# FEBI Invitation to Interested Parties
# March 26, 2004

Interested parties are invited to participate in Phase One of a competitive procurement the U.S. Department of Education (ED) is conducting for Front End Business Integration (FEBI), which will be an integrated solution for Federal Student Aid (FSA) for student aid application, origination and disbursement as well as customer service and shared services such as imaging, fulfillment, etc. FSA's requirements are described in the "Front End Business Integration (FEBI) Statement of Objectives" (SOO). The award will be a performance-based incentive type contract for a term up to 10 years, including optional periods. ED will conduct the procurement using a two-phase procedure, in accordance with Federal Student Aid's procurement flexibility statute (20 U.S.C. 1018a(d)). An explanation of the process, instructions for offeror submissions and evaluation criteria are contained in the "Instructions and Evaluation Criteria Front End Business Integration Phase One."

We recommend you review the FEBI website at http://www.FEBI.ed.gov/ where you will find the FEBI Statement of Objectives (SOO), "Instructions and Evaluation Criteria for Front End Business Integration Phase One," Q&As and other information. We recommend that you register your e-mail address on this website to receive notices of updates and other information.

Interested offerors must prepare their Phase One submissions in accordance with the "Instructions and Evaluation Criteria for Front End Business Integration Phase One" ("Instructions and Evaluation Criteria") and provide two paper copies and five (5) CDs to the address below. The proposal responses should be organized in sections: Past Performance and Organizational Experience, Conceptual Approach and Rough Order of Magnitude Cost. Electronic documents must be in a format readable by Microsoft Office applications (e.g., MS-Word or Excel) or in PDF format. Please include a *brief* cover letter with contact information (phone, fax and e-mail).

The Government may choose to procure services currently found in the SOO such as: Aid Awareness and Outreach (2.3.1), Document Design (2.3.1.1), translation for documents (3.1.10), Web Usability (2.3.5.4) and the Systems Generated printing and mailings (2.3.8.1), under a separate solicitation(s) set aside for small business. ***Small Businesses are hereby invited to provide comments to the Contracting Officer regarding how many solicitations should be issued and recommend an appropriate combination of services.*** These comments will be used by the Government as part of its on-going market research and NOT as a prequalification of small businesses. Comments from small businesses regarding these requirements should be submitted via e-mail to Carolyn.Dickens@ed.gov no later than 4:30 p.m. local time (Washington, DC) on April 15, 2004. Comments from small businesses should be limited to two pages (8 ½ x 11) of single-spaced text using a font size of no less than 12 pitch.

Submissions in response to the FEBI Invitation must be complete and consistent with the "Instructions and Evaluation Criteria." Offers that fail to furnish required information as specified in the "Instructions and Evaluation Criteria" may be considered "not acceptable" and therefore, ineligible for further consideration and participation in Phase Two. In addition,

information provided on pages that exceed the page limitations as specified in the "Instructions and Evaluation Criteria" will not be considered.

The Government intends to make Phase One selections without discussions with offerors. Submissions must be *received* at the location designated below no later than 4:30 PM local time (Washington, DC) on April 15, 2004. (Please note that we are not accepting submissions sent by e-mail or fax.)

U.S. Department of Education
Attention: Carolyn Dickens
Contracts and Purchasing Operations
830 First Street NE, 033F2
Washington, DC 20202

If you hand deliver your submission, please allow time for building security procedures. Report to the guard desk (on your right as you enter the building) and ask them to call Ellen Mason at 202-377-3063. Someone will come down and meet you at the guard station, receive your package and mark it with the time of receipt. (If the guards cannot reach anyone at that number, please ask them to try the following numbers: 377-3459, 377-3679 or 377-3609.) Offers received in the designated office later than the date and time indicated will NOT be considered and will be returned unopened to the Offeror. The Government will give no consideration to offers which are late due to delays caused by the security process, the US Mail or by Government handling prior to receipt in the designated office.

All questions or comments should be sent to FEBI.competition@ed.gov.

