

access

EXTERNAL/STAKEHOLDER RELATIONS COMMITTEE

Monday, September 19, 2022

2:00 p.m.

Webinar

Committee Members: D. Nason, Chair
T. DeVera
A. Del Castillo

	<u>DISPOSITION</u>
1. CALL TO ORDER	ACTION
2. GENERAL PUBLIC COMMENT	INFORMATION
3. CONSIDERATION TO APPROVE TRANSPORTATION PROFESSIONALS ADVISORY COMMITTEE MEMBER REAPPOINTMENTS (page 5)	ACTION
4. CONSIDERATION TO AWARD CUSTOMER SERVICE CALL CENTER CONTRACT (AS-4160) (page 6)	ACTION
5. LOCAL, STATE AND FEDERAL LEGISLATIVE UPDATES	PRESENTATION
6. ADJOURNMENT	ACTION

Access Services does not discriminate on the basis of disability. Accordingly, Access Services seeks to ensure that individuals with disabilities will have an equal opportunity to participate in the range of Access Services events and programs by providing appropriate auxiliary aids and services for communications. Primary consideration is given to the request of individuals with disabilities. However, the final decision belongs to Access Services. To help ensure the availability of any auxiliary aids and services you require, please make every effort to notify Access Services of your request at least three (3) business days (72 hours) prior to the meeting in which you wish to utilize those aids or services. You may do so by contacting (213) 270-6000.

Note: Access Services Board committee meetings are held pursuant to the Ralph M. Brown Act [Cal. Gov. Code §54950] and are open to the public. The public may view and obtain all written information supporting this agenda provided to the Board committee both initially and supplementally prior to the meeting at the agency's offices located at 3449 Santa Anita Avenue, El

Monte, California and on its website at <http://accessla.org>. Documents, including Power Point handouts distributed to the Board committee members by staff or Board committee members at the meeting, will simultaneously be made available to the public. Three opportunities are available for the public to address the Board committee during a Board committee meeting: (1) before closed session regarding matters to be discussed in closed session, (2) before a specific agenda item is debated and voted upon and (3) during the time allotted for general public comment. The exercise of the right to address the Board committee is subject to restriction as to time and appropriate decorum. All persons wishing to make public comment must fill out a goldenrod Public Comment Form and submit it to the Secretary of the Board. Public comment is generally limited to three (3) minutes per speaker and the total time available for public comment may be further limited at the discretion of the Chairperson. Persons whose speech is impaired such that they are unable to address the Board at a normal rate of speed may request an accommodation of a limited amount of additional time from the Chair but only by checking the appropriate box on the Public Comment Form. Granting such an accommodation is at the discretion of the Chair. The Board committee cannot and will not respond during the meeting to matters raised under general public comment. Pursuant to provisions of the Brown Act governing these proceedings, no discussion or action may be taken on these matters unless they are listed on the agenda, or unless certain emergency or special circumstances exist. However, the Board committee may direct staff to investigate and/or schedule certain matters for consideration at a future Board committee meeting and staff may respond to all public comments in writing prior to the next Board committee meeting.

Commitment to Civility

To assure civility in its public meetings, staff and the public are also encouraged to engage in respectful dialog that supports freedom of speech and values diversity of opinion. To achieve compliance with these Rules, Directors, staff, and the public are encouraged to:

- Create an atmosphere of respect and civility where Directors, staff, and the public are free to express their ideas;
- Establish and maintain a cordial and respectful atmosphere during discussions;
- Foster meaningful dialogue free of personal attacks;
- Listen with an open mind to all information, including dissenting points of view, regarding issues presented to the Board;
- Recognize that it is sometimes difficult to speak at Board meetings, and out of respect for each person's feelings, allow others to have their say without comment, including booing, whistling or clapping; and
- Adhere to speaking time limit.

Alternative accessible formats are available upon request.

