



The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at wvOASIS.gov. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at WVPurchasing.gov with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header  2[List View](#)**General Information** | [Contact](#) | [Default Values](#) | [Discount](#) | [Document Information](#) | [Clarification Request](#)

Procurement Folder: 807919

SO Doc Code: CRFQ

Procurement Type: Central Master Agreement

SO Dept: 0402

Vendor ID: VS0000017476 

SO Doc ID: EDD2100000003

Legal Name: Coast Professional, Inc.

Published Date: 12/10/20

Alias/DBA:

Close Date: 12/15/20

Total Bid: \$702,900.00

Close Time: 13:30

Response Date: 12/14/2020 

Status: Closed

Response Time: 16:09

Solicitation Description: P-EBT Remote Call Center Services

Responded By User ID: smcglynn 

Total of Header Attachments: 2

First Name: Scott

Total of All Attachments: 2

Last Name: McGlynn

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Price Per Call By Month	1.00000	EA	702900.000000	702900.00

Comm Code	Manufacturer	Specification	Model #
81111811			

Commodity Line Comments: n/a

Extended Description:

**If Vendor is submitting bid online, Vendor must upload and attach the Exhibit A-Pricing Page. Vendor should enter total bid amount as the amount bid in wvOASIS commodity line when submitting online.

Call Center Services

Exhibit A - Pricing Page

Description	Monthly Call Volume	Unit of Measure	Monthly Estimated Quantity	Unit Cost	Extended Cost
Price Per Call By Month	0-2500	Per Call	2500	\$6.39	\$15,975
Price Per Call By Month	2501 - 5000	Per Call	5000	\$6.39	\$31,950
Price Per Call By Month	5001 - 7500	Per Call	7500	\$6.39	\$47,925
Price Per Call By Month	7501 - 10000	Per Call	10000	\$6.39	\$63,900
Price Per Call By Month	10001 - 12500	Per Call	12500	\$6.39	\$79,875
Price Per Call By Month	12501 - 15000	Per Call	15000	\$6.39	\$95,850
Price Per Call By Month	15001 - 17500	Per Call	17500	\$6.39	\$111,825
Price Per Call By Month	17,500 - 20000	Per Call	20000	\$6.39	\$127,800
Price Per Call By Month	20000+	Per Call	20000	\$6.39	\$127,800
TOTAL BID AMOUNT					\$ 702,900 -

Note: The estimated quantity is for evaluation purposes only. Actual call volume is undetermined. No future use of the contract or any individual item is guaranteed or implied.

VENDOR'S NAME: Coast Professional, Inc.

VENDOR'S REPRESENTATIVE: Jonathan Prince, Chief Operating Officer



Coast Professional, Inc. Response to CRFQ 0402 EDD2100000003 for

State of West Virginia P-EBT Remote Call Center Services

State of West Virginia Department of Administration Purchasing Division

Submitted to:

Mr. Joseph Hager
State of West Virginia Department of
Administration Purchasing Division
2019 Washington Street East, PO Box 50130
Charleston, WV 25305-0130
(304) 558-2306
joseph.e.hageriii@wv.gov

Submitted by:

Andy Chance
Director of Business Development
Coast Professional, Inc.
4273 Volunteer Road
Geneseo, NY 14454
(904) 826-9471
achance@coastprofessional.com



Coast Professional, Inc. Mission Statement:

Coast Professional, Inc. is a top-performing accounts receivable management and customer support center specializing in communications for private, public, and government entities across the United States. Our mission is to perform services with the highest standards of integrity, efficiency, and ethics.

We develop rapport with companies and consumers, create long-term relationships with clients, and improve communities through philanthropic initiatives. We further our corporate culture of compliance, customer service, and teamwork by investing in our most valuable asset: our people. We maintain a professional environment and always do what is right.

Coast Professional, Inc. Vision Statement:

Coast strengthens relationships between consumers and our partners while empowering employees to excel.

Coast Professional, Inc. Core Values:

In all decisions, actions, and outcomes, Coast's guiding principle is to do what is right. We believe in:

- **Community:** Volunteer efforts and philanthropic initiatives are essential to the improvement of our communities.
- **Compliance:** Strict compliance with applicable laws and regulations is an absolute requirement in all aspects of our business.
- **Influence:** Our efforts make a positive impact on consumers, clients, employees, and our local communities.
- **Integrity:** Fair, proper, credible, and honest communication is required in every interaction.
- **People:** Hiring competent individuals and providing them with support and advancement opportunities improves our organization.
- **Performance:** Our technology advancements, compliance initiatives, and experience makes us an industry leader.
- **Perseverance:** Our company stability and longevity requires adaptability, agility, grit, and decisiveness.
- **Respect:** People deserve to be treated with respect, professionalism, and responsiveness.
- **Trust:** Preserving the integrity and the reputation of the partners we serve is of the utmost importance.

Coast is proud of our employees. Coast is proud of our accomplishments. Coast is proud of what we do.

Equal Opportunity Employer

Coast Professional, Inc. is an equal opportunity employer and federal contractor or subcontractor. Consequently, the parties agree that, as applicable, they will abide by the requirements of 41 CFR 60-1.4(a), 41 CFR 60-300.5(a) and 41 CFR 60-741.5(a) and that these laws are incorporated herein by reference. These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, or national origin. These regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran status or disability. The parties also agree that, as applicable, they will abide by the requirements of Executive Order 13496 (29 CFR Part 471, Appendix A to Subpart A), relating to the notice of employee rights under federal labor laws.



December 11, 2020

Mr. Joseph Hager III
State of West Virginia Department of Administration
Purchasing Division
2019 Washington Street East, PO Box 50130
Charleston, WV 25305-0130

Dear Mr. Hager,

Coast Professional, Inc. (Coast) is pleased to have the opportunity to respond to CRFQ 0402 EDD2100000003 for the State of West Virginia P-EBT Remote Call Center Services, issued by State of West Virginia Department of Administration, Purchasing Division (the State), on behalf of the West Virginia Department of Education. Coast has the personnel, resources, experience, and expertise to deliver both excellent results and world-class customer service to the State and its constituents.

Coast has provided successful call center services since our founding in 1976. Specializing in both the government and higher education industries, our clients include more than 200 public and private entities across the United States. With more than 13 years of experience managing large-scale government contracts, Coast is the perfect choice for the State.

We understand the importance of treating consumers with respect and empathy. Our representatives are well trained and experienced in practicing efficient telephone techniques during challenging times. They are skilled in the requirements of federal and state regulations, sensitive to the circumstances of children and families, and attentive to the needs of our clients. Coast representatives will assist families, answer their questions, and efficiently direct them to the proper resources.

Coast has read and understands the State's intents and objectives. We have included an overview of our effective methodologies, cost effectiveness, and experience on the following pages. Coast will successfully accept account placements within the requested time frame of the final contract signing barring any unforeseen circumstances.