Carolyn Dickens
Contracting Officer

**Instructions and Evaluation Criteria**
**Front End Business Integration Phase One**

The Department of Education will select the Front End Business Integration (FEBI) provider using a two-phase procedure, in accordance with applicable Federal procurement laws and regulations and Federal Student Aid's procurement flexibility statute (20 U.S.C. 1018a(d)).

In Phase One, the Department will select those offerors who will be eligible to participate in the second and final phase of the competition. **Only the most highly rated offerors selected in Phase One will be eligible to participate in Phase Two; all others will be disqualified from further participation in the competition (except that disqualified offerors may be proposed as subcontractors or teaming partners of offerors deemed qualified in Phase One).**

The Department may limit the number of eligible offerors selected in Phase One to the greatest number needed for the conduct of an efficient competition among the most highly rated competitors in Phase Two. Phase Two will consist of the submission and evaluation of proposals and selection of the winning FEBI solution. The Department will announce the Phase One results and issue a draft request for proposals to the offerors selected during Phase One on April 30, 2004 or thereafter.

In Phase One, the selection of the eligible offerors proceeding to Phase Two, will be based on the following three evaluation factors:

1. Past Performance/Organizational Experience
2. Conceptual Approach
3. Rough Order of Magnitude (ROM) of Costs

In Phase One, the Past Performance/Organizational Experience factor is more important than the Conceptual Approach factor and ROM Costs. All non-cost factors, when combined, are significantly more important than ROM Cost. Each submission will be evaluated, as follows:

1. <u>Past Performance and Organizational Experience</u> will be evaluated based on the extent of the offeror's recent experience with various tasks and capabilities required for FEBI and the degree of relevance and extent of customer satisfaction.
2. <u>Conceptual Approach</u> will be evaluated on whether or not the proposed approach appears feasible and meets the objectives of FEBI and the goals of FSA.
3. <u>ROM Costs</u> will be ranked from lowest to highest evaluated cost.

The government will select for Phase Two those offerors whose Phase One submissions are the most advantageous to the government considering Past Performance/ Organizational Experience, Conceptual Approach and ROM Costs. In conducting this assessment, the Government reserves the right to use both data provided by the offeror and data obtained from other sources. The Department reserves the right to select other than the lowest cost offeror or offerors with the highest non-cost ratings.

Interested offerors must submit the information described in detail in these instructions if they wish to be considered during Phase One. Offers that fail to furnish required information as specified herein may be considered "not acceptable" and therefore, ineligible for further consideration and participation in Phase Two. In addition, information provided on pages that

exceed the page limitations as specified in these instructions will not be considered. The proposal responses should be organized in sections: Past Performance and Organizational Experience, Conceptual Approach and Rough Order of Magnitude Cost. Proposal sections (track number) must be indicated on the CD label. All offerors responding to the FEBI Phase One solicitation must follow the instructions contained in these "Instructions and Evaluation Criteria" especially number of pages and font size limitations.

# I. Past Performance/Organizational Experience

**Offeror submissions**

Each offeror shall submit:

- References—Using Attachment I, each offeror shall provide 4 relevant references that cover the areas of work required by FEBI as broadly as possible. Each completed Attachment I should not exceed 5 (8 ½ x 11) pages. The Government may consider as relevant efforts performed for agencies of the Federal, state, or local governments and commercial customers. Past performance references provided should include only references for similar efforts that directly relate to the breadth of work covered by FEBI. Past performance information provided may include data on efforts performed by other divisions, critical subcontractors, or teaming contractors, if such resources will be brought to bear or significantly influence the performance of the offeror's approach to FEBI. Offerors may provide references for any member of the offeror team proposed to perform the work required by FEBI (an offeror team may consist of a prime contractor with major subcontractors or a joint venture). However, at least two references should be provided for the proposed prime contractor and at least one of the references should be related to development efforts. Optimally, the references provided should be from organizations independent of the offeror or its team members. A reference provided for work the offeror performed for one of its affiliates would not be considered as reliable because of the potential for bias. No member of the offeror's team may be used as a reference. **Do not include information regarding work completed more than 3 years ago.**

