



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

Procurement Type: Central Master Agreement

Vendor ID: VS0000036894

Legal Name: Solix, Inc.

Alias/DBA: Solix, Inc.

Total Bid: \$1,100,625.00

Response Date: 12/15/2020

Response Time: 13:02

Responded By User ID: SolixSolutions

First Name: Lisa

SO Doc Code: CRFQ

SO Dept: 0402

SO Doc ID: EDD210000003

Published Date: 12/10/20

Close Date: 12/15/20

Close Time: 13:30

Status: Closed

Solicitation Description: P-EBT Remote Call Center Services

Total of Header Attachments: 2

Total of All Attachments: 2



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

**State of West Virginia
 Solicitation Response**

Proc Folder: 807919
Solicitation Description: P-EBT Remote Call Center Services
Proc Type: Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2020-12-15 13:30	SR 0402 ESR12152000000004306	1

VENDOR
 VS0000036894
 Solix, Inc.

Solicitation Number: CRFQ 0402 EDD2100000003
Total Bid: 1100625 **Response Date:** 2020-12-15 **Response Time:** 13:02:51
Comments: Solix, Inc. provides a Technical Proposal document for consideration in Section 4. Add Attachments of this online submittal. Exhibit A - Pricing Page in Excel format is also submitted in Section 4. Add Attachments.

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

Vendor Signature X **FEIN#** **DATE**

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

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Price Per Call By Month	1.00000	EA	1100625.000000	1100625.00

Comm Code	Manufacturer	Specification	Model #
81111811			

Commodity Line Comments: As per RFQ instructions, the Unit Price entered here is the Total Bid Amount submitted by Solix, Inc. on Exhibit A - Pricing Page. Exhibit A - Pricing Page has been submitted in Section 4. Add Attachments section of this online submission.

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.



West Virginia Department of Education

Technical Proposal

P-EBT Remote Call Center Services

RFP # CRFQ EDD2100000003

Proposal Opening: December 15, 2020

Submitted to:
West Virginia Department of
Education
Department of
Administration, Purchasing
Division
2019 Washington Street East
Charleston, WV 25305-0130
Attn.: Joseph E. Hager III

Submitted by:
Solix, Inc.
10 Lanidex Plaza West
Suite 300
Parsippany, NJ 07054
www.solixinc.com
Eric D. Seguin
Senior Vice President
973-581-7676
Eric.Seguin@solixinc.com

Eric D. Seguin
Senior Vice President
973-581-7676
Eric.Seguin@solixinc.com



10 Lanidex Plaza West
Suite 300
Parsippany, NJ 07054
www.solixinc.com

December 15, 2020

Mr. Joseph E. Hager III
West Virginia Department of Education
Department of Administration, Purchasing Division
2019 Washington Street East
Charleston, WV 25305-0130

Re: RFP No. CRFQ EDD2100000003, P-EBT Remote Call Center Services

Dear Mr. Hager,

The West Virginia Department of Education (“WVDE”), on behalf of the Office of Child Nutrition, seeks a highly-qualified and experienced service provider for inbound call handling and messaging services to augment and support the State’s Pandemic Electronic Benefit Transfer (P-EBT) project. Solix, Inc. (“Solix”) offers a comprehensive and holistic solution designed to serve the WVDE’s needs with the utmost professionalism and focus on the customer experience, quality, and efficiency.

Our contact centers possess more than 30 years of experience providing customer care and are staffed with highly-skilled and professional Customer Service Representatives (“CSRs” or “Agents”), leadership, and support staff that serve clients across the U.S. With a successful history delivering a myriad of inbound and outbound contact center services, we are adept at identifying opportunities for program enhancements and implementing process efficiencies. Solix has successfully administered state and federally funded grant and benefit programs for over 20 years.

We are proud of our long history of driving program success and positive outcomes for our clients while serving more as a partner than simply a vendor. We are confident that the WVDE and the Office of Nutrition will gain tremendous value through Solix’ contact center services and we look forward to collaborating with you. We thank you for your consideration of our solution. Please do not hesitate to contact me if you have any questions regarding our proposal.

Sincerely,

A handwritten signature in blue ink that reads "Eric D. Seguin". The signature is fluid and cursive, with a horizontal line at the end.

Eric D. Seguin
Senior Vice President, Client Relations

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REQUIRED INFORMATION & FORMS

The required information and forms are on the pages that follow.

Exhibit A – Pricing Page is excluded from this Technical Proposal and is provided as a separate document submitted by Solix, Inc. online via wvOASIS Vendor Self Service (VSS).



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
Doc Description: P-EBT Remote Call Center Services
Reason for Modification:
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: VS0000036894
Vendor Name : Solix, Inc.
Address :
Street : 10 Lanidex Plaza West, Suite 300
City : Parsippany
State : NJ **Country :** US **Zip :** 07054
Principal Contact : Eric D. Seguin
Vendor Contact Phone: 973-581-7676 **Extension:**

FOR INFORMATION CONTACT THE BUYER

Joseph E Hager III
 (304) 558-2306
 joseph.e.hageriii@wv.gov

Vendor Signature X  **FEIN#** 22-3741663 **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

DEPARTMENT OF EDUCATION
 BLDG 6, RM 330
 1900 KANAWHA BLVD E
 CHARLESTON WV 25305
 US

SHIP TO

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		

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>
-------------	--------------	-------------------

	Document Phase	Document Description	Page
EDD210000003	Final	P-EBT Remote Call Center Services	3



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		Addendum #1 issued to revise the Q&A Deadline and Bid Close Date	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2020-12-03	2020-12-15 13:30	CRFQ 0402 EDD2100000003	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: VS0000036894
Vendor Name : Solix, Inc.
Address :
Street : 10 Lanidex Plaza West, Suite 300
City : Parsippany
State : NJ **Country :** US **Zip :** 07054
Principal Contact : Eric D. Seguin
Vendor Contact Phone: 973-581-7676 **Extension:**

FOR INFORMATION CONTACT THE BUYER

Joseph E Hager III
 (304) 558-2306
 joseph.e.hageriii@wv.gov

Vendor Signature X  **FEIN#** 22-3741663 **DATE** December 11, 2020

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

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		

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>
1	Q&A DEADLINE @ 4:00 PM	2020-12-08

	Document Phase	Document Description	Page
EDD210000003	Final	P-EBT Remote Call Center Services	3



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: VS0000036894
Vendor Name : Solix, Inc.
Address :
Street : 10 Lanidex Plaza West, Suite 300
City : Parsippany
State : NJ **Country :** US **Zip :** 07054
Principal Contact : Eric D. Seguin
Vendor Contact Phone: 973-581-7676 **Extension:**

FOR INFORMATION CONTACT THE BUYER

Joseph E Hager III
 (304) 558-2306
 joseph.e.hageriii@wv.gov

Vendor
 Signature X

FEIN# 22-3741663

DATE December 11, 2020

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

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		

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

	Document Phase	Document Description	Page
EDD210000003	Final	P-EBT Remote Call Center Services	3

ADDITIONAL TERMS AND CONDITIONS

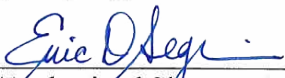
See attached document(s) for additional Terms and Conditions

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.

Jodi Allen Durbin - Director, Client Relations
(Name, Title)
Jodi Allen Durbin - Director, Client Relations
(Printed Name and Title)
700 W. Lincoln, Suite 200, Charleston, IL 61920
(Address)
Phone: 217-717-8800; Fax: 973-599-6540
(Phone Number) / (Fax Number)
Jodi.Allen@solixinc.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.

