.

Q8. What data elements are to be captured and reported back to The University of Florida?

A8. Daily Reports (Call Statistics) must include the following elements: Total number of incoming calls, handled calls, escalated calls (Referred to firm manager or UF Privacy Office); Number of introduction hang-ups; Call abandoned rate expressed as percentage; Call answer rate expressed as percentage; Average call handled time; Average call hold time.

Escalated Call Report must include the following elements: Customer Service Representative ID; Date and time of call; Caller name; Claimant name and address (maybe caller or caller representative); Daytime telephone number for call back; Email address if caller prefers email response; Call memo (may refer to specific question or issue, caller may be overly agitated, or caller may be voicing threats against UF).

Summary report at conclusion of service agreement.

Q9. In Section 5.0 - Scope of Work, Bullet # 3 stipulates "no subcontracting". With that said, it appears that the University is looking for a single firm with multiple locations, capacity, contingency manpower and multi-lingual capabilities within the Continental U.S. to provide these services. Please confirm that this is the case.

A9. Yes, UF is looking for a single firm with at least two locations, sufficient capacity, available manpower, and multilingual capabilities within the US borders. The firm must be subject to US law.

Q10. The ITN requires the center to have "experience responding to breach notifications, specifically, experience with privacy breaches of "restricted" information (protected by law)" Will the University consider a firm with staff members that have dealt with and/or worked with breach incidences?

A10. No, UF is looking for an experienced firm to act as its agent when breach notification requires call center services.

Q11. In Section 5.0, Scope of Work, Bullet # 2 requires the successful vendor to "provide confidential services." Please define "confidential services" as it relates to this ITN.

A11. Information related to breach activities and breach notification must remain confidential between UF and call center firm. The call center firm cannot use UF breach experience as a marketing advantage or otherwise share UF data about breach notification unless expressly authorized (in writing) by the University's Privacy Office, or the firm received a properly executed court order.

Q12. Would the University consider a Joint Venture or a teaming arrangement with other firms as "subcontracting"?

A12. If the business arrangement is a formal, legal agreement and both firms share performance liability and are located in the US, UF would consider a Joint Venture arrangement providing each party is experienced in breach notification call center services.

Q13. Will the University perform a site visit as part of the evaluation process?

A13. Not planned.

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Q14. Are subsidiaries considered subcontractors?

A14. Subsidiaries or affiliated companies, which are separate legal entities and each experienced in breach notification, are not subcontractors and may be an alternative to a single firm.

Q15. Will a center in Gainesville be considered a benefit?

A15. Yes. However, UF will not provide start up seed money or cover expenses to have a local call center available.

Q16. In Section 2.7.10 – Proposal Organization, Tab #11 requests that the vendor describe the process of producing “best value” for the University and its users. Small business and diversity programs, “green initiatives, and/or other programs. Our firm often utilizes small business partners to compliment and support other projects. Please clarify if an interested vendor would be disqualified for implementing its small business and/or diversity program to support this contract.

A16. If the partnership arrangement is a formal, legal agreement and both firms share performance liability and are located in the US, UF would consider a partnership arrangement providing each party is experienced in breach notification call center services.

Q17. “Section 2.9.8 – Method of Award” Are evaluators going to place “points” for each evaluation criteria? If so, please provide the point system that will be utilized to determine the “best value” to the University.

A17. Responses will be evaluated by whether or not the vendor provides the services as requested; responses to each criterion will be expressed as Yes/No. These evaluation criteria are not a subjective, weighted point system.

Q18. How many times there have been breaches in the past 5 years?

A18. Ten breaches which required notification and call center services occurred since 2005 when the statutory requirement was instituted. However, new federal regulation will likely cause more breach notification activities after the HITECH regulation effective date of September 23, 2009. Unfortunately, breach incidents are random events that cannot be predicted.

Q19. Would we be able to get a sample script (or two) that has been provided by the Chief Privacy Officer (referenced in the Call Services Section)?

A19. See Question 4 response.

Q20. How long and/or detailed are the communications?

A20. See Question 4 response.

Q21. What are the types of questions that would be asked by those impacted by the breach?

A21. See following for sample of questions asked by callers:

Q: What happened?

Q: How did this happen?

Q: I received a notification letter from the University of Florida about a computer security incident, does that mean someone stole my personal information?

Q: Will UF contact me to ask for private information because of this event?

Q: Why did you have my personal information?

Q: What personal information was involved? When was it available to the unauthorized intruder?

Q: Is this information still at risk of disclosure to an unauthorized person?

Q: How will I know if any of my personal information was used by someone else?

Q: Do I have to pay for the credit report?

Q: I called the credit bureau fraud line and they asked for my Social Security number. Is it okay to

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give it?

Q: Why doesn't UF buy a years' credit monitoring subscription for me?

Q: Should I contact the Social Security Administration and change my Social Security number?

Q: Should I close my bank account?

Q: Should I close my credit card or other accounts?

Q: What should I do if I discover fraudulent use of my personal information?

Q: I received a letter but have never been a patient at UF. Why did I get a letter?

Q22. *What is longest period/duration of time the call center was needed to field calls?*

A22. For a 2008 breach incident that affected 336,000 individuals, over 22,000 calls were received during a 40 day period. Obviously, the first two weeks of the breach notification prompted the highest call volumes. The call center was initially open 14 hours per day to accommodate calls from all US time zones; as calls tapered off, both the number of customer service representatives and the hours of the call center were adjusted for the diminished call volumes. Note: For this breach average per call time was 10 minutes.