- Organizational Experience - Offerors must use the form provided in Attachment II to submit organizational experience information. In the column entitled "Volume in 12 Month Period" of Attachment II, offerors must list the highest aggregate total volume achieved or managed by their organization in each category during any one twelve month, contiguous period within the last three (3) calendar years. The offerors should use actual amounts and not include averages or estimates in their responses. The offerors should use whole dollar amounts with the leading "$" character where appropriate. Offerors may wish to provide comments regarding the characteristics of the projects to which the volumes provided relate, including how the work was similar to the FEBI effort, or other information believed important to understand the offeror's experience. Use the "Comments and Notations" section of Attachment II for this purpose. Limit all comments and information to this one page.

- Release Consent Letters—The offeror shall submit a consent letter, authorizing each reference to release any past performance information, including any adverse past performance information, to the Government. If a reference is for work performed by a team member other than the proposed prime contractor, the consent letter must be signed by the team member and must authorize release of the information to the proposed prime contractor as well as to the Government.

- Organizational Structure Change History—Many companies have acquired, been acquired by, or otherwise merged with other companies, or reorganized their divisions, business groups, subsidiary companies, etc. In many cases, these changes have taken place during the time of performance of relevant present or past efforts or between conclusion of recent past efforts and this source selection. As a result, it may be difficult to determine what past performance is relevant to this acquisition. To facilitate this relevancy determination, include in this submission volume a "roadmap" describing all such changes in the organization of your company. As part of this explanation, show how these changes impact the relevance of any efforts you identify for past performance evaluation/ performance confidence assessment. Since the Government intends to consider present and past performance information provided by other sources as well as that provided by offerors, your "roadmap" should be both specifically applicable to the efforts you identify and general enough to apply to efforts on which the Government receives information from other sources. This information shall be limited to two pages.

**Past Performance and Organizational Experience Evaluation**

Under the past performance and organizational experience factor, the overall rating will reflect the evaluation of an offeror's work record, relevant experience and capability to assess the Government's confidence in the offeror's probability of successfully performing as proposed. The past performance and organization experience evaluation is accomplished by reviewing aspects of an offeror's relevant present and recent past performance and organizational experience, focusing on and targeting performance that is relevant to the work required for FEBI. The Government will evaluate the offeror's demonstrated record of contract compliance in supplying products and services that meet user's needs, including cost and schedule. Note that the Government generally will not consider performance on a newly awarded contract without a performance history or on an effort that concluded more than three years prior to this source selection.

In conducting the evaluation of past performance and organizational experience, the Government reserves the right to use both data provided by the offeror and data obtained from other sources. The past performance and organizational experience information collected from references and other sources will be evaluated against two factors:

- Relevance of past performance and experience
- Customer Satisfaction

Past performance and organizational experience information will be obtained through the Contractor Performance Assessment Reporting System or similar systems of Government departments and agencies, questionnaires tailored to the circumstances of this acquisition, interviews with program managers and contracting officers, and other sources known to the Government, including commercial sources, as well as the materials submitted by the offeror.

The evaluation decision will focus on how well the offeror is expected to perform the proposed effort in terms of meeting overall program objectives and cost. The Past Performance and Organizational Experience evaluation will result in a single overall rating for each offeror. It is

the Department's responsibility to analyze the data collected, determine its relevancy, and to perform an independent past performance and organizational experience evaluation. Dialogue with Government agencies may be necessary through the use of personal contact to the appropriate program manager, contracting officer, or Administrative Contracting Officer (ACO) listed in the Past Performance and Organizational Experience submissions by the offeror.

Where relevant performance record indicates performance problems, the Government will consider the number and severity of the problems and the appropriateness and effectiveness of any corrective actions taken (not just planned or promised). The Government may review more recent contracts or performance evaluations to ensure corrective actions have been implemented and to evaluate their effectiveness.

