****

**Request for Proposal**

Unified Communications and Contact Center Solution

For

**

RFP Issued: 7/10/2018

Bidder’s Conference: 7/19/2018

**Response Due Date: 8/22/2018**

TABLE OF CONTENTS

[TABLE OF CONTENTS 2](#_Toc518983566)

[REQUEST FOR PROPOSAL (RFP) 2](#_Toc518983567)

[1 RFP Overview 2](#_Toc518983568)

[1.1 Introduction 2](#_Toc518983569)

[1.2 Desired Outcomes 2](#_Toc518983570)

[1.3 Technology Preference 2](#_Toc518983571)

[1.4 Executive Overview 2](#_Toc518983572)

[2 Vendor Instructions for response 2](#_Toc518983573)

[2.1 Schedule of Events 2](#_Toc518983574)

[2.2 Contacts 2](#_Toc518983575)

[2.3 Intent to Bid 2](#_Toc518983576)

[2.4 Bidder’s TeleConference 2](#_Toc518983577)

[2.5 RFP Response Format 2](#_Toc518983578)

[2.6 Responsiveness and Compliance 2](#_Toc518983579)

[2.7 Add/Delete Schedule – On Schedule A 2](#_Toc518983580)

[2.8 Manufacturer’s Guarantee of Price Support in Absence of VAR 2](#_Toc518983581)

[2.9 Proposal Delivery 2](#_Toc518983582)

[2.10 Evaluation Process 2](#_Toc518983583)

[2.11 Vendor Demonstrations 2](#_Toc518983584)

[2.12 Performance Bond 2](#_Toc518983585)

[2.13 Instructions to Proposer 2](#_Toc518983586)

[2.14 Payment Schedule 2](#_Toc518983587)

[2.15 Recommended Optional Upgrades 2](#_Toc518983588)

[3 Infrastructure and Environment 2](#_Toc518983589)

[3.1 Locations and Branches 2](#_Toc518983590)

[3.2 Departments 2](#_Toc518983591)

[3.3 Voice Infrastructure 2](#_Toc518983592)

[3.4 IT Infrastructure 2](#_Toc518983593)

[3.5 VoIP Compatible Network 2](#_Toc518983594)

[4 Company Information 2](#_Toc518983595)

[4.1 Vendor RFP Authorization 2](#_Toc518983596)

[4.2 Contact Information 2](#_Toc518983597)

[4.3 Confidential Information 2](#_Toc518983598)

[4.4 Vendor/VAR Background 2](#_Toc518983599)

[4.5 Premise Based System 2](#_Toc518983600)

[4.6 Hosted, Cloud, SaaS, Hybrid System 2](#_Toc518983601)

[4.7 Reference Accounts 2](#_Toc518983602)

[5 RFP Requirements 2](#_Toc518983603)

[5.1 Mandatory Reliability 2](#_Toc518983604)

[5.2 Unified Communications, Conferencing, and Collaboration Requirements 2](#_Toc518983605)

[5.3 UC Telephony Requirements: 2](#_Toc518983606)

[5.4 Unified Communications: 2](#_Toc518983607)

[5.5 Automated Attendant (AA) & Integrated Voice Response (IVR) 2](#_Toc518983608)

[5.6 System Self-Administration 2](#_Toc518983609)

[5.7 Conferencing and Collaboration: 2](#_Toc518983610)

[5.8 Contact Center Requirements 2](#_Toc518983611)

[5.9 Call Recording 2](#_Toc518983612)

[5.10 API and Integration Tools 2](#_Toc518983613)

[5.11 Integration with Current LAN/WAN 2](#_Toc518983614)

[5.12 VoIP Network Readiness Assessment 2](#_Toc518983615)

[5.13 Proof of Concept 2](#_Toc518983616)

[5.14 Phased Deployment/Migration 2](#_Toc518983617)

[5.15 Implementation Requirements 2](#_Toc518983618)

[5.16 Warranty, Maintenance and Support 2](#_Toc518983619)

[6 Premise Based Solutions 2](#_Toc518983620)

[6.1 Solution Architecture and Platform 2](#_Toc518983621)

[6.2 Voice Messaging System Description 2](#_Toc518983622)

[6.3 Implementation Requirements 2](#_Toc518983623)

[6.4 System Administration 2](#_Toc518983624)

[6.5 Warranty Questions 2](#_Toc518983625)

[7 Hosted, Cloud, SaaS Solutions 2](#_Toc518983626)

[7.1 Solution Architecture and Platform 2](#_Toc518983627)

[7.2 System Administration Questions 2](#_Toc518983628)

[7.3 Warranty Questions 2](#_Toc518983629)

[8 UC Solution 2](#_Toc518983630)

[8.1 Telephone System 2](#_Toc518983631)

[8.2 Voicemail System 2](#_Toc518983632)

[8.3 Unified Communications, Collaboration, Conferencing 2](#_Toc518983633)

[8.4 Mobility Applications 2](#_Toc518983634)

[8.5 VoIP Specifications 2](#_Toc518983635)

[8.6 Encryption 2](#_Toc518983636)

[9 Contact Center 2](#_Toc518983637)

[9.1 Contact Center Questions 2](#_Toc518983638)

[9.2 Contact Center Reporting 2](#_Toc518983639)

[9.3 Contact Center Recording 2](#_Toc518983640)

[9.4 Omni-Channel Contact Center 2](#_Toc518983641)

[10 Implementation Requirements 2](#_Toc518983642)

[10.1 Installation 2](#_Toc518983643)

[10.2 Training 2](#_Toc518983644)

[10.3 SIT and UAT Solution Testing 2](#_Toc518983645)

[10.4 Cutover Coverage 2](#_Toc518983646)

[10.5 System Acceptance 2](#_Toc518983647)

[11 Contract Terms and Conditions 2](#_Toc518983648)

[11.1 Customer General Provisions and Requirements for Contractors 2](#_Toc518983649)

[11.2 Order of Precedence 2](#_Toc518983650)

[11.3 General Conditions 2](#_Toc518983651)

[12 Attachments 2](#_Toc518983652)

[13 APPENDIX A: INSTRUCTIONS TO Vendor (PROPOSER) 2](#_Toc518983653)

