

Statement of Work
Appendix 1

Mass Relay RFP Table of Contents

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3.0 Service Standards

3.1. Scope of Service

The relay service shall be designed to provide a means whereby individuals who use text-based communication devices will be able to communicate by wire or radio over the existing or any new telecommunications network with voice users through the services of a relay service operator in a manner that is functionally equivalent to a telephone conversation between two individuals who can hear and speak. The service is called Massachusetts Relay and shall be available on a full-time basis, 24 hours a day, 7 days per week, and 365 days a year.

Under Massachusetts statute, the Administrator Value-Added the most cost-effective and efficient relay service possible that meets the requirements of Massachusetts General Law ("M.G.L.") Chapter 159 § 15E and that are in full compliance with the requirements and intent of Title IV of the Americans with Disabilities Act of 1990, 47 U.S.C. § 225, and Federal Communications Commission (FCC) regulations at 47 C.F.R. §§ 64.601 through 64.605 (at the time of proposal and subsequent to it), which are hereby incorporated by reference as mandatory standards required in the context of this RFP and resulting awarded Contract, whether or not said standards are specifically mentioned, named, or referred to in this RFP. Where there is a difference between a FCC TRS standard and the standard of a requirement in this RFP, the stricter standard of the two shall prevail relative only to that portion of the standard that differs, except that notwithstanding any stricter standard in this RFP, the standard shall not conflict with federal law. Verizon may negotiate with the successful Bidder in the event the FCC or Commonwealth of Massachusetts mandates changes in the provision of TRS, which require an increase in price.

The Bidder will demonstrate how the costs charged to Massachusetts compare to those charged to other states under Contract with the Bidder, and will disclose any increased costs being passed on the Contract Bidder by their subcontractors.

The Bidder shall include a comprehensive description of the methods used and detail the costs to satisfy the RFP requirements. The Bidder's proposal shall address in detail how the following specifications will be accomplished.

3.2. Compliance with RFP Specifications

The successful Bidder must establish and operate the Telecommunications Relay Services in compliance with specifications outlined in this RFP. The establishment of this service must include the provision of all necessary facilities, equipment, software, circuits, telephone service, staff, training, setup, testing, reporting, and other program

elements as may be needed for implementation and operation of Massachusetts Relay services.

4.0 Technical Requirements

4.1. Overview

This section of the RFP lists and describes the specific operational functions that fall within the scope of a TRS. The operational functions listed here are the elements that will be evaluated in the Bidder's technical proposal. Each function or requirement listed will be labeled as being in one of two categories of operational functions.

The two categories of functions are as follows:

- **Mandatory.** These are specific operational functions or specifications that **MUST** be offered by the Bidder as part of the proposed service and do not receive scoring points.
- **Value-Added.** These are general operational functions or specifications that must be addressed in the Bidder's proposal. Scoring points will be awarded to Bidders with respect to these functions on a variable scale, depending upon the degree of compliance, function, and/or specification in comparison with other proposals.

4.2. Location: Mandatory

Each Bidder shall provide a telecommunications relay service from a center located within the Commonwealth of Massachusetts.

4.3. Call Types: Mandatory

The Bidder is required to provide the following types of TRS calls, and shall be required to process the following call types in a manner that allows users of each call type to initiate or receive a call using their preferred call type mode. All dedicated lines for specific types must be answered first in that call type while having the ability to switch to any other call type when needed by the inbound caller:

1. Text-to-Voice
2. Voice-to-Text
3. Voice Carryover (VCO)
4. 2-Line VCO
5. VCO-to-TTY
6. VCO-to-VCO
7. Hearing Carryover (HCO)
8. 2-Line HCO
9. HCO-to-TTY
10. HCO-to-HCO
11. VCO to HCO

12. Speech-to-Speech (STS) STS users must be able to communicate with any and all relay users to include but not be limited to, VCO, HCO, TTY, 2-Line VCO, other STS users, or standard phone users.
13. Spanish to Spanish language translation for all the call types listed above.

4.4. Facilities and Equipment: Mandatory

The Bidder must provide a detailed system description showing that all of the necessary telecommunications equipment and software will be furnished at time of start up and will be capable of expansion as required herein. The transmission circuits shall meet or exceed FCC interexchange performance standards for circuit loss and noise. Telecommunications equipment, including station terminals, must be capable of receiving and transmitting in Baudot, Turbo Code™, Fast Type and ASCII codes, with Baudot as the primary setting. Methods of accessing and being accessed by computers of up to and including 300 Baud via ASCII codes, and at least up to 2400 Baud, shall be described.

The bidder must have modems that are auto-answer and auto-switchable at all speeds.

It is also required that relay systems be capable of automatically identifying incoming text based calls as either Baudot or ASCII. If the Bidder plans more than one line, the text based line shall recognize Baudot, ASCII and voice in that order until such time as another prevalent protocol may supplant Baudot. If the Bidder proposes a single line for voice and text service, the answering sequence shall be voice first and then Baudot then ASCII as detailed above.

4.5. Service Expansion: Value-Added

The Bidder shall be expected to deal with projected and/or reasonable increases in call volume and shall describe in detail the time lag needed to meet any unexpected increases in call volume.

The Bidder shall describe its capability of expanding services (including physical plant and human resources) to meet increased call volumes. Describe in detail the plan to accommodate the "peaks and valleys" in service demand including methodology for predicting these surges and lags in call volume. Describe the plan to increase staffing, trunking capacity when necessary, as well as adding any equipment to remain in compliance with all of the standards of the RFP and contract.

4.6. New Technology: Value-Added

The Bidder shall describe the methodology and process that will be used to introduce new technologies that will improve the provision of telecommunications relay service and subsequent upgrades of the system, and how these activities will be coordinated with marketing, community outreach, promotional, and/or education efforts.

4.7. Mass Relay Access: Mandatory

The bidder shall design Massachusetts Relay to provide users with network access in the categories listed below which are functionally equivalent to that available to persons without communications impairments. The minimum level of service must include 711

dialing capability, toll free numbers for voice, TTY, Speech-to-Speech (STS), Spanish-to-Spanish, 900 pay-per-call access, VCO Direct, Deaf Blind and Massachusetts Customer Service. The existing state-owned, nationwide toll-free numbers listed below shall be used:

- 711
- 800-439 -2370 TTY/ASCII
- 800-439-0183 Voice
- 900-230-8989 Pay-Per-Call Access
- 800-720-3480 Customer Service TTY
- 800-720-3479 Customer Service Voice

Should other features be offered the Bidder shall recommend the most efficient means to provide dialing access including additional numbers? The existing dialing access number(s) for TRS in Massachusetts — Massachusetts Relay Service — shall be available for the next TRS provider at the completion of the contract.

4.8. Call Carriage: Mandatory

The Relay Center must be capable of processing Massachusetts intrastate, interstate, and international calls that originate in Massachusetts. Bidders may not include the cost of interstate or international calls in their bids. The price for handling such interstate and international calls shall be subject to funding for such service which will come from interstate jurisdiction as mandated by the Federal Communications Commission. It is mandatory that the service be designed such that all interLATA calls made through the center will be billed from the LATA of origin to the LATA of termination using the facilities of the customer's selection of an interLATA carrier.

The Bidder will be required only to provide international calls that originate in Massachusetts, provided the equipment of the foreign country is compatible. The Bidder shall indicate which international locations it recognizes as not compatible.

Bidders Value-Added a network design diagram and accompanying explanation indicating how this specification shall be met for each call type: intralata, interlata and international.

4.9. Automatic Number Identification (ANI): Mandatory

The Bidder must utilize ANI on incoming calls to the TRS Center. The Bidder shall deliver ANI to the operator position with the initial call contact and shall utilize ANI to establish the AMA (Automatic Message Accounting) billing record.

4.10. True Caller ID and Enhanced Custom Calling Services: Value-Added

Bidder shall provide access to True Caller ID in a functionally equivalent manner. With each outbound relay call processed by an operator, the inbound caller's telephone number shall automatically pass to the outbound relay called party for display on the called party's Caller ID display. The caller's number shall not be automatically passed on to the

called party if the calling party has Caller ID blocking invoked by their local telephone company.