More recent and relevant performance and organizational experience will have a greater impact on the evaluation than less recent or relevant effort. A strong record of relevant past performance and organizational experience may be considered more advantageous to the Government. Likewise, a more relevant past performance and organizational experience record may receive a higher rating and be considered more favorably than a less relevant record of favorable performance.

**Relevance**

In assessing Past Performance and organizational experience the Department must perform an independent determination of the relevancy of the past performance and organizational experience information obtained. In considering how relevant an offeror's present or recent past performance and organizational experience history is to the instant acquisition, the Department will assign relevance ratings or categories, as follows:

- HIGHLY RELEVANT: The offeror's past performance and organizational experience involved performance of work comparable in magnitude of effort and complexities to what will be required for FEBI and included nearly all of the tasks and capabilities that will be required for FEBI.
- RELEVANT: The offeror's past performance and organizational experience involved a magnitude of effort and complexities that was somewhat less than will be required for FEBI, but included most of the tasks and capabilities that will be required for FEBI.
- SEMI-RELEVANT: The offeror's past performance and organizational experience involved much less magnitude of effort and complexities, but included some of the tasks and capabilities that will be required for FEBI.
- MINIMALLY RELEVANT: The offeror's past performance and organizational experience involved a low magnitude of effort and complexities or few or none of the tasks and capabilities that will be required for FEBI.

The Department will consider the relevancy an offeror's performance and organizational experience in aggregate, rather than on an effort-by-effort or reference-by-reference basis. For

example, an offeror's work on one of four recent past efforts may represent only a "Semi-Relevant" effort. However, if all four efforts are assessed in aggregate, the work may more accurately reflect a "Highly Relevant" effort.

**Customer Satisfaction**

In assessing Past Performance and Organizational Experience the Department will perform an independent determination of customer satisfaction for present and recent projects. For purposes of this evaluation, customer satisfaction includes expectations and contract requirements in respect to cost, schedule, and quality of delivery.

In customer satisfaction, the Department will assign ratings, as follows:

HIGHLY SATISFACTORY: The offeror's past performance was reported as meeting all expectations and contract requirements and exceeding all expectations and contract requirements in respect to adherence to one or more of the following - cost, schedule, and quality of delivery.

SATISFACTORY: The offeror's past performance was reported as meeting expectations and contract requirements in respect to cost, schedule, and quality of delivery.

UNSATISFACTORY: The offeror's past performance was reported as <u>not</u> meeting expectations and contract requirements in respect to adherence to one or more of the following - cost, schedule, and quality of delivery.

**Overall Past Performance and Organizational Experience Rating**

The Department will assign an overall past performance and organizational experience rating to each offeror that considers relevance, customer satisfaction ratings and organizational experience. The ratings will reflect the Government's level of confidence in the offeror's probability of successfully performing as proposed, as follows:

- HIGH CONFIDENCE: The offeror has a highly satisfactory record of past performance and organizational experience with essentially all relevant tasks and capabilities in high volumes.

- MODERATE CONFIDENCE: The offeror has a satisfactory record of past performance and organizational experience with most but not all relevant tasks and capabilities or has experience in only moderate volumes.

- LOW CONFIDENCE: The offeror has an unsatisfactory record of past performance and organizational experience with only some of those tasks and capabilities or has experience in only low volumes.

Offerors without a record of relevant past performance or organizational experience will receive an overall past performance/organizational experience rating of "Neutral."