[14 APPENDIX B: General provisions 2](#_Toc518983654)

[15 APPENDIX C: requirements for contractors 2](#_Toc518983655)

[16 APPENDIX D: County of Marin department list 2](#_Toc518983656)

[17 APPENDIX E: LOCAL BUSINESS PREFERENCE CERTIFICATION FORM 2](#_Toc518983657)

[18 APPENDIX F: County of marin non-Disclosure AGREEMENT 2](#_Toc518983658)

REQUEST FOR PROPOSAL (RFP)

1. RFP Overview
   1. Introduction

The County of Marin in the State of California(County, Customer or Client) wishes to replace its aging telephone systems, all Avaya, with a new telecommunications platform at all of its sites. While this project is driven by the need to replace the 18-year old current telephone system, the County also wishes to use this opportunity to evaluate new communications technology that will increase productivity and enhance service quality. The County desires a modern communications system that allows workers to communicate with each other and the public using voice (and potentially chat / video / text messaging) in a cost-effective, reliable, and secure environment. The new telecommunications platform will support a total of approximately 3600 stations at 19 Customer sites. See the County of Marin website for more information about the county: ( https://www.marincounty.org/ ).

The County of Marin is seeking proposals from qualified respondents (Vendor or Proposer) for the installation of a new Unified Communications and Contact Center (UC&CC) telecommunications platform (Solution). The County has retained Communication Strategies (Consultant), an independent technology consulting firm, to assist in the design, evaluation, and implementation of this new UC & CC platform.

* 1. Desired Outcomes

The goals of this project are to:

* Replace the present telephone system with a modern Unified Communications and Contact Center platform
* Provide integrated communications with Microsoft Office 365 Skype for Business
* Be cost effective considering total cost of ownership (TCO)
* Start installation in Q4 2018 and complete deployment by end of August 2019
  1. Technology Preference

Customer expects that vendors will bid a system that reflects current technology and supports industry direction.

Customer will only consider new (not used) equipment on a system platform that is currently supported by the manufacturer of such equipment and represents the current “Go to market” platform for the manufacturer for our solution requirements. End of Sale, End of Life, and End of Service solutions will not be considered. Furthermore, manufacturer must provide written assurance that they will provide ongoing software/hardware support for the solution and all quoted products for six (6) years after the date of the proposal, or a minimum of five (5) years after the date of Purchase.

Customer prefers an On-Premises solution. Non-premise solutions, such as Hosted, Cloud, SaaS (System as a Service) and Hybrid solutions will be considered if they are compliant with the stated requirements and satisfy the desired TCO goals for the project. Solutions will be evaluated on a five (5)-year Total Cost of Ownership (TCO) based on initial purchase price, recurring charges, software upgrades, and ongoing maintenance. Vendors should describe any unique savings or advantages to their solution in the Executive Summary or body of the RFP response.

Vendors that can do both On-Premises and Non-Premises solutions are encouraged to provide two quotations (t Section 2.5.2) and two Bill of Materials (Section 2.5.3) along with one RFP response (Sections 2.5.1 and 2.5.6), noting in the RFP response to each question any differences between their On-Premises and Non-Premises solutions.

Customer would be willing to consider reusing elements of the current telecom infrastructure if there was a significant cost saving and it did not restrict their ability to implement desired functionality now, and in the future. If you are not reusing their current infrastructure, you may quote a trade-in price for the applications currently installed.

* + - 1. If existing systems are going to be re-used by the Vendor, the Vendor is required to upgrade any such system, and Vendor should include the cost for hardware/software/labor to upgrade the system to the current software release, hardware platform and specifications, and integrating it with the rest of their system without the involvement of Customer or other Customer vendors. All work on the existing/retained hardware must be performed by technicians certified on such equipment that are employed by a VAR in good standing of that hardware.
      2. Additionally, this upgrade and integration must not affect current users that are attached to the existing telecom system.
      3. The Vendor must address any issues related to the retained systems remaining integrated to two different platforms (existing and new) and migrating users from one system to the other (probably with overlapping dial plans) over a phased multi-month implementation cycle.

Vendors that wish to provide a quote to upgrade the existing phone system are strongly encouraged to provide two bids – one as an upgrade to the currently installed technology, the second as a complete and new installation. Any such quote requires that the new system functionality be implemented without any degradation or interruption in service to the existing telephone system. The logistics of deploying the new system while the old system remains operational should be considered and explained below.

Respond with your compliance (see Section 2.6.5) with all requirements above, and describe in the Executive Overview section what technology type(s) you are bidding.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Executive Overview

In this section, the Vendor should deliver an introduction to, and summary of, the RFP response and its specific fit for Customer. It should be structured so anyone reading only this section will have a clear understanding of the response and why the solution best fits Customer’s specific requirements. Customer requires a Visio (or equivalent) drawing in this section that shows the internetworking of all equipment, integration points, and applications quoted. Please limit this response to 2-4 pages. Your overview should directly address the Customer’s stated requirements, so don’t just provide generic marketing collateral. This is your chance to highlight your strengths and to explain how your company is uniquely qualified to exceed their expectations.

Response:

1. Vendor Instructions for response

This RFP is not an offer by Customer to enter into a contract under these or any other terms. Customer shall have the right to make its selection decision on any basis, in its sole discretion. All costs for proposal preparation are the responsibility of the Vendor. RFP responses are bound by California Public Records Act (Government Code 6250 et seq.) and may not be marked as confidential, as all materials submitted are considered a public record by the County.