Bidders shall indicate the technology (SS7 or functionally equivalent) used to provide Caller ID. For these requirements to be fully functional the called party must also have Caller ID services provided by their local telephone company or other functionally equivalent services, and must have compatible equipment capable of displaying the Caller ID text messages. Describe how the following enhanced services will function when a call is placed or received through the TRS:

1. Caller ID (including enhanced Caller ID services)
2. Anonymous Call Rejection
3. Call Block
4. Caller ID Block
5. Call Rejection
6. Last Call Return
7. Call Trace
8. Preferred Call Forwarding
9. Priority Call

4.11. Wireless and Personal Communication Phone Calls: Value-Added

The Bidder shall provide service compatible with cellular services; personal communications services (PCS), paging services, and mobile radio services. Describe in detail how these services will be handled including determining the call type and the amount of time necessary to determine call types and procedures for ensuring accurate billing.

4.12. Access to Regional Toll Free Services and Special Prefixes: Value-Added

The Bidder shall provide access to regionally restricted toll free numbers, regionally directed toll free numbers, N11 or other abbreviated dialing toll free services.

Bidder shall explain how these calls will be routed to the appropriated location.

4.13. Access to 900 or Pay per Call Numbers: Value-Added

The Bidder shall describe in detail how access to intrastate 976, 940, and other intrastate or interstate 900 number services will be provided. The Bidder will also explain the methodology for billing the user directly for any charges incurred and clearly explain the methodology for accurately separating interstate and intrastate calls for billing purposes.

4.14. Access to Coin Sent-Paid Calls: Value-Added

The Bidder shall allow Massachusetts Relay users to make a call from a coin-operated public pay phone. Local calls will be provided at no cost to the pay phone user.

Long distance and toll calls may be made by charging the call to a calling card, making a collect call, or billing the call to a third party.

4.15. Access to Directory Assistance: Value-Added

The Bidder must detail how it will provide text-based and Speech to Speech relay users access to local and long distance directory assistance through the TRS. Local directory assistance calls must be billed to end users at the same rates, or less that are billed by the local telephone company serving the end user. Long distance directory assistance must be billed at the tariff rate of the carrier requested by the caller for the long distance directory.

4.16. Three-Way Calling Functionality: Mandatory

The Bidder shall describe the plan to provide three-way calling functionality as required by the FCC. Three-way calling is defined as a TRS feature that allows more than two parties to be on the telephone line at the same time with the Relay operator.

4.17. Customer Preference Database: Value-Added

The Provider must establish and maintain a customer preference database of call setup and handling preferences for Massachusetts Relay users. Permanent call type identification and any other information in the customer record shall be automatically synchronized in the successful responder's system ensuring that the customer will not be required to contact the provider more than once to give the same information.

In accordance with FCC 47 C.F.R. § 64.604 (c) (7) the Contract Vendor "shall provide for the transfer of TRS customer profile data from the outgoing TRS vendor to the incoming TRS vendor.

Such data must be disclosed in usable form at least 60 days prior to the provider's last day of service provision. Such data may not be used for any purpose other than to connect the TRS user with the called parties desired by that TRS user. Such information shall not be sold, distributed, shared or revealed in any other way by the relay center or its employees, unless compelled to do so by lawful order."

Massachusetts Relay users shall not be required to provide any data beyond their first name, last name, phone number and one other field (other than user password if required) in order for their customer preference registration to be considered valid.

Data entry (addition, change or delete) shall occur within 24 hours of receipt.

Required Fields

At a minimum, the Provider's customer preference database shall consist of the following multiple fields. The Administrator may, from time to time, require the Provider to provide additional mandatory fields as deemed necessary by the Administrator.

- User's primary telephone number including area code.
- User's first and last names.
- User's street address, city, state, and zip code.

- Preferred mode of communication (TTY, TTY with Braille, Voice, VCO, HCO, STS, ASCII and baud rate).
- Preferred Language (English, Spanish, and ASL).
- Preferred long-distance carrier for intraLATA toll service.
- Preferred long-distance carrier for interLATA toll service.
- Preferred billing method.
- Preference for a female or male operator.
- Preferred Call handling options (List options available)
- Preference for no abbreviations, standard abbreviations, text messaging abbreviations
- Out-dial restrictions (long distance, international, operator and/or directory assistance, pay-per-call and/or 800 calls). The caller shall be able to override their assigned blocking on a per-inbound call basis by providing the operator with a password that matches the password provided in their customer preference registration.
- Frequently dialed numbers (include telephone number, name and modality (TTY, VCO)).
- Emergency numbers.
- Greeting (allows the relay user to customize how the operator announces the relay call to the called party).
- Customer notes.
- Password or access code.

Request Modalities

The Provider shall accept Massachusetts Relay customer preference information via hand delivery, mail, fax, email and other electronic transmission, and in all modes of relay (voice, TTY, STS, etc.).

Confirmation of Customer Preference Data

When customer preference information is received by customer service, or by the MassRelay website, the Provider shall ask if the caller would like to receive a confirmation copy of their customer preference record by mail, fax or email. When the user wants to receive the confirmation copy, the Provider shall confirm with the customer the customer's mailing address, fax number or email address as appropriate. Note that address, fax number or email address information might not be included in the customer's customer preference record, and any portion not included in the customer's record shall not be retained by the Provider after the confirmation copy is sent. The Provider shall send the confirmation copy within 24 hours of the request. Users shall also be able to request a copy of their customer preference record via mail at any time.

Customer Preference Data Confidentiality & Security

The contents of Massachusetts Relay's customer preference database are of the highest sensitivity and confidentiality. Bidders shall describe what security measures they will

take to ensure the confidentiality of customer preference data, including any security verification measures to ensure that a user's customer preference information may only be acted upon (establish/changed/deleted) by that user or a person authorized in writing to make changes on the user's behalf.

4.18. Branding: Value-Added

The Bidder may not develop "branding" or "probability profiles" or other customer preference records based solely on experience with Massachusetts Relay users. Likewise, the Bidder may not use call set-up or handling instructions given by the relay user at the start, during, or after a relayed call to develop a customer preference record unless specifically requested by the caller.

4.19. Answering Protocol: Value-Added

711 and 800-439-0183 calls shall first be answered by voice. If there is no response from the caller, then the call will next be answered in TTY mode. If there is no TTY response, then the call will next be answered in ASCII. If there is no ASCII response, then the call will again be answered by voice, continuing to TTY and ASCII before disconnecting for no caller response. The State reserves the right to change the order of answering or to add other Massachusetts Relay services into the order.

If a Massachusetts Relay user has included his preferred mode of communication on a Customer Preference Profile and the user calls into the Massachusetts Relay via the 711 access numbers, the call shall be answered in the user's preferred relay modality.

4.20. Carrier of Choice: Mandatory

Bidders shall describe the method they will provide for users of the TRS to select their inter-exchange carrier automatically. The Bidder shall provide an entry in the Customer Preference database for this purpose and must list the choices of long distance carriers that will be offered.

Massachusetts Relay users shall be able to request their carrier of choice (COC) via information contained in their customer preference record and via a direct request to the relay operator. Direct requests to an operator shall override the COC information contained in the caller's preference record only for that singular request.

If the caller's Carrier of Choice is not available via the Massachusetts Relay or if the caller is unable to provide a choice of carrier, the call may be placed by the provider, after asking if the provider's long distance service is acceptable to the caller. Long distance and toll calls placed and billed by the provider through the relay service shall be billed to the caller at the provider's lowest subscriber rate. Casual user charges or other additional changes shall not apply.

4.21. User Billing: Mandatory

A. Charges for Service

Calls placed through the Relay Center shall be billed at the same rate that would apply if the calls had been placed without the use of the relay operator. This rate shall include any

applicable discounts offered to Massachusetts Relay users by the user's long distance carrier or by the local exchange company for a toll call and an individual's local calling plan.

The Bidder shall describe the billing procedures that will be employed for intraLATA, intrastate/interLATA calls, interstate/InterLATA calls, and international calls where appropriate, including rates to be charged to the user. The Bidder shall also supply billing or make the appropriate arrangements for interLATA long distance services to user's choice of interexchange carriers and at that carrier's rates and using that carrier's calling card or other major credit card. Bidder must comply with residential billing and termination practices as specified under D.P.U.18448 (195.0) which is attached in Appendix 6. The Bidder shall include a complete description of how the service will be provided, and specify any billing limitations that may apply.

The bidder shall describe how intrastate calls will be routed. If a call is routed through a switch outside the originating LATA, explain how the call can be accepted by the local exchange carrier as a call originating and terminating within the LATA.

B. Cellular Flat Rate Calling Plans

The successful Bidder will ensure that flat rate plans purchased by cellular users accessing Massachusetts Relay when they are identified by the identification digits 60,61,62, or by users stating that they are on a cell phone and the call should be a local call, do not incur any additional charges.