# II. Conceptual Approach

In this portion of your submission, please describe your proposed conceptual approach to FEBI. The Department understands that your approach may evolve during Phase Two of the competition. For this Phase One, the Department requests only a high-level description of how you propose to satisfy the requirements and objectives of FEBI (including student aid awareness, application, origination and disbursement as well as customer service and shared services such as imaging, fulfillment, etc.) as set forth in the FEBI SOO in an integrated manner. In your response, you may address such aspects as:

- technological approach, personnel and system resources you will commit to the project;
- intentions regarding teaming and subcontracting including small business participation[1];
- application architecture approach;
- software engineering process (vision, requirements, design, construction, testing and maintenance);
- approach for integrating FSA's evolving data strategy initiative into your solution;
- a vision of data transition from the legacy contractors, risk management and mitigation;
- approach for partnering with the Government;
- anticipated schedule of key dates including start-up, development, full implementation, operation, and length of transition, etc.; and,
- any other relevant information you feel would help us understand your high-level conceptual approach.

The Government may choose to procure services currently found in the SOO such as: Aid Awareness and Outreach (2.3.1), Document Design (2.3.1.1), translation for documents (3.1.10), Web Usability (2.3.5.4) and the Systems Generated printing and mailings (2.3.8.1), under a separate solicitation(s) set aside for small business. Please provide your technical approach to working/integrating with small business(es) providing these services under a separate contract(s) or you may propose an alternate strategy for meeting these requirements. The rationale for proposing an alternate strategy for meeting these requirements should be provided.

Limit the Conceptual Approach narrative to a maximum of 15 pages (8 ½ x 11) of single-spaced text using a font size of no less than 12 pitch.

[1] Offerors are advised that small business participation will be a significant factor in evaluation and source selection in Phase Two. Offerors will be expected to make a substantial commitment toward meeting the Department's small business goals.

**Instructions and Evaluation Criteria**
**Front End Business Integration Phase One**

The Conceptual Approach will be evaluated on whether or not the proposed approach appears to be feasible, as follows:

1) Appears Feasible:
   A conceptual approach would appear feasible if it exhibits an understanding of the basic FEBI requirements as well as the resources and effort needed to satisfy those requirements. It must include demonstrable evidence that it is capable of being accomplished, possible to fulfill the objectives of FEBI and meets the goals of FSA while promoting continuous improvements and mitigating risks.
2) Does Not Appear Feasible:
   A conceptual approach would not appear feasible if it indicates a serious lack of understanding of the basic requirements as well as the resources and effort needed to satisfy those requirements. It would not appear feasible if there is evidence that the approach would create unmitigated undue risk to the Government and presents an unsuitable approach to fulfilling the objectives of FEBI and the goals of FSA.

## ATTACHMENT I
## PAST PERFORMANCE INFORMATION

Provide the information requested in this form for each contract/program being described. Provide frank, concise comments regarding your performance on the contracts you identify. Provide a separate completed form for each contract/program submitted. Limit the number of past efforts submitted and the length of each submission to the limitations set forth in this solicitation.

A. Offeror Name (Company/Division): _____
DUNS Number: _____

(NOTE: If the company or division performing this effort is different than the offeror or the relevance of this effort to the instant acquisition is impacted by any company/corporate organizational change, note those changes. Refer to the "Organizational Structure Change History" you provided as part of your Past Performance Volume.)

B. Program Title: _____

C. Contract Specifics:
1. Contracting Agency or Customer _____
2. Contract Number _____
3. Contract Type _____
4. Period of Performance _____
5. Original Contract $ Value _____(Do not include unexercised options)
6. Current Contract $ Value _____(Do not include unexercised options)
**7.** If Amounts for 5 and 6 above are different, provide a brief description of the reason**:**

_____

D. Brief Description of Effort as __Prime or __Subcontractor
(Please indicate whether it was development and/or production, or other acquisition phase and highlight portions considered most relevant to current acquisition)

E. Estimated Completion Date: _____
1. Original date: _____
2. Current Schedule: _____
3. Estimate at Completion: _____
4. How Many Times Changed: _____
5. Primary Causes of Change: _____

F. Primary Customer Points of Contact: (For Government contracts provide current information on all three individuals. For commercial contracts, provide points of contact fulfilling these same roles.)