Solix, Inc.
(Company)

 Eric D. Seguin - Senior Vice President, Client Relations
(Authorized Signature) (Representative Name, Title)

Eric D. Seguin - Senior Vice President, Client Relations
(Printed Name and Title of Authorized Representative)

December 11, 2020
(Date)

Phone: 973-581-7676; Fax: 973-599-6540
(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ EDD2100000003

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.

Solix, Inc.
Company


Authorized Signature

December 14, 2020
Date

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

REQUEST FOR QUOTATION
P-EBT Remote Call Center Services

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: Jodi Allen Durbin
Telephone Number: 217-717-8800
Fax Number: 973-599-6540
Email Address: Jodi.Allen@solixinc.com

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.

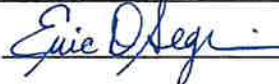
"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' 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: Solix, Inc.

Authorized Signature:  Date: December 11, 2020

State of New Jersey

County of Morris, to-wit:

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

My Commission expires November 13, 2023

AFFIX SEAL HERE

NOTARY PUBLIC 
Purchasing Affidavit (Revised 01/19/2018)

CAROLYN M. SKRZYNIARZ
NOTARY PUBLIC OF NEW JERSEY
My Commission Expires 11/13/2023

SOLIX COMPANY OVERVIEW

Established in 2000, Solix, Inc. is a privately-held, shareholder-owned corporation incorporated in the State of Delaware. With more than 700 employees and contractors, Solix is headquartered in Parsippany, NJ. Contact center services and operational support are provided from our locations in Killeen, TX and Charleston, IL. Our subsidiary, Sivic Solutions Group (“SSG” or “Sivic”), is located in Utica, NY and provides consulting, systems, and support services to state and county health and human service agencies, juvenile justice agencies, and school districts across the United States.



Exhibit 1: With all facilities in the U.S., Solix offers an agile, scalable and flexible workforce that is focused on service delivery and client satisfaction.

Solix is a leading provider of complex regulatory program management solutions with a focus on claim processing, eligibility determination, customer care, and technology services to public sector, private sector, and healthcare organizations throughout the United States. For more than 20 years, we have successfully administered state and federally funded grant and benefit programs requiring complex regulatory program expertise and secure handling of confidential and sensitive information.

Since the onset of the COVID-19 pandemic, Solix has helped commercial service providers and government agencies at the state, county, and local levels.

Solix possesses extensive expertise in process management, consulting and technology solutions, regulatory program administration, and customer care services for mission-critical public and commercial programs. Solix’ demonstrated core competencies, as detailed below enable us to effectively and efficiently serve the West Virginia Department of Education and to Office of Child Nutrition for the P-EBT Remote Call Center Services Program (“WVDE P-EBT Program”).









 Eligibility-Related Program Planning, Development and Administration	 Avoidance of Benefit Duplication
 Application Intake & Case File Management	 Billing / Collections / Cash Management / Funds Disbursement
 Application Review and Eligibility Determination	 Program Integrity / Compliance / Waste, Fraud, and Abuse Prevention
 Customer Service Operations	 IT Solutions

Exhibit 2: Solix provides efficient and effective program administration to maximize program participation and improve program outcomes.

Program Management and Scalability

Solix is adept at scaling to meet program volumes and fluctuations. Our best practices and recommendations for effective workforce management include regular communication to analyze and understand arrival patterns, volume fluctuations, call type changes, customer behavior anomalies, and the impact of media campaigns and policy changes. Solix possesses vast experience with resource modeling to ensure we provide program staff that mirrors client needs.

To date in 2020, Solix’ contact center services has handled over 1 million inbound calls and more than 2 million outbound calls across all client programs, and has handled over 500,000 inbound calls and 1.7 million outbound calls related to the COVID-19 pandemic on behalf of the states of Florida, Massachusetts, New Jersey, and Texas.

Client Feedback and Focus on Continuous Improvement

We strongly believe that customer feedback can provide important insights from key stakeholders that can improve processes, systems, and the customer experience. Gathering this feedback on a regular basis enables Solix to keep a finger on the “pulse” of program performance from the viewpoint of our clients. We are pleased to share with WVDE that Solix has earned its 10th consecutive quarterly “World Class” ranking for customer service in the Net Promoter Survey for Q3 2020.

We are proud of our industry reputation of attaining program success and positive results for our clients. Solix implements innovative solutions and applies best practices to drive program efficiencies and improve program outcomes.

Solix continuously seeks opportunities to streamline program processes, improve customer service, leverage the knowledge and expertise of our staff, and gain program efficiencies through technology.

- During program execution, we monitor trends in fluctuating call volumes and program performance metrics in collaboration with the client, using well-defined criteria for benchmarking and implementing process and technology improvements as required.
- We partner with our clients and lead the charge in executing improvement efforts. Service Level Agreements (SLAs) will ensure the attainment of expected performance levels while continuing to focus on a positive customer experience.
- We regularly share our insights, lessons learned, and successes across client projects to incorporate evolving best practices and process improvements across all clients.
- We maintain a Call Traffic Control (CTC) Team to monitor call volume and make intra-day adjustments as needed to satisfy the SLA.
- Knowledge is maintained through participation in weekly and monthly account team meetings, call listening sessions, call calibration, and partner calls.
 - We will ensure we partner with WVDE to develop a cadence for continuous improvements to the customer and client experiences.
- Periodic refresher training is delivered to our Customer Service Representatives (CSRs), FAQs are maintained to stay current and maintain knowledge, and designated staff members also participate in up training and program change training so they are always aware of the current process and procedures.
- Throughout the life cycle of all client programs, Standard Operating Procedures (SOPs) are updated and reference materials are included in our knowledge databases, ensuring that the team possesses the knowledge to provide superior service on the program.

Our Continuous Improvement (CI) Team uses Six Sigma Principles and its best practices to identify, implement, and track improvement initiatives. We will apply these same principles when supporting the WVDE Program. Through collaborative initiatives that implement technology solutions and improvements to process flows, Solix continuously increases customer satisfaction and reduces program costs across our client base.

It is Solix' best practice to execute quality control processes and standards for all client programs. We have a history of commitment to upholding the highest standards and designing solutions that comply with applicable laws and regulations.

SPECIFICATIONS

Section 3. Qualifications

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

Solix meets all required minimum qualifications listed in the below table. Details are provided for each requirement.

RFQ Section	Minimum Qualification	Solix Compliance
3.1	Vendor must have relevant remote call center experience specific to the types of services requested.	Yes
3.2	Vendor should have experience in serving public education and/or public sector clients.	Yes
3.3	Security and training measures to properly handle confidential information.	Yes
3.4	Support for ADA compliance.	Yes
3.5	Links to any demonstrations/simulations of your services.	Yes
3.6	Must have bilingual staff available who can speak English and Spanish fluently.	Yes

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

Solix is headquartered in Parsippany, NJ, with contact center services and operational support provided from our locations in Killeen, TX, and Charleston, IL. Driven by the success of our client services and to support growth, we expanded our Killeen operations in 2014 and again in 2018.