* 1. Schedule of Events

|  |  |
| --- | --- |
| **Dates** | **Activity** |
| July 10, 2018 | RFP distribution |
| July 18, 2018 | Intent to Bid |
| July 19, 2018 @ 10 AM | Bidder’s TeleConference |
| August 13, 2018 | Final Day for Vendor Questions |
| **August 22, 2018 @ 1 PM** | **Responses Due** |
| September 11 – September 12, 2018 | Vendor Demonstrations |
| October 16, 2018 | Board Approval |
| **October 26, 2018** | **Contract signed** |
| October 29 to November 28, 2018 | Consultation and Design |
| November 28, 2018 to January 2, 2019 | Core Equipment delivered, installed, programmed, and Vendor tested |
| January 2 to January 18, 2019 | User Acceptance Testing |
| January 21 to February 8, 2019 | Proof of Concept (PoC) Trial |
| **February 8 to August 31, 2019** | **System Phased Deployment Deliveries and Cutovers (End Date)** |
|  | *Dates are estimates and may change depending on the needs of the Customer* |

* 1. Contacts

Vendors may contact Communications Strategies for any questions related to this RFP. Salient responses will be posted to the County web site and/or emailed to all Vendors who responded with an Intent to Bid as addendums to the RFP. Telephone calls are permitted; however, verbal communications are not binding and should not be relied upon until confirmed in writing. Direct communication with any other person at Customer regarding this RFP is not permitted.

Contact Name: Dennis Bell, [Dennis@Com-Strat.com](mailto:Dennis@Com-Strat.com), 408-476-8291

CC on all emails: Kathy Harrington, KHarrington@marincounty.org

* 1. Intent to Bid

**Vendors must notify Customer of their intention to bid, or not to bid, by the date noted above in the Schedule of Events.**  You should use the form below for your Intent to Bid and it may be copied into an email response to Communication Strategies and Customer. If an intent to bid is not received by the due date, Vendor may be excluded from further consideration. Additional information and Addendum communications will be delivered to the contacts delineated in the Intent to Bid. As well, Vendor should return a signed Non-Disclosure Agreement (NDA) in Appendix F to receive additional confidential network information from the County as described in subsequent sections.

|  |  |
| --- | --- |
| Vendor Company Name: |  |
| Sales representative name, telephone number and email address: |  |
| Technical advisor name, telephone number and email address: |  |
| State the Manufacturer, Service Provider, or System Vendor intends to propose: |  |
| # of people who will attend the Bidder’s Conference: |  |

* 1. Bidder’s TeleConference

A bidder’s conference will take place by teleconference, details which will provided by email to the Vendor contacts in the Intent to Bid. Each responding vendor should have a representative attend the teleconference. Please note that not all items or questions brought up during the conference will necessarily be released in an addendum.

* 1. RFP Response Format

Customer’s requirements are summarized in this RFP Word Document, as well as the RFP Excel Spreadsheet Schedules. Both documents should be reviewed to engineer a solution that is fully compliant.

**Schedule A** Pricing Worksheet, **Schedule B** Counts and Capacities, and **Schedule C** Features and Functionality are Mandatory Response documents. Instructions for completing these forms are included on the respective spreadsheets in text boxes or Comments that appear when you hover your cursor over the title of a row or column. Vendors should read and understand ALL spreadsheet instructions in these text boxes and cell Comments.

**Bill of Material** – Vendor must also provide an itemized Bill of Material (BoM) detailing parts, quantities, model numbers, and list price organized in a similar fashion to Schedule A but on Vendor’s normal proposal documents. Vendor must ensure that the total cost on the Bill of Material matches the Schedule A. Vendor should include Pro Forma calculations for Sales Tax, Shipping, other Taxes, and Regulatory/Usage Fees on their BoM.

Attachments – Vendors should respond with all documents listed in Section 12 [Attachments](#Attachments) in electronic, searchable form. Please use file names that use the section number and/or document name listed in the Attachments.

Appendices/Brochures – The RFP response document and RFP Schedules must stand without appendices or reference to brochures, or technical documents, and these additional documents will not be read as part of the evaluation. The only exceptions to this are listed explicitly in the RFP questions.

Vendor should respond in the Word and Excel documents provided, with inline responses. Where the option is given, Vendor should respond to each question with its stated compliance, choosing from the following options:

* Comply, Included - Feature/Functionality in the proposed solution fully complies with all items in the listed requirement and the price is included in the proposed solution base pricing in the Schedules.
* Partial Comply, Included - Feature/Functionality is included in the base pricing provided, and generally (though not exactly) provides the functionality requested. Explanation of any deviance from requested description must be provided in the response, including any work around.
* Optional Cost, Not Included - Feature/Functionality is available at additional cost, and is not included in the base price for the proposed solution. Pricing is defined on Schedule A in the Options sections at the bottom of the spreadsheet.
* DO NOT Comply - Feature/Functionality is not available in the proposed solution.

Responses should be stated in the body of the document following the specific questions. Please indicate your compliance (*use the provided check*  *boxes - double click on the correct box, then click on “Checked” and then click on OK*) and provide the requested response underneath the compliance line and in **BLUE**. The following styles have been created for your convenience. Please note your compliance in bold and explain only as requested or necessary on the next line.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Response text – Vendor should answer the question, explain compliance or describe their solution on the next line, still in blue, but not bolded.

**It is important to note that any material modification to the questions in this RFP by the Vendor will result in immediate rejection of that proposal. Do not add or delete rows or columns, change formulas, or re-label any cell in the Excel documents. If an error in the RFP is noted, please bring it to Communication Strategies’ attention as soon as possible.**

* 1. Responsiveness and Compliance

RFP responses **may be disqualified** if they do not meet the RFP requirements upon review of any workaround or alternate strategy recommended by the Vendor. Disqualification is not automatic and may be tempered by the overall compliance of the proposed solution at Customer’s sole discretion. If a Vendor responds as compliant, and it is later discovered that a Vendor is non-compliant to one of the RFP requirements, Vendor will be considered to be in material breach of contract, and Customer will have access to all remedies provided by the contract, this RFP, and rule of law, including cancellation of the contract with a full refund. Vendor may (within reason) submit a written response/answer to any of the following sections prior to the official due date and the evaluation committee will determine if your response will be considered materially compliant to the requirement if there is ambiguity.

Pricing must be provided for each element in the RFP and any proposal that does not provide pricing in the base price or optional price section (as defined by Schedule A) will be considered non-responsive and may be excluded from consideration. If Vendors require any further information or discovery in order to respond, it is important that they provide all questions as early as possible in the RFP process to allow Customer to research and reply. Pricing should be turnkey including discovery, design, implementation, integration, testing, training, hardware and software. Any responses along the lines of “Further information is required to provide firm pricing”, or “Pricing will be provided upon further discovery” will be considered non-compliant.