***NOTE**

NOTICE OF ALTERNATIVE PUBLIC COMMENT PROCEDURES

Pursuant to temporary revised Brown Act requirements, Board committee members will be participating via webinar. The public may submit written comments on any item on the agenda - 1)

through email by addressing it to - board@accessla.org or 2) via US Postal mail by addressing it to - Access Services Board Comments, PO Box 5728, El Monte CA 91734. Please include your name, item number and comments in the correspondence. Comments must be submitted/received no later than 9:00 am on Monday, September 19, 2022 so they can be read into the record as appropriate.

The public may also participate via the Zoom webinar link, or by teleconference. Please review the procedures to do so as follows -

How to Provide Public Comment in a Board Meeting via Zoom

Online

1. Click the Zoom link for the meeting you wish to join. Meeting information can be found at: https://accessla.org/news_and_events/agendas.html. Make sure to use a current, up-to-date browser: Chrome 30+, Firefox 27+, Microsoft Edge 12+, or Safari 7+. Certain functionality may be disabled in older browsers including Internet Explorer. You may also use this direct link - <https://us06web.zoom.us/j/88022407009>
2. Enter an email address and your name. Your name will be visible online while you are speaking.
3. When the Committee Chair calls for the item on which you wish to speak, click on "raise hand." Speakers will be notified shortly before they are called to speak. Mute all other audio before speaking. Using multiple devices can cause audio feedback.
4. Please note that the "Chat" feature is an accessibility tool for comments on items by committee members and the general public attendees who need to use this tool. If you cannot use the "raise hand" feature, then please submit a written comment as outlined above.
5. When called, please limit your remarks to three minutes. An audio signal will sound at the three-minute mark and the Chair will have the discretion to mute you at any point after that. After the comment has been given, the microphone for the speaker's Zoom profile will be muted.

Note: Members of the public will not be shown on video.

By phone

1. Call the Zoom phone number and enter the webinar ID for the meeting you wish to join. Meeting information can be found at: https://accessla.org/news_and_events/agendas.html
2. You can also call in using the following information -
Dial (for higher quality, dial a number based on your current location):
US: +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799 or +1 929 205 6099 or +1 301 715 8592 or +1 312 626 6799 or 833 548 0276 (Toll Free) or 833 548 0282 (Toll Free) or 877 853 5247 (Toll Free) or 888 788 0099 (Toll Free)
Webinar ID: 880 2240 7009
3. When the Committee Chair calls for the item on which you wish to speak, press *9 to raise a hand. Speakers will be notified shortly before they are called to speak. Speakers will be called by the last four digits of their phone number. Please note that phone numbers in their entirety will be visible online while speakers are speaking.
4. If you cannot use the "raise hand" feature, then please submit a written comment as outlined above.
5. When called, please state your name and limit your remarks to three minutes. An audio signal will sound at the three-minute mark and the Chair will have the discretion to mute you at any

point after that. After the comment has been given, the microphone for the speaker's Zoom profile will be muted.

SEPTEMBER 12, 2022

TO: BOARD OF DIRECTORS

FROM: MATTHEW AVANCENA, DIRECTOR, PLANNING AND COORDINATION

RE: CONSIDERATION TO APPROVE TRANSPORTATION PROFESSIONALS ADVISORY COMMITTEE MEMBER REAPPOINTMENTS

ISSUE:

Seven Transportation Professionals Advisory Committee (TPAC) members have terms that will expire on October 31, 2022. The reappointments recommended below are for two-year terms beginning November 2022. These terms will expire in October 2024.

RECOMMENDATION

Approve the reappointment of the following seven (Group B) members.

Group B Reappointments

- Chaka Garbutt, Long Beach Transit
- Sebastian Hernandez, City of Pasadena
- Adrianna Kendricks, Montebello Bus Lines
- Eric Hoch, Santa Monica’s Big Blue Bus
- Frazier Watts, G-Trans
- Esteban Rodriguez, Antelope Valley Transit Authority
- Nicole Carranza, Pomona Valley Transportation Authority

IMPACT ON BUDGET

None

BACKGROUND

TPAC was created in September 2001 by the Access Services Board of Directors to provide input regarding operational and policy issues. TPAC is comprised of two sets of members, Group A and Group B, which serve two-year terms. Group A members have term expiration dates which occur in odd numbered years. Group B members have term expiration dates which occur in even numbered years. TPAC meets bi-monthly and is comprised of representatives from social service, community transportation and fixed-route transportation providers.