1. Program Manager: Name _____
Office _____
Address _____
_____
Telephone _____

| | | |
|---|---|---|
| 2. Contracting Officer: | Name | _____ |
| | Office | _____ |
| | Address | _____ |
| | | _____ |
| | Telephone | _____ |
| 3. Administrative Contracting Officer | Name | _____ |
| | Office | _____ |
| | Address | _____ |
| | | _____ |
| | Telephone | _____ |

G. Address any technical (or other) area about this contract/program considered unique.

H. Include relevant information concerning your compliance with FAR 52.219-8, Utilization of Small Business Concerns, on the contract you are submitting.

I. Identify whether a subcontracting plan was required by the contract you are submitting. If one was required, identify, in percentage terms, the planned versus achieved goals during contract performance. If goals were not met, please explain.

J. Describe the nature or portion of the work on the proposed effort to be performed by the business entity being reported here. Also, estimate the percentage of the total proposed effort to be performed by this entity and whether this entity will be performing as the prime, subcontractor, or a corporate division related to the prime (define relationship).

K. Explain the rationale for selecting the reference as relevant to FEBI requirements. Explain what aspects of the referenced contract are deemed relevant to the proposed effort and to what aspects of the proposed effort they relate. Indicate the specific tasks or capabilities listed in the SOO to which the past performance reference relates. In determining relevance, consideration may be given to similarity of services, magnitude of effort, complexity, technology, type of effort (development, production, etc.), contract type and scope, and schedule.

Provide any additional information you wish the Department to consider in relationship to this reference. This may include, but is not limited to, a discussion of efforts accomplished by the offeror to resolve problems encountered on prior contracts as well as past efforts to identify and manage program risk. (Merely having problems does not automatically equate to low past performance rating, since the problems encountered may have been on a more complex program, or an offeror may have subsequently demonstrated the ability to overcome the problems encountered.)

# Organizational Experience

## ATTACHMENT II

| Activity | Volume in 12 Month Period | Comments |
|---|---|---|
| | | |
| **Application, Origination and Disbursement:** | | |
| Number of Applications | | |
| Number of Originations | | |
| Number of Unique Recipients on File | | |
| | | |
| **Customer Service/Help Desk:** | | |
| Inbound Calls Handled | | |
| Outbound Calls Handled | | |
| Incoming Correspondence | | |
| Outbound Correspondence | | |
| Automated Contacts (IVR, Web) | | |
| | | |
| **Shared Services:** | | |
| Number of Images Processed | | |
| Number of Documents Stored | | |
| Number of Documents Mailed | | |
| Dollar Value of Mailing/Distribution Budget | $ | |

## Organizational Experience
### ATTACHMENT II (continued)

| | | | |
|---|---|---|---|
| Comments and Notations | | | |
| | | | |

# III. Rough Order of Magnitude (ROM) of Costs

In this portion of your submission, please submit the rough order of magnitude (ROM) amount of costs likely to be associated with your proposed conceptual approach, using the attached Excel spreadsheet (FEBI ROM). The following 3 pages (Attachment III) are samples only for your reference. You may provide printed charts conforming to those samples as part of your response but we require submission of the Excel spreadsheet. Limit the response to no more than the provided pages.

Your submission must include all costs you believe are associated with the FEBI requirements. The Government may choose to procure services currently found in the SOO such as: Aid Awareness and Outreach (2.3.1), Document Design (2.3.1.1), translation for documents (3.1.10), Web Usability (2.3.5.4) and the Systems Generated printing and mailings (2.3.8.1), under a separate solicitation(s) set aside for small business. Your ROM should include any costs required for coordination and integration with the separate contractors if you consider it advisable for these services to be performed under separate contracts with small businesses. However, if you propose to provide these services as a part of your offer, your ROM should include the costs for providing these services.