* 1. Add/Delete Schedule – On Schedule A

Add Schedule – Customer IT and Purchasing departments require ongoing fixed pricing from the Vendor and Manufacturer/Distributor as a requirement of this RFP. Understanding that the Vendor and Manufacturer may be able to secure ‘special’ up front discounted pricing for equipment purchased in conjunction with the initial deployment, we have added an Add/Delete schedule to **Schedule A** near the Total rows halfway down the document. Discount from List Price should cover both Specified and Non-Specified items.

Delete schedule – Equipment/Software/Licensing/etc. that is purchased but not required for the project should be returned for full credit by the Vendor through prior arrangement with the Manufacturer/Distributor. Vendor can assume that any equipment returned will be shipped at Customer cost and in unopened boxes. Software and licensing will be de-provisioned from the Solution as required by the Vendor.

List Price – The current (or future) Published List Price for the line item as determined from the Bill of Material or from published Price Lists that are available to the Vendor.

Pre-cutover Discount % – should include hardware/software/licensing/etc. costs, for both Specified and Non-Specified items, that can be added or deleted during the phased installation process, prior to final System Acceptance, and closure of the project.

Post-cutover Discount % – should include discounted pricing for hardware/software/licensing costs, for both Specified and Non-Specified items, that would be added or deleted after System Acceptance. These prices should remain valid for five (5) years after System Acceptance, barring pricing changes or product discontinuance from the Manufacturer that are beyond Vendor’s control.

Specified Items – Items listed in the Schedule B response or Vendor’s Bill of Materials (BOM).

Non-Specified Items – Items that are in the Manufacturer’s published price lists for the successful bidder’s entire product line, but are not listed in Schedule B or BOM.

Labor rates shall remain firm for twelve (12) months after the award of the contract at the rates shown on Schedule A, and then constrained to not exceed the inflation rate as defined by the Consumer Price Index CPI.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Manufacturer’s Guarantee of Price Support in Absence of VAR

Vendor should provide a signed and dated letter from the Manufacturer that confirms that the Successful Vendor is currently an authorized Value Added Reseller (VAR) and agrees that if the Successful Vendor loses its authorized VAR status after entering into a contract with Customer pursuant to its proposal, the Manufacturer will honor the prices and discounts offered to the Successful Vendor in its response to the RFP, through an alternate vendor of Manufacturer’s and Customer mutual acceptance, for the remaining term of its contract with Customer. Manufacturer should also agree to accept any hardware or software purchased that was not installed, or was not needed, for RMA with no restocking or other fees and for full refund.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Proposal Delivery

Sealed, printed (double sided preferred but not required), full color, RFP responses must be delivered VIA COURIER to the address below. Please submit three (3) original hard copies signed in blue ink soft-copy of the RFP and response documents is **also required**, and should be in Microsoft Office format allowing us to save a copy as an editable file for internal review. Please email one (1) soft-copy of your response documents to each of the contacts listed previously (limiting emails to 10MB or smaller), to allow for internal distribution of your response. Responses larger than 10MB should be zipped before sending, or sent by Drobox or similar service. File/folder names should be kept short so that we can save to personal folders without exceeding 255 characters total path length. **Vendor is responsible for ensuring timely delivery, and Customer and/or Com-Strat will acknowledge receipt of responses as they come in. If a response is not received to your email of the soft copy, Vendor should contact Com-Strat to ensure that the message was not blocked for some reason.**

MARIN COUNTY PURCHASING DIVISION, 3501 CIVIC CENTER DRIVE, ROOM 404, SAN RAFAEL, CA 94903

* 1. Evaluation Process

All proposals received by the specified deadline will be reviewed by the Evaluation Committee for content, proposed service costs, and capabilities of the Vendor. After initial screening, the Evaluation Committee may shortlist, for further evaluation, those Vendors deemed most qualified based on a review of the proposals. Vendors are advised that Customer, at its option, may award a contract strictly based on the initial proposals. The proposals will be evaluated on the following (in descending order of importance):

RFP Response (50%): A complete and concise response to the RFP that complies with the RFP requirements.

* + - Reliability: A system that has a proven track record of reliability as well as an architecture that is inherently fault tolerant.
    - Functionality: The ability for the system to improve how Customer conducts its mission, including efficiency and effectiveness of communications.
    - Administration: A system that is easy to program, update, and maintain.

Capacity to Deliver (25%): a solution from a viable manufacturer by a vendor with demonstrated ability to design, install, and maintain.

* + - Manufacturer Vision and Stability: Manufacturer’s commitment to excellence, financial stability, market share, and technological vision for the future.
    - Vendor Capabilities and Experience: Evaluation of the Vendor's experience and ability to design and implement the quoted solution.
    - Warranty/Maintenance Support: Ability to provide timely and high-quality support during the installation, warranty period, and ongoing maintenance.

Cost Effectiveness (25%): A cost effective solution when considering Total Cost of Ownership (TCO) as defined by Schedule A response over the first five (5) years.

* 1. Vendor Demonstrations

Customer has set aside the dates noted in the Schedule of Events for Demonstrations/Presentations with the Vendors that make the short list. Demonstrations will be scheduled at 9AM and 1PM of the days noted. Customer would prefer onsite demonstrations, if possible, to minimize travel time and maximize participation among staff. If an onsite demonstration is not possible, Vendors should reserve space at their demonstration facility or Executive Briefing Center for those dates. Vendors should submit their 1st and 2nd choice for date and time when providing their Contact Information in Section 3.