C. Wireless Flat Rate Plans

The successful Bidder will ensure that flat rate plans purchased by wireless users enable them to access Massachusetts Relay without incurring any additional charge. This will include but not be limited to access via text pagers, Personal Data Assistant (PDA) or other wireless devices able to initiate and receive text messages.

D. Call Billing Record.

Bidders must specify a system for identifying and documenting long distance and toll calls for billing purposes. The system's record shall contain, at a minimum, the following information:

- a. Date
- b. Originating telephone number (NPA-prefix-line number)
- c. Terminating telephone number (NPA-prefix-line number)
- d. BTN: telephone number or credit card number to be billed (NPA-prefix-line number)
- e. Start time (the time the calling party is initially connected to the called party or to an answering machine at the called party's number or to a recorded message or intercept for the called number)
- f. End time (the time when either the called party or the calling party hangs up or the TRS user asks the operator to hang up, in the event that another call is to be placed)

- g. Call duration to the full second (the time in between start time and end time)
- h. Indication digit by the TRS provider that the call was processed through the Massachusetts relay for reporting/rating purposes

The system must be automated as completely as possible, except in case of emergency calls, system failures, or other circumstances in which handwritten tickets are commonly utilized by voice telecommunication operators in automated offices under standard practices. Bidders must also fully describe the billing system and billing process that will be used, including identification of any subcontractors, specific duties of the subcontractors, how the billing record detail will be transmitted to the billing agent (if any), and how charges will appear on the end user's bill.

The Bidder will provide the materials/documentation indicated in the description above.

E. Coin Sent Paid Calls

In accordance with FCC regulations, carriers Value-Added free TRS local (non-toll) calls from coin operated payphones. With regard to toll calls, the FCC requires carriers to allow the use of calling cards, and collect or third party billing for TRS calls from payphones. Bidders shall indicate how they will rate and process coin-sent paid long distance calls made from coin operated payphones.

4.22. Service Reliability: Mandatory

A. Uninterruptible Power System

An uninterruptible power system (UPS) must be able to provide and maintain emergency power in the event of a any type of power outage for a minimum of eight (8) hours battery capacity sufficient to operate the Relay Center at busy season, busy hour load. In addition, the Relay Center shall have installed power generating equipment capable of operating the center for extended periods of time. The Bidder must describe in detail how the proposed Back-up Power System (BPS) will support the switching system and its peripherals, switch room environmental (air conditioning, fire suppression system, emergency lights and system alarms), operator consoles/terminals, operator work site emergency lights, and Call Detail Record (CDR) recording.

B. Switching System

The switching system shall include a redundant CPU on "hot stand-by" to ensure that no calls are dropped because of processor failure, a full maintenance and administrative terminal with keyboards, screen and printer capabilities, on-line system monitoring, real-time programming capabilities that will not take the system off line, the ability to perform preventive maintenance without taking the system off line, and an inventory of spare critical components (to be defined by the Bidder) that are maintained on site to ensure that the required levels of service are met.

C. Intercept Messages

Recorded announcements as appropriate shall be provided if a system failure occurs within the relay switch or on outbound circuits. Messages shall be provided in both voice

and text. Intercept messages on inbound circuits may or may not be under the control of the service provider.

D. Alternate Facilities

The bidder may propose to provide, in the case of a failure of any portion of Massachusetts Relay, alternate circuits, equipment, staff, etc., in order to continue to provide relay service for Massachusetts until suitable repairs or replacements can be made. The responder shall describe the parameters under which Massachusetts Relay calls may be temporarily rerouted, whether such rerouting will be a manual or automatic operation, how long it will take, whether any calls may be dropped during rerouting, and what messages (if any) will be transmitted to users if alternate facilities are used. Full traffic reporting pursuant to Section 5.12 (E-J) shall be maintained during any use of alternate facilities.

E. Disaster Recovery Plan

The Bidder shall provide a complete plan (not just an outline) for dealing with all types of natural and man-made problems and conditions. Bidders should also provide details that address how they plan to cope with specific disasters, or sustained workforce reduction that impacts quality of service. Details may include: alternate switching of calls, including network diagrams identifying where traffic will be rerouted if vulnerable circuits become inoperable; the provision of redundant circuits to geographic areas where users are concentrated; a contingency plan for how disasters will be handled that are not part of the network, but that may affect the network (e.g., a fire in the Central Office that serves the MassRelay Center); participation in the FCC's Telecommunications Service Priority (TSP) Program and/or other areas which the Bidder considers important to include in a disaster recovery plan.

F. Notification of Massachusetts Relay Center Outage

A primary requirement is to notify the Administrator and the Common Carrier immediately if a major problem occurs. A major problem is defined as the Massachusetts Relay Center going off line for more than five (5) minutes. In addition, the plan should detail the levels of escalation that will be employed to deal with the problem and restore service. The plan shall be designed to ensure that no aspect of relay service is impaired.

4.23. Traffic Standards: Mandatory

The goal of Massachusetts Relay is to provide users access to the telecommunications network that is functionally equivalent to that of persons without communications impairments.

To achieve that end, the relay system must be monitored and managed carefully so it is always staffed and equipped to meet the following traffic standards. The Contract Vendor shall also commit to comply with the requirements in 47 C.F.R. § 64.604, any emerging FCC requirements for TRS traffic and operations, and any State requirements.

A. Usage

No restrictions shall be placed on the length or number of calls placed by callers through Massachusetts Relay during both peak and non-peak periods during each 24-hour period of operation. There shall be no limit at any time on consecutive calls or consecutive call attempts.

B. Blockage Rate

The average daily network blockage rate for all calls into the relay center shall be no greater than one (1) in one hundred (100) calls so that the probability of a busy response due to network congestion is functionally equivalent to what a voice caller would experience using the voice telephone network. If a call rings or is in queue/hold in excess of 90 seconds, it is to be considered a blocked call. Calls may not be blocked at the Automated Call Distributor. Daily blockage reports will be used to determine contract compliance. This grade of service shall apply to both the equipment and network availability as well as retaining an adequate number of operators on duty to handle surges in demand.

The Bidder shall describe in detail the plan to meet this specification including network plans and diagrams of routing systems and operator staffing plans depicting this grade of service.

C. Average Speed of Answer

The Bidder is required to answer eighty-five (85%) percent of all calls within 10 seconds on a daily basis. Measurement of ASA shall begin when the provider's switching system (Automatic Call Distribution or other system) accepts the call from the LEC and the call is delivered by the public switched network to the Massachusetts Relay Center.

The TRS center shall accept all calls immediately when offered by the LEC (without delay) or shall return a busy signal. Measurement of speed of answer shall continue until the accepted call is either abandoned or answered by a live operator ready to relay the call; not placed in queue, placed on hold, or given ring back or other treatment, or answered by a live operator or other party that is not prepared to relay the call (such as if 711 calls would be first answered by a live operator solely to determine the call type before transferring the call to an operator who will then relay the call). Abandoned calls shall be included in the speed of answer calculation.

D. Calls Allowed in ASA Calculation

If for any reason, calls are transferred to another TRS center, only the call placed for Massachusetts Relay may be used in the ASA calculation, not the daily Average Speed of Answer for the remote location handling the transferred calls.

Blocked and abandoned calls processed at remote locations are subject to the same requirements as in-state center calls. Abandoned calls shall be included in the ASA calculation.

E. No Recorded Message or Answer Queue on Inbound Calls

No call will be answered by a recorded message for voice or TTY, except as provided in Section 5.29(C). No call will be put on hold (except to be transferred to a supervisor) or in queue. Only continuous ringing or a busy signal shall be used.

4.24. Transfer Capability: Value-Added

The Bidder must detail how the Massachusetts Relay Center will be equipped to allow for the transfer of calls within the relay center when necessary to meet user needs. By transfer, it is meant that originating calls, either voice or text, may be switched to a supervisor, another operator of a different gender, non-English speaking operator, etc., or another relay center within the state. This requires switching the originating call from one console position to another within the Relay Center and/or the capability of switching the originating call to a similar facility located elsewhere within the Commonwealth.

4.25. Call Release Capability: Mandatory

The Bidder shall also provide for “call release” allowing a call intended for a text based telephone device but encountering a voice — or vice-versa — to be “released” from the TRS and allow the Operator to enable the call — voice-to-voice or text-to-text — to occur without acting as intermediary freeing up the operator to be available for other incoming calls to the center.

The Bidder will provide the materials/documentation indicated in the descriptions above.

5.0 Operational Requirements

5.1. Providing Qualified Staff: Mandatory

Employees of Massachusetts Relay shall be residents of the Commonwealth of Massachusetts. Preference in employment at the Massachusetts Relay Center shall be given to persons with disabilities including individuals who are deaf, hard-of-hearing, late-deafened deafblind and/or have a disability affecting speech or clarity of speech. Each proposal shall include a detailed plan to ensure the active recruitment and hiring of skilled personnel. Although it is not required for initial hiring, it is strongly recommended that persons be recruited and hired who have a working knowledge of American Sign Language (ASL), relay service experience, and experience working within the deaf, hard of hearing, and/or deafblind communities. It is further recommended that applicants have experience working with individuals who have disabilities affecting speech or clarity of speech. If a newly hired employee does not possess this experience, the employee must receive training in these areas before being considered a fully functional employee. The responder must state an ASL learning timeline for relay employees and identify the level of ASL required for employees to maintain employment.

The bidder must include an explanation of how it will provide speech-to-speech (STS) service and any specific requirements and training for STS operators in the plan.

Each proposal must include: (a) an organization chart depicting levels and numbers of

relay service personnel, (b) a hiring practices plan documenting outreach to the deaf and disabled community and copies of job descriptions for each planned position, (c) documentation of past hiring practices for relay service personnel, and (d) a description of proposed benefits, salary range, potential for advancement, etc. for operators and relay center personnel as well as documentation of these items in past practice as a relay service provider.

5.2. Identification of Relay Operators: Value-Added

The operator identification method to be used for all Massachusetts Relay calls is “MASS RELAY OPR” or “Massachusetts Relay operator” followed by the operator number immediately followed by the letter “F” or “M” to indicate the operator’s gender. Operators shall provide their identification number at the beginning and conclusion of a relay call.

Operators with 90 days or less of employment as an Operator at the relay center or who are in a designated “trainees” or are in a training program shall be required to append the Operator identification number and letter indicating gender with the letter “T” signifying “Trainee” (e.g. “MASS RELAY OPR 1234MT”) to text users and announce trainee status with the word “trainee” to the voice users (e.g. “Massachusetts Relay Operator Trainee 1234”).

5.3. Relay Operator Gender Choice: Value-Added

The text based telephone device user and the STS user may request either a male or female Operator to voice for them. The Massachusetts Relay provider is required to have an adequate number of both male and female staff available to honor the request for either a male or female Operator. Operator changes during relay call processing shall remain consistent with the previous Operator (male or female).

5.4. Relay Operator Qualifications

Bidders shall specify how they plan to demonstrate that Operator meet all necessary proficiency requirements. Operators shall be able to quickly and accurately type text relay messages and speak in a clear, concise, understandable manner to the voice users. This shall include, but not be limited to, the following capabilities:

A. Typing Speed: Mandatory

A minimum typing speed of sixty (60) words per minute (“wpm”) is required. An audible typing test shall be administered upon entry, upon completion of initial training, and after 90 days to measure typing capabilities. The formula to calibrate words per minute shall be five (5) keystrokes (four alphanumeric characters plus one space) per “word” requiring three hundred (300) keystrokes per minute to achieve sixty (60) wpm.

B. English Skills. English Grammar: Mandatory

Basic skills in English grammar, as demonstrated by a continued grammar test measuring both auditory and visual typing, are required. The maximum grammatical error rate allowed shall be five percent (5%).

C. Understanding Limited English: Value-Added

An ability to understand individuals using non-native English (or ESL) and to transliterate/translate it to grammatically correct spoken English is required. The Bidder shall demonstrate how he plans to train Operators to transliterate/translate such calls and how they will determine the need. Furthermore, the Bidder shall indicate at what level he would consider Operators to be fully trained in this capacity.

D. Spelling Skills: Value-Added

Minimum spelling skills equivalent to quickly and easily spelling words comparable to a mature, college-level conversation are required. The Bidder must describe how spelling skills will be measured upon entry and on an on-going basis.

E. Clear and Articulate: Value-Added

Each operator shall be able to speak in a clear, articulate, accent-neutral manner using names, words and pronunciations which can easily be understood by Massachusetts Relay users. In addition, it is required that operators be able to effectively communicate with a voice party who is hard of hearing. The bidder shall demonstrate how he plans to train operators to meet this requirement.

F. Spanish Relay: Value-Added

Each operator processing Spanish relay calls shall demonstrate, at a minimum, skills in Spanish grammar and spelling at a level equivalent to that used in the first year of college.

G. Relay Operator Proficiency Exam: Value-Added

The contractor shall require that all prospective Operators take a quantifiable, performance-based relay operator proficiency exam at time of hiring and pass the quantifiable, performance-based relay Operator proficiency examination at the completion of the 90 day training period as well as take a similar exam annually. This examination shall cover spelling, typing, dictation, transliteration of typewritten ASL, and procedures, including the handling of emergency calls, familiarity with deaf culture, ethics and confidentiality, and professional judgment. This test shall have as its minimum requirements the proficiency skills for Operators mandated by this RFP. The Relay Center shall make sure that material from these tests is not available to the Operators before testing time and must change portions of the tests from time to time. The Bidder must include a copy of the expected proficiency examination in the proposal. Any Operator who cannot pass this examination within a three-month training period shall not be utilized as a relay operator. Operators shall be re-tested at least once a year.

5.5. Relay Operator Training Requirements: Value-Added

All relay center staff, including management, shall receive training in ASL, deaf culture, speech impairments, ethics, confidentiality, and emergency call handling. Each proposal must include: 1.) an outline of a staff training plan indicating training topics and time frames, 2.) a description of how applicants and/or trainees will be tested prior to handling

live calls, 3.) a continuation training program outline including training topics and time frames to maintain and improve operator proficiency, 4.) a description of how individuals or organizations representing the Deaf, Harding of Hearing and Deaf/blind community will be hired to assist with the training

Each proposal must include a comprehensive outline of proposed training for each of these topics, including standard training used to orient new operators, that includes call handling procedures and all scripted relay explanations. One outline shall be provided for TRS call handling and one for speech-to-speech (STS) operators.

A. Relay Procedure Training

Operators shall be trained in the procedural details of handling all forms of relay that they will be involved in relaying, including TTY, Voice, ASCII, VCO, HCO, STS, emergency calls, Directory Assistance services, and Operator Assistance services.

B. Initial Disability Awareness Training

All Relay Center staff, including management, shall receive training about ASL, deaf culture, acquired deafness, disabilities affecting speech, ethics, and plan indicating training topics and time-frames as well as identifying individuals or organizations representing the people who are deaf, hard of hearing, who have disabilities affecting speech or clarity of speech, and people who are deaf and or blind and their respective communities that will be used to assist with the training.

C. Ongoing Training

The responder shall demonstrate how ongoing training will be provided by including with its proposal an outline of a proposed ongoing training plan. All staff providing service to Massachusetts Relay, including management, shall receive ongoing training in disability awareness, including functional and cultural issues within the deaf, hard-of-hearing, late deafened, and speech disabled communities. Ongoing training shall also include, but not be limited to, ethics, confidentiality, ASL, software changes, revised call handling procedures and operation of relay telecommunications equipment. Training shall include both simulated and live on-line call handling.

D. Massachusetts Place Names

All operators shall be trained in familiarity with common Massachusetts place names, including their spelling, pronunciation and common abbreviations.

E. Complaint Training

All operators shall be trained in the proper procedures for receiving caller complaints.

F. Operator Policies and Procedures Manual

Bidders shall provide with the proposal a comprehensive outline of a proposed Operator Policies and Procedures that shall include, but not be limited to, confidentiality and ethics, handling of emergency and crisis calls, consequences of non-compliance to policies, and functions and roles of a relay operator.

Upon award of the Contract, the Provider shall provide the Contract Administrator with a complete Operator Policies and Procedures Manual. Updates to the manual shall be given to the Contract Administrator as they occur.

5.6. Procedures for Relaying

Operator procedures must comply with 47 C.F.R. § 64.604. Unless requested otherwise by a user, the operator shall relay all calls according to the following procedures. Bidders shall indicate how they will ensure operator adherence to the following procedures:

A. Limited Typed English: Value-Added

Those users whose native language is not English will need to have their calls transliterated / translated into clear, spoken English so that the voice user can understand the call and communication occurs, unless the TTY user requests verbatim.

The Bidder will provide an entry in the customer profile database addressing this issue and the default shall be to transliterate/translate as needed. The other option shall be verbatim (or word-for-word).

B. Tone of Voice: Value-Added

When speaking for the text based telephone device user, the Operator shall adopt a conversational tone of voice appropriate to:

- the type of call being made;
- the context, content and intent of the call; and
- the text based telephone device user's use of punctuation, figures of speech, etc.

C. Call Status: Value-Added

Operators shall also keep the user informed on the status of the call, such as dialing, ringing, busy, disconnected, hung up, or on hold. The operator shall maintain contact with the caller during a hold period for the purpose of receiving instructions from the caller, such as hand up and dial again, or hang up and call another number.

D. Outbound Called Number: Value-Added

The operator shall be required to inform the caller of the outbound number being dialed unless the outbound called number is entered directly by the calling party.

E. Providing Call Handling Options: Value-Added

The user shall have the option of telling the Operator what aspects of the call that he/she will handle. For example, the user may request that he/she introduce or explain relay services to the called party, rather than have the Operator do it.

F. Operator Interaction: Value-Added

The Bidder shall describe potential capabilities for the operator to interact with the text based telephone device user and/or the voice user when requested by either party. For example, in an effort to address situations where multiple transfers may be necessary before encountering the intended party, the operator may — when requested — place a call and instead of announcing and explaining relay, may simply request the information sought should it be of a simple nature. It is understood that the operator will not “explain

relay”. Examples such as the caller saying to the operator at the beginning of a call: “Please call Macy's, 555-1212, and just find out what time they close and hang up. GA” or “Please ask for Mr. Smith’s TTY extension number so I can call him direct then hang up GA”. The relay user must remain on the line at all times.

G. Verbatim Relay: Value-Added

The Operator shall type to the text based telephone device user or verbalize to the voice user exactly what is said when the call is first answered and at all times during the conversation unless either party specifically requests otherwise.

The Bidder shall provide an entry in the customer profile database addressing this issue and the default shall be to transliterate/translate as needed. The other option shall be: verbatim (word-for-word).

H. Explaining Relay: Value-Added

The Bidder shall have standard explanations of the various types of relay calls. All operators shall use these standard explanations.

When the operator needs to explain relay to a hearing user, the operator shall also type "explaining relay" for the benefit of the TTY user. Conversely, when the operator needs to explain relay to a TTY user, the operator will inform the hearing user that the operator is explaining relay.

Upon request by the user, the operator shall not announce a call as a relay call, permitting the caller to provide explanation, if any.

I. Communicating Tone to TTY: Value-Added

Operators shall, to the best of their abilities, let the text telephone device user know the voice user's tone of voice if it has any bearing on the content, context, or intent of the conversation by describing the tone used in a text based format. The intent of this requirement is to convey tone of voice that is out of the ordinary or has a substantial impact on the content, context, or intent of the call and is not apparent through the textual content. Nevertheless, a user shall have the option of requesting all conversational tone or no conversational tone.

Phrases or words such as “sounds like” or “sounds” shall not be used unless requested. The Operator shall not provide opinion but shall provide observation of the situation. Examples of conversational tone include but are not limited to: (ABRUPT), (YELLING), (TALKING FAST), (MUMBLING), (CRYING). Such descriptions of the observation of tone of voice may be used when it is not already apparent from the textual content, context or intent of the call. Consumer input has also indicated that — regardless of the user profile — should conversational tone of voice seem out of the ordinary or change suddenly or markedly, this should be conveyed in the manner and style indicated by the examples above.

The Bidder will provide an entry that can contain at least three choices in the consumer profile database addressing this issue and the default shall be to only convey tone of voice when it has a significant impact on the conversation. Options shall also include: provide no tone of voice; and, provide all tone of voice.

J. Content, Context and Intent: Value-Added

All operators must convey the full content, context and intent of the communication they relay.

Operators shall not cause a relay conversation to be delayed. They shall not necessarily wait for a relay message to be completed before beginning to relay the message.

K. Third Person on Line: Value-Added

Operators shall indicate to either party if another person comes on the other end of the line at any time during a relay call. Examples of such instances include but are not limited to: transfers to different departments, a supervisor/manager at a place of business taking over a call, or someone picking up an extension.

L. Change of Relay Operator: Value-Added

Change of operators during a call is strongly discouraged. Unless requested by a user before or during a conversation or unless the operator becomes physically incapacitated, a change of operators shall not be made before 15 minutes have elapsed since the beginning of the relay conversation. If the change is necessary, both parties shall be informed, and the new operator shall inform both parties of the operator's identification number. Changing of operators shall not cause the new operator to lose the caller's call handling preferences, either from the caller's customer preference record nor as requested by the caller during call setup, including instructions given once for sequential outbound calls. If the caller has requested a specific gender then the replacement operator shall also be of that gender. The caller shall always have the right to request a change in operator and the Bidder shall accommodate the request.

M. Redials: Value-Added

When a line is busy, the Operator shall redial at least three times, with a fifteen (15) second delay between abandoning a caller's attempt after encountering a busy signal and redialing if requested by the caller. In the event of continual busy signals, the Operator will continue to redial (using 15-second intervals) for as many attempts as requested by the caller. The text based telephone device user must remain on line.

N. All Comments Typed: Value-Added

All comments directed to the voice user by the Operator shall be relayed to the text based telephone device user. These comments shall be typed in parentheses, for example: (Reminding person to speak directly to you.). All comments directed to the Operator by the voice user shall also be relayed, for example: *Could you spell the name please?*

O. Relay in Third Person: Value-Added

If either party communicates in the third person, the Operator shall relay in the third person.

P. Automatic Spell Check and Auto-Correction: Value-Added
The Bidder's system shall have automatic spell check.

Q. Corrections: Value-Added
To correct a typing error, Operators shall not backspace, but continue in a forward direction by typing "xx" or "xxx" (common TTY convention for error) and then typing the word correctly.

R. Automatic Change of Abbreviations: Value-Added
The bidder's system shall have the ability to change abbreviations to full words upon request. Example: Late deafened VCO user is not comfortable with TTY abbreviations and prefers full words.

S. Verification of Spelling: Value-Added
When necessary, Operators shall verify spelling of proper nouns, numbers, and addresses that are spoken. If the operator requests spelling of a word, the operator shall type the word with spaces between each letter to indicate to the text telephone user that the spelling was requested. For example: K U M A R.

T. Amplification of Operator's Voice: Value-Added
Each operator must be able to increase the outgoing volume of their speech via TRS platform controls (not just speaking louder) to help compensate for voice, HCO and STS users with some hearing loss, and shall do so to facilitate the hearing party's understanding of the operator, or at the request of the hearing party. If a volume setting is higher than normal, the operator shall reduce the volume at the request of the user. Volume shall be returned to normal settings after each call.

U. Gender: Value-Added
The text based telephone device user and the STS user may choose either a male or female Operator to voice for them. The TRS provider is required to have an adequate number of both male and female staff available to honor the request for either a male or female Operator. Operator changes during relay call processing shall remain consistent with the previous Operator (male or female).

V. Staying on the Line: Value-Added
The Operator shall stay on the line until both parties have terminated the call. If necessary to process a formal complaint or compliment, the call shall be transferred to an on-site supervisor or manager.

W. Relay Operator Intrusion: Value-Added
Operators, supervisors or managers shall not counsel, advise, or interject personal opinions, messages, observations, personal questions or additional information into any relay call. This also means the operator shall not make any value judgments on the profanity or obscenity or legality of any messages. Additionally, operators shall not hold personal conversations with anyone calling Massachusetts Relay.

X. Voice Mail and Interactive Menus: Value-Added

Operators must inform callers to the presence of a recorded message and interactive menu through a hot key on the operator's terminal. The hot key will send text from the operator to the TTY caller indicating that a recording or interactive menu has been encountered. The Bidder shall electronically capture recorded messages and retain them for the length of the call, and may not impose any charges for additional calls that must be made by the relay user in order to complete calls involving recorded or interactive messages.

Y. Leaving Messages: Value-Added

Operators shall leave messages on answering machines or other voice processing systems including pagers and any voice driven menu systems if the user activates one while actually making the call. The caller must remain on line. The procedures shall include the following steps:

- The Operator shall inform the caller when an answering machine has been reached.
- The Operator shall relay any outgoing message on answering machines accessed to the caller (both voice and text) unless requested not to do so.
- The Operator shall ask the caller if she/he wishes to leave a message.
- The operator shall inform the caller if the answering machine times out by (TIMED OUT).
- The Operator shall leave the caller's message, either by voice or by text.
- The Operator shall confirm to the caller that the message has been left.
- The caller shall be charged only for one call, regardless of the number of redials required to leave the message.

Z. Retrieving Messages: Value-Added

Operators shall retrieve voice and TTY messages from voice processing systems and answering machines and relay the messages to the caller in the caller's calling format (voice, TTY, ASCII, etc.) Unless instructed otherwise by the caller, the operator shall capture and record each message in its entirety and relay it to the caller. If more than one call to the answering machine or voice processing system is required to retrieve the entire message, the caller will only be charged for one call (the first call).

AA. Disconnecting an Inbound Caller: Value-Added

If a caller puts the operator on hold or is otherwise inactive, the operator shall wait for at least three (3) minutes before disconnecting the caller. For example, this may be needed

to allow a deaf/blind user time to look up a telephone number or other information for the call.

The operator shall not disconnect the caller during periods of inactivity during a relay call (for example the called party may have put the caller on hold) without the caller's permission. In all instances of operator initiated caller disconnect, the operator shall inform the caller (or leave a message) that they are disconnecting the call (hanging up) prior to doing so, and shall pause for a possible response before proceeding.

BB. Split Screen for ASCII: Value-Added

If an ASCII caller requests split screen service, the operator shall cause both the ASCII caller's text and the operator's typed text to appear on the operator's screen at the same time, enabling the ASCII caller to interrupt the operator by typing text, which the operator shall be able to view while the operator is relaying to the other party. If the ASCII caller does not request split screen service, it shall be the Bidder's option whether or not to invoke split screen functionality.

CC. Call Interrupt: Value-Added

When a relayed conversation is interrupted by one party, and that interruption is received by the operator, the operator shall respond by relaying the conversation provided by the interrupting party, provided that relay modalities of the parties are compatible with interrupted conversation (e.g., a TTY user with Turbo Code, by a voice user, etc.)

5.7. Speech to Speech Requirements

A. STS Called Numbers

The Bidder must offer STS users the option to maintain, via registration of customer preference information, a list of names and telephone numbers that the STS user calls. When the STS user requests one of these names, the operator must repeat the name and state the telephone number to the STS user. This information must be transferred to any new STS provider.

B. Additional Qualifications for STS Operators

The following minimum qualifications are for STS operators only, and are in addition to those in Section 5.4, above. In responding to these requirements, except for item 3 below, responders shall also describe: 1.) how applicants and/or trainees will be tested on these qualifications prior to handling live Massachusetts Relay STS calls, 2.) how often during employment STS Operators will be re-tested.

1. Hearing Acuity

Each STS operator's hearing must be tested to assure that they are competent to understand people with a variety of speech disabilities. Each STS operator shall score 92% or higher in each ear using a 50 word, W-22 or NU6 speech recognition test. Each STS operator shall measure hearing acuity of 20dB or less in each ear using a pure tone sensitivity test at 250 Hz, 500 Hz, 1000 Hz, 2000 Hz and 4000 Hz. An audiologist using calibrated equipment shall administer the speech recognition test and pure tone test. The audiologist shall be a State licensed professional audiologist

or certified by the American Speech-Language-Hearing Association with a Certificate of Clinical Competence in Audiology (CCC-A.)

2. Understanding of Speech Patterns

STS operators shall be screened to assure their ability to understand the irregular speech patterns of people with speech disabilities. Responders shall define acceptable STS operator speech comprehension levels and ensure that all STS operators meet that criterion.

3. Removal of STS Operators

The floor supervisor will identify STS operators and remove them from STS duties if:

- a. hearing or concentration has become impaired because of a cold or other (temporary or permanent) medical condition.
- b. no longer extremely patient with customers' speech and respectful of them.

4. English Fluency

STS operators assigned to relay in English must be fluent in U.S. English, and able to speak English without a distorted non-U.S. English accent. STS English operators must be tested for hearing acuity, speech comprehension, and English language skills including vocabulary, grammar and syntax.

5. Spanish Fluency

STS operators assigned to relay in Spanish must be fluent in Spanish, and able to speak Spanish without a distorted non-Spanish accent.

STS Spanish operators must be tested for hearing acuity, speech comprehension, and Spanish language skills including vocabulary, grammar and syntax.

C. STS Operator Training

The following minimum training requirements are for STS Operators only, and are in addition to those in Section 5.5, above.

1. STS Users

Adequate training on STS service must be provided to all personnel who will be interacting with speech disabled users and/or operators who complete STS calls, including counseling personnel, customer service representatives, and user assistance and complaint resolution personnel. Training shall also be provided on identifying and dealing with suspected fraudulent use of STS services.

In addition, responders shall describe: 1.) how STS training in this area will be provided to staff before handling live Massachusetts Relay STS calls, and 2.) how often during employment they will be retrained.

2. Transfer of STS Calls

Calls will only be transferred to supervisors who thoroughly understand and respect the STS protocols, requirements, and philosophy.

3. Specialized STS Staff

The Bidder is encouraged to develop a small bank of operators for STS service. This bank must be large enough to handle the traffic, but small enough so that operators become accustomed to most of the users' speech patterns.

4. Specialized STS Training

Training of STS operators must include at least eight (8) hours of training specific to STS service, two (2) hours of which is training specific to voicing for voice synthesizer users. Training must include experiencing a variety of speech disabilities, possibly partly through video.

As part of her or his training, every STS operator must have a minimum of eight (8) hours of a combination of training by a live speech disability professional and consumer expert. STS operator training must include introduction to a variety of technologies used by consumers to communicate, including voice synthesizers. Training must include introduction to many speech disabilities. Up to one-quarter of STS training may be provided by videotape.

In addition, responders shall describe: 1.) how STS training in this area will be provided to staff before handling live STS calls, and 2.) how often during employment they will be retrained.

D. Procedures for Relaying STS Calls

The following requirements for relaying Speech-to-Speech calls are in addition to the requirements of Section 5.6. If conflicts exist between these two sections, the requirements of this section shall prevail for relaying STS calls. In responding to the following procedural requirements, except for items 13 and 14 below, responders shall also describe how their operator' use of the following procedures will be ensured on an ongoing basis after the operator begins relaying STS calls.

1. Never Guess

STS operators shall never guess what the speech disabled caller says, but will request clarification.

2. Verification of Busy Number

If a line is busy, then the STS operator will immediately repeat aloud the number dialed to verify that the STS operator understood the number correctly.

3. Dictate Message

Users may dictate a message to be left on an answering machine in the STS operator's voice.

4. Additional Calls

After each call, STS operators will offer to make another call.

5. Request Clarification

While STS operators may not counsel, advise, or interject personal opinions into a conversation, they may ask questions to clarify what was said particularly if the meaning or context is unclear. “Apple” differs from “ample”, “articulate” differs from “article,” “pants” differs from “Lance.”

6. Interaction with Users

STS operators may interact with users having a problem using the service and to reassure new users. STS operators may reassure users that the user was understood. STS operators also may interact with users to help the user use the service more effectively. This is particularly necessary in helping developmentally delayed users with short-term memory loss.

For example, STS operator may correct a telephone number that the user receives from one caller and then repeats in error to the STS operator in requesting another call. Operators must never attempt to assist users in ways that could interfere with the user’s independence. The above directions may appear self-contradictory, but are not in light of the wide variance in intellectual capacity within this user group. An opportunity for an operator to facilitate communication takes priority over transparency. However, the STS operator must not facilitate if there is a great risk of diminishing communication.

7. Leaving Messages

STS operators will leave messages on answering machines or other voice processing systems if the caller activates one while making a call as described in above in 5.6 (X). In addition, STS callers shall be allowed to recite a prepared message to an answering machine. The STS caller may dictate the message to the STS operator before making the call. If the called number is busy, then the STS operator shall retain the dictated message in the STS user’s customer preference record at the user’s request. The message shall be retained for a minimum of one hour, during which time the user may call back and attempt to reach the answering machine and leave the message.

Given the limited telephone experience and delayed social development of some users, STS operators may prompt users leaving messages on answering machines who forget to leave their name and/or telephone number.

8. Respect

Operators will avoid informality interpretable by users as patronizing. Adult users must always be treated as mature adults regardless of their behavior.

9. Caller Names

Callers shall not be required to give their names or the name of the party they are calling.

If names are given, this information shall not be recorded in any form without the permission and knowledge of the caller (except for long distance billing purposes). Operators shall not ask for names even though it is understood that for some calls, having the full name would help facilitate the call. The operator shall not, however, refuse to make a call if the caller does not wish to give names.

Before dialing, the STS operator will ask, "Shall I tell the party who is calling?"

10. Change of STS Operator

The Bidder is encouraged to use the same operator throughout each STS call. Operator change is very disruptive to speech disabled users. It prompts fear that the new operator may not understand them as well as the first operator did. Unless requested by a user before or during a conversation or unless the operator becomes physically incapacitated, a change of STS operators shall not be made before 15 minutes have elapsed since the beginning of the relay conversation. If a change is necessary, both parties shall be informed and the new operator shall inform both parties of the operator's identification number. The caller shall always have the right to request a change in STS operator and the Bidder shall accommodate the request if another STS operator is available.

11. Announcement of Voicing

At the start of the call, the STS operator will announce that he or she will voice for the speech disabled person throughout the call, unless both parties ask the STS operator to stop.

12. Voicing at the User's Option

Some people with speech disabilities can be clearly understood if allowed to speak uninterrupted; they do not need operators to voice for them, they just need the other party not to interrupt them. Such customers may request the STS operator to only repeat what they say when the speech-able customer misses a word.

13. Quiet STS Operator Environment

The STS operators' work environment should be quiet and the partitions between the operators' cubicles should be sound proof enough so that STS operators can concentrate intensely on hearing the caller's speech.

14. Retention of Information

STS operators must be able to retain information from one inbound call for use in a subsequent outbound call, and such information shall only be retained for the duration of the inbound call. The method of retention shall be up to the Bidder.

15. Dual Voicing

The Contract Vendor will provide STS voicing for people with speech disabilities calling each other, for both parties.

5.8. Confidentiality

Responders shall describe how they will adhere to the following confidentiality requirements.

A. Total Confidentiality: Mandatory

All calls made through Massachusetts Relay shall be totally confidential, with no written or electronic script kept beyond the duration of the inbound call except as specified in Sections 5.6 (X) and 5.7 (D) (7). Except as provided in Sections 5.8 (E) and 5.11 operators and supervisory personnel shall not reveal information about any call, except for any minimum information that may be necessary for billing purposes.

B. Workspace Accommodations for Call Privacy & Confidentiality: Value-Added

The provider shall ensure that the equipment and structural accommodations made to the operator workspace will ensure the total confidentiality of relay user's calls, and prevent the relay users on one call from overhearing an operator processing another call. Such incidents will be considered a breach of confidentiality on the part of the Bidder.

C. Pledge of Confidentiality: Mandatory

The provider shall ensure that all staff who relay Massachusetts Relay user conversations or have access to Massachusetts Relay user data, e.g., operators, supervisors, customer service staff, etc., shall be required to sign a pledge of confidentiality agreement promising not to disclose the identity of any callers or fellow relay operators, or any information learned during the course of handling or relaying calls, handling complaints, or accessing customer data (customer preference data, billing information), either during the period of employment or after termination of employment.

Bidders shall submit a copy of their Pledge of Confidentiality Agreement with their proposal.

D. Discussion of Calls: Value-Added

Operators shall not discuss among themselves or with their supervisors any names or specifics of any relay call, except in instances of resolving a complaint. Operators may discuss the general situation they need assistance with in order to clarify how to process a particular type of relay call. Operators shall be trained to ask questions about procedures without revealing specific information that will identify the parties on the call.

E. Emergencies: Value-Added

If a Massachusetts Relay user is in an emergency or life-threatening situation or causes an emergency situation to exist by threatening the operator or the relay center, names and specific information may be disclosed by the operator to a supervisor to expeditiously address the situation.

F. Monitoring of Calls: Mandatory

Watching or listening to actual calls by anyone other than the relay operator is prohibited, except for training or monitoring purposes or other purposes specifically authorized by

the FCC or Administrator, or by this RFP and Contract. Watching or listening of relay calls by others for training or monitoring purposes shall not be allowed as a general practice for all calls, but shall be restricted to discrete calls for temporary purposes. Therefore, announcements to callers that say, for example, “Your call may be monitored for training purposes”, shall not be deployed de facto to all calls. Recording of calls is prohibited except as allowed in this RFP for STS calls and for handling voice mail and/or interactive type messages. Except as provided for in Section 5.7 (D) (7), all recordings of calls shall be immediately deleted at the completion of the call.

G. Confidentiality Policy: Mandatory

Providers must develop a written Confidentiality Policy, covering the above points at a minimum. A copy of the Confidentiality Policy shall be provided to consumers upon request.

H. Termination for Violation of Confidentiality: Value-Added

Relay personnel who, after investigation, are found to have violated the confidentiality rules and regulations shall be terminated immediately.

I. Restriction of Information: Mandatory

The provider shall be restricted to collecting and using only that personal information necessary for billing purposes or customer preference records. This information shall not be used for any other purposes.

5.9. Relay Operator Counseling: Value-Added

The Bidder shall outline counseling and support program that will help operators deal with the emotional aspects of relaying calls. Because operators are not allowed to talk about their calls with other operators, friends, or family, other relay systems have found that operators need to have access to someone they can talk to and trust. They need to be able to talk about their emotions and learn ways to cope with their feelings. Those providing this staff support must have training in dealing with these situations. However, the operators must not give the names of the calls involved to the support person. The counseling support system must follow the confidentiality provisions listed above.

5.10. Customer Contacts and Complaint Resolution: Mandatory

Bidders shall, at a minimum, ensure the following:

A. Establish Procedures: Mandatory

The provider must establish procedures for receiving and responding to complaints, commendations, inquiries and comments regarding Massachusetts Relay services and personnel. The procedures must comply with 47 C.F.R. § 64.604(c) (1), (2), and (6). These procedures shall be explained in appropriate Massachusetts Relay outreach or informational material.

B. Description of the Complaint Process: Value-Added

Bidders shall describe their complaint receiving, responding, tracking and resolution procedures for Massachusetts Relay.

C. Compliance with FCC Regulations: Mandatory

The provider shall be in compliance with the FCC's complaint reporting and resolution process as described in 47 C.F.R § 64.604(c) (1), (2), and (6) and as may be further amended by the FCC. Compliance shall include keeping a complaint log as described therein and reporting to both the FCC and the State.

D. Access to Supervisors or Administrators While on Line: Value-Added

The provider shall ensure that any caller to Minnesota Relay having a complaint or commendation will be able to reach a supervisor or administrator while still on line during a relay call.

E. Access to Customer Service: Value-Added

The Bidder shall fully describe its Customer Service element including an 800 number for in-state access to customer service at the Massachusetts Relay center. This description shall include at a minimum: staffing (include position descriptions) associated with this activity, specific activities designed to promote relay use, number of "person hours" per month and strategies for reaching hard-to-reach individuals such as people with a speech disability, hard-of-hearing people and elderly people.

The Bidder shall describe its reporting procedure and format for the activities of a customer service line and/or department. A sample report must be included in its response.

F. Documentation of Complaints: Value-Added

The provider shall ensure that all complaints received (by supervisors, customer service, the Massachusetts Relay Customer Service Line, etc.), verbally and in writing, shall be documented. Documentation shall be as follows:

1. All complaints shall be documented on a standardized Consumer Contact form, in an electronic format.
2. Complaint documentation shall include date complaint was filed, whom the complaint was received by, type of relay call (e.g. VCO, HCO, Spanish, STS, captioned telephone VCO, etc.), customer contact information (if given), operator number, category of complaint, nature of complaint, date of resolution, explanation of resolution, and complaint tracking number.
3. Customers shall be asked if they would like to leave contact information in order for their complaint to be followed up by mail, e-mail, or phone.
4. Copies of all complaints, as well as a monthly complaint summary report, shall be submitted to the administrator, in electronic format.

G. Yearly Complaint Summary Report: Mandatory

The provider shall submit to the contract administrator a yearly complaint summary report by June 15th detailing all Massachusetts Relay complaints received for the 12 month period ending May 31st. The yearly complaint summary report shall be in

electronic format and shall include the date complaint was filed, type of relay call, category of complaint, nature of complaint, date of resolution, explanation of resolution, and complaint tracking number.

H. Documentation of Commendations: Value-Added

The provider shall ensure that all commendations received (by operators, supervisors, and customer service), verbally and in writing, shall be documented. Documentation shall be as follows:

1. All commendations shall be documented on a standardized Consumer Contact form, in electronic format.
2. Commendation documentation shall include date commendation was filed, whom the commendation was received by, type of relay call (e.g. VCO, HCO, Spanish, STS, captioned telephone VCO, etc.), operator number (if applicable), and nature of commendation.
3. Copies of all commendations shall be submitted in electronic format to the contract administrator, on a monthly basis.

5.11. Emergency Call Handling Procedures: Value-Added

The provider shall develop a policy for relaying and referring emergency calls in accordance with the standards in 47 C.F.R § 64.604(a) (4).

Additional specific emergency call handling requirements are listed below.

A. Pass Caller's ANI to the PSAP

The operator must pass along the caller's telephone number to the PSAP when a caller disconnects before being connected to emergency services.

B. Stay on the Line to Ensure Connectivity

If the emergency call is transferred to a PSAP, the operator shall stay on the line as long as necessary to ensure that the PSAP operator has received the call.

C. Relay Only Under Limited Circumstances

The emergency call may be relayed to a PSAP operator (instead of transferred) only on a call-by-call basis under any of the following circumstances:

- At the request of the caller.
- At the request of the PSAP operator or PSAP supervisor.
- If the PSAP is not capable of receiving and conversing directly with the caller in the modality of the caller (for example if the caller is using any communications modality other than TTY, e.g., VCO, HCO, STS, ASCII)
- The operator is having technical trouble transferring the call to the PSAP, e.g., the caller is disconnected from the PSAP, the PSAP cannot establish a TTY connection, etc.

- As allowed by the FCC.

D. Treat a Call as an Emergency Call When Unsure

When receiving a relay call that the operator suspects is an emergency call requiring a response from a PSAP, the operator shall immediately treat the call as an emergency call and shall make no attempt to determine if the call is an actual emergency or not.

E. No Questioning or Advice

The operator shall not attempt to question the caller about the exact nature of the emergency, nor shall the operator attempt to give advice to the caller in response to the emergency. The operator shall let the PSAP operator, who has the professional training to carry out those functions, deal with the emergency.

F. Allowance for Limited Transparency

When processing an emergency call, the operator shall be able to facilitate the call to a greater degree than a normal relay call to the extent described herein:

1. The operator may inform the answering PSAP operator that the caller is a TTY user (or other type of relay user).
2. The operator may inform the answering PSAP of the caller's disability, name and other information available to the operator from the caller's customer preference data and ANI data, if available.
3. The operator does not have to be fully transparent (as is required in non-emergency verbatim relay) to the caller and PSAP operator if either the caller or PSAP operator request such non-transparency, or if in the professional opinion of the operator such limited non-transparency will greatly facilitate the PSAP operator's ability to understand or respond to the caller; and if the caller does not object. By far the greatest emphasis of each relayed emergency call shall be on transparent verbatim relay, and the use of non-transparency shall only be for temporary summarization or for interpretation of ASL gloss terminology. In all instances of non-transparency, the operator shall not alter the relayed conversation, shall not interfere with the independence of the caller, and shall not interfere with the caller's control of the conversation. In each instance during an emergency call when an operator engages in non-transparency, the operator shall first identify him/herself as the source of the talking or typing by indicating "Relay operator speaking" or similar language.
4. The operator may stay on the line for the duration of a relay call connected to a PSAP, and in which case the operator shall remain in a listening or non-active mode unless called upon by either party for relay or other assistance or information, or unless it is obvious to the operator that either party needs non-transparent services (as described above) in order for effective communications to occur between the caller and the PSAP operator.

5. Whenever an operator is providing non-transparent services, the operator shall immediately cease such non-transparency if asked to do so by either the caller or by the PSAP operator. The request may be in any terminology, such as, “Please relay verbatim”, “Repeat only what I type”, “Just say what I type”, etc.
6. A relay supervisor may listen to an emergency call in process if deemed necessary by the Provider. The listening supervisor may not enter into the conversation in any manner unless the relay function is transferred to the supervisor.

G. Change of Operator during an Emergency Call

There shall be no replacement of operators during an emergency call, except to a supervisor who has been involved in the entire call.

H. Call Set-Up

When an operator places a call to a PSAP for either transferring the call or for relaying the call, the operator shall, at a minimum, identify the call to the PSAP operator as a Massachusetts Relay call, operator number, and if the call is relayed, shall establish the call with the normal relay instructions.

I. Training for Emergency Call Handling

All operators and supervisors shall receive training specific to responding to emergency calls.

5.12. Reports

Reports requested shall be for Massachusetts Relay activities of one calendar month unless requested otherwise by the Contract Administrator. Reports shall be provided in an electronic format acceptable to the Contract Administrator, no later than the 15th calendar day following the month of service or on the next State workday if the 15th falls on a weekend or holiday (unless specified otherwise). All reports provided shall become the property of the State, i.e., the provider shall not copyright them, and they shall become public record. In addition to periodic, ad hoc or other reports requested by the Contract Administrator, the Provider shall provide the following reports shown below. The Contract Administrator may modify the required report formats at any time.

The Provider shall, upon the request of the Contract Administrator, provide the Contract Administrator with professional interpretation, analysis and explanation of any reports provided. Within two months of award, the Provider shall meet with the Contract Administrator to determine types of data available for reporting purposes and to set up any regular monthly reports that may be in addition to those shown below.

A. Implementation Progress Reports: Mandatory

The Provider shall provide the Contract Administrator with regular Implementation Progress Reports. These reports shall be provided at least monthly from the date of Contract award for six (6) months unless requested longer or more frequently by the

Administrator. The specific progress report due dates and the acceptable format for the reports will be determined by the Administrator at the time of Contract award.

At a minimum, these reports will describe the current status in implementation of Massachusetts Relay services, changes in status since the previous report, a project timeline incorporating dependencies, milestones, and deadlines.

B. Complaint and Commendation Reports: Mandatory

The provider shall prepare monthly summary reports for the Administrator and the Advisory Committee regarding numbers of complaints and commendations received and topic areas of the complaints as well as the current status of any and all unresolved complaints to date.

C. Customer Satisfaction Reports: Value-Added

The provider shall report annual customer satisfaction information on the service being provided. The Bidder is asked to provide a detailed plan outlining the process (design and methodology) of conducting the evaluation and disseminating the results.

D. Annual Report: Value-Added

The Provider shall submit an annual report summarizing operations for the calendar year with statistical summaries of usage, trends, complaints and commendations, service performance, Massachusetts Relay features, facility improvements, traffic analysis, and future relay operations.

Traffic projections and costs for the upcoming year shall be included for use in the annual program budget. The annual report shall be due by January 15th of each year.

E. Total Daily and Monthly Traffic Reports: Mandatory

The TRS provider must report total daily and monthly (by calendar month):

- 1 number of incoming calls
- 2 number of outgoing calls (including busy, no answer, disconnected)
- 3 number of completed calls
- 4 number of incoming or outgoing calls that were abandoned by the provider, and
- 5 number of incoming or outgoing calls that were abandoned by the caller

F. Average Blockage Rate: Mandatory

The TRS provider shall report the average daily and monthly (by calendar month) network blockage rate sampled at thirty (30) minute intervals for each 24-hour period. The provider shall not block calls at the Automated Call Distributor.

G. Average Answer Time: Mandatory

The TRS provider shall report average daily and monthly (by calendar month) answer time and range of daily and monthly answer times. See Section 4.34 (C) (D) for details on the measurement of answer time.

H. Average Calls in Queue: Value-Added

The TRS provider shall report average daily and monthly (by calendar month) number of calls in queue (caller is receiving a ringing or is waiting for an available operator). The average length of time in queue both prior to connection (ringing) and after connection (waiting), and the range of times for calls in queue both prior to (ringing) and after connection (waiting) shall be clearly identified.

I. Average Call Length: Value-Added

The TRS provider shall report average daily and monthly (by calendar month) length of call, broken down into call set-up, call duration, and call wrap-up.

J. Operators on Duty: Value-Added

The TRS provider shall report the number of operators on duty by hour of day and day of week for each calendar month.

K. Status of Operator Training: Value-Added

The TRS provider shall report each calendar month on the status of operator training including:

- a. Operator typing proficiency (wpm) (See Section 5.4 (A))
- b. Operator accuracy proficiency (percentage)
- c. Operator combined typing and accuracy proficiency (percentage meeting 60/ wpm and 95 percent accuracy requirement)
- d. Annual number of ongoing training hours completed for Operators
- e. Percentage of operators who are trainees (employed less than 90 days or designated as trainees)
- f. Operator personnel turnover rate (hires, terminations, resignations, transfers, etc).

L. Capacity for Ad Hoc Reports: Value-Added

The Bidder must include information on its capability to provide ad hoc reports including new information in the Bidder's system database, new regulations affecting TRS or new formats for existing information.