



Proposal For: University of Central Florida Copy



In Response to: ITN# 1508NCSA Call Center Services WUCF-TV
Closing Date: October 19, 2015 2:00pm EST.

Submitted to:

Nellie Nido

Purchasing Department

12479 Research Parkway,

Orlando, FL 32826-3248

Phone Number: 407.823.2661

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1.0 Transmittal Letter

October 15, 2015

University of Central Florida
Nellie Nido
12479 Research Parkway
Orlando, FL 32826-3248

Dear University of Central Florida,

ACD Direct is delighted to provide the enclosed proposal for WUCF-TV Inbound Answering Services ITN# 1508NCSA

Our proposal showcases an experienced and highly-skilled team with call center expertise that is directly relevant to that required for this solicitation. Bidding as the exclusive prime contractor, ACD Direct submits realistic pricing that reflects a clear understanding of the work to be performed and demonstrates its capability to meet all requirements of this solicitation.

We have developed the tools to manage inbound campaigns through a robust and scalable phone switch, well-trained professional agents and web-based tools for servicing and real-time monitoring.

This proposal will remain valid for a period of 120 days from the date of submission. Please accept this as a complete response to your ITN. We are ready to start immediately and put our experience to work for you. If you have questions or need clarification on any point, please feel free to contact Josh Rosales via phone or email at (801) 896-1011 \ joshr@acddirect.com.

Sincerely,

Josh Rosales
Business Development
ACD Direct, Inc.
1353 North 1075 West, Suite 6
Farmington, UT 84025
FEIN # 76-0731716
eMM# 3863

2.0 Executive Summary

ACD Direct has something that fewer and fewer organizations have today: Passion! We are very passionate about what we do, and our continuous goals include being the best at matching client needs with precise solutions at fair prices.

We are very proactive in maintaining a professional workforce skilled in providing proficient services. Honesty, integrity and efficiency are of the utmost importance to us. We frequently monitor agents to ensure your ongoing high standards are met.

Highlights

Listed below are several benefits our current clients enjoy when using ACD Direct:

- Service Levels above 90%
- 512-bit encryption web-based data entry system
- Identity theft insurance - \$100,000 per incident policy
- Redundant databases, contact centers
- Experienced, mature, professional US-based customer service agents
- PCI Service Provider Level 1 compliance
- Scalable staffing model
- Proven Dependability

Exceptions

ACD Direct has taken no exceptions to the requirements of this ITN, the Contract, or any other attachments.

3.0 Experience and Qualifications of Proposer

1. History and Experience

Our company originally began operations as Attend Communications in February, 2002, working with one of the largest computer manufacturers in the country to handle returns management for their computer systems. Attend Communications then initiated a strategic alliance with CallsWithoutWalls (a proprietary pledge capture software company) to expand our businesses by improving results for eight PBS/NPR accounts previously handled by several other call centers. As a result, ACD Direct, Inc. was created in 2003 to align our efforts under one entity.

We have a proven plan to provide the best customer service and to answer 90% of all calls within 17 seconds or less. How do we provide this level of service? The answer is by changing the way we do business to a model that incorporates a scalable staffing solution. We instituted this model more than thirteen years ago, when we switched from a “brick and mortar” call center to a virtual solution. How do we expertly handle NON-PROFIT calls utilizing agents in a virtual setting from remote locations? We choose the right people, ensure the location is free of noise, and we record every call to ensure quality. And as part of our commitment, our company provides 24/7 coverage for all our NON-PROFIT partners. We are always available.

Our agents are well trained in and knowledgeable about the expectations of our Clients. We take calls for the “TOP 20” PBS stations, ASPCA, Wounded Warrior Project, World Wildlife Fund, Disabled America Veterans and UNICEF. Our training program focuses on customer care practices, Client business rules, and conversion techniques. We have a 64% retention rate, rare in the call center industry, and we have many agents who have been with us for over 10 years now. We have over 800 agents, all located in the U.S

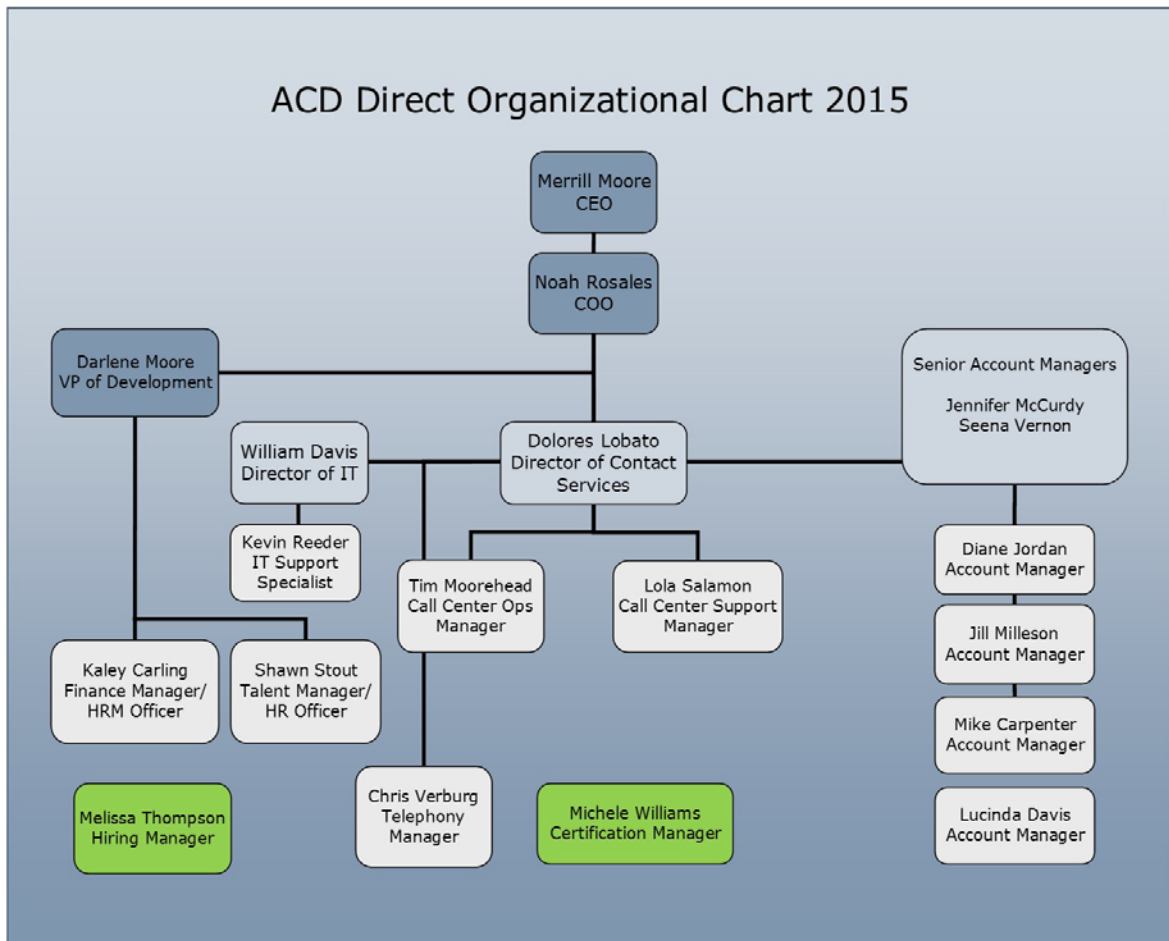
2. Client Accounts

Client	Contact	Service	Call Volume D/M/Y
WNET 825 Eighth Avenue New York, NY 10019	Mark Cataldo Director Fundraising Operations 212.560.3187	6yrs	D: 19,200 M: 330,000 Y: 1,955,000
WPBA 740 Bismark Rd. NEAtlanta, GA 30324	Alicia Ames-Steele On-Air Fundraising Specialist 678.686.0304	12yrs	D: 19,200 M: 330,000 Y: 1,955,000
WGBH One Guest Street, Boston, MA 02135	Jack Callahan Director, On-Air Fundraising & Membership Marketing 617.300.5720	12yrs	D: 19,200 M: 330,000 Y: 1,955,000

3. Client Accounts lost within 5yrs

KCET, Left PBS- Limited Funding	Debbie Converse Ph.7472015841
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4. ACD Direct Company Organization Chart

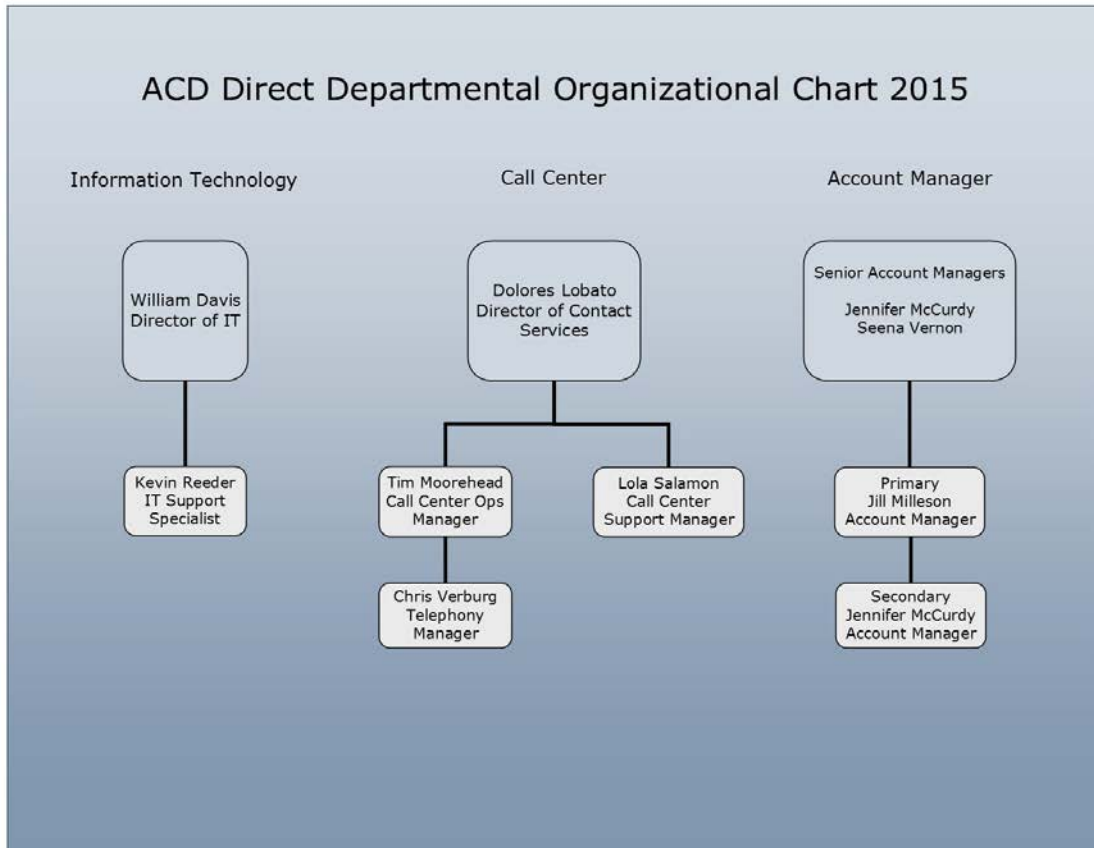


5. Years of Experience

ACD Direct has been in operation since 2003, providing similar services to 80+ Non-Profit clients for over 13yrs. 95% of our business is in working with PBS/NPR. We have handled PBS national events (John Fogerty), Common Carriage programs (Downton Abby, Suze Orman, etc.)

4.0 Project Staff and Qualifications/Experience

1. Department Organizational Chart for UCF



2. Account Managers

Primary: Jill Milleson *UCF Account Manager*

Resume: Attachment 2

Secondary: Jennifer McCurdy *Senior Account Manager*

Dolores Lobato *Director of Contact Services*

William Davis *Director of Information Technology*

Tim Moorehead *Manager of Contact Services*

5.0 Scope of Services/Project Timeline

Using our proprietary SimplePledge scripting technology, we are able to provide NON-PROFIT partners with real time, online pledge reporting that has been customized over the years by numerous NON-PROFIT partners who utilize this product. Collectively, they have contributed to the structure and content of its reporting suite. Our online pledge cart is proven and allows all data to be combined into one dynamic report. Your work load is reduced, by eliminating the need to manually merge call center and web reports.

We have a mature agent pool that is well trained and skilled in meeting the needs of our NON-PROFIT partners. Our training program focuses on member care practices, membership levels, and premium gift descriptions. We have a very high retention rate, with many agents that have been taking NON-PROFIT calls for over 10 years.

1. Report Suite

ACD Direct includes a wide variety of reports, listed below are some of the included reports among others that can be custom created at client's request based on quote approval:

Summary Report by Day	Non-Pledge Calls
Summary Report by Hour	Non-Pledge Details
Detailed Report	Non-Pledge Summary
Daily Pledge Summary	Gift Summary Report
Daily Pledge Summary Split Checks, Credit Card	Daily Pay Type
Pledge Summary Overview	Quarterly Drive Report

2. Timeline of events

Estimated Length	Description	Initial Start Up/ Ongoing
2-3 Weeks	Complete Campaign Start Up	Complete
4 Days	Set Up IVR, Recordings and Telephony	Complete
5 Days	Create Simple Pledge Script	Complete
1-2 Weeks	Create Reports and Export	Complete
3 Days	Create KB and FAQ's	Complete
10 Days	Staff and Train Agents	Complete
2 Days	End to End Testing	Complete
2 Days (Shorter Lead time if necessary)	Gift/Show/Break Data Processing	Ongoing

3. General

ACD Direct works with multiple Non-Profit counterparts to ensure adequate staffing for all DRTV. We understand that in order to reach your goal, you need an inbound solution that is as flexible as your schedule. Our team handles Public Broadcasting Service spots that run 30 seconds to 60 minutes or more in length.

4. Competencies

- A. While we rely on projections from our NON-PROFIT partners, ACD Direct has a quickly scalable model allowing us to handle overflow calls 24x7, with particularly high volume staffing during pledge drives.
- B. We are currently staffed and take calls 24x7 including late night and weekend hours.
- C. Bilingual agents available
- D. ACD Direct currently staffs and manages calls 24x7 including Holidays
Using CallsWithoutWalls/SimplePledge technology, we are able to provide our NON-PROFIT partners with real time, online pledge reporting. This reporting has been customized over the years by so many NON-PROFIT organizations using and contributing to the structure and content of the reporting suite.
- E. ACD Direct provides a 24/7 hotline for all clients in the instance that any changes must be made in real time.
- F. Provide callers with basic program information, as scripted by WUCF. Our scripting tool is fully customizable and we provide both a script and knowledgebase for our agents that can be updated by both our staff and your station staff at any time.
- G. We are currently equipped to, and do take pledges in one-time, sustaining and installment increments.
- H. ACD Direct provides a 24/7 hotline for all clients in the instance that any changes must be made in real time.
- I. We manage address validation through Melissa Data for both US and Canada with instant verification
- J. Mod-10 validation on entering credit card number during live calls
- K. ACD Direct works alongside many payment processors to be able to handle credit card (via GUID) or EFT's either instantly or batch.
- L. ACD Direct provides a decrementing counter that works in real time and in conjunction with all pledges taken for gifts that have limited quantities. We also have a 24/7 hotline in the instance that your initial gift count or requirements change.
- M. Our agents are well trained and knowledgeable in the needs of our NON-PROFIT partners. Our training program focuses on customer care practices, membership levels, and premium gift descriptions. We have a very high retention rate with many agents that have been taking NON-PROFIT calls for over 13 years now.
- N. Not only do we have Team Leads that monitor for quality assurance, we also give our clients the ability to monitor. We provide a toll free number and an online web site to facilitate your ability to monitor agents. You can add notes during call monitoring that are read the following day by ACD Direct management. We pride ourselves on quality, and we are eager for your feedback.

5. Quality Assurance

All calls are recorded as part of our quality improvement process, and we have a team dedicated to monitoring for compliance. Our clients have the ability to monitor recordings or real-time calls. We provide an online web site to facilitate client monitoring. Clients can also make notes on specific calls to provide feedback direct to ACD Direct management and/or the agent. We pride ourselves on quality, and we welcome feedback.

6. Phone Platform/Location

Our phone platform is a Computer Telephony Integrated cloud-based system that includes:

- VM, IVR, remote monitoring, live statistics, call recording, warm/blind transfers
- Geographically redundant system architecture
- Highly secure and robust HTTPS and SFTP encryption
- 7x24x365 Network Operations Center
- SAS70 audited data centers
- Safe Harbor Certified
- Change control policies, regular and timely patch management, disaster recovery planning and security training
- 99.99% SLA
- Blocking calls/Prank calls can be addressed within minutes based on agent monitoring
- Toll Free Number can be provided or Responsible Organization for any current TFN/DID can be processed

7. Information Technology & Security Features/Location

Our servers are located in a secure, 7X24X365 monitored facility with redundant power and bandwidth and includes:

- Access control via a two factor biometrics
- SSAE 16, type 2 audit certification
- Fully redundant A/B electrical power distribution infrastructure (including ATS, generator, and UPS systems)
- Triple-redundant fiber optic upstream connections
- N+1 redundancy
- Fully Redundant Data Storage (Multiple Processing units, RAID drives, 2 minute snap shot backups)
- Load Balanced Web Servers (redundancy and high availability)
- Enterprise Web Application Firewall (OWASP threat detection, Illegal resource access, XSS, SQL Injection, Bot blocking)
- Intrusion Prevention (Antivirus, antispam, antiphishing, URL blocking/filtering, content control)
- Internal and External Penetration testing (Daily vulnerability scans from CISSP certified security specialists, yearly internal/external user authenticated penetration testing)
- 24X7X365 Data center monitoring (RAM, CPU, Hard drive utilization, change tracking, root-cause analysis, network behavior analysis)

Our IT department has the experience to rapidly create, deploy and maintain advanced internet applications utilizing the following applications, tools and skillsets:

- Microsoft SQL/MySQL Server +
- Adobe Programming Platform (Flex Framework, ColdFusion 9, Air, BlazeDS)
- PHP
- .NET
- Internet/Mobile/Web Application Design and Development

- Mobile Devices i.e. iOS, Android, Windows Mobile
- Business Analysis and Process Design
- User Interface Design/Usability
- Database Modeling, Development and Administration Software
- Systems Architecture, Integration and Administration
- LAN, Wi-Fi and WAN Network Design
- Creation and integration with diverse external systems, APIs to include payment and data systems
- CFML, HTML, CSS, JavaScript, jQuery+mobile, Ajax, XML, HTML 5
- Mura CMS, Web Services, Visual Basic / ActiveX
- Eclipse, Subversion (SVN), Jira
- ESXi, VirtualBox, VPN
- Windows / Server, OS X (Mac), Linux,
- Barcode and Wavelink scanners

6.0 Pricing

See Attachment 6

Conclusion

ACD Direct is passionate about working with the non-profit industry. We were, in fact, created solely to take calls for non-profits; it is the very core of our business. We do have the experience, the skill to professionally handle your incoming calls, and our track record verifies our commitment to the non-profit sector. We are confident that the facts presented will give you all the information necessary to complete your decision process. However, if you do need any additional information, please let us know. We hope to have the opportunity to continue working with you.

ATTACHMENT 1 – Resume: Jill Milleson

ATTACHMENT 2 – Terms and Conditions

ATTACHMENT 3 – Certificate of Non-Segregated Facilities

ATTACHMENT 4 – Compliance and Certification of Good Standings

ATTACHMENT 5 – Secure Handling of UCF Data

ATTACHMENT 6 – Proposal Price Sheet

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<p align="center">SUBMIT OFFER TO: PURCHASING DEPARTMENT UNIVERSITY OF CENTRAL FLORIDA 12479 RESEARCH PARKWAY, BLDG. 600 ORLANDO, FL 32826 Phone:(407) 823-2661 – Fax (407) 823-5551 www.purchasing.ucf.edu</p>		<p align="center">University of Central Florida INVITATION TO NEGOTIATE Contractual Services Acknowledgement Form</p>	
Page 1 of 37 Pages	OFFERS WILL BE OPENED October 19, 2015 and may not be withdrawn within 120 days after such date and time.		ITN NO: 1508NCSA
UNIVERSITY MAILING DATE: September 25, 2015	ITN TITLE: Call Center Services for WUCF-TV		
FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER FEIN# 76-0731716			
VENDOR NAME ACD Direct		REASON FOR NO OFFER	
VENDOR MAILING ADDRESS 1353 North 1075 West, Suite 6			
CITY - STATE - ZIP CODE Farmington, UT 84025		POSTING OF PROPOSAL TABULATIONS	
AREA CODE 801	TELEPHONE NO. 896-1011	Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department and our solicitation web page and will remain posted for a period of 72 hours. Failure to timely file a protest or failure to timely deliver the required bond or other security in accordance with the Board of Governors' Regulations 18.002 and 18.003 shall constitute a waiver of protest proceedings.	
888	TOLL FREE NO. 320-0033		
888	FAX NO. 556-3452		

Government Classifications
Check all applicable

- | | |
|--|---|
| <input type="checkbox"/> African American | <input type="checkbox"/> American Women |
| <input type="checkbox"/> Asian-Hawaiian | <input type="checkbox"/> Government Agency |
| <input type="checkbox"/> Hispanic | <input type="checkbox"/> MBE Federal |
| <input type="checkbox"/> Native American | <input type="checkbox"/> Non-Minority |
| <input type="checkbox"/> Non-Profit Organization | <input type="checkbox"/> Pride |
| <input type="checkbox"/> Small Business Federal | <input type="checkbox"/> Small Business State |

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm or person submitting an offer for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this offer and certify that I am authorized to sign this offer for the vendor and that the vendor is in compliance with all requirements of the Invitation To Negotiate, including but not limited to, certification requirements. In submitting an offer to an agency for the State of Florida, the vendor offers and agrees that if the offer is accepted, the vendor will convey, sell, assign or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the state of Florida. At the State's discretion, such assignment shall be made and become effective at the time the purchasing agency tenders final payment to the vendor.

GENERAL CONDITIONS

1. SEALED OFFERS: All offer sheets and this form must be executed and submitted in a sealed envelope. (DO NOT INCLUDE MORE THAN ONE OFFER PER ENVELOPE.) The face of the envelope should contain, in addition to the above address, the date, and time of the solicitation opening and the solicitation number. Offer prices not submitted on any attached price sheets when required shall be rejected. All offers are subject to the terms and conditions specified herein. Those which do not comply with these terms and conditions are either automatically rejected with respect to non-compliance with non-negotiable terms and conditions or may be rejected, at UCF's sole discretion, with respect to any other terms and conditions.

2. EXECUTION OF OFFERS: Offers must contain a manual signature of the representative authorized to legally bind the Respondent to the provisions herein. Offers must be typed or printed in ink. Use of erasable ink is not permitted. All corrections to prices made by vendor are to be initialed.

3. NO OFFER SUBMITTED: If not submitting an offer, respond by returning only this offer acknowledgment form, marking it "NO OFFER," and explain the reason in the space provided above. Failure to respond without justification may be cause for removal of the company's name from the solicitation mailing list. NOTE: To qualify as a respondent, vendor must submit a "NO OFFER," and it must be received no later than the stated offer opening date and hour.



AUTHORIZED SIGNATURE (MANUAL)

Josh Rosales, Business Development

AUTHORIZED SIGNATURE (TYPED), TITLE

4. PRICES, TERMS AND PAYMENT: Firm prices shall be negotiated and include all services rendered to the purchaser.

(a) DISCOUNTS: Cash discount for prompt payment shall not be considered in determining the lowest net cost for offer evaluation purposes.

(b) MISTAKES: Offerers are expected to examine the conditions, scope of work, offer prices, extensions, and all instructions pertaining to the services involved. Failure to do so will be at the offerer's risk.

(c) INVOICING AND PAYMENT: All vendors must have on file a properly executed W-9 form with their Federal Employer Identification Number prior to payment processing.

Vendors shall submit properly certified original invoices to:

Finance & Accounting
12424 Research Parkway, Suite 300
Orlando, Florida 32726-3249

Invoices for payment shall be submitted in sufficient detail for a proper pre-audit and post audit. Prices on the invoices shall be in accordance with the price stipulated in the contract at the time the order is placed. Invoices shall reference the applicable contract and/or purchase order numbers. Invoices for any travel expenses shall be submitted in accordance with the State of Florida travel rates at or below those specified in Section 112.061, Florida Statutes and applicable UCF policies. Travel Reimbursement must be made using the UCF Voucher for Reimbursement of Traveling Expenses available on the web at <http://www.fa.ucf.edu/forms/forms.cfm#>.

Final payment shall not be made until after the contract is complete unless the University has agreed otherwise.

Interest Penalties: Vendor interest penalty payment requests will be reviewed by the UCF ombudsman whose decision will be final.

Vendor Ombudsman: A vendor ombudsman position has been established within the Division of Finance & Accounting. It is the duty of this individual to act as an advocate for vendors who may be experiencing problems in obtaining timely payments(s) from the University of Central Florida. The Vendor Ombudsman can be contacted at (407) 882-1040; or by mail at the address in paragraph 4, (c) above.

The ombudsman shall review the circumstances surrounding non-payment to:

- determine if an interest payment amount is due;
- calculate the amount of the payment; and
- ensure timely processing and submission of the payment request in accordance with University policy.

**APPENDIX II
SUPPLEMENTAL OFFER SHEET
TERMS AND CONDITIONS**

The sections set forth below are to each be initialed, as YES for "understood and agreed upon" or NO for "not agreed to." Failure to complete and return this document with your offer could result in rejection of your offer, at UCF's sole discretion. Respondents shall not check sections as "understood and agreed upon" with the intent to negotiate a change to those sections/terms and conditions after tentative award of a contract resulting from this ITN. Respondents disagreeing with any term or condition of this ITN are to act to resolve the difference prior to the deadline for inquires, as noted in this ITN. A Respondent's disagreement with any non-negotiable section of this ITN shall be automatically rejected. Failure of the university and the tentative awardee to come to an agreement with respect to terms and conditions within a time frame UCF determines to be reasonable constitutes grounds for rejection of that offer and the University shall have the right, at its sole discretion, to award the contract to the next favorable respondent.

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.1 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.2 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.3 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.4	<u>✓</u>	_____	<u>JE</u>
2.5	<u>✓</u>	_____	<u>JE</u>
2.6 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.7 Section Not Used			
2.8 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.9	<u>✓</u>	_____	<u>JE</u>
2.10	<u>✓</u>	_____	<u>JE</u>
2.11 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.12	<u>✓</u>	_____	<u>JE</u>
2.13 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.14 **Non-negotiable**	<u>✓</u>	_____	<u>JE</u>
2.15	<u>✓</u>	_____	<u>JE</u>

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.16	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.17	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.18 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.19	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.20 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.21	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.22	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.23	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.24	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.25	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.26	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.27 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.28 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.29	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.30 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.31 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.32	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.33	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.34	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.35 **Non-negotiable**	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.36	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.37	<u>✓</u>	<u>_____</u>	<u>JE</u>
2.38	<u>✓</u>	<u>_____</u>	<u>JE</u>

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.39**Non-negotiable**	<u>✓</u>	<u> </u>	<u>JR</u>
2.40	<u>✓</u>	<u> </u>	<u>JR</u>
2.41	<u>✓</u>	<u> </u>	<u>JR</u>
2.42**Non-negotiable**	<u>✓</u>	<u> </u>	<u>JR</u>
2.43	<u>✓</u>	<u> </u>	<u>JR</u>
2.44	<u>✓</u>	<u> </u>	<u>JR</u>
2.45	<u>✓</u>	<u> </u>	<u>JR</u>
2.46	<u>✓</u>	<u> </u>	<u>JR</u>
2.47	<u>✓</u>	<u> </u>	<u>JR</u>
2.48	<u>✓</u>	<u> </u>	<u>JR</u>
2.49 **Non-negotiable**	<u>✓</u>	<u> </u>	<u>JR</u>
2.50	<u>✓</u>	<u> </u>	<u>JR</u>
2.51	<u>✓</u>	<u> </u>	<u>JR</u>
2.52 **Non-negotiable**	<u>✓</u>	<u> </u>	<u>JR</u>
3.0	<u>✓</u>	<u> </u>	<u>JR</u>
4.0	<u>✓</u>	<u> </u>	<u>JR</u>
Appendix II	<u>✓</u>	<u> </u>	<u>JR</u>
Appendix III	<u>✓</u>	<u> </u>	<u>JR</u>
Appendix IV	<u>✓</u>	<u> </u>	<u>JR</u>
Appendix V	<u>✓</u>	<u> </u>	<u>JR</u>
Appendix VI	<u>✓</u>	<u> </u>	<u>JR</u>

Company: ACD Direct

Authorized Representative's Name: Josh Rosales

Authorized Representative's Signature: *JRosales*

Date: 10/15/2015

APPENDIX IV

**COMPLIANCE AND
CERTIFICATION OF GOOD STANDINGS**

The parties shall at all times comply with all applicable ordinances, laws, rules and regulations of local, state and federal governments, or any political subdivision or agency, or authority or commission thereof, which may have jurisdiction to pass laws, ordinances, or make and enforce rules and regulations with respect to the parties.


Vendors shall certify below that they are in good standings to conduct business in the State of Florida. **The awardee of any contract resulting from this solicitation shall forward a certification of good standing. The certifications must be submitted to the UCF Purchasing Department prior to providing any goods or services required under the resulting contract.** Noncompliance with this provision may constitute rejection of proposal or termination of a contract at UCF's sole discretion.

CERTIFICATION

I certify that the company submitting an offer under this solicitation in is compliance with all applicable laws to conduct business in the State of Florida, is in good standings and will provide a certificate of good standings from the State of residence prior to initiating any performance under any contract resulting from this solicitation.

Company: ACD Direct

Authorized Representative's Name: Josh Rosales

Authorized Representative's Signature: 

Date: 10/15/2015

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, ACD Direct certify to the University of Central Florida that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services, under our control, where segregated facilities are maintained. We understand and agree that a breach of this certification is a violation of the Equal Opportunity clause required by Executive order 11246, amended.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash room, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom or otherwise.

We, further, agree that (except where we have obtained identical certifications from offered subcontractors for specific time periods) we will obtain identical certifications from offered subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity Clause; that we will retain such certification in our files; and that we will forward the following notice to such offered subcontractors (except where the offered subcontractors have submitted certifications for specific time periods):

NOTE TO PROSPECTIVE SUBCONTRACTORS OR REQUIREMENTS FOR CERTIFICATIONS OF NON-SEGREGATED FACILITIES. A Certificate of Non-segregated Facilities, as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted prior to the award of a sub-contract exceeding \$10,000 which is not exempt from the provisions of the Equal Opportunity clause. The certification may be submitted either for each sub-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

The Contractor and subcontractors shall abide by the requirements of 41 CFR, Section 60-1.4(a), 60-300.5(a) and 60-741.5(a). 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, or national origin. Moreover, 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, national origin, protected veteran status or disability.

NOTE: Whoever knowingly and willfully makes any false, fictitious, or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES SUBPART - CONTRACTOR'S AGREEMENTS

SEC. 202. Except in contracts exempted in accordance with Section 204 of this Order, all Government contracting agencies shall include in every Government contract hereafter entered into the following provisions:

During the performance of this contract, the contractor agrees as follows:

- (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The contractor will send to each labor union or representative of workers with which the contractor has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The contractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
- (6) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.
- (7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the contractor becomes involved in, or is threatened

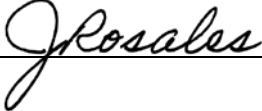
with, litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

(1) The contractor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

Company: ACD Direct

Authorized Representative's Name: Josh Rosales

Authorized Representative's Signature: 

Date: 10/15/2015

APPENDIX V

Secure Handling of UCF Data

Secure protection and handling of data by vendors and third parties

1. Network Security. Vendor agrees at all times to maintain network security that – at a minimum – includes: network firewall provisioning, intrusion detection, and regular third party penetration testing. Likewise Vendor agrees to maintain network security that conforms to one of the following:
 - a. Those standards that UCF applies to its own network, as found at <http://www.cst.ucf.edu/about/information-security-office/iso-policies-standards/>
 - b. Current standards set forth and maintained by the National Institute of Standards and Technology, including those at:

<http://web.nvd.nist.gov/view/ncp/repository>
 - c. Any generally recognized comparable standard (e.g., ISO/IEC 27001, etc.) that Vendor then applies to its own network.
2. Data Security. Vendor agrees to protect and maintain the security of UCF data based on the latest industry security standards and best practices. These security measures include, but are not limited to, maintaining secure segmented networks, maintaining systems that are up-to-date, and environments free of malware.
3. Data Transmission. Vendor agrees that any and all transmission or exchange of system application data with UCF and/or any other parties expressly designated by UCF – solely in accordance with Section 6 below – shall take place via secure means, e.g. HTTPS or FTPS with 128 bit key AES encryption or better.
4. Data Storage. Vendor agrees that any and all UCF data will be stored, processed, and maintained solely on designated target servers and that no UCF data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless that storage medium is in use as part of the Vendor's designated backup and recovery processes.
5. Data Encryption. Vendor agrees to store all UCF backup data as part of the its designated backup and recovery processes in encrypted form using 128 bit key AES encryption or better.
6. Data Re-Use. Vendor agrees that any and all data exchanged shall be used expressly and solely for the purposes enumerated in the Current Agreement. Data shall not be distributed, repurposed or shared across other applications, environments, or business units of Vendor.

Vendor further agrees that no UCF data of any kind shall be transmitted, exchanged or otherwise passed to other vendors or interested parties except on a case-by-case basis as specifically agreed to in writing by an agent of UCF.
7. End of Agreement Data Handling. Vendor agrees that upon termination of this Agreement it shall erase, destroy, and render unreadable all UCF data according to the standards enumerated in DOD 5220.22 or NIST 800-88 and certify in writing that these actions have been completed at a mutually predetermined date.

8. Data Breach. Vendor agrees to comply with all applicable laws that require the notification of individuals in the event of unauthorized release of personally-identifiable information or other event requiring notification. In the event of a breach of any of Vendor's security obligations or other event requiring notification under applicable law ("Notification Event"), Vendor agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify, hold harmless and defend UCF and its trustees, officers, and employees from and against any claims, damages, or other harm related to such Notification Event.

Related Documents:

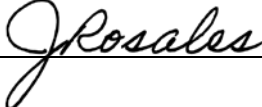
- Third-Party Outsourcing (Cloud Computing) of University Data
- UCF Third Party Assurance Questionnaire
- 4-008 Data Classification and Protection

9. FERPA

If Vendor is provided access to any student personally identifiable information (as defined under FERPA), Vendor acknowledges that it will comply with the privacy regulations outlined in the Family Educational Rights and Privacy Act ("FERPA"), for the handling of such information, to the extent such regulations apply to Vendor. Vendor will not disclose or use any student information except to the extent necessary to carry out its obligations under its agreement with UCF and as permitted by FERPA.

Company: ACD Direct

Authorized Representative's Name: Josh Rosales

Authorized Representative's Signature: 

Date: 10/15/2015

**Appendix VI
Proposal Price Sheet**

Set-Up Development Fee \$ Paid in Full

Inbound Calling \$.97 per minute

Pledge Management Fee \$ 2250.00 / per qtr

Call Center Training \$ Waived

Email Confirmations

 Set up Fee \$ Paid in Full

 Email Confirmation Sent \$ 03 per email

Programming Fees \$ 150.00 per hour
 (any programming changes)

Call Storage \$ Nocharge
 (6 months call storage with immediate availability)

List any other categories of ancillary expenses that may be billed. Note: The University will not reimburse travel, meals or lodging expenses.

JILL M. MILLESON

PROFESSIONAL EXPERIENCE

04/2012 – Current

ACD Direct

As an Account Manager for ACD Direct, I am responsible for a client list of non-profit PBS television stations, NPR/Classical Radio Stations and other non-profit organizations. I help these clients achieve their fundraising goals utilizing our call center services. I work as a liaison for our call center with the clients and their other vendors such as payment processors and CRM software companies. I suggest and develop scripting, online donation pages and reporting to help the stations achieve greater success in reaching their fundraising goals. I conduct monthly pre and post drive meetings to ensure I am meeting the needs of my clients. I work in conjunction with our IT programming team to develop and test new features and enhancements. I review call recordings to help improve our service levels and to provide agent coaching and development.

08/11- 04/2012

Theresa B Miley State Farm

I was a licensed insurance sales development specialist selling auto, homeowners, health, life, long term care, and business policies. I was responsible for closing and booking vehicle loans and opening deposit product accounts. I marketed to local businesses to help with all their insurance product needs to ensure their liability is adequately protected. I was licensed in South Carolina and contracted to only sell State Farm products.

03/08 – 08/11

David M Gilston Ins. Agency

As a life, health, and group benefits independent insurance sales agent, I helped my clients find the right products to help fit the needs of their families and/or businesses. I marketed to local businesses and also through internet leads. I was licensed in South Carolina and contracted with multiple carriers.

1/06 – 03/11

Self Employed Contractor

Worked as an independent teleservice agent for Guru projects, ACD direct, JM Services and West Corporation. I took inbound customer service calls, outgoing telemarketing calls, data entry projects and incoming pledge calls. My main duties included processing incoming orders/pledges and schedule service appointments. Also, worked freelance projects which included administrative, sales, skip tracing and customer service duties.

3/00 – 7/05

Sterling Jewelers Inc

Credit Authorizations/Fraud Manager

I co-managed the call centers of the Credit Authorization/Credit Fraud Department with one other Manager. I was responsible for coaching and developing two Authorization Supervisors and their teams of Authorizers, as well as, two ACS Systems Specialists. My primary responsibilities consisted of overseeing the development of Authorizer work schedules to ensure appropriate coverage based on staffing need projections, facilitate all

departmental communication, recruiting, staffing, coordinating/scheduling the new hire training process, and ensuring preparedness for peak seasons and special events. I held the Supervisory and Authorizer staff accountable for quality and production goals. I oversaw the completion of departmental projections, which included phone projections, instant credit projections and staffing need projections. I worked on a task load which consists of the field survey quality improvement initiatives, retention action plan with quarterly updates, authorized user procedures, completion of monthly team communication per the department's communication map, SLA reports and the department's scheduling opportunities plan. I reviewed credit history and lent credit lines up to \$20,000 on my own and credit lines up to \$50,000 with a second opinion. I skip traced fraud accounts to locate suspects to recover losses. I was responsible for overseeing the department payroll each week and ensure accurate time card records were kept for the department. I worked closely with the home office Human Resource department ensuring FMLA reporting was completed and all FMLA guidelines were being adhered to by my department.

South Carolina Department of Insurance Feb 2008- currently hold
Life and Health insurance and Property and Casualty licenses.

Meyers University 1/97 – 1/00
External Degree Program
Major – Marketing
Completed 15 credit hours

University of Akron 6/96 – 1/97
Major- Marketing
Completed 3 credit hours.

Cuyahoga Community College 9/93 – 6/96
General Core Classes
Major- Marketing
Completed 39.66 credit hours

ADDITIONAL TRAINING

Property and Casualty Insurance licensing class, 2011
Long Term Care, 2011
State Farm Insurance Product Knowledge, 2011
Life and Health Insurance licensing class, 2008
Diversity III, Sterling Inc., 2004
Diversity II, Sterling Inc., 2003
Using Grammar Effectively, Akron University continuing education, 2003
Introduction to Access, Sterling Inc. 2003

Introduction to Excel, Sterling Inc. 2003
Applied Time Management I and II, Sterling Inc. 2002
Sell the Solution, Sterling Inc. 2002
LEA, Sterling Inc. 2001
Advanced Lending, Sterling Inc. 2001
High Impact Presentations, Sterling Inc. 2001
Interviewing for Productivity and Longevity, Wicklander-Zulawski & Associates 2001
Self Discipline and Emotional Control, Fred Pryor Seminars 2001
Keeping the Good Ones, Sterling Inc., 2001
Mastering Conflict, Sterling Inc., 2001
Performance Appraisal, Sterling Inc., 2001
Behavioral Interviewing, Sterling Inc., 2001
Time Management, Sterling Inc. 2001
Stress Management, Sterling Inc. 2000
Sell the Sizzle, Sterling Inc. 2000
Field Partnership, Sterling Inc., 2000
Managing Interpersonal Relationships, Sterling Inc., 2000
Millennium Management Series, Sterling Inc., 2000
Performance Management. Sterling Inc., 2000
Working Together, Sterling Inc. 2000
Business Writing, Sterling Inc. 2000

PROFESSIONAL MEMBERSHIPS

March 2010 – August 2011

Member of the Greater Irmo Chamber of Commerce

October 2009- October 2012

Board member of the Milford Park Home Owners Association

January 2010 – September 2011

CHEBAC – Lexington Richland School District 5 member