SEPTEMBER 12, 2022

TO: BOARD OF DIRECTORS

**FROM: SUSANNA CADENAS, MANAGER, CUSTOMER RELATIONS
DAVID CHIA, PROCUREMENT AND CONTRACT ADMINISTRATOR
BRUCE FRINK, SENIOR MANAGER, FINANCIAL PLANNING & ANALYSIS**

RE: CONSIDERATION TO AWARD CUSTOMER SERVICE CALL CENTER CONTRACT (AS-4160)

ISSUE:

Board approval is required to execute a contract to manage and operate the Customer Service Call Center (AS-4160).

RECOMMENDATION:

Authorize staff to execute Contract No. AS-4160 for Customer Service Call Center management and operations for a four (4) year base contract beginning January 1, 2023, and ending December 31, 2026 with Alta Resources Corporation in an amount not to exceed \$13,882,476.

IMPACT ON BUDGET:

The not-to-exceed maximum of \$13,882,476 will be expended at fixed rates based on monthly call volume and as-needed hourly services for the Customer Service Call Center. This contract is funded by Proposition C.

ALTERNATIVES CONSIDERED:

No suitable alternatives are available. The existing contract for customer service center operations expires on December 31, 2022. This procurement would maintain operations with the award of a new contract for the Customer Service Call Center.

EFFECT OF APPROVAL OF STAFF RECOMMENDATION:

If the Board approves the staff recommendation, staff would be authorized, but not required, to negotiate and enter into a written contract upon terms and conditions no less favorable to Access than those proposed above. Access would not be legally bound to the contract herein proposed unless and until it is incorporated into a formal written agreement executed by all parties thereto and approved as to form by this entity's legal counsel.

BACKGROUND:

On February 8, 2016, the Board approved the consolidation of Customer Service operations and Operations Monitoring Center services under one contract and awarded Contract No. AS-3955 to Alta Resources for two base years with two options to extend the term for an additional four years in two-year increments. Both options have been exercised. Contract No. AS-3955 ends on December 31, 2022.

Procurement Overview

On March 22, 2022, Access issued Request for Proposals (RFP) No. AS-4160 to retain an experienced contractor to oversee the Customer Service Call Center, which manages Customer Service operations and Operations Monitoring Center services. Access issued three addenda to provide answers to proposer questions and extend the proposal deadline.

Access received proposals from the following firms:

1. A to Z Call Center Services, LP doing business as The CMI Group (**CMI**)
2. Allied Digital Services, LLC (**Allied**)
3. Alta Resources Corp. (**Alta**)
4. Ecco Group USA, LLC (**Ecco**)
5. Inktel Government BPO Services, LLC (**Inktel**)
6. Senture, LLC (**Senture**)
7. Transcosmos America, Inc. (**Trans**)
8. USCB America, Inc. (**USCB**)
9. Visaya Knowledge Process Outsourcing Corporation (**Visaya**)

Visaya's proposal was deemed unresponsive for failing to comply and respond to all terms and conditions of the RFP. The remaining proposals were deemed responsive and their respective proposers responsible.

An evaluation panel was convened, and a comprehensive technical evaluation followed. The evaluation panel consisted of five members: two Access staff from Customer Relations, one Access staff from Eligibility, and one Access staff from Operations, and one external member from LA Metro's Office of Management and Budget. In addition, two non-voting internal subject matter experts, one from Finance and one from Information Technology, examined the proposals.

The proposals were evaluated based on the following evaluation criteria and associated weights:

	Evaluation Criteria	Maximum Points
1.	Firm Qualifications & Experience	10
2.	Quality of Staff, Recruitment & Management Plan	25
3.	Quality of Work Plan	35
4.	Quality of Facility Plan	10
5.	Price	20
	TOTAL	100

Price is based on the proposed average monthly rate for the base term of four years.

During the period from May 18, 2022 through August 17, 2022, the evaluation panel conducted its independent evaluation of the proposals. Based on the evaluation criteria, Alta ranked the highest. A summary of scores is set forth below.

Evaluation Criteria	Alta	USCB	Senture	CMI
1. Firm Qualifications & Experience	9.00	7.00	6.60	6.90
2. Quality of Staff, Recruitment & Management Plan	20.75	18.75	17.50	18.50
3. Quality of Work Plan	28.35	26.60	25.20	24.15
4. Quality of Facility Plan	9.10	8.90	5.40	5.70
5. Price	16.14	20.00	18.98	15.02
TOTAL	83.34	81.25	73.68	70.27

Evaluation Criteria	Ecco	Inktel	Allied	Trans
1. Firm Qualifications & Experience	5.90	7.90	7.00	6.40
2. Quality of Staff, Recruitment & Management Plan	17.00	15.75	13.75	15.00
3. Quality of Work Plan	23.80	23.45	17.50	18.20
4. Quality of Facility Plan	5.60	5.40	7.90	6.70
5. Price	14.94	13.77	13.36	5.81
TOTAL	67.24	66.27	59.51	52.11

Financial Overview

The average monthly fixed rates for all monthly call volumes over the base term of four years for each proposer are set forth below.

TABLE 1: AVERAGE MONTHLY FIXED RATE
(FOR ALL CALL VOLUMES FOR BASE FOUR-YEAR TERM)

Proposer	Average Monthly Fixed Rate
Transcosmos America, Inc.	\$811,072.59
Allied Digital Services, LLC	\$352,639.31
Inktel Government BPO Services, LLC	\$342,198.10
Ecco Group USA, LLC	\$315,235.24
A to Z Call Center Services (CMI)	\$313,711.00
Alta Resources Corp.	\$291,942.00
Senture, LLC	\$248,143.21
USCB America, Inc.	\$235,539.00

Alta's rates have been determined to be fair and reasonable based upon competition, fact-finding, and a comparison of proposed rates to rates in the industry. Alta's monthly fixed rates for the four-year base term are set forth below.

TABLE 2: FIXED MONTHLY RATES

Monthly Call Volume	Monthly Fixed Rate Year 1	Monthly Fixed Rate Year 2	Monthly Fixed Rate Year 3	Monthly Fixed Rate Year 4
0 - 15,000	\$189,190	\$189,190	\$189,190	\$211,893
15,001 - 25,000	\$207,935	\$207,935	\$207,935	\$232,887
25,001 - 35,000	\$232,056	\$232,056	\$232,056	\$259,902
35,001 - 40,000	\$244,116	\$244,116	\$244,116	\$273,410
40,001 - 45,000	\$248,476	\$248,476	\$248,476	\$278,293
45,001 - 50,000	\$261,989	\$261,989	\$261,989	\$293,428
50,001 - 55,000	\$272,888	\$272,888	\$272,888	\$305,634
55,001 - 60,000	\$286,255	\$286,255	\$286,255	\$320,606
60,001 - 65,000	\$299,769	\$299,769	\$299,769	\$335,741
65,001 - 70,000	\$312,266	\$312,266	\$312,266	\$349,738
70,001 - 75,000	\$327,879	\$327,879	\$327,879	\$367,225
75,001 - 80,000	\$344,273	\$344,273	\$344,273	\$385,586
80,001 - 85,000	\$361,487	\$361,487	\$361,487	\$404,865
85,001 - 100,000	\$379,561	\$379,561	\$379,561	\$425,108

Task (hourly rates)	Base Year 1-3	Base Year 4
Change in Phone Recording	\$170	\$190
Change in Phone Menu Recording	\$170	\$190
Change in IVR Recordings	\$170	\$190
Change in IVR Systems Menu	\$170	\$190
CRM development	\$ 225.00	\$ 250.00

ALTA’s proposed rates reflect additional resources that will be dedicated to the project including additional staff, competitive wages, and additional performance standards.

TABLE 3: FINANCIAL COMPARISON

45k - 50k Calls/Month	Current	Proposed	% Change
Monthly Fee	\$194,066	\$261,989	35%
Estimated Annual Spend	\$2,328,792	\$3,143,868	35%
Cost per Call	\$4.09	\$5.52	35%
CSR Starting Wage	\$16.25	\$17.50	8%
Supervisors	1	2	100%
Quality Assurance	0	1	N/A

Overview of Recommended Proposer

Headquartered in Wisconsin, Alta is an integrated business product outsourcing (BPO) company that possesses over 25 years of experience in omnichannel customer service and client relations. As a leading customer service and client relations provider, Alta provides contact center services for the Orange County Transportation Authority (OCTA) and Metrolink. In addition, as the incumbent, Alta's experience has given it a deep understanding of Access' business operations, technology infrastructure, and administrative procedures.

The proposed project team includes a team of highly experienced management staff. Proposed staff includes an executive manager, program director, and team leader. ALTA will also be assigning a supervisor for all shifts, including after hours and weekends, and a designated staff person dedicated to quality assurance. The team members possess financial training, human resources expertise, healthcare experience, and decades of customer care experience. Collectively, the team possesses over 70 years of combined customer service and client relations experience.

Alta has presented a detailed Staff, Recruitment and Management Plan that meets the requirements of the Scope of Work. The plan implements a wide range of recruiting techniques to attract qualified candidates. It utilizes recruiters at community job fairs and university employment events. It uses job postings on its website and external job boards. It uses print, radio, and online advertisements. The plan also offers bonuses to employees who refer candidates who are hired by Alta and encourages internal transfers of employees from other departments who have demonstrated high performance.

To further attract and retain employees, the plan offers increased wages for call agents. It also implements an internal promotion program that seeks to advance new employees to senior positions. The promotion program trains and evaluates employees on best practices and Six Sigma techniques.

To engage employees, the plan implements a workforce program that was developed with global analytics and consulting firm Gallup, Inc. The Gallup program applies a detailed curriculum that increases employee involvement in the workplace. This curriculum has been in place at Alta for six years. The effectiveness of the curriculum was recently demonstrated in Alta's recent employee engagement assessment in which Alta scored an employee participation of 91% -- well above Gallup's 85% best practice standard.

To manage staffing needs, the plan proposes several strategies. Alta can adjust full-time and part-time schedules, enlist overtime support, and mobilize cross-trained staff from other departments. To expedite response time, Alta can utilize two software tools. The first tool is the automated callback queue, which gives customers the opportunity to save their place in the call queue (without having to wait on hold) and receive a call back when a call agent becomes available. The second tool is the NICE IEX communication tool that allows Alta to send blanket texts to call agents and offer shifts with minimal notice.

Alta has presented a detailed Work Plan that addresses the requirements of the Scope of Work. At the core of its Work Plan is its training plan. To ensure quality service, it stresses staff training and continuing education. It implements corporate best practices training and tailored team-specific training. To facilitate training, the plan utilizes flexible settings that include in-person classrooms,

virtual meetings, and hybrid environments. Significantly, emphasis is placed on handling negative contacts. Through Alta's CARE coaching process, team leads mentor call agents on a one-on-one basis, teaching them how to quickly defuse tension and effectively respond to a myriad of customer issues.

To maintain performance standards, the Work Plan sets forth a detailed reporting plan. The plan provides monthly operational reports that examines key metrics and other statistics. In addition, the plan offers a range of analytical reports that include a basic report (which releases additional statistical measures), customized report (that includes additional descriptive analyses with the assistance of a Reporting Analyst), business report (that includes additional customized analyses with the assistance of a Business Analyst), and premium report (that includes additional forecasts with the assistance of a Senior Business Analyst).