This year, largely due to the COVID-19 pandemic, Solix effectively ramped up remote contact center services within a six-week timeframe. The proficiency and professionalism of Solix staff in the execution of related activities and deliverables enabled quick sourcing of approximately 250 staff, development and delivery of customized training, swift coordination of equipment availability, and prompt access to required client and Solix systems by contact center staff. We continue to successfully execute our contact center operations predominantly delivered by remote staff.

Unbound by facility size and locations, Solix can support exponential growth throughout the United States.

In March 2010, Solix purchased Consolidated Market Response (CMR), a Charleston, IL-based contact center established in 1988. This acquisition has enabled Solix to ensure that our standards of customer service excellence are met by assuming direct control over contact center

and fulfillment operations for the programs we administer on behalf of our clients. Today, we are leveraging a remote staffing model that allows us to scale our staff without being restricted by physical space. With this model, Solix will efficiently support WVDE's requirements with highly-qualified CSRs today and into the future.

With extensive knowledge of eligibility-based public benefit programs, Solix is familiar with the challenges and expectations involved in accepting and processing applications, managing orderly case files, delivering responsive customer service, caring for sensitive private information, and arranging for prompt and accurate benefit services.

Serving our clients’ needs with professionalism and focus on quality and customer satisfaction are always in the forefront of our corporate strategy and goals. We bring a wealth of experience and expertise to the WVDE P-EBT Program. The below table provides a summary of the value Solix brings to the Program.

Service	Capabilities
Focus on the Client	<ul style="list-style-type: none"> ■ A Project Team that leverages experience and professional, customer-focused CSRs/Agents ■ Tools and processes for monitoring SLAs/metrics to ensure attainment of expected service levels ■ Customized Interactive Voice Response (IVR) to provide self-service capability to customers, and/or efficiently route customers to “live” inbound and outbound CSRs ■ Access to bilingual CSRs and Contact Center Supervisors (English/Spanish), if required
Contact Center Services Tools	<ul style="list-style-type: none"> ■ Customized IVR platform for call routing and skill assignments ■ A robust CRM tool, used by Solix for call scripting and case management ■ Knowledge Management System (KMS) to generate consistent and accurate information to Agents as they support customers
Customer Service Representative (CSR)/Agent Training and Knowledge Dissemination	<ul style="list-style-type: none"> ■ A proven and effective Training Development Model - A.D.D.I.E. (Analyze, Design, Develop, Implement, and Evaluate) ■ Training customized to the specific needs of the Program ■ Interactive, facilitator-led training program that incorporates multiple training delivery methods (lectures, graphics, hands-on) to address differences in learning styles ■ Regular call observations – “live” and recorded ■ Ongoing Agent development conducted real-time while handling “live” calls ■ Established and measured training goals and Agent assessments ■ Training and Development Plans ■ Real-time assistance to CSRs provided by Supervisors and QA/QC

Service	Capabilities
	<ul style="list-style-type: none"> ■ Multiple channels of communication within the Contact Center (KMS, E-mail, chat, desk drops, huddles, and team meetings)
Communication Pathways	<ul style="list-style-type: none"> ■ Solix Account Manager as the primary interface and point of contact with overall responsibility for program operations ■ Work Plan that is monitored throughout the program life cycle ■ Team collaboration/status meetings/feedback loops for effective communication ■ Development of and adherence to a formal Communication Plan ■ Regular cadence of meetings with Solix and WVDE to review service levels, program performance, and compliance ■ Regular reporting, analytics, and recommendations
Appropriate Levels of Staffing	<ul style="list-style-type: none"> ■ Proven and flexible Workforce Management (WFM) Model ■ Call Traffic Control (CTC) Team to efficiently and effectively scale to meet program volume fluctuations ■ Active monitoring of trends and performance metrics ■ Regular calibrations with the client to understand volume patterns, call durations, special events, and factors affecting call fluctuations
Effective Agent Recruiting & Retention	<ul style="list-style-type: none"> ■ Refined interviewing and selection processes resulting in screened and highly-skilled CSRs ■ Investment in multiple recruiting tools and technologies ■ Formal training and one-on-one coaching ■ S.M.A.R.T. (Specific, Measurable, Attainable, Relevant, and Timely) goals and objectives with regular feedback and mentoring ■ Flexible scheduling for CSR effectiveness ■ Retention strategies ■ “Stack Rank” process used to retain top talent ■ Performance recognition and incentives
Reporting Capabilities	<ul style="list-style-type: none"> ■ A call center platform used today by Solix; familiar with data and reporting capabilities ■ Solix <i>Intuition</i> data analytics tools to create customized dashboards, perform ad hoc analyses, and view trending information; track and monitor established contact center performance standards and KPIs
Continuous Partnership and Collaboration	<ul style="list-style-type: none"> ■ Continuous collaboration between Solix and the client to identify areas for improvement and efficiencies ■ Automation to improve customer service, reduce the number of calls to “live” Agents, and increase efficiency ■ Use of data analytics to identify areas and opportunities for improvement ■ Utilize technology solutions to streamline service delivery and identify opportunities for expanded services

In 2020, Solix has contracted a multitude of client services due to the COVID-19 pandemic. These services include, but are not limited to, the following:

- “Live” Agent inbound and outbound contact center services:
 - Attainment of test results by telephone, answering program Frequently Asked Questions (FAQs), application process assistance, and eligibility determination; and
 - Automated outbound campaign operations for the communication of test results to residents tested “positive”.
- Program and system development and implementation for disbursement of federal funding to small businesses;
 - Payment notification and processing (AHC or check)
 - Generation and distribution of Federal IRS-1099 forms, if necessary

Solix has also supported COVID-19 recovery programs that include the following services:

- Design and implementation of client-branded web portals through which customers can apply for assistance and/or securely retrieve test results;
- Review processes to approve online applications;
- Application intake, review, and eligibility determination; and
- Customer service “hotline”.

“Solix continues to innovate and anticipate the needs of our business. They have been extremely agile in supporting our program changes due to the covid19 pandemic. Solix was able to pivot quickly and implement urgent changes that allowed us to best assist our customers.”

~ Solix Client (NJ), Q2 2020

“Great job today, Solix. There were a few technical glitches but that's always expected. What really made the difference was the stellar customer service and responsiveness to the applicants your team provided. We have been receiving nothing but positive feedback.”

~ Solix Client (NJ), July 2020

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

Solix is fortunate to be a valued partner for both public and private sector clients across the United States. The following provides a high-level view of our footprint of major client contracts.

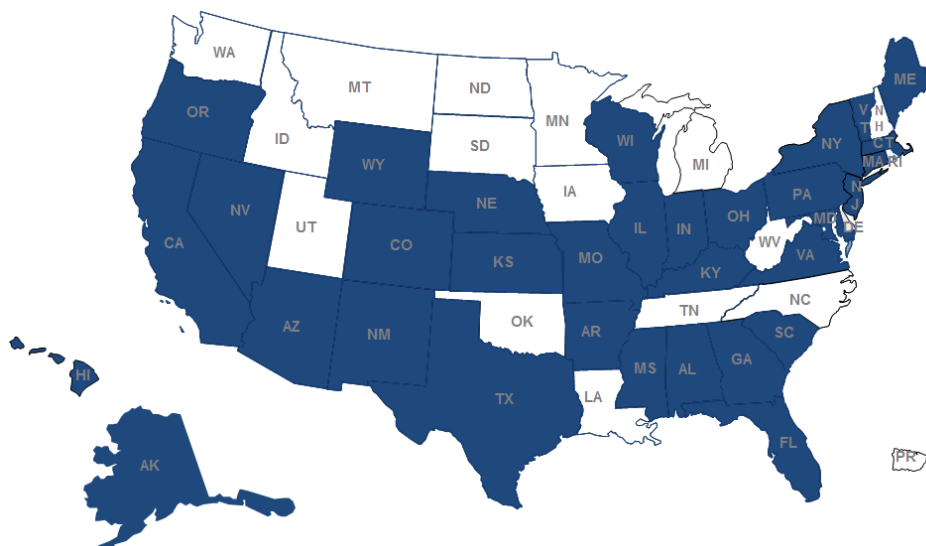


Exhibit 3: Solix is fortunate to service world-class clients across the United States, providing consulting, recovery of federal funds, and program administration services.

Solix' core business involves supporting grant and federal assistance programs for federal and state agencies, demonstrating that we are very well-positioned and staffed to meet the demands of large programs and school districts. Solix has served as the Administrator for many State Universal Service Fund (USF) programs, the Rural Health Care program, low income discount programs, disaster recovery efforts, COVID-19 relief programs, as well as many other programs that assist in getting critical funds to those who need it most.

Solix provides Business Process Outsourcing (BPO) services, technology solutions, customer care, and Business Process as a Service (BPaaS) for mission-critical commercial and government programs across the healthcare, public utilities and telecommunications industries. With a long history of innovation, Solix has demonstrated its ability to identify, recommend, and implement continuous improvements in close collaboration with our clients. As a best practice, we seek opportunities to streamline program processes, improve customer service, and leverage the knowledge and expertise of our staff. We are very accustomed to managing workloads and maintaining a highly-skilled, cross-trained workforce that adjusts to peak demands ensuring a positive customer experience.

Our subsidiary, Sivic Solutions Group (SSG), specializes in assisting school districts and health and human services agencies in recovering Medicaid funds for special needs programs, Title IV funding, and more. They service districts and states across the country, including districts with more than 70,000 students. Through SSG, our clients include New Mexico, Chicago Public Schools, District of Columbia (DC) schools, Florida, Kentucky, and Pennsylvania as a few examples.

Solix is proud of our record of successful service delivery across public and private sector clients. The following provides an overview of the breadth of our customer base and the range of services we can provide. Solix improves the lives of millions of individuals and families each year through the expertise we bring to our clients that serve communities, families, and individuals.

Consulting Services	Regulatory Program Management	Centralized Lifeline Programs	Commercial Services
<ul style="list-style-type: none"> ■ E-rate Consulting ■ Rural Healthcare Consulting ■ Federal Medicaid Claiming, Compliance, & Systems ■ Business Intelligence & Data Analytics 	<ul style="list-style-type: none"> ■ Universal Service Fund (USF) Administration ■ Lifeline Program Administration ■ Telecommunications Relay Fiscal Agent Services ■ Disaster Recovery Programs (New York City, New York State, and New Jersey) ■ COVID-19 Support 	<ul style="list-style-type: none"> ■ Texas Low-Income Discount Administrator (LIDA) ■ California LifeLine ■ Nevada LifeLine ■ District of Columbia LifeLine ■ Arkansas ALIVE 	<ul style="list-style-type: none"> ■ BlueCross BlueShield of Alabama ■ Austin Energy Customer Support Programs ■ Philadelphia Gas Works Low-Income Support Verification Audits ■ LifeLine Eligibility ■ Discounted Broadband Eligibility

Exhibit 4: Solix offers a broad range of services to manage and consult highly-complex and strictly regulated programs across commercial and public clients.

With a long history of innovation, Solix has demonstrated its ability to identify, recommend, and implement continuous improvements in close collaboration with our clients. As a best practice, we seek opportunities to streamline program processes, improve customer service, and leverage the knowledge and expertise of our subject-matter experts (SMEs).

3.3. Security and training measures to properly handle confidential information

Data security is a high priority for our clients and for Solix. We are dedicated to protecting the privacy and security of confidential information that we manage or have under our control. Solix has a robust security program that includes a comprehensive suite of policies, procedures, and controls that are based on laws, regulations, and best practices for the programs we administer. The Solix Compliance Office, Information Technology, and Operations Management implement, manage, monitor and audit Solix’ security program to protect the security and privacy of confidential information throughout the organization.

Solix manages compliance through the use of: policies and procedures; internal controls; awareness and training; and monitoring and auditing. Solix employs multiple layers of controls

consistent with the National Institute of Standards and Technology (NIST) Special Publication 800-53, “Security and Privacy Controls for Federal Information Systems and Organizations.”

From the corporate Compliance level to the IT and operational levels, policies and procedures define practices and controls for security requirements such as, but not limited to: user access determined by role-based security and principle of least privilege for system access; required two-factor authentication for user access; FIPS 140-2 encryption; change control; data backups; a DMZ to separate the LAN from the internet; audit logging of user and system activities and events; Intrusion Detection/ Prevention system to detect and protect against external threats; log reviews; timely patch management; secure disposal of confidential information, media and devices; and annual network and application vulnerability risk assessments, which include penetration testing. Active directory group policy settings prevent the copy of data to USB or USB hard drives and CD/DVDs, which can be a major source of data loss from workstations.

Solix contact center facilities are physically secured with controlled access by staff role or function, and we can provide 24/7 operations, 365 days per year as dictated by the scope of services. We collaborate with each client to ensure we are meeting the security requirements and contact center availability appropriate to the program supported.

Solix reviews and updates its Compliance and Information Security policies regularly and whenever necessary to address changing laws and regulations and emerging risks. Every year staff is required to take security awareness training and review the Information Security policies.

We will work with WVDE to implement the appropriate measures necessary to secure confidential information under our control from unauthorized access and use.

3.4. Support for ADA compliance

Solix contact centers have TYY devices to effectively support calls to and from hearing-impaired customers.

3.5. Links to any demonstrations/simulations of your services

Solix is happy to coordinate “live” demonstrations of our systems, training content and delivery, and call flows (including scripts).

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

For many years, Solix has managed the provision of multi-lingual contact center services, including Interactive Voice Response (IVR) and automated outbound dialer ("robocall") capabilities. Through contact centers located in Illinois and Texas, Solix staffs more than 350 “live” Agents who regularly deliver interactive support in English and Spanish.

Our contact center located in Killeen, TX, enables Solix to support client programs in both English and Spanish. Bilingual (English/Spanish) Agents will be assigned to the WVDE P-EBT Program.

Solix' CSR/Agent Assessment Process

The following describes our assessment process, for Solix CSRs:

- *Pre-screening Assessment* - Determine if the candidate meets the basic requirements necessary for successful placement for position based on skills, experience and work preferences listed on the application.
- *Telephone Assessment* - In this critical step we determine how each candidate will perform on the phone. We spend considerable time gauging the candidate's interest level and motivation for the position or assignment. We verify availability, shifts, and experience. Throughout the interview process, we evaluate the candidate's performance for the following: listening skills, voice clarity, articulation, grammar, vocabulary, and manner. Candidates who perform well are invited for a face-to-face interview.
- *Critical Competencies Determination* – In this step, we review the candidate's customer service skills and ability to deliver satisfaction.

Through the tools and practices, we are able to effectively evaluate candidate hard and soft skills to ensure they are a good fit with job requirements. Solix arranges personal interviews for final candidates, at which time testing is administered that include typing/keyboard and reading skills. The utilization of this assessment process and technology has proven to be of value to the Solix hiring process.

Section 4. Mandatory Requirements

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

Solix meets all mandatory requirements listed in the below table. Details are provided for each requirement.

RFQ Section	Minimum Qualification	Solix Compliance
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.	Yes
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.	Yes
4.1.1.3	Vendor must have message storage and retrieval capability, commiserate with the industry but no less than 36-hour retrieval.	Yes
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.	Yes
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).	Yes
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.	Yes
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.	Yes
4.1.1.8	Vendor must ensure that callers are not put on hold for more than 2 minutes.	Yes
4.1.1.9	The number of caller complaints about the call center must be 3% or less of all received calls.	Yes
4.1.1.10	80% of the calls should be answered within 20 seconds or less.	Yes
4.1.1.11	Vendor call center must be located within the Continental United States.	Yes

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.

Solix Contact Center Technology

Solix' contact center operations are customized and managed in a web-based application. The system functionality includes: options for multi-channels of communication with contacts; call status and contact center activity reporting; custom script application; and conducting CSR call reviews. Additionally, it is the tool for common tasks performed by managers and administrators such as the creation and management of CSRs (additions and deletions), service level assignments, security profiles, and skill(s) groups.

Available 24/7/365, Solix' IVR technology provides self-service functionality that enables callers to access program information and request services at their convenience. For WVDE, Solix will customize an IVR system that answers each call and has the capacity to handle calls received simultaneously during peak periods of activity. During operating hours, the IVR will offer the caller the option to route to an available CSR. Solix provides detailed flows, quality tests, monitoring, reporting, and analysis to ensure successful IVR implementation and customer experience.

Solix effectively uses IVRs to increase first contact resolution and reduce operational costs.

Our low-risk IVR capabilities and service options include:

- Multi-language IVR (English and Spanish)*;
- Menu-driven interface to guide and route callers through the IVR experience (with options to talk to "live" CSRs during business hours);
- On-hold feature with priority call-back prompt;
- Database integration to provide and/or update customer information;
- Real-time IVR automated processing system fully integrated with backend databases and software;
- Integrated IVR logs and reporting for feedback regarding IVR operation and efficiency;
- Use of IVR statistical data to make improvements to caller experience; and
- 99.9% system availability.

* Additional languages can be added based on WVDE's requirements

With continuous focus on minimizing calls and costs, Solix will recommend solutions for WVDE that may include FAQs, custom messaging, callbacks, routing directly to online services, outreach services, social media channels, and self-service options.

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.

Solix has the ability to work on any holiday not observed by WVDE. Today, our contact centers in Killeen, TX are operational 24x7. We are ready to support WVDE callers during holidays and maintain the flexibility necessary to change our hours of operation as requested by WVDE to meet demand. Solix' proven Workforce Management (WFM) Model will enable us to scale the contact center staff to answer calls to accommodate peak calling periods and other periods of fluctuating call volume. We will continuously monitor trends and program performance metrics in collaboration with WVDE, using well-defined criteria for benchmarking and implementing process and technology improvements as required.

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.

Our staffing and Workforce Management (WFM) model leverages an expert team of trained CSRs and enables us to efficiently respond to customer inquiries while meeting or exceeding Service Level Agreements (SLAs) or Key Performance Indicators (KPIs).

Solix' proven WFM model will enable us to scale the contact center staff to answer calls in compliance with WVDE's established service levels. Under this model, we effectively optimize operations to manage programs with varying call volumes. The following highlights Solix' WFM model capabilities:

Solix' proven workforce model has enabled us to increase staff by more than 300% during peak volume times for a major health insurance client.

- Automatic creation of the most efficient schedule to ensure call demand is met;
- Proactive searches and alerts identifying potential risks related to SLAs targets;
- Real-time adherence alerts and visibility to WFM, support staff, and CSRs;
- ACD call data integration to capture real-time and historical data; and
- Provide flexibility to CSRs, aiding in the minimization of attrition.

Peak staffing requirements are determined by use of historical data, outreach initiatives, and anomalies as identified and input by the WFM Administrator. Solix' best practices and recommendations for effective WFM include regular calibrations with WVDE to analyze and understand arrival patterns, volume fluctuations, call type changes, customer behavior anomalies, and the impact of media campaigns. At Solix, we seek to partner with WVDE to lead the charge in executing improvement efforts. Service Level Agreements (SLAs) will ensure the attainment of expected performance levels while continuing to focus on a positive customer experience.

During program execution, we monitor trends in fluctuating call volumes and program performance metrics in collaboration with the client, using well-defined criteria for benchmarking and implementing process and technology enhancements as required. We will take into account the following data to accurately predict the number of CSRs required to handle call volumes while meeting WVDE's SLAs:

- Historical volume data;
- Forecasted volume increase or decrease;
- Volume peak periods such as time of day, days of the week, or time of the month;
- Average answer times;
- CSR utilization;
- Forecasted attendance factors; and
- Forecasted as well as allowances for unplanned attrition.

Solix translates expected usage levels into the required staffing and skill sets needed to meet demand. We will maintain a CTC Team to monitor call volume and make intra-day adjustments as needed to satisfy the SLA. This Team will track both attendance and service performance hourly throughout each day, initiating action where required to meet daily performance targets. These actions may include rescheduling breaks and lunches, or requesting overtime.

We leverage a multi-step process to staff our contact centers to meet demand with high quality, professional CSRs.

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

Unanswered calls will be recorded by Solix and accessed the next business day with priority callback by a Solix CSR.

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.

Solix understands that it is the customer experience that differentiates WVDE's brand. Through integration of our technology and quality assurance process, Solix has a proven track record of highly successful client implementations. Solix' experienced personnel will help elevate WVDE's brand to provide a superior customer experience.

Solix has a passion for precision, while providing transparency and ensuring the highest level of customer satisfaction.

An Effective Client Relationship Management (CRM) Tool

Solix' Client Relationship Management (CRM) tool will serve as the single CRM for the CSRs. With easy-to-use Einstein Artificial Intelligence (AI) technology, the CRM will enable a connected customer service experience that is predictive, automated, and intelligent, contributing to increased efficiency and decreased handle time.

Solix' proposed solution provides single system cloud-based access through user licenses, thusly, promoting timely accessibility and increased security, and eliminating the time and costs required for on premise installations. The CRM tool will be accessed by the CSRs assigned to the WVDE program for call scripts and documenting customer interactions.

Call Efficiency Utilizing a Customized and Current Knowledge Management System (KMS)

A comprehensive knowledge management system (KMS) increases organizational agility and accelerates call resolution. With a focus on providing superior service to WVDE and your customers, Solix' KMS provides: real-time guidance navigating CSRs through their calls to support first call resolution; efficient and effective communication of critical changes or information updates; expedited training time and time to competency; mitigation of the risk of human errors; and consistent and accurate distribution of information regarding CSC procedures and guidelines.

We provide a dedicated and experienced management and procedures resource responsible for the management and enhancement of KMS content in support of WVDE's P-EBT Program. Data analysis is performed on a regular basis and CSR feedback is continuously reviewed to ensure the content within the KMS is accurate, clear, concise, and up-to-date with current policies and regulations. With keen focus on minimizing call times and maximizing call quality, our knowledge management system will expedite the time to call resolution while ensuring information integrity. The below table illustrates the features and benefits of Solix' KMS system.

Feature	Benefit
<ul style="list-style-type: none"> Hosted in a leading cloud environment/ infrastructure 	<ul style="list-style-type: none"> Reduces the reliance of on premise equipment and servers; cloud scalability is virtually endless
<ul style="list-style-type: none"> Access is granted by Solix System Administrators by providing a unique login and password for each end user. 	<ul style="list-style-type: none"> User access is role-based; access to read, view, and modify content is managed based on permissions
<ul style="list-style-type: none"> Navigation through a website-like interface which allows CSRs to quickly arrive at knowledge within the content efficiently. 	<ul style="list-style-type: none"> Expedient call resolution
<ul style="list-style-type: none"> Solix' KMS Supervisors and Administrators upload programmatic content and procedures 	<ul style="list-style-type: none"> Content is managed by dedicated KMS resources, providing CSR access to up-to-date content
<ul style="list-style-type: none"> Content is properly indexed and categorized 	<ul style="list-style-type: none"> Provides the end-user the "right" answer, at the "right" time, and is given to the "right" person
<ul style="list-style-type: none"> CSRs are assisted step-by-step using decision trees 	<ul style="list-style-type: none"> The CSR is led through a defined list of questions and answers that lead to successful first call resolution or escalation if needed
<ul style="list-style-type: none"> CSRs have the ability to ask clarifying procedural questions and escalate within the KMS 	<ul style="list-style-type: none"> Users in authorized roles, such as Supervisors and Training/Procedures staff, can provide immediate feedback and clarification
<ul style="list-style-type: none"> CSRs have the ability to provide feedback and comments to content within the KMS 	<ul style="list-style-type: none"> CSRs are the front line of customer service and in many instances the voice of the customer. Dedicated content managers can easily make adjustments (once validated) to content based on CSR feedback.
<ul style="list-style-type: none"> Notifies CSRs of changes in procedures and rules via real-time banners within the system and procedural update notifications 	<ul style="list-style-type: none"> Keeps the CSRs current with the frequent changes of policy and legislation thus providing the customer with accurate information
<ul style="list-style-type: none"> CSRs are notified of specific changes made, requiring them to navigate directly to updated procedures, and requires sign-off for compliance and understanding 	<ul style="list-style-type: none"> Ensures CSR comprehension
<ul style="list-style-type: none"> Integration with the CRM system 	<ul style="list-style-type: none"> Provides seamless and efficient access to information spanning the CRM and KMS
<ul style="list-style-type: none"> Access to key metrics regarding the information CSRs are accessing, how often, and what types of questions are asked 	<ul style="list-style-type: none"> Supporting continuous improvement, we are able to modify and update identified areas for additional clarity and detail.
<ul style="list-style-type: none"> Effective content management by Solix program subject-matter experts 	<ul style="list-style-type: none"> Minimizing lead time for content changes/ updates

Solix Quality Assurance

Currently, due to the COVID-19 pandemic, Solix contact center services are performed predominantly by remote staff. Regardless of where services are performed, Solix relies on a strong Quality Assurance (QA) process to ensure that we consistently provide exemplary customer experience while ensuring that performance metrics and compliance requirements are identified, achieved, and monitored throughout the program life cycle.

Solix' QA Managers monitor daily operational delivery, observe interaction handling, answer Agent questions, monitor Agent performance, provide real-time coaching, and manage escalations. On average, the Solix Quality Assurance (QA) Team monitors CSRs in real-time and at least two times per CSR within a single work week. In addition, all calls (unless otherwise requested by WVDE) are captured through our digital recording technology for later review.

The QA Department produces quality control reports that outline areas where CSRs demonstrate strong performance and areas where improvements can be made. The Operations Manager and the QA Managers are responsible for reviewing these reports with CSRs and initiating any necessary corrective action.

Please see the below *Exhibit 5: Sample Quality Assurance (QA) Form*.

Result ID XXXXX:						
Employee		Event Date	21/06/2019			
Group		Event Time				
Team		Event Duration				
Monitor		Event Type				
Supervisor		Sub Type				
Category		Reference				
Scorecard: Inbound Call						
Question	Comment / Causes	Answers	Score			
Opening						
1 Greeting/Branding		Yes/No				
Capture Customer Information in						
2 Salesforce		Yes/No				
3 Offer Assistance		Yes/No				
4 Restate		Yes/No				
Rapport						
5 Check Customer Information in LIDA		Yes/No				
6 Hold/Dead Air		Yes/No				
7 Pace		Yes/No				
8 Polite/Professionalism		Yes/No				
Call Control						
9 Listening Skills		Yes/No				
10 Probing Questions		Yes/No				
11 Initial Concern FIRST		Yes/No				
12 Clear/Complete Answer		Yes/No				
13 Control of Conversation		Yes/No				
14 Use of Resources		Yes/No				
Product Knowledge						
15 Most Appropriate Resolution		Yes/No				
16 Discount Details		Yes/No				
17 Incorrect/Misleading Information		Yes/No				
Close						
18 Appropriate Close (with Brand)		Yes/No				
19 Notes and Disposition		Yes/No				
Compliance						
20 Confidential Information		Pass/Fail				
Target	Below Target					
Numeric						
Percentage						
Section	Total	Percentage	Non Numeric			
Opening			100%			
Rapport			60%			
Product Knowledge			75%			
Close			100%			
Compliance			0%			
Call Control			42.86%			

Exhibit 5: Sample Quality Assurance (QA Form) is utilized in our Contact Centers to evaluate CSR performance.

We have a long, successful history in partnering with our clients to optimize processes and improve efficiencies. Our Continuous Improvement (CI) Team uses Six Sigma Principles and its best practices to identify, implement, and track improvement initiatives. We will apply these same principles when supporting the WVDE Program.

Through collaborative initiatives that implement technology solutions and improvements to process flows, Solix continuously increases customer satisfaction and reduces program costs across our client base.

It is Solix' best practice to execute quality assurance processes and standards for all client programs. We have a long history of commitment to upholding the highest standards and designing solutions that comply with applicable laws and regulations.

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).

Solix' goal is to handle all calls routed to the Solix contact center, escalating issues to the Supervisors when necessary. Solix' telephony services include the capability to transfer callers to the WVDE or the DHHR, when requested and/or required. Solix will work with these departments to define the appropriate transfer process, including approved transfer numbers and reasons for transfer.

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.

A core component of Solix' program management is comprehensive reporting and data analysis that enable timely evaluation of operational effectiveness and satisfaction of oversight or regulatory requirements. Customized reporting can be made available based on WVDE's specific requirements that will allow monitoring and evaluation of performance, as well as classification of calls. During program execution, we will continuously monitor program performance metrics in collaboration with WVDE, using well-defined criteria for benchmarking.

Solix will support WVDE's objectives by providing robust, flexible data collection, analysis, auditing, and reporting options. Solix' automated data collection processes are combined with

flexible reporting tools supported by the latest technologies. Additionally, reports will allow for the identification of current WVDE policies and procedures that may require revision.

Solix at a minimum will provide WVDE with the minimal acceptable fields of information that should be included within each daily report. Some of the statistics included in a typical report include:

- Number of Calls (Contacts) Offered
- Contacts Answered
- Contacts Abandoned
- Percent Abandoned
- Grade of Service
- Average Speed of Answer (ASA)
- Average Talk/Chat Time
- Average Handle Time
- Total Talk/Chat + After Call Work Hours
- Calls transferred
- Service Level
- Average Delay
- Talk Minutes
- Service Level Goal

Below provides samples of customized reports provided and utilized by Solix to manage WVDE P-EBT Program performance.

Date	Day of the Week	Offered	Answered	AHT	Answer Rate	Transfers	Transfer %
4/1/2017	Saturday	272	266	400	97.79%	0	0.00%
4/2/2017	Sunday	161	139	356	86.34%	1	0.72%
4/3/2017	Monday	1001	849	428	84.82%	5	0.59%
4/4/2017	Tuesday	841	773	408	91.91%	4	0.52%
4/5/2017	Wednesday	728	696	403	95.60%	6	0.86%
Totals for Month:		3,003	2,723	409	90.68%	16	0.59%

Date	Day of the Week	Offered	Answered	Abandons	Abandon %	Talk Time Minutes	Time to Answer	Average Duration (Minutes)	Average Duration (Duration Format)	Answer Rate	Hold Minutes	After Call Minutes
English												
4/1/2017	Saturday	259	256	3	1.16%	1,161.58	1.57	4.52	00:04:31	98.84%	72.48	89.22
4/3/2017	Monday	1089	1073	16	1.47%	5,174.47	1.52	4.80	00:04:48	98.53%	350.28	273.58
4/4/2017	Tuesday	721	710	11	1.53%	3,474.85	1.15	4.87	00:04:52	98.47%	342.52	192.12
4/5/2017	Wednesday	578	571	7	1.21%	2,896.38	1.60	5.07	00:05:04	98.79%	162.50	148.00
English Skill:		2,647	2,610	37		12,706.28	1.18	4.85	00:04:51		827.78	762.92
Spanish												
4/1/2017	Saturday	13	12	1	7.69%	61.67	1.17	5.14	00:05:08	92.31%	1.06	3.47
4/3/2017	Monday	49	48	1	2.04%	213.65	1.88	4.44	00:04:26	97.96%	9.83	17.87
4/4/2017	Tuesday	35	34	1	2.86%	179.75	3.27	5.26	00:05:15	97.14%	26.80	14.87
4/5/2017	Wednesday	34	34	0	0.00%	169.52	1.40	4.40	00:04:23	100.00%	6.67	13.67
Spanish Skill:		131	128	3		664.58	1.54	4.71	00:04:42		44.45	49.17
Totals for		2,778	2,738	40	1.44%	13,310.87	2.72	4.85	00:04:50	98.36%	872.23	752.86

Optional: Reporting & Analytics Utilizing Solix' Intuition

As an optional value-add service, Solix has the ability to provide WVDE with access to our self-service reporting platform, Solix' *Intuition* ("Intuition"), for the delivery of the established performance standards. Solix will retrieve contact center data from our automatic call distribution system and house the data within *Intuition*. Solix' *Intuition*, powered by Qlik, provides a powerful business intelligence (BI) and data analytics system that helps organizations better understand programmatic performance while providing critical strategic insights to drive Program planning and resource deployment. Solix' *Intuition* empowers end users with the ability to access raw programmatic data, standardized reports, and the ability create customized reports and relevant data visualizations in a structured end user friendly environment. *Intuition* offers multiple customizable views of analyzed data for identification of trends, anomalies, and overall Program health through the monitoring and reporting of Key Performance Indicators and Service Level Agreements. Some features *Intuition* offers:

- Customized dashboard views including executive level
- Data analytics and ad hoc graphs and tables
- Drill-down capability from detailed analysis for insight into:
 - Trends and Demographics
- Online intelligent graphical analysis
- Multiple filter criteria
- Export to Excel, PDF, Email, or PowerPoint
- Ease of use and instant access to data across multiple devices

Intuition is cloud-based with the end user interface web-based and supported by multiple browsers including Google Chrome, Internet Explorer, Apple iOS, and is mobile friendly. Users of *Intuition* will be assigned a username and password which will ultimately drive role permissions in terms of what reports and functionality is available to the end user. Reports requested by WVDE can be made available via *Intuition* and all are downloadable in .xls, .xlsx, .csv, PDF, and other formats for use by the end user.

Frequency of data refreshes can be customized as agreed upon from once a day, twice, to three times a day etc. Solix' *Intuition* will contribute to fact-based decision making for critical business decisions. The following provides illustrations of *Intuition*, providing WVDE the ability to receive reporting and data analytics through customizable self-serve dashboards.

The below contact center dashboard allows the end user to select customizable date ranges (month/year), specific campaigns, and drilldown on each individual visualization for further analysis. Data visualizations include:

- Call Volume Monthly/Daily

- Month over Month Number of Calls Handled
- Month over Month Talk Minutes
- Monthly Talk Minutes with Monthly Average Identified
- Call Abandonment Percentage
- Call Language Distribution



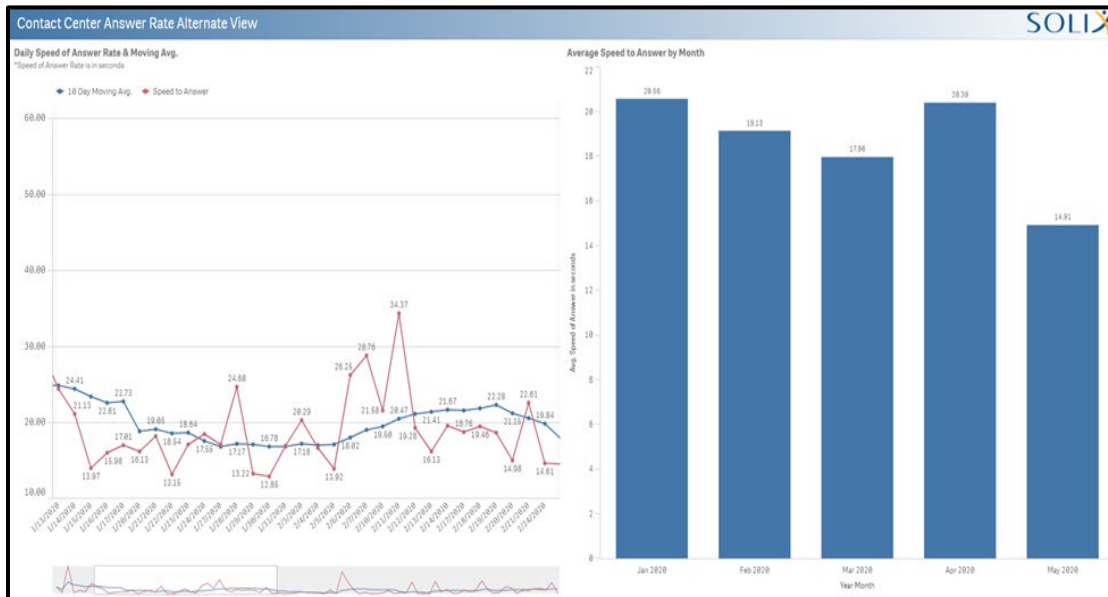
The below data visualizations include the following data elements with filters for applying specific year, month, and date ranges. The data elements are:

- Average Handle Time
- Average Talk Time
- Number of Calls Offered
- Number of Calls Handled
- % of Calls Abandoned
- Average Call Hold Time
- Incoming Calls by Campaign and Skill



Additional metrics provided include:

- Speed of Answer Rate & Moving Average
- Average Speed of Answer by Month
- Call Volume: 30 Minute Intervals



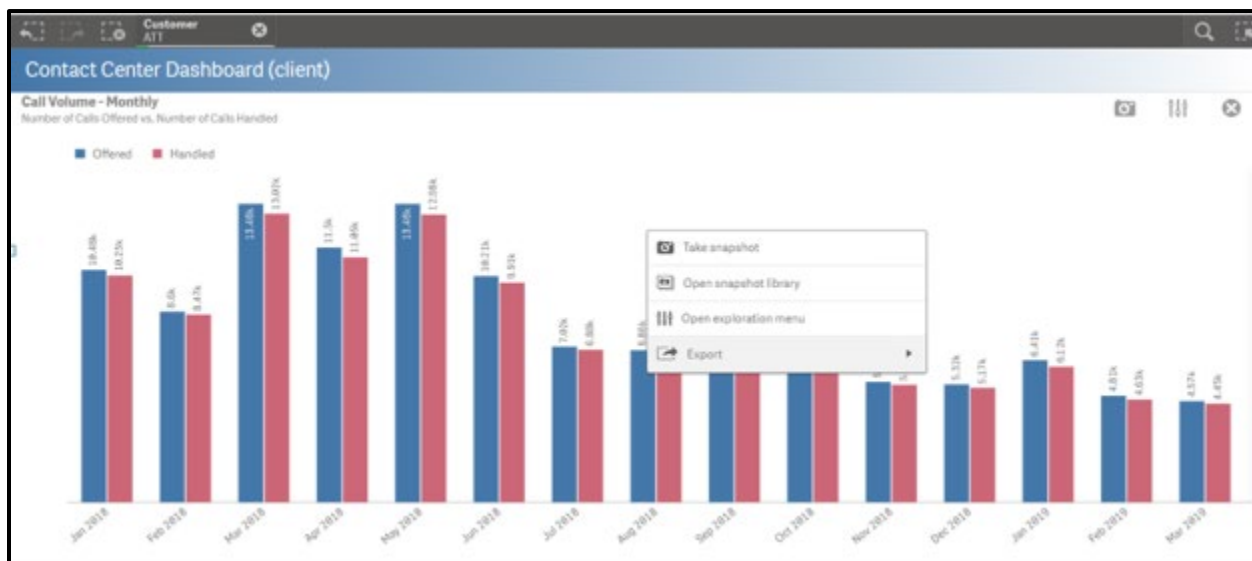
Call Volume Breakdown: 30 Minute Intervals

*Time displayed is in Central Time

Time Weekday Year Year Month First Day Of Week

	Mon	Tue	Wed	Thu	Fri
07:00	41	28	25	23	14
07:30	61	49	41	36	36
08:00	102	73	53	60	58
08:30	131	97	82	91	82
09:00	159	134	85	124	112
09:30	168	148	145	144	136
10:00	178	139	133	137	141
10:30	191	200	152	171	165
11:00	235	191	174	178	201
11:30	259	207	186	182	220
12:00	239	221	171	205	213
12:30	248	213	199	184	193
13:00	265	212	218	241	237
13:30	237	206	206	229	218
14:00	267	193	216	205	206
14:30	266	210	197	203	212
15:00	250	190	254	207	216
15:30	244	202	174	212	194
16:00	193	176	165	223	189
16:30	187	178	169	193	163
17:00	181	160	136	143	155
17:30	156	116	141	141	134
18:00	131	111	94	107	84
18:30	96	81	90	91	103
19:00	1	-	-	11	-
19:30	-	-	-	6	-

The below snapshot indicates how the end user can right-click on the visualization and take a snapshot to include within an Email or PowerPoint as well as exporting data to PDF or Excel for further manipulation.



Customized Reporting Through Operational Input

The remaining data that will be required to track the performance SLAs are derived based on operational input from Solix Contact Center Supervisors, Trainers, QA/QC, and Contact Center Management. Our Agent time reporting and Agent quality monitoring systems will be the source of the remaining data that is needed.

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.

Solix' IVR customized for the WVDE P-EBT Program will provide the caller with the option to select a prompt for priority call-back. Solix will place the calls in a queue for return call within a one-hour timeframe by Solix CSRs.

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

Solix' Contact Center Operations staff will ensure adequate staffing and training for call handling efficiency. Supervisors will evaluate the CSR call interactions and ensure that callers do not experience a hold time exceeding 2 minutes.

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

The Solix contact centers include management teams with operations and supervisory staff who lead the programs from an operational perspective. Customer complaints and any issues encountered by CSRs are escalated to the Supervisors, Operations Manager, or Senior Director of Customer Care Solutions for guidance and/or resolution. The Team Lead and the QA Analyst may also assist with escalations. If necessary, Supervisors will participate and/or take control of calls and escalate to WVDE only when required or upon customer's insistence.

SLAs will ensure the attainment of expected performance levels while continuing to focus on a positive end-user experience.

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

Solix will comply. Solix' CTC Team will closely monitor the inbound call volume to minimize the answer time.

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

Solix is 100% US-based and is incorporated in the State of Delaware.

WHY SOLIX

We conduct our contact center programs with focus on the following:

- ***Solix offers WVDE professional, experienced contact center and support staff.*** Our CSRs are fully trained for the programs they support and are managed by contact center management and Supervisors who have tools for real-time call monitoring and live coaching. Solix' headquarters staff supports all Solix locations. *Solix earned its 10th consecutive quarterly "World Class" ranking for Customer Service in the Q3 2020 Net Promoter Survey.*
- ***Solix is adept at scaling to meet program volumes and fluctuations.*** Solix' best practices and recommendations for effective workforce management for WVDE's P-EBT Program include regular communication to analyze and understand arrival patterns, volume fluctuations, call type changes, customer behavior anomalies, and the impact of media campaigns and policy changes. Solix possesses vast experience with resource modeling to ensure we provide program staff that mirrors client needs. We will closely monitor service levels to ensure we attain WVDE's expected performance levels while continuing to focus on a positive end-user experience.
- ***Solix relies on a strong Quality Assurance (QA) process to ensure that we consistently provide an exemplary customer experience.*** We typically make modifications to our standard process, as needed, to meet the particular requirements of each client. Our Quality Assurance Team monitors CSRs on a real-time basis and all calls are captured through our digital recording technology.
- ***Solix offers technology solutions to enhance contact center efficiency and ensure timely and accurate responses.*** Our solution offers staff expertise augmented by a Knowledge Management System (KMS), providing CSRs access to current and accurate program information.
- ***Solix provides more insight into performance with reporting and Business Intelligence through Solix' Intuition.*** With customizable and dynamic reporting and dashboards, both Solix and WVDE can analyze program data in real-time, perform trend analysis, and drill-down performance to a granular level. Solix' *Intuition* will contribute to fact-based decision making for critical business decisions.
- ***Solix delivers positive, seamless, and efficient customer support.*** Solix effectively uses IVR technology to increase call connection and reduce operational costs. We customize the IVR to our client's needs, including accurate call routing and self-service capabilities (if applicable).
- ***Solix understands that it is the customer experience that differentiates WVDE's brand.*** With a proven track record of highly-successful client implementations, system integration,

and our experienced personnel, Solix will help elevate WVDE's brand to provide a superior customer experience.

- ***Solix integrates continuous process efficiencies through the life of the contract.*** With a long history of generating innovation, Solix has demonstrated its ability to develop and implement improvements in the programs we support. As a best practice, we continuously seek opportunities to implement process automation, improve customer service, and leverage the knowledge and expertise of our staff.