ROM cost submissions will be ranked from lowest to highest based on the total evaluated cost. The Department will review ROM costs to ensure they are reasonably consistent with the offeror's proposed conceptual approach and reflect the entire scope of the effort required to meet FEBI requirements. The offeror's cost submission will be reviewed together with the conceptual approach to consider whether the ROM costs are sufficient to reward good performance. This same review will consider whether the ROM costs reflect the offeror's understanding of the work to be performed, the capability and capacity necessary to do it, and to provide the required service with quality and results. ROM cost submissions that do not reflect an effort necessary or adequate for the FEBI requirements, that indicate a misunderstanding of the requirements or a high-risk approach to contract performance will be rated as "unreliable" and ranked below the highest cost submission.

**INSTRUCTIONS FOR COMPLETING THE ROM SPREADSHEET:**
Provide Rough Order of Magnitude (ROM) pricing in the shaded cells (Attachment III) for the Transition and Operation Periods. You may assume industry standard service levels.

<u>Transition Period Pricing</u>
Development - If applicable, provide Development Pricing. This may not be necessary if development prices are built into the Operational Pricing.
Operations Pricing - If a proposed transition includes phase-in volumes, the price should be the total price during the transition, not a unit price.

<u>Operation Period Pricing</u>
Provide pricing information for each Year (1 October to 30 September) based upon the sample volumes shown below for Application and Eligibility Determinations, Origination and Disbursement, Customer Service/Help Desk and Shared Services. The Pricing information should be a total price for a year as opposed to a unit price. Note that application and eligibility determination as well as origination and disbursement have an annual, cyclical development cycle.

# Rough Order of Magnitude (ROM) of Costs
# ATTACHMENT III

Provide Rough Order of Magnitude (ROM) pricing in the shaded cells below for the Transition and each Operation Period. You may assume industry standard service levels.

| | Transition Period Pricing | | Operation Period Pricing | | Operation Period Pricing | |
|---|---|---|---|---|---|---|
| | If applicable | | Year 1 | | Year 2 | |
| | Development | Operations | Sample Volumes [1] | Price | Sample Volumes [1] | Price |
| **Application and Eligibility Determination** | | | | | | |
| # of Applications processed | | | 13,164,000 | | 13,275,000 | |
| | | | | | | |
| **Origination and Disbursement** | | | | | | |
| # of Origination records | | | 8,741,000 | | 8,820,000 | |
| # of Disbursement records | | | 21,928,000 | | 22,411,000 | |
| | | | | | | |
| **Customer Service/Help Desk** | | | | | | |
| # of Incoming calls | Provide ROM totals in the shaded area below. | | 8,776,000 | | 8,850,000 | |
| # of Incoming email | | | 505,000 | | 509,000 | |
| # of Incoming chat | | | 131,000 | | 132,000 | |
| # of Inbound written letters | | | 102,000 | | 103,000 | |
| # of Outbound letters | | | 106,000 | | 106,000 | |
| # of Outbound calls | | | 231,000 | | 233,000 | |
| | | | | | | |
| **Shared Services** | | | | | | |
| # of Documents Imaged | | | 7,512,000 | | 7,576,000 | |
| # of Pages scanned for data entry | | | 20,019,000 | | 20,189,000 | |
| # of New documents stored | | | 7,512,000 | | 7,576,000 | |
| # of Documents/Publications Mailed | | | 58,000,000 | | 58,000,000 | |
| **Total** | | | | | | |

[1] The sample volumes are only assumptions and therefore may not represent future volumes. Volumes are based on best estimates from previous trends. Please be advised that the Government makes no guarantee regarding future volumes on this contract.

Sample Only

# Rough Order of Magnitude (ROM) of Costs
# ATTACHMENT III (Continued)

Provide Rough Order of Magnitude (ROM) pricing in the shaded cells below for the Transition and each Operation Period. You may assume industry standard service levels.

| | Operation Period Pricing | | Operation Period Pricing | | Operation Period Pricing | |
|---|---|---|---|---|---|---|
| | Year 3 | | Year 4 | | Year 5 | |
| | Sample Volumes [1] | Price | Sample Volumes [1] | Price | Sample Volumes [1] | Price |
| **Application and Eligibility Determination** | | | | | | |
| # of Applications processed | 13,415,000 | | 13,562,000 | | 13,698,000 | |
| | | | | | | |
| **Origination and Disbursement** | | | | | | |
| # of Origination records | 8,925,000 | | 9,015,000 | | 9,105,000 | |
| # of Disbursement records | 22,904,000 | | 23,385,000 | | 23,876,000 | |
| | | | | | | |
| **Customer Service/Help Desk** | | | | | | |
| # of Incoming calls | 8,943,000 | | 9,042,000 | | 9,132,000 | |
| # of Incoming email | 514,000 | | 520,000 | | 525,000 | |
| # of Incoming chat | 133,000 | | 135,000 | | 136,000 | |
| # of Inbound written letters | 104,000 | | 105,000 | | 107,000 | |
| # of Outbound letters | 108,000 | | 109,000 | | 110,000 | |
| # of Outbound calls | 235,000 | | 238,000 | | 240,000 | |
| | | | | | | |
| **Shared Services** | | | | | | |
| # of Documents Imaged | 7,656,000 | | 7,740,000 | | 7,817,000 | |
| # of Pages scanned for data entry | 20,401,000 | | 20,626,000 | | 20,832,000 | |
| # of New documents stored | 7,656,000 | | 7,740,000 | | 7,817,000 | |
| # of Documents/Publications Mailed | 58,000,000 | | 58,000,000 | | 58,000,000 | |
| **Total** | | | | | | |

[1] The sample volumes are only assumptions and therefore may not represent future volumes. Volumes are based on best estimates from previous trends. Please be advised that the Government makes no guarantee regarding future volumes on this contract

Sample Only

# Rough Order of Magnitude (ROM) of Costs
# ATTACHMENT III (Continued)

Provide Rough Order of Magnitude (ROM) pricing in the shaded cells below for the Transition and each Operation Period. You may assume industry standard service levels.

| | Operation Period Pricing | | Operation Period Pricing | | Operation Period Pricing | |
|---|---|---|---|---|---|---|
| | Year 6 | | Year 7 | | Year 8 | |
| | Sample Volumes [1] | Price | Sample Volumes [1] | Price | Sample Volumes [1] | Price |
| **Application and Eligibility Determination** | | | | | | |
| # of Applications processed | 13,842,000 | | 13,987,000 | | 14,127,000 | |
| | | | | | | |
| **Origination and Disbursement** | | | | | | |
| # of Origination records | 9,205,000 | | 9,297,000 | | 9,390,000 | |
| # of Disbursements records | 24,354,000 | | 24,841,000 | | 25,337,000 | |
| | | | | | | |
| **Customer Service/Help Desk** | | | | | | |
| # of Incoming calls | 9,228,000 | | 9,325,000 | | 9,418,000 | |
| # of Incoming email | 531,000 | | 536,000 | | 542,000 | |
| # of Incoming chat | 137,000 | | 139,000 | | 140,000 | |
| # of Inbound written letters | 108,000 | | 109,000 | | 110,000 | |
| # of Outbound letters | 111,000 | | 112,000 | | 113,000 | |
| # of Outbound calls | 243,000 | | 245,000 | | 248,000 | |
| | | | | | | |
| **Shared Services** | | | | | | |
| # of Documents Imaged | 7,899,000 | | 7,982,000 | | 8,062,000 | |
| # of Pages scanned for data entry | 21,051,000 | | 21,272,000 | | 21,484,000 | |
| # of New documents stored | 7,899,000 | | 7,982,000 | | 8,062,000 | |
| # of Documents/Publications Mailed | 58,000,000 | | 58,000,000 | | 58,000,000 | |
| **Total** | | | | | | |

[1] The sample volumes are only assumptions and therefore may not represent future volumes. Volumes are based on best estimates from previous trends. Please be advised that the Government makes no guarantee regarding future volumes on this contract.

Sample Only