If you have any questions about the services discussed herein or require additional information about what Coast can do for the State, please contact your Director of Business Development, Andy Chance. He can be reached by phone at (904) 826-9471 or by email at achance@coastprofessional.com.

On behalf of the entire Coast Team, thank you for this opportunity.

Sincerely,



Jonathan Prince
Chief Operating Officer

TABLE OF CONTENTS

GENERAL TERMS AND CONDITIONS	1
DESIGNATED CONTACT FORM	2
ADDENDUM ACKNOWLEDGEMENT FORMS	4
RFP COVER PAGES	8
PURCHASING AFFIDAVIT	15
SPECIFICATIONS	17
Purpose and Scope	17
Definitions	17
Qualifications	17
Quick Stats	18
Government Phone-Based Education Experience	19
Campus Portfolio	19
Department of Education Experience	19
Department of the Treasury, Bureau of the Fiscal Service Experience	20
Contact Tracing Experience	20
Data Security	20
Data Encryption	22
Physical Security	22
Document Shredding Practices	23
Environmental Security Controls	23
FISMA Compliant	23
Employee Training	24
Award-winning Training	25
4. MANDATORY REQUIREMENTS	26
Consumer Interaction Techniques	28
Ability to Adjust based on Call Volumes	29
Call Recording	29
Script Implementation	29
Office Locations	31
5. CONTRACT AWARD	32
6. PERFORMANCE	33

**Coast Professional, Inc. Response to CRFQ 0402 EDD2100000003 for the
State of West Virginia Department of Administration Purchasing Division**

7. PAYMENT 34

8. TRAVEL 35

9. FACILITIES ACCESS 36

10. VENDOR DEFAULT 38

11. MISCELLANEOUS 39

EXHIBIT A – PRICING PAGE 40

GENERAL TERMS AND CONDITIONS

Coast has read, understands, and agrees to comply with the General Terms and Conditions set forth by the State of West Virginia Department of Administration, Purchasing Division. We can provide our Certificate of Good Standing with the State of West Virginia at any time upon request.

In addition, Coast agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements set forth in:

<http://www.state.wv.us/admin/purchase/privacy/default.html>.

DESIGNATED CONTACT FORM

Coast has provided our Designated Contact Form on the following page.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Jonathan Prince, Chief Operating Officer

(Name, Title)

Jonathan Prince, Chief Operating Officer

(Printed Name and Title)

4273 Volunteer Road Geneseo, NY 14454

(Address)

Phone: (585) 991-5200 Fax: (318) 807-5100

(Phone Number) / (Fax Number)

proposals@coastprofessional.com

(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Coast Professional, Inc.

(Company)


Jonathan Prince, C.O.O.

(Authorized Signature) (Representative Name, Title)

Jonathan Prince, Chief Operating Officer

(Printed Name and Title of Authorized Representative)

December 11, 2020

(Date)

Phone: (585) 991-5200 Fax: (318) 807-5100

(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORMS

Coast has provided our signed Addendum Acknowledgement Forms on the following pages. This includes the Acknowledgement Form included within the original solicitation, Addendum 1, and Addendum 2.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Coast Professional, Inc.

Company


Authorized Signature

Jonathan Prince, Chief Operating Officer

December 11, 2020

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ EDD21*03

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Coast Professional, Inc.

Company



Jonathan Prince, COO

Authorized Signature

December 11, 2020

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ EDD21*03

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Coast Professional, Inc.

Company



Jonathan Prince, COO

Authorized Signature

December 11, 2020

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012

RFP COVER PAGES

Coast has included its signed RFP Cover Pages (Pages 1 & 2) included within the Original RFP, Addendum #1, and Addendum #2 on the following pages.



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Centralized Request for Quote
 Service - Prof

Proc Folder: 807919	Reason for Modification:
Doc Description: P-EBT Remote Call Center Services	
Proc Type: Central Master Agreement	

Date Issued	Solicitation Closes	Solicitation No	Version
2020-11-30	2020-12-23 13:30	CRFQ 0402 EDD2100000003	1

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: VS0000017476
Vendor Name : Coast Professional, Inc.
Address :
Street : 4273 Volunteer Road
City : Geneseo
State : New York **Country :** United States **Zip :** 14454
Principal Contact : Jonathan Prince
Vendor Contact Phone: (585)-991-5200 **Extension:** n/a

FOR INFORMATION CONTACT THE BUYER
 Joseph E Hager III
 (304) 558-2306
 joseph.e.hageriii@wv.gov

Vendor
 Signature X  **FEIN#** 33-0791735 **DATE** December 11, 2020

All offers subject to all terms and conditions contained in this solicitation



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Centralized Request for Quote
 Service - Prof**

Proc Folder: 807919			Reason for Modification: To publish Addendum #2 agency responses to vendor questions
Doc Description: P-EBT Remote Call Center Services			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2020-12-10	2020-12-15 13:30	CRFQ 0402 EDD2100000003	3

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: VS0000017476
Vendor Name : Coast Professional, Inc.
Address :
Street : 4273 Volunteer Road
City : Geneseo
State : New York **Country :** United States **Zip :** 14454
Principal Contact : Jonathan Prince
Vendor Contact Phone: (585) 991-5200 **Extension:** n/a

FOR INFORMATION CONTACT THE BUYER
 Joseph E Hager III
 (304) 558-2306
 joseph.e.hageriii@wv.gov

Vendor Signature X  **FEIN#** 33-0791735 **DATE** December 11, 2020

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

Open End Contract

WVDE - Office of Child Nutrition

The West Virginia Purchasing Division is soliciting bids on behalf of the West Virginia Department of Education (WVDE), Office of Child Nutrition to establish an open-end contract for P-EBT Remote Call Center Services per the specifications and terms and conditions attached hereto.

INVOICE TO	SHIP TO
DEPARTMENT OF EDUCATION BLDG 6, RM 330 1900 KANAWHA BLVD E CHARLESTON WV 25305 US	DEPARTMENT OF EDUCATION OFFICE OF COMMUNICATIONS 1900 KANAWHA BLVD E, BLDG 6 RM 009 CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Price Per Call By Month	1.00000	EA	\$702,900	\$702,900

Comm Code	Manufacturer	Specification	Model #
81111811			

Extended Description:

**If Vendor is submitting bid online, Vendor must upload and attach the Exhibit A-Pricing Page. Vendor should enter total bid amount as the amount bid in wvOASIS commodity line when submitting online.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
-------------	--------------	-------------------

ADDITIONAL INFORMATION

Addendum

Addendum #1 issued to published the attached documentation to the vendor community

Open End Contract

WVDE - Office of Child Nutrition

The West Virginia Purchasing Division is soliciting bids on behalf of the West Virginia Department of Education (WVDE), Office of Child Nutrition to establish an open-end contract for P-EBT Remote Call Center Services per the specifications and terms and conditions attached hereto.

INVOICE TO	SHIP TO
DEPARTMENT OF EDUCATION BLDG 6, RM 330 1900 KANAWHA BLVD E CHARLESTON WV 25305 US	DEPARTMENT OF EDUCATION OFFICE OF COMMUNICATIONS 1900 KANAWHA BLVD E, BLDG 6 RM 009 CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Price Per Call By Month	1.00000	EA	\$702,900	\$702,900

Comm Code	Manufacturer	Specification	Model #
81111811			

Extended Description:

**If Vendor is submitting bid online, Vendor must upload and attach the Exhibit A-Pricing Page. Vendor should enter total bid amount as the amount bid in wvOASIS commodity line when submitting online.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Q&A DEADLINE @ 4:00 PM	2020-12-08

ADDITIONAL INFORMATION

Addendum

Addendum #2 issued to published the attached documentation to the vendor community

Open End Contract

WVDE - Office of Child Nutrition

The West Virginia Purchasing Division is soliciting bids on behalf of the West Virginia Department of Education (WVDE), Office of Child Nutrition to establish an open-end contract for P-EBT Remote Call Center Services per the specifications and terms and conditions attached hereto.

INVOICE TO	SHIP TO
DEPARTMENT OF EDUCATION BLDG 6, RM 330 1900 KANAWHA BLVD E CHARLESTON WV 25305 US	DEPARTMENT OF EDUCATION OFFICE OF COMMUNICATIONS 1900 KANAWHA BLVD E, BLDG 6 RM 009 CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Price Per Call By Month	1.00000	EA	\$702,900	\$702,900

Comm Code	Manufacturer	Specification	Model #
81111811			

Extended Description:
 **If Vendor is submitting bid online, Vendor must upload and attach the Exhibit A-Pricing Page. Vendor should enter total bid amount as the amount bid in wvOASIS commodity line when submitting online.

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Q&A DEADLINE @ 4:00 PM	2020-12-08

PURCHASING AFFIDAVIT

Coast has included its signed and notarized Purchasing Affidavit on the following page.

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Coast Professional, Inc.

Authorized Signature:  Date: 12/11/2020

State of New York

County of Livingston, to-wit:

Taken, subscribed, and sworn to before me this 11th day of December, 2020.

My Commission expires Jan 4, 2022

AFFIX SEAL HERE

CHERI LYN KING
Notary Public, State of New York
Registration #01K16215787
Qualified In Broome County
Commission Expires Jan. 4, 2022

NOTARY PUBLIC



Purchasing Affidavit (Revised 01/19/2018)

SPECIFICATIONS

Purpose and Scope

The West Virginia Purchasing Division is soliciting bids on behalf of the West Virginia Department of Education (WVDE), Office of Child Nutrition to establish an open-end contract for P-EBT Remote Call Center Services. This procurement may be funded in whole or part with federal funds and thus this solicitation and its resulting awarded contract are subject to the requirements of Exhibit B: Provisions for Federally Funded Procurements.

Coast has read and understands the Purpose and Scope set forth by the State.

Definitions

The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

2.1 "Contract Services" means providing call center support services more fully described in these specifications.

Coast has read and understands the definition on Contract Services.

2.2 "Pricing Page" means the pages, contained wvOASIS or attached hereto as Exhibit A, upon which Vendor should list its proposed price for the Contract Services.

Coast has read and understands the definition of the Pricing Page.

2.3 "Solicitation" means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

Coast has read and understands the definition of Solicitation.

Qualifications

Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications:

3.1. Vendor must have relevant remote call center experience specific to the types of services requested.

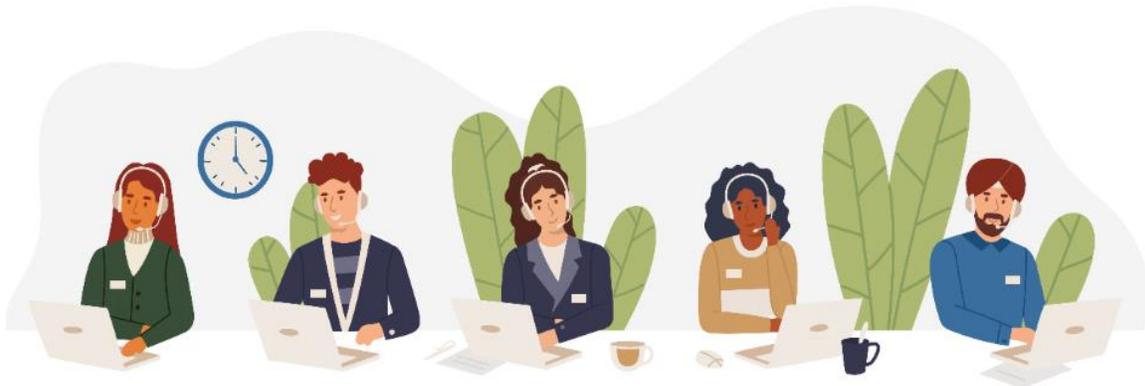
Coast has more than 44 years of experience successfully providing empathetic and compassionate call center services (both in-house and remote) on behalf of our clients. Whether it's our effective call center solutions, accounts receivable management business line, or our COVID-19 contact tracing efforts, our representatives are experts at speaking with consumers regarding sensitive topics. Our remote and/or

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

in-office workforce can assist the State with multiple services such as inbound and outbound dialing, mail services, and additional back-office functions as required.

Over the years, we have grown into a robust, national organization that is dedicated to service, compliance, performance, and technology. We constantly reimagine our business model in order to align with the current environment and provide exceptional call center services for the needs of our clients. Coast has the demonstrated ability to quickly implement, adapt, and exceed performance expectations on large scale government contracts. The State can be confident that we have the requisite human capital, security infrastructure, and decades of experience working with consumers during difficult times.

To effectively perform our work, we focus on active listening techniques that include paying close attention to the caller's words and nonverbal cues (such as emotion and tone). Representatives remain silent while the caller discusses what they need and who they need to speak to in order to understand and process their needs with the utmost accuracy. Our representatives also ask questions to confirm that we heard what was said correctly. Coast employees are dedicated to treating people with respect, regardless of race, ethnicity, socioeconomic background, sexual orientation, or gender.



Quick Stats

Coast's Call Center Operations Overview

- Field over 15 million calls annually with 700,000 pieces of mailed correspondence processed
- Storied history of compliant, ethical, and empathetic communication with consumers
- 44 years of call center services; 13 years of experience providing call center operations to large government clients
- Current COVID-19 contact tracing contract with the State of Louisiana, Louisiana Office of Public Health; outpacing the base line contact rate by 46%
- Employees have completed our training program which received an award as one of the Top 125 Training Programs in the world in February 2020 (as awarded by *Training Magazine*).
- Independent Compliance Department monitors calls and provides regulatory support
- A secure technological infrastructure that meets Federal Information Security Management Act (FISMA) / National Institute of Standards and Technology (NIST) 800-53 rev 4 standards

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

- Compliance with HIPAA, UDAAP, and other applicable information security and consumer communication standards
- 2017 Better Business Bureau Torch Award winner for business ethics
- Surge capacity ability for call volume fluctuation
- Dedicated business analytics department to deliver portfolio insights

Government Phone-Based Education Experience

Coast provides call center services on behalf of the Department of Education, Federal Student Aid (FSA). In this role, we answer in-depth questions related to loans, borrowing considerations, and responsible repayment options. Our average conversation is over 30 minutes in length during which we actively listen to fears and concerns, compassionately explain program benefits, document relevant case details, and help the person plan for restoring their autonomy. 91.2% of our efforts are unsolicited outbound communications to individuals.

Campus Portfolio

We also work closely with and provide services for more than 200 college and university campuses across the United States. Coast receives inbound and performs outbound calls to assist student consumers with any questions they may have and to assist them in resolving their accounts. Our campus portfolio contains a mix of student loans (Perkins/NDSL, Nursing, HPSL, institutional, etc.) and student receivables, such as tuition, housing and parking citations, and varies from month to month. Our current campus portfolio is over 26,500 accounts.

3.2. Vendor should have experience in serving public education and/or public sector clients.

Coast has provided professional, ethical and compliant services to public education and public sector clients for more than four decades.

We understand that schools closing for prolonged periods of time due to COVID-19 has had a major impact on children who rely on free and reduced school meals for food security. Our representatives are trained to provide empathetic, individualized support for a high volume of callers to help them get in touch with the correct office. Coast currently provides contact tracing services to combat the spread of COVID-19 and has a company-wide understanding of the importance of maintaining an empathetic approach to these difficult conversations.

We have more than 230 years of combined management experience providing call center services to the federal government and state agencies including the U.S. Department of Education, federal government entities, and hundreds of public and private colleges and universities. Coast has partnered with major federal government agencies for more than 10 consecutive years, including the Department of Education, Federal Student Aid (FSA) and the Department of the Treasury, Bureau of the Fiscal Service (Fiscal Service).

Department of Education Experience

As mentioned previously, Coast has provided call center services on behalf of the United States Department of Education, Federal Student Aid (FSA) office for over 13 years. For this client, our average

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

conversation is over 30 minutes in length during which we help the person come up with a plan for restoring their financial autonomy.

Department of the Treasury, Bureau of the Fiscal Service Experience

Coast has been providing call center services for the Department of the Treasury, Bureau of the Fiscal Service (Fiscal Service) since 2018. We have the necessary federal government call center experience, technological and operational infrastructure, contract knowledge, account volume, staffing capacity, and successful past performance to provide exceptional services to the State. Coast currently manages 65,000 government accounts worth \$817 million for the federal government. These accounts include 229 unique debt types for 34 different government entities. This work demonstrates Coast's ability to manage varying account types and program requirements for large scale government clients.

Contact Tracing Experience

Coast has been providing the State of Louisiana, Louisiana Office of Public Health (OPH) with contact tracing services since May 2020. We provide OPH with COVID-19 contract tracing services by communicating with individuals who have tested positive for COVID-19 and identifying contacts who may have been exposed. We are one (1) of four (4) agencies contracted to provide these services to OPH. We utilize call center technology to provide these services. Our process includes utilizing provided consumer data and scripted conversations focused on empathetic and information sharing communications.

Along with our COVID-19 contact tracing work, we are currently a partner on a contract that is responsible for calling patients and advising them of Medicare changes.

3.3. Security and training measures to properly handle confidential information

Coast recognizes its fiduciary responsibility to clients includes protecting confidential information and properly training employees in regards to appropriate security practices. We have a secure technological infrastructure that meets Federal Information Security Management Act (FISMA) / National Institute of Standards and Technology (NIST) 800-53 rev 4 standards. Coast is compliant with the Health Insurance Portability and Accountability Act (HIPAA), Unfair or Deceptive Acts or Practices (UDAAP), and other applicable security and consumer communication standards. Please see below for an overview of our data security procedures and practices, as well as our security training procedures.

Data Security

Our firewalls protect internal servers and internal/external access through layers of defense including but not limited to deny-all permit by exception rulesets, next generation firewall inspection configurations, and strong multi-factor authentication and encryption at multiple levels of our network. Coast has standards and guidelines governing the use of electronic resources including firewall and wireless access and use policies. We take reasonable and appropriate steps consistent with current technological developments to make sure that all Personally Identifiable Information (PII) is secure and to safeguard the integrity of records in storage.

Coast has standards and guidelines governing the use of electronic resources including firewall and wireless access and use policies. Coast takes reasonable and appropriate steps consistent with current

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

technological developments to make sure that all Personally Identifiable Information (PII) is secure and to safeguard the integrity of records in storage.

Coast's strict protocols and procedures have been designed, developed, and tested to protect internal data in the event of a cybersecurity or other data security breach. In addition, internal and external physical and facility access and control are maintained through layers of right to use parameters at multiple levels of our hardware, software, network, data center and production areas.

Data Security Efforts

Coast is devoted to safeguarding the confidential taxpayer information with which we have been entrusted. We comply with the:

- Family Education Rights and Privacy Act (FERPA)
- Federal Information Security Management Act of 2002 (FISMA)
- Gramm-Leach Bliley Act (GLBA)
- Payment Card Industry Data Security Standard (PCI DSS)
- Red Flags Rules
- And other applicable regulations covering data security

Coast's internal and external physical and facility access and control are maintained through layers of right to use parameters at multiple levels of our hardware, software, network, data center and production areas. Access control to the software and hardware is only permitted by authorized personnel under rigorous physical, software, and password protection. All staff is required to complete regular security awareness training including facility, data access, and document control, as well as all other applicable federal security requirements, specifically including the Gramm Leach Bliley Act (GLBA) concerning privacy.

All Coast employees working on our system and network are required to use Multi-factor authentication (MFA), the staff is issued unique user IDs and passwords along with a security token that safeguard passage within Coast's Ontario Systems, LLC (OS) servers, and Artiva servers.

Please Note: As a current contractor for the federal government, Coast's Human Resources Client Clearance team has an experienced, efficient onboarding process, with the ability to screen thousands of applicants rapidly. Coast is familiar with the Electronic Questionnaires for Investigations Processing (e-QIP) process and is currently utilizing this process for the performance on our federal contracts including the Department of Education, Federal Student Aid (FSA) and Department of the Treasury, Bureau of the Fiscal Service (Fiscal Service). **Coast staff assigned to this contract shall undergo suitability screening and receive a favorable fingerprint check and background investigation.**

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

Data Encryption

The first step in developing a world-class information security platform is to classify the data and to develop data flow diagrams to understand where the classified data is located.

Coast has invested heavily in the policies, procedures, training, and technologies to secure our IT environment and data residing within it. Coast has implemented multi-layered network security strategies which start at the perimeter of the network and include redundant firewalls with Intrusion Detection Systems (IDS) and Intrusion Prevention Systems (IPS) configured

to alert to Coast's centralized Security and Event Log server. Through Log Event Monitoring (LEM), configured using Lightweight Directory Access Protocol (LDAP), the IDS actively monitors the anti-intrusion system and notifies administrators of events via alerts 24/7/365. On our local networks, our systems are hardened according to NIST best practices following strict group policy and hardening procedures, which are completed on each system individually to ensure specific applications are locked down according to best practices. Coast has implemented data loss prevention technology for email traffic which is considered confidential or pertains to Health Insurance Portability and Accountability Act (HIPAA), Gramm-Leach-Bliley Act (GLBA) and other consumer information.



In order to access our data, Coast utilizes role-based access methodologies to permit staff access to only necessary data to perform their jobs. While data at rest encryption is important to us, we also work to make sure that all data that is transmitted, is encrypted during that transmission. Coast utilizes a file transfer product which allows Coast to receive data via secure methods such as SSH, SSL, and HTTPS. In addition, all data stored on our SFTP server is encrypted at rest and when in transit with 256-bit AES FIPS 140-2 validated encryption.

Physical Security

Coast has addressed the physical security of employees and the confidential data entrusted to our care by limiting access to only those employees who have a business reason to know such information. Existing policies establish a procedure for the prompt reporting of the loss or theft of protected information. Offices and storage facilities that maintain protected information limit unauthorized access and are appropriately secured. Paper documents that contain protected information are shredded before disposal. **Coast production, support and systems' facilities are under a 24/7/365 monitored alarm, electronically monitored and controlled access card system, 24/7 camera surveillance, and all operations are contained inside physically locked door areas with stringent security password and access policies.** Our database hardware is housed in a locking rack chassis located within a further access controlled restricted entry data center.

Physical and administrative controls to prevent unauthorized entry into Coast facilities have been established. Coast has 100% controlled access requiring photo-identification and access permissions from management to enter the buildings. Cardkeys provide both authorization and accountability. The following physical access controls are in place at each Coast facility:

- All Data Center visitors must sign a data center visitor's log
- All firewalls, switches, servers, and Local Area Network (LAN) are in secured data closets

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

- All visitors must always have an escort with them while in the facility
- All visitors require visitor badges and must sign in at the front desk
- Card access system to enter/exit the Data Center (including card logging system)
- Data Center has no external windows
- Data Center is in an unidentified room
- Employees are required to display their photo identification badges while in the facility, as well as utilize their fobs for entrance to all secured areas.
- Front desk receptionist at the entrance to the facility monitor all access by visitors and employees
- No cellphones are allowed in the buildings except for those who are required to have one for business purposes: (COO, CCO, CHRO, Contract Managers, Senior Directors)
- Receptionists maintain logs to record the entry and departure of all visitors

Document Shredding Practices

Coast is vigilant about protecting any paper documents associated with confidential client and consumer information. We safely store paper documents in a format that can be quickly retrieved and reviewed. This is achieved by scanning documents and shredding the originals in-house. Coast contracts for onsite shredding and destruction of all regular correspondence, documents containing personal information, and other sensitive documents.

Environmental Security Controls

Network components are housed in an environmentally controlled data center at the Coast facility. The following environmental controls have been implemented to protect the system resources:

- Air Conditioning (AC) unit, including redundant AC
- Fire extinguishers
- Moisture detectors are installed
- Plumbing lines are located under the raised floor
- Raised floors
- Smoke detectors
- Uninterruptible Power System (UPS)

FISMA Compliant

As a contractor for the Department of Education, Federal Student Aid, Coast is required to obtain an Authority to Operate (ATO) and follow the Federal Information Security Management Act of 2002 (FISMA, 44 U.S.C. § 3541, et seq.), a federal law intended to strengthen information security systems and refine the transmission of electronic data. This law extends beyond the systems managed by the federal government to cover any third-party service providers who aid in the management of government data.



FISMA compliance is obtained by an agency submitting to a process in which the company's complete IT structure, equipment and security controls are recorded, assessed, certified and accredited. Once FISMA

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

compliance is achieved, regulations require annual monitoring to maintain compliance. Although our contractual obligations to the Department of Education was the catalyst for Coast to pursue compliance, all business lines benefit from working with a FISMA compliant agency due to the advanced security practices it requires.

Employee Training

All staff is required to complete regular security awareness training including facility, data access, and document control, as well as all other federal security requirements, specifically including the Gramm Leach Bliley Act (GLBA) concerning privacy.

Coast emphasizes education, security awareness training, and compliance by allocating substantial resources to fostering personal and professional growth in its employees. Our staff is our most important asset, and their continual development and adherence to our strict data policies is a top priority.

To ensure our clients' needs are met, all new hires must attend an intensive two-week, hands-on training program. This training encompasses:

- Security awareness training: handling documents, properly notating accounts, etc.
- State laws and the rights, responsibilities and options of the consumer
- Training and daily routines

Continued education and compliance is achieved on an ongoing basis with mentoring and monitoring to ensure Consumer Care Representative (CCR) success. Performance appraisals are initially conducted at 30, 60, and 90 days. This information is compiled in a quarterly evaluation which includes competency in matters such as:

- Account documentation
- Applicable laws and statutes
- Call handling
- Call volume
- Number of daily contacts
- Oral communication
- Phone techniques
- Protocols
- Route control
- Software navigation
- Use of time and resources
- Written communication

Employees are encouraged and supported in expressing ideas about ways they can improve their skills. Coast has implemented a successful mentoring program allowing entry level representatives to partner with tenured, skilled representatives to gain knowledge and hands-on experience. The result of this program has been to build a successful team with outstanding support and productivity.

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

Award-winning Training

In February 2020, Coast received a Training Top 125 Award from *Training Magazine*. The Training Top 125 Awards recognize organizations with the most successful learning and development programs in the world. The Top 125 rankings are calculated based on corporate training overall, including the number of training hours per employee program, total training budget, and innovative learning goals. Coast has worked diligently to establish a world-class training program resulting in the recognition from Training Magazine. This award is a direct result of Coast's improved employee training programs, exemplary customer service, and compliance standards.

3.4. Support for ADA compliance

Coast has undergone and passed website testing for Americans with Disabilities Act (ADA) and Section 508 standards. Additionally, we work with consumers, clients, and employees that may have additional needs and accommodate where possible. Coast utilizes an outside law firm to provide guidance on compliance with accessibility standards.

3.5. Links to any demonstrations/simulations of your services

Please see below for a link to Coast's website:

www.coastprofessional.com

Coast can also provide the State with links to recordings of our quarterly webinars upon request.

3.6. Must have bilingual staff available who can speak English and Spanish fluently.

Coast will work with the State to establish the necessary Spanish speaking staff as applicable and appropriate. We will maintain bilingual staff or establish agreements with an interpreter service during the duration of any agreement if bilingual staff is not available on Coast's team. Coast actively recruits bilingual and multilingual staff to ensure effective communication with clients and consumers. Our potential interpretation service providers can communicate in more than 240 languages and provides an average connection time of 8.3 seconds for Spanish speaking calls and 16.1 second connection time on average for other languages. Coast will begin the process of establishing a contract with the interpretation service as necessary upon contract award with Agency.

As part of our compliance process, Coast can develop scripts for representatives that are translated into different languages as appropriate, to effectively communicate with consumers. We currently develop Spanish speaking scripts for employees to utilize and maintain Spanish speaking staff who review call recordings and account notation to ensure that our efforts remain compliant in our communications with consumers.

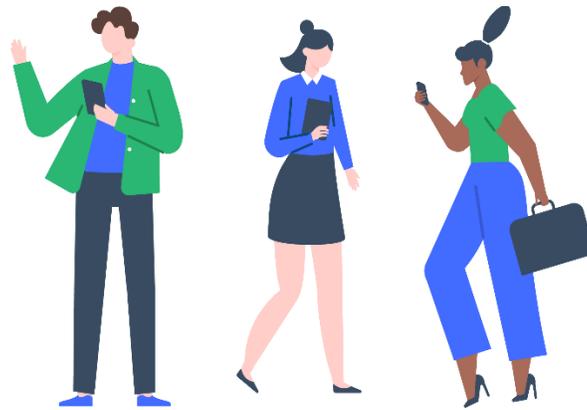
4. MANDATORY REQUIREMENTS

4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.

4.1.1 Vendor must provide inbound call handling system and messaging services to augment and support the Pandemic Electronic Benefit Transfer (P-EBT) project in West Virginia. The vendor must provide a turn-key, full service supplemental call center operation to answer inbound calls to include, but not limited to labor, facilities, equipment, including telephone instruments and related lines/cable, telephone service, software, circuits, staff, training, and reporting.

Coast will provide the State with the required call handling system and messaging services to augment and support the Pandemic Electronic Benefit Transfer (P-EBT) project in West Virginia.

We have a robust call platform that we can both utilize and customize to support the State's needs. This service will include the necessary equipment, software, services, and personnel necessary to appropriately handle the State's needs. This includes, but is not limited to labor, equipment, telephone service, software, circuits, staff, training, and reporting.



Labor and Staff: Coast's organizational structure is scalable and repeatable. We have a backlog of current experienced staff to immediately assign to this contract. Based on the volume and complexity of this contract, Coast anticipates transferring experienced staff to the contract and hiring additional staff as necessary. Our knowledgeable, skilled team members will utilize their experience providing successful services for the State. Our representatives understand the urgency and seriousness of the current situation and are ready to begin work immediately. Coast will provide the State with the required number of staff based on the State's needs. Coast currently maintains a 1:12.5 supervisor to representative ratio for our call center teams.

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

Telephone Service: Coast utilizes a call platform that allows the ability to call telephones over landline, cell, and VOIP. We will set up a dedicated phone number, as applicable, for this contract to ensure that our services are toll-free and easily accessible. Coast has the ability to record all calls, where allowed by Federal and state laws and regulations, and will provide call recordings to the State upon request.

Software and Circuits: Coast will create a specific template for our Artiva system that will comply with all requirements of the State. This will accomplish data segregation and information security. The system will provide automatic notation of accounts, track all communications, and identify potential accounts which may require further action. This system will act as our system of record for our services.

Coast's IT infrastructure environment is made up of highly resilient systems that provide us secure, reliable, scalable, and high-performance computing environments. Our online system is accessed through multiple firewalls and each person who visits any screen is tracked via electronic marker/signature which permits us to know exactly who made or viewed any entry and when it occurred. Every client will have a unique user ID and personal password. Coast currently uses Secured Socket Layer (SSL) protocol. Coast has implemented multi-layered network security strategies which start at the perimeter of the network and include redundant firewalls with Intrusion Detection Systems (IDS) and Intrusion Prevention Systems (IPS) configured to alert to Coast's centralized Security and Event Log server. Through SolarWinds Log Event Monitoring (LEM), configured using Lightweight Directory Access Protocol (LDAP), the IDS actively monitors the anti-intrusion system and notifies administrators of events via alerts 24/7/365.

Coast utilizes Microsoft Office Suite applications that include Word, Excel, Teams and Adobe PDF.

Coast's EPL (Ethernet Private LAN) Connects all locations in an any-to-any configuration. All sites are connected to a private layer 2 switch in essence and Coast routes the traffic across it. The EPL provides Point-to-point connectivity at symmetrical speeds up to 10Gbps, Mesh configuration offers equal effectiveness, Spans metro areas as well as intrastate and interstate WAN deployments. In the event of an extended ELAN outage Coast would rely on Internet based VPN connectivity to get sites the ability to talk to one another or the primary data center and or alternate processing site. Data connectivity includes on-premise internet access by two Internet Service Providers (ISPs), and private ELAN network to the failover site, which also has internet access. Internet is available at both sites. The primary phone channels are T1's provided by an ISP and there are additional backup facilities available over a VoIP SIP circuit to Frontiers SBC. During a defined business interruption or outage, Coast would modify the dialer and phone system to utilize the SIP services in the alternate processing site to establish connectivity with the outside world and continue to dial consumers.

Training: Coast emphasizes education and training and allocates substantial resources to fostering personal and professional growth in its employees. To ensure our clients' needs are met, all new hires must attend an intensive two-week, hands-on training program. This training encompasses accessing and operating our system (and the client's system), state laws, rights, and responsibilities, empathetic phone techniques, and tactics training and daily routines. Training is conducted using classroom instruction and discussion, one-on-one intensive sessions, videos, voice recordings, and other tutorials and instructional materials. Role-playing exercises are also used.

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

Coast employees also begin their onboarding with a rigorous, in-depth training process covering a multitude of information protection regulations including the Health Insurance Portability Accountability Act (HIPAA) and the Family Education Rights and Privacy Act (FERPA). We are devoted to safeguarding the confidential information with which we have entrusted.

Reporting: Coast understands the importance of receiving comprehensive and timely reports and is able and willing to comply with any reporting requirements of the State. Depending upon the State's needs, customized reports can be programmed and generated according to the schedule required by the State. Upon contract award, Coast's Application Development (App Dev) team can create customized, intricate reports for the client.

4.1.1.1 Vendor must provide inbound answering services to assist with calls related to P-EBT during normal business hours (Monday-Friday, 8:00 a.m. - 4:45 p.m., EST). Additionally, weekend/holiday call coverage may also be needed. These calls are regarding a federal public benefit program requiring each caller to be treated with the utmost professionalism and courtesy.

We have developed a staffing model to accommodate a seven-day workweek and substantial volume (call increases). This is completed through a flexible scheduling plan, hiring sufficient staff, and continually monitoring assigned consumer volume fluctuations to ensure we maintain appropriate staff for the State's requested hours of operation. Our call center employees and supervisors will ensure proper, on-time follow up conversations with consumers.

Coast representatives will treat all callers with the utmost respect, professionalism, and courtesy. We will provide proper, credible, and honest communication with consumers regarding their inquiries and establish appropriate solutions to help resolve their questions and needs.

Consumer Interaction Techniques

Coast invests significantly in Information Technology and Business Process Optimization. A primary objective of this investment is understanding and improving the way in which consumers interact with our representatives and systems to efficiently resolve their obligations. A few examples of consumer centric solutions include:

- Optimizing the time to call consumers, reaching them based upon their availability and preferences, leading to greater consumer satisfaction
- Streamlining the process for receiving, processing and auditing documentation received from consumers, reducing wait times for document acceptance or feedback
- Improving the accessibility of standardized forms for consumers, making them available through several channels, ultimately reducing frustration and increasing consumer satisfaction

4.1.1.2 Vendor must maintain adequate staffing to ensure enough operators are available to avoid any missed calls. Call volume may fluctuate but could peak at a volume of 2,000 calls per day.

Coast will maintain adequate staffing to ensure representatives are available during required hours and to minimize any missed calls. Coast has a proven record of monitoring and analyzing call volume data to provide a rapid response to increased staffing needs. **In 2019, Coast averaged approximately 59,600 (inbound and outbound) calls per day.**

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

Ability to Adjust based on Call Volumes

To demonstrate our ability to appropriately accommodate changes in account assignment fluctuations, our contract with the U.S. Department of Education has inbound call volume increases, approximately 2-3 times greater than average, during January and March. We adjust our staffing model to manage the increased call volume through daily review of our Average Speed of Answer (ASA) and answer rate. If we notice the answer rate is decreasing and ASA is increasing, we will deploy more staff hours to the contract through:

- Increasing the availability of overtime
- Hiring additional staff
- Creating set schedules during peak call volume time

We will use our experience managing significant increases in call volumes to provide the State with flexible contact tracing services.

4.1.1.3 Vendor must have message storage and retrieval capability commiserate with the industry but no less than 36-hour retrieval.

Coast is able to store, save, and retrieve messages within the expected timeframe.

Call Recording

Coast records 100% of allowable telephone calls after notifying the consumer that the conversation is being recorded. This is an excellent tool for training, compliance audits, and ensuring accuracy. All records may be retrieved and reviewed at any time by management or at the request of the client to determine if the call was appropriately conducted and adhered to all applicable laws, regulations, and client standards.

4.1.1.4 Vendor must screen all incoming calls according to requirements using a provided script to ensure necessary information is communicated to the callers. WVDE will provide the script and any other relevant communication prompts needed to manage incoming calls.

Script Implementation

Coast will screen all incoming calls and utilize the provided scripts according to the State's requirements. Our script implementation process is simple; once a client sends their required scripts, we pass them to our instructional design team. Our instructional design team properly formats the scripts and plugs in our client's desired text. Once the scripts have been properly formatted, we send them back to the client for approval. Once approved, our representatives are trained on the updated scripts, and they are rolled out for live use.

Coast understands the importance of script-based communication as it ensures adherence to the client's requirements and consistency of information provided to consumers.

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

4.1.1.5 Vendor must have phone transfer capabilities - in which a caller can be transferred at their request to the appropriate administering state agency - the West Virginia Department of Education OR the West Virginia Department of Health and Human Resources (DHHR).

Coast phones have transfer capabilities. Our representatives will have the ability to transfer callers to the appropriate administering agency.

4.1.1.6 Vendor must provide a recap report of all incoming calls received, messages taken, and messages delivered. A report must be emailed to designated points of contact at WVDE and DHHR daily. A prepared daily spreadsheet of messages must be prepared and emailed to the designated points of contact no later than 10:00 a.m. EST the following business day. WVDE will provide vendor with the minimally acceptable fields of information that should be included with each daily report. All reports shall be sent via email.

Coast will provide the State with a daily progress report, including a recap of all incoming calls received, messages taken, and messages delivered. A Senior Representative will email the report to the designated points of contact daily, no later than 10:00 a.m. EST the following business day.

We currently provide the Louisiana Office of Public Health (OPH) with progress reports and summaries multiple times a week at their request.

4.1.1.7 Vendor must provide callers on-hold with an option to press a prompt for priority call-back. Calls should be returned within one hour.

Coast has read, understands, and agrees to comply with the State's call-back prompt and response time requirements.

4.1.1.8 Vendor must ensure that callers are not put on hold for more than 2 minutes.

Coast ensures that callers will not be on hold for more than two minutes. Our average hold times are approximately 28 seconds. We have also developed prompts within our phone system to alert the representative if the caller has been placed on hold greater than 60 seconds to ensure that they are frequently checking in with the consumer.

4.1.1.9 The number of caller complaints about the call center must be 3% or less of all received calls.

Coast has read, understands, and agrees to comply. In 2019, our caller complaints accounted for 0.04% of all received calls.

4.1.1.10 80% of the calls should be answered within 20 seconds or less.

Coast's Department of Education, Federal Student Aid (FSA) contract, which maintains an inventory of more than 2,670,000 federal debts, requires us to achieve specific metrics regarding call activity including an average speed of answer rate less than 60 seconds and an average call abandon rate of less than 2%. Since FSA implemented the requirement, **Coast has maintained an average speed of answer of less than two seconds and an average abandon rate less than 1%.**

Coast Professional, Inc. Response to CRFQ 0402 EDD210000003 for the State of West Virginia Department of Administration Purchasing Division

4.1.1.11 Vendor call center must be located within the Continental United States.

The State's call center will be located at one of Coast's four locations or can be set up in a remote (Work From Home) environment if required by the State. Currently, Coast has four (4) call center locations and eight (8) satellite office locations nationwide. Coast's call center service and operations functions within the Continental United States. Please see the following page for a list of our office locations.

Office Locations

Geneseo, NY Office (Company Headquarters)

4273 Volunteer Road
Geneseo, NY 14454

East Aurora, NY

300 Glead Avenue
East Aurora, NY 14052

West Monroe, LA

214 Expo Circle, Suite 7
West Monroe, LA 71292

West Monroe, LA

651 Downing Pines Road
West Monroe, LA 71292



Satellite Offices

Coast maintains eight (8) satellite sales, marketing, and executive offices.

- Alpharetta, GA
- Dallas, TX
- Hahira, GA
- Palm City, FL
- Russellville, OH
- St. Augustine, FL
- Trenton, OH
- Tustin, CA

5. CONTRACT AWARD

5.1 Contract Award: The Contract is intended to provide the Agency with a purchase price for the Contract Services. The Contract shall be awarded to the Vendor that provides the Contract Services meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.

Coast has read and understands the specifications of the contract award.

5.2 Pricing Page: Vendor should complete the Pricing Page and submit it as part of their bid response. Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified. The Pricing Page contains a list of the Contract Items and estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied. Vendor should complete the Pricing Section by providing unit cost per call that coincides with the monthly call volume. The unit price should be multiplied by the monthly estimated quantity to sum the extended cost. The extended cost should be totaled to equal the total bid amount. Total bid amount is for evaluation purposes and will be used to capture the unit price for each item per year. Vendor should complete the Pricing Section in full as failure to complete the Pricing Section in its entirety may result in Vendor's bid being disqualified. Vendor should type or electronically enter the information into the Pricing Pages through wvOASIS, if available, or as an electronic document. Vendor's who wish to respond to a Centralized request for Quotation (CRFQ) online may submit information through the State's wvOASIS Vendor Self Service (VSS). Vendors should download the Exhibit "A": Pricing Page that is attached separately to the CRFQ and published to the VSS. Vendors must complete this form with their prices information and include it as an attachment to their online response. Vendor should enter their Total Bid Amount for commodity line 1 in wvOASIS. If unable to respond online, please submit Exhibit "A" Proposal Form/Pricing Pages with your bid prior to the scheduled bid opening date.

Coast has read, understands, and agrees to comply. Coast has submitted its Pricing Page in Exhibit A as required.

6. PERFORMANCE

Vendor and Agency shall agree upon a schedule for performance of Contract Services and Contract Services Deliverables, unless such a schedule is already included herein by Agency. If this Contract is designated as an open-end contract, Vendor shall perform in accordance with the release orders that may be issued against this Contract.

Coast has read, understands, and agrees to comply.

7. PAYMENT

Agency shall pay based on the monthly unit cost per call, as shown on the Pricing Pages, for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

Coast has read, understands, and agrees to comply. We will accept payments in accordance with the State's procedures.

8. TRAVEL

Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

Coast has read and understands it is responsible for all travel costs associated with performance of the contract.

9. FACILITIES ACCESS

Performance of Contract Services may require access cards and/or keys to gain entrance to Agency's facilities. If access cards and/or keys are required:

9.1. Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.

If facilities access is required, Coast designates Andy Chance, Director of Business Development, and Brooke Singletary, Vice President of Business Development, as principal service personnel. Mr. Chance routinely communicates with clients regarding any questions, concerns, or changes to their accounts. Additionally, Ms. Singletary regularly communicates with clients to ensure our services are meeting and exceeding expectations.

Both Mr. Chance and Ms. Singletary understand the importance of transparent communication with clients that is convenient and obliging. Their contact information is listed below for reference.



Brooke Singletary
Vice President of Business Development
bsingletary@coastprofessional.com
(318) 307-9856



Andy Chance
Director of Business Development
achance@coastprofessional.com
(904) 826-9471

9.2. Vendor will be responsible for controlling cards and keys and will pay replacement fee, if the cards or keys become lost or stolen.

Coast has read, understands, and agrees to comply.

9.3. Vendor shall notify Agency immediately of any lost, stolen, or missing card or key.

Coast has read, understands, and agrees to comply.

**Coast Professional, Inc. Response to CRFQ 0402 EDD2100000003 for the
State of West Virginia Department of Administration Purchasing Division**

9.4. Anyone performing under this Contract will be subject to Agency's security protocol and procedures.

Coast has read and understands.

9.5. Vendor shall inform all staff of Agency's security protocol and procedures.

Coast has read, understands, and agrees to comply.

10. VENDOR DEFAULT

10.1. The following shall be considered a vendor default under this Contract.

10.1.1. Failure to perform Contract Services in accordance with the requirements contained herein.

Coast has read and understands.

10.1.2. Failure to comply with other specifications and requirements contained herein.

Coast has read and understands.

10.1.3. Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

Coast has read and understands.

10.1.4. Failure to remedy deficient performance upon request.

Coast has read and understands.

10.2. The following remedies shall be available to Agency upon default.

10.2.1. Immediate cancellation of the Contract.

Coast has read and understands.

10.2.2. Immediate cancellation of one or more release orders issued under this Contract.

Coast has read and understands.

10.2.3. Any other remedies available in law or equity.

Coast has read and understands.

11. MISCELLANEOUS

11.1. Contract Manager: During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below. Contract Manager: _____ Telephone Number: _____ Fax Number: _____

Primary Contact

Coast designates Andy Chance, Director of Business Development, as the primary point of contact and contract administrator for the State of West Virginia Department of Administration Purchasing Division. He may be reached by phone at (904)-826-9471 or by email at achance@coastprofessional.com. After contract execution and project implementation, Mr. Chance will remain involved to ensure that your expectations are not only met, but exceeded. His complete contact information is provided below for easy reference.

Andy Chance

Director of Business Development
Coast Professional, Inc.
4273 Volunteer Road
Geneseo, NY 14454
Phone: (904) 826-9471
Fax: (318) 807-5100
achance@coastprofessional.com

EXHIBIT A – PRICING PAGE

Coast has included Exhibit A, Pricing Page on the following page. We also submitted the Pricing Page according to the wvOASIS submission directions.

Call Center Services

Exhibit A - Pricing Page

Description	Monthly Call Volume	Unit of Measure	Monthly Estimated Quantity	Unit Cost	Extended Cost
Price Per Call By Month	0-2500	Per Call	2500	\$6.39	\$15,975
Price Per Call By Month	2501 - 5000	Per Call	5000	\$6.39	\$31,950
Price Per Call By Month	5001 - 7500	Per Call	7500	\$6.39	\$47,925
Price Per Call By Month	7501 - 10000	Per Call	10000	\$6.39	\$63,900
Price Per Call By Month	10001 - 12500	Per Call	12500	\$6.39	\$79,875
Price Per Call By Month	12501 - 15000	Per Call	15000	\$6.39	\$95,850
Price Per Call By Month	15001 - 17500	Per Call	17500	\$6.39	\$111,825
Price Per Call By Month	17,500 - 20000	Per Call	20000	\$6.39	\$127,800
Price Per Call By Month	20000+	Per Call	20000	\$6.39	\$127,800
TOTAL BID AMOUNT					\$ 702,900 -

Note: The estimated quantity is for evaluation purposes only. Actual call volume is undetermined. No future use of the contract or any individual item is guaranteed or implied.

VENDOR'S NAME: Coast Professional, Inc.

VENDOR'S REPRESENTATIVE: Jonathan Prince, Chief Operating Officer