* 1. Performance Bond

The Vendor Respondent to whom a contract is awarded (Successful Vendor or successful Respondent) shall furnish to Customer a Performance Bond executed by a corporate surety acceptable to Customer and authorized to issue such surety bonds in the State of California. The Performance Bond shall be in an amount equal to one hundred percent (100%) of the contract price. The entire cost of the bonds shall be borne by the successful Respondent. Vendor should show the cost of the Bond where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Instructions to Proposer

Vendors (Proposers) are further instructed in their response by the Instructions to Proposer, listed in Appendix A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Payment Schedule

Customer requires the following payment terms, payable net 30 upon receipt of invoice from the Vendor:

* 25% due upon contract execution
* 25% due upon equipment delivery (including hardware, software, and licensing) to specified client site and inventory. Title of equipment shall pass to Customer upon payment of delivery milestone.
* 40% due as progress payments invoiced by Vendor after Installation and User Acceptance Testing of the phases in the mutually-agreed Project Plan
* 10% due within 30 days of System Acceptance, net of any additions or deletions approved by Customer.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Recommended Optional Upgrades

In answering this type of Request for Proposal, Communication Strategies recommends that Vendors provide pricing on the minimum cost alternatives that allow for full compliance with the RFP. However, we would be interested to know what options or upgrades you would recommend to your base configuration. Please name, define, describe, and price each upgrade that you would recommend in your hardware, software, or feature functionality. Please place the brief description and price for these in the applicable section of Schedule A.

Additionally, you can use the space following to provide further explanation of any areas of Schedule C that could not be answered fully on the Excel spreadsheet due to format or space limitations.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Infrastructure and Environment

For each section below please respond whether the solution being proposed will operate in the environment being described. If the solution is non-compliant with any section below, please copy a Response line beneath the section and explain the non-compliance. If there are no notes under a section, it will be understood to be “Read, Understood and Compliant”

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Locations and Branches

Customer’s main (primary) data center location is at 1600 Los Gamos Drive, San Rafael, CA 94903. Customer’s Disaster Recovery (DR) data center is at 3501 Civic Center Drive, San Rafael, CA 94903. Vendor will provide branch equipment at offices throughout the County of Marin as listed in Schedule B.

* 1. Departments

Appendix D lists the departments in the County of Marin.

* 1. Voice Infrastructure

The County has an Avaya Communication Manager voice platform that connects the “main” site, called “Civic Center,” to 18 remote locations. There are approximately 1300+ phones at the main site: 939 digital phones, 161 analog phones, 81 fax machines, 114 modem lines, the remaining are a mix of ring down and other miscellaneous lines. This site has 250+ ISDN PRI trunks (AT&T) which are used for primary for inbound and outbound dialing for this site and the remote sites. There are 16 CAMA trunks used for 911 dialing by all sites. The main Avaya Aura Messaging voicemail system is located at this site.

A robust data center at another location, called “Marin Commons,” hosts a “survivable” site for the Avaya Communication Manager and Aura Messaging system. This facility hosts our Emergency Operations Center (EOC). There are approximately 473 phones at this location: 377 digital phones, 52 analog phones, 26 fax lines, 16 modem lines, and a few IP and SIP phones. There are 96 ISDN PRI (AT&T) used for primary inbound and outbound dialing for this site. A “survivable” voicemail system is located at this site.

There are 18 remote sites connected to the “main” Civic Center site, operating approximately 1706 phones: 1278 digital phones, 165 analog phones, 99 fax lines, 97 modem lines, 34 IP phones, the remaining a mix of ring down, point-of-sale devices, and other miscellaneous lines. Of the remote sites, 16 sites use Avaya G650 and 2 use Avaya Media Gateways. Several of the central and remotes sites use analog ports to integrate with overhead paging systems. Several departments use the Marin Emergency Radio Authority (MERA) consortium radio system.

The present Avaya ACD supports eight (8) call center groups and 48 named agents. Avaya CMS is used for ACD reporting. Call Accounting (CDR) reporting is done with the Calero VeraSMART eCAS system.

Existing Communications Platform:

* Avaya Aura Communication Manager r6.3, 4267 extensions
* Avaya Aura System Manager / Session Manager r6.3
* Avaya AES r6.3
* Avaya ESS r016x.03.0.124.0
* Avaya SBC r7.0
* Avaya CMS r18
* Avaya Aura Messaging 6.3, with 2583 mailboxes and 201 caller applications
* Avaya Aura Conferencing 8.0, with 20 audio-only conference bridges
* Avaya Meet Me Conferencing, with 42 audio-only conference bridges
* Avaya One-X Speech Access, approximately 150 users
* Mutare Message Mirroring v2.0.9
* AVST CallXpress 8, 4 ports, used only for voice recognition automated attendant
* Avaya Presence r6.2
* Avaya SAL r2.5

The County anticipates replacing the entirety of its existing voice infrastructure, except for the Calero VeraSMART eCAS call accounting system, three (3) ISDN PRI to be used for tertiary PSTN trunk failover, and various analog lines (counts listed in Schedule B) that will be retained for use by emergency services (e.g., overhead paging, alarms and elevators), fax lines, and modems – all of which will be integrated to the new system. As well, during phased deployment, the County anticipates that new system will be integrated for extension and PSTN calling with the present Avaya PBX system via PRI/QSIG (46 channels), as further explained in the Requirements.

The County has approximately 4000 DID numbers in use, while it has available 128 100-number DID blocks from its carrier AT&T. (These DID numbers will be ported to the new SIP trunks that will be installed in advance of this UC & CC project.) The County intends to renumber existing extensions that are not already in the 415-473 prefix, continuing to use 4-digit extension numbers.

* 1. IT Infrastructure
     1. Current Network Topology

Customer will provide a current network diagram and listing of network resources in an Addendum to Vendors who submit an Intent to Bid and sign an approved Non-Disclosure Agreement (NDA in Appendix F) with the County.

* + 1. IT Architecture

The County of Marin has a mature and up-to-date IT architecture and infrastructure, which is being leveraged for this UC & CC project. No significant server or network changes are anticipated to support the project or that would affect the project, except as noted below to prepare for the UC & CC project in selected areas.

* + 1. LAN Summary

The LAN network is fully managed by the County, using Cisco routers and switches throughout, running the latest OS. All user access and transport runs on Cisco network equipment, Current IOS, IOS-XE, and NX-OS. Customer’ Access layer LAN consists of new Cisco 3560or Cisco 2960 (24 and 48 port) GigE power over Ethernet (PoE) switches in each closet. There are approximately 100 closets in all buildings and approximately 140 switches total. Existing PoE ports are expected to be used in a converged network drop (port to new voice over IP “VoIP” phone and connect the phone to the user’s PC) and as noted below, County will establish new network connections as needed to provide VoIP phone service.