The Work Plan includes a robust information technology and telecommunications plan. The technology and telecommunications plan provides each call agent with a Wyse Citrix terminal, VoIP phone with headset, and dual 20-inch monitors. To ensure consistent connections, all agent stations have in-bound and outbound integrations that can be accessed remotely through web access. This includes the ability to utilize a web Text-to-Chat function similar to Short Message Service (SMS). To safeguard data, two-factor authentication is required for remote workers. In addition, the plan incorporates use of Access' Rider360 Portal and the "Where's My Ride" (WMR) app.

The Work Plan also includes a detailed business continuity plan to respond to emergency circumstances and unforeseen events. To deliver continuity of operations, the business continuity plan includes a list of contacts, inventory of business applications, inventory of business specific hardware and software, procedures to respond to weather and pandemic disasters, interim manual processing procedures, procedures to recover lost data, and other important information.

Alta has presented a detailed Facility Plan that responds to all requirements in the Scope of Work. The plan utilizes a Southern California campus that is over 286,500 square feet. Located in the city of Brea, California, the campus is only 30 minutes away from Access Headquarters in El Monte, allowing Access staff to coordinate onsite inspections on short notice. The campus includes a large conference center and fitness center, with a staff lounge and game room scheduled for opening later this fall.

In addition, Alta has successfully performed most of its call center duties and responsibilities under the current contract. It has maintained key performance standards for all the KPIs except for one as they have had to respond to unforeseen challenges. These included post-pandemic service changes, an introduction of a new Customer Relations Management system, and similar to our contract providers, ALTA has been challenged with recruitment and employee retention. We are confident that the proposed additions to the contract mentioned above will allow ALTA to meet the scope of work.

	Answered Calls	Calls On Hold > 5 Min	Abandoned Calls	Average Hold
Standard	---	≤ 10%	≤ 10%	≤ 180 sec
FY 19	489,948	7%	3%	71
FY 20	388,151	4%	2%	46
FY 21	222,296	13%	5%	119
FY 22	337,532	14%	5%	117
FY 23*	77,516	8%	3%	80

Key Performance Indicators (KPIs)

Following presentations to the CAC, TPAC and the Board, staff made modifications to the KPIs associated with this contract. This increased the number of KPIs from four (4) to (6). Liquidated damages are assessed after not meeting standard two or more months in a rolling six-month period.

Queue / Item	Category	Definition	Standard	Liquidated Damage Schedule
Customer Service	Average Hold Time	The average number of seconds ACD calls waited before being answered.	Average hold times no greater than three (3) minutes	\$1,000 when average hold time for all CS Queues fall within 3:01 minutes and 4 minutes. \$3,000 when average hold time for all CS Queues fall within 4:01 minutes and 5 minutes. \$5,000 when average hold time for all CS Queues exceed 5 minutes.
Customer Service	Calls on Hold Over 5 Minutes	The percentage of calls on hold for more than 5 minutes (300 seconds) before being answered.	No more than 10% of all calls shall be on hold for more than five (5) minutes	\$500 for each percentage point above 10%
Customer Service	Abandoned	The percentage of calls terminated by customers while waiting on hold before the call is answered (After 60 seconds).	No more than 10% of all calls shall be abandoned	\$500 for each percentage point above 10%
OMC	Average Hold Time	The average number of seconds ACD calls waited before being answered.	Average hold times no greater than three (3) minutes	\$1,000 when average hold time for all CS Queues fall within 3:01 minutes and 4 minutes. \$3,000 when average hold time for all CS Queues fall within 4:01 minutes and 5 minutes. \$5,000 when average hold time for all CS Queues exceed 5
OMC	Calls on Hold Over 5 Minutes	The percentage of calls on hold for more than 5 minutes (300 seconds) before being answered.	No more than 10% of all calls shall be on hold for more than five (5) minutes	\$500 for each percentage point above 10%
OMC	Abandoned Calls	The percentage of calls terminated by customers while waiting on hold before the call is answered (After 60 seconds).	No more than 10% of all calls shall be abandoned	\$500 for each percentage point above 10%