* + 1. WAN and Internet Summary

The existing data network is AT&T Switched Ethernet (ASE), supporting 26 remote locations, bandwidth per location ranging 5MB – 150MB (most locations range between 5MB – 20MB). There are two ASE networks, one primarily for voice that terminates in a 100Mbps connection at Civic Center, which is the location for the present Avaya primary infrastructure, and another primarily for data that terminates in a 1Gbps connection at 1600 Los Gamos. The County intends to deprecate the voice ASE after this UC & CC project is completed. Several sites are connected by Comcast data services.

Internet connectivity is from two different providers, each with 500Mbps connections.

All network hardware is Cisco. Most remote site routers are Cisco 4331. Customer has implemented VLAN segmentation for the voice and data networks in conjunction with this VoIP implementation, but also expects to continue using static IP addressing for computers

* + 1. WiFi Summary

The County has redundant Cisco wireless controllers and wireless is available in most County offices. The infrastructure uses centralized Cisco 5520 WLAN controllers and WAP1831 wireless access points. Customer expects to be able to use laptop and cellular based softphones/smartphones throughout the enterprise.

* + 1. Data Centers

The County of Marin has its primary data center at 1600 Los Gamos, which will be the location for the new primary UC & CC infrastructure. The county has its secondary data center at the Marin Civic Center, which will be the location for the new secondary UC & CC infrastructure used for geo-redundancy (see subsequent section) and disaster recovery (DR). As noted in Section 3.3, the present Avaya infrastructure has its primary location at Marin Center, so the intended location of the new UC & CC system primary at the primary data center at Los Gamos is a change, and the Vendor is expected to coordinate with the County’s network engineering and server engineering staff in this intended design and implementation. The data centers each have a virtualized server environment (both Hyper-V and VMware at both data centers). The network connection between the Civic Center and Marin Commons is a 10GB connection. We have one path to the Internet, out of Marin Commons. We have two Internet providers, hardware Cisco ASR routers running BGP.

* + 1. Disaster Recovery Strategy

Customer has a secondary Data Center at Civic Center which mirrors or backs up the primary Data Center at 1600 Los Gamos. In the event of an incident at the Primary Data Center users and applications will fail over to the secondary servers through DNS load balancing, secondary gateway paths, and/or manual intervention.

Backup power: Both the primary and backup data center have on-site generators and uninterruptible power systems (UPS) to retain power until the generators come on line. The County will also have UPS (minimum 30 minutes) at all remote site wiring closets

In the case of a DR incident, workers will be able to VPN to a VPN concentrator for both telephone and server access. Access will be through Cisco IPSEC VPN clients, although there may be a plan to move to SSL VPN in the future.

* + 1. Firewall Summary

Edge traffic from the internet passes through Cisco 2130 firewalls before and after reaching the DMZ.

There is currently a firewall within the LAN, as one of the Cisco 2130 is used to for all voice and data traffic to the County Sheriff offices at 1600 Los Gamos. The successful Vendor will be requested to provide the minimum port listing that must be opened to establish the required system functionality across the firewall.

* + 1. Application and Server Standards

Customer uses the following major applications and server standards:

* Microsoft Office 365 (E3 Governmental).
* Current Server standard – Windows Server 2012 – 64 bit
* Microsoft Hyper-V Windows Server 2016
* VMware ESXi 6.5 with vSphere and vCenter
  + 1. Active Directory (AD)

The County uses Microsoft Azure Active Directory (AD). **Not all County users are on the same domain.** Most users and extensions are in the domain defined for co.marin.ca.us (marincounty.org redirects to this), while about 300 extensions are in the marinsheriff.org domain, and a small number (<30) users in Child Support Services have yet another separate domain. Vendors should review all sections of this RFP for “Active Directory” and answer the questions (e.g., for single sign on authentication) assuming these multiple domains are retained. Vendors must list here any limitations, requirements, and/or suggestions that Vendor may have when conforming to this existing domain architecture and the multiple-domain support requirement for AD.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* + 1. Workstation Personal Computing Standards

Customer is deploying a new Windows 10 (Professional 64 bit) software image in 2018 and it is anticipated that 100% of users will be on the new image by the time the new UC & CC system is deployed. All staff use Microsoft Office 365 with Skype for Business, Government E3 plus Enterprise Mobility (not connected to Avaya). Browsers in use are Chrom, MS Edge, and Internet Explorer. Perimeter security is Cisco AnyConnect R4.5.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* + 1. Software Distribution and Updating Requirements

Customer uses WSUS – Workstation Update Service or Active Directory GPO,SCCM to install and update software on user computers. Vendor is responsible for creating a “pushable” installation package and “answer” script for any required desktop applications (e.g. softphone client) that will install as a silent installation and will not require administrator account at desktop, ‘per user’ customization, IT visits to each desktop, or end user customization.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

We will require a test of any software that will be loaded on the desktop with our standard system images to ensure compatibility. Are there any known compatibility issues with any of the software or hardware above?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. VoIP Compatible Network

It is understood that the current network infrastructure will support an implementation of the VoIP platform envisioned. The vendor can make the following assumptions in order to configure their proposed solution:

Customer’s current preference is to provide dedicated VoIP network PoE ports connected directly and solely to the new VoIP phones. Where this is not possible, due either to difficulty or expense in cabling or deemed undesirable by the Customer, the secondary preference is to run the VoIP network on a converged backplane with the telephone connected to a Power over Ethernet (PoE) LAN switch through the wall jack, and the computer connected to the VoIP telephone. This is contingent on the ability of the telephones to provide an IP address, separate VLAN, and different QoS prioritizations to voice and data. If you cannot support this requirement, please explain your workaround solution below.

QoS is not currently fully deployed in the LAN but all network equipment will support QoS when needed.

Cabling:

* + - 1. 1 x Category 5e or better data drop per office/cubicle
      2. 1 x 4 Pair Category 3 drop per office/cubicle for analog/TDM telephones/devices

The Customer network will support the following as a minimum (we have also noted desired performance in parenthesis, although this level will not be guaranteed):

* + - 1. Latency <150ms (80ms)
      2. Average Jitter <80ms (40ms)
      3. Packet Loss <1% (0.1%)
      4. Peak WAN utilization <80% (50%)

MPLS, or equivalent, fully meshed WAN infrastructure through a Tier 1 provider with SLAs that would be conducive to the implementation of VoIP to branch offices. QoS, prioritization, and bandwidth allocation would be provided by the carrier.

Internet based IP-VPN, with no QoS, connectivity to remote workers using either VoIP deskphones or softphones.

Customer will provide a redundant/resilient core LAN switch that will aggregate traffic from the edge routers through redundant GigE uplinks, provide redundant 10/100/1000 Ethernet ports to telephone servers, have redundant power supplies, provide QoS, prioritization, Layer 3 routing, and enhanced routing capabilities such as Rapid Spanning Tree.

Customer will provide access LAN equipment that will provide 10/100/1000 Ethernet, Power over Ethernet (PoE), Quality of Service, Layer 2 switching, VLAN support, and basic port based security.

Edge routers that will support the required inter-office connectivity, QoS, prioritization, and bandwidth allocation.

19” 4 post, racks in the Server Room – most racks have square holes~~,~~

Wall mounted racks in IDFs, telephone closets and smaller branches.

UPS Battery Backup, power, cooling, patch panels, and MDF to IDF inter-connectivity, as required.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Company Information
   1. Vendor RFP Authorization

To receive consideration, proposals shall be made in accordance with the following general instructions:

The signature of all persons signing the proposal shall be in longhand and the primary signer shall have the authority to bind the proposer to the offer. The completed proposal shall not alter the questions and specifications provided, nor add/delete/modify the text provided in the RFP request.

The submission of a proposal shall be an indication that the proposer has investigated and fully satisfied themselves as to Customer’s requirements and site conditions that will be encountered, and the scope of the work to be performed.

The pricing provided by this proposal is all-inclusive pricing for the turnkey installation of the solution proposed, including but not limited to all discovery, design, implementation, integration, testing, training, trouble shooting, hardware, software, and licenses. Pricing must remain valid for 90 days after RFP response due date.

**This RFP, your response to the RFP, Appendices, Schedules, Addenda and written modifications to the RFP requirements will be incorporated into the final contract as indicative of the overall scope of work under which you are awarded the contract (and as a material inducement for Customer to enter into contract), further defining the contractual responsibilities of the Vendor.**

Full Legal Name of Vendor:

Signer’s Name and Title:

Address:

Phone #:

E-Mail:

Contractor’s License Number and/or Federal ID #:

The following individual is an authorized officer of the company with the authority to commit the company to the terms and requirements of this RFP. This individual, or their agent, has had the opportunity to review this Request for Proposal and asserts compliance with the requirements therein; except where noted otherwise.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and make an Offer to Contract according to the terms of the RFP response:

**Signature Authorizing Vendor RFP Response Date**

Physical signature is required for hard copies.

* 1. Contact Information

|  |  |
| --- | --- |
| Bidding Company Name: |  |
| Head Office Address: |  |
| Branch Office (responding or closest to customer) Address: |  |
| Sales Representative name, telephone number and email address: |  |
| Technical Advisor name, telephone number and email address: |  |
|  |  |
| What is the UC system manufacturer, platform, model, and software version being proposed? |  |
| What model numbers of telephones are being proposed? |  |
| What is the voice mail manufacturer, platform, model, and number of ports? |  |
| What is the Contact Center manufacturer, platform and software level being proposed? |  |
| What is the LAN/WAN infrastructure manufacturer, model numbers, and port density being proposed? | N/A |
| Will the Vendor sub-contract any portion of their Scope of Work; if so, to whom, and for which part? |  |
| Which Warranty/Maintenance Level or Package is included in the base proposal for the first year (and additional years if different)? |  |
| Who will provide 1st level warranty/maintenance service and who will Customer call when service is needed (Vendor, Manufacturer, Joint, other, etc.)? |  |
|  |  |
| 1st date/time choice for demonstration if shortlisted: |  |
| 2nd date/time choice for demonstration if shortlisted: |  |
| Location for Vendor demonstration if shortlisted: |  |

* 1. Confidential Information

If any of the financial or market share information requested in Section 4 is deemed confidential by the Vendor, Manufacturer, or Service Provider (collectively called “Company”) – and that information is not generally available knowledge (for instance if the Company is privately owned and has never publicly disclosed such information) such information may be classified as Confidential by the Company.

Confidential information (as defined by the relevant Freedom of Information Act that governs Customer) can usually be exempted from Open Government ‘Access to Information’ Acts. State the relevant grounds for Confidentiality in your response below. Additionally, if Company would like to confirm the nature of their Confidential information, they may contact the County (“Contacts”) for authorization prior to the RFP Due Date.

Any information that is narrowly, reasonably, and defensibly construed as Confidential should be provided separately sealed or encrypted from the main RFP response, and will only be opened by an authorized Officer of Customer which is approved and authorized by Company to view such information. Any required NDA, or determination of authorized officer, should be provided by Company prior to the RFP Due Date to allow the Vendor to provide a complete RFP response.

Any Vendor that does not provide a complete response due to claims of Confidentiality that are found to be over-reaching, or that tries to claim its entire response as Confidential – will be considered non-responsive and may be eliminated from further consideration upon the sole discretion of Customer.

Note below any information that Company and Customer have agreed to be Confidential, and the reason it is confidential.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Vendor/VAR Background

Provide a brief (two or three paragraphs) overview and history of the company responding to the RFP.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please state how many years your company has been selling or installing this manufacturer, this system, and/or the solution that you are quoting. Please summarize your certifications, annual sales volume with the provider of the solution, Distributor tier and any special recognition awarded by the system Provider of each component (UC, Collaboration, Contact Center, Data Network, SaaS – System as a Service, etc.) you are proposing.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

How many customers or installations does the Vendor have with this exact same system and version, installed within 150 miles of Customer?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Briefly summarize the typical Scope of Work, Project Plan, and process for deploying a Solution such as the one described in this RFP (2-4 paragraph maximum).

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Briefly describe Vendor’s standard procedures for cutover coverage, trouble identification/reporting, and punch list resolution. (1-2 paragraph maximum, details can be provided in following sections.)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Briefly describe Vendor’s standard procedures for warranty and maintenance coverage, who would provide maintenance labor and hardware, and how repairs would be provided. (1-2 paragraph maximum, details can be provided in following sections.)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Premise Based System

Only answer the following section if you are quoting a Premise based solution.

Provide a brief (two or three paragraphs max) overview and history of the Manufacturer of the system being proposed.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Manufacturer Financial Statements – Attach to your response a copy of the Manufacturer’s last 2 years audited Income Statement and/or Tax Return, as well as your Balance Sheets for those years. Please summarize key numbers into the table below. Include as an Attachment to your response a copy of this year’s Gartner Magic Quadrant report (or similar) that shows the manufacturer’s position.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

|  |  |  |  |
| --- | --- | --- | --- |
| **Manufacturer Financials** | Last Quarter | Last Year | Previous Year |
| Dates reported: (example 7/2016-62017 or Q2 2017) |  |  |  |
| Sales |  |  |  |
| Income from Operations |  |  |  |
| EBITA Income (non-GAAP) |  |  |  |
| Net Income after all Expenses (GAAP) |  |  |  |
| R&D % of Sales |  |  |  |
| Short Term Debt |  |  |  |
| Long Term Debt |  |  |  |
| Market Capitalization |  |  |  |
| Market Share (Source: ) |  |  |  |

Briefly summarize the history of the solution platform being quoted that has brought it to its current point of development. Summarize the future vision of the system.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

How many offices does the Vendor have? What # of manufacturer certified technician does the Vendor directly employ within a 150-mile drive of Customer? How many total technicians does the Vendor have certified on this solution? How will the Vendor provide sales, installation, warranty and maintenance support in cities where they have no on-site personnel?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer prefers that the project manager and lead engineer for this project be based within a 150-mile drive of Customer. Will Vendor be able to meet this requirement? If not, how will you organize the project to ensure onsite attendance during key discovery meetings and installations/cutovers.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Hosted, Cloud, SaaS, Hybrid System

Only answer the following section if you are quoting a Hosted, Cloud, SaaS (System as a Service), or Hybrid System (generically referred to as Cloud). Service Provider (SP) is hereby defined as the company that hosts, provisions, runs and maintains the Cloud Solution. Manufacturer refers to the maker of the underlying SaaS technology if it is not internally developed by the SP (such as Broadsoft, Cisco HCS, etc.)

Provide a brief (two or three paragraphs max) overview and history of the Service Provider company, including a history of the development of the solution being proposed.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Service Provider Financial Statements – Attach to your response a copy of the SP’s last 2 years audited Income Statement and/or Tax Return, as well as Balance Sheets for those years. Please summarize key numbers into the table below. If the Cloud solution being quoted only represents a portion of the SP’s total revenue, also state the annual revenue derived from the Cloud solution. What # of companies and # of users does the SP have under contract? What is the customer retention/renewal rate? Include as an Attachment to your response a copy of this year’s Gartner Magic Quadrant report (or similar) that shows the Service Provider’s position.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

|  |  |  |  |
| --- | --- | --- | --- |
| **Service Provider Financials** | Last Quarter | Last Year | Previous Year |
| Dates reported: (example 7/2016-62017 or Q2 2017) |  |  |  |
| Sales |  |  |  |
| Income from Operations |  |  |  |
| EBITA Income (non-GAAP) |  |  |  |
| Net Income after all Expenses (GAAP) |  |  |  |
| Revenue directly attributed to quoted Solution |  |  |  |
| Short Term Debt |  |  |  |
| Long Term Debt |  |  |  |
| Market Capitalization |  |  |  |
| Market Share (Source: ) |  |  |  |
| # of Customers, # of Seats/Users |  |  |  |
| Customer retention/renewal rate % |  |  |  |

Briefly summarize the history of the solution platform being quoted that has brought it to its current point of development. Specify whether the technology is internally developed, or developed by a different Manufacturer (such as Broadsoft, Cisco, Avaya, etc.) Summarize the future vision of the system as it relates to the quoted Solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Will the Vendor/VAR participate in the actual programming, implementation, training, testing, cutover of the Cloud solution? Will the Vendor/VAR participate in maintenance and troubleshooting for the solution? Or, will the Vendor/VAR only participate as a Sales Agent with all installation and maintenance processes completed/delivered by the Service Provider?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the Vendor/VAR/Service Provider responsible for programming, development, and implementation of the solution come onto Customer Site for meetings, or will the deployment be conducted primarily (or exclusively remotely)? Briefly summarize the typical Scope of Work, Project Plan, and process for deploying a solution such as the one described in this RFP. (1-2 paragraph maximum, details can be provided in following sections.)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What services are included in the quoted solution after installation – Tier 1 help desk, Tier 2 troubleshooting, Tier 3 maintenance, Moves/Adds/Changes, Additional programming, Call Center programming, Reporting, etc. (1-2 paragraph maximum, details can be provided in following sections.)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Reference Accounts

Provide contact information for a minimum of three local references, using the same Solution being quoted. Please endeavor to make these references as similar to Customer as possible, ideally including: having a similar set of features/functionality, same industry, same size, and located within 150 miles of Customer.

|  |  |
| --- | --- |
| Company name and location |  |
| Contact name, position and phone number |  |
| Solution/Products installed |  |
| Size of system |  |
| How long installed |  |

|  |  |
| --- | --- |
| Company name and location |  |
| Contact name, position and phone number |  |
| Solution/Products installed |  |
| Size of system |  |
| How long installed |  |

|  |  |
| --- | --- |
| Company name and location |  |
| Contact name, position and phone number |  |
| Solution/Products installed |  |
| Size of system |  |
| How long installed |  |

In addition, provide at least one reference account that has experienced negative service issues. Please describe how your organization responded to the issue(s) and possibly improved internal processes.

|  |  |
| --- | --- |
| Company name and location |  |
| Contact name, position and phone number |  |
| Solution/Products installed |  |
| Size of system |  |
| How long installed |  |

1. RFP Requirements

This section and Schedule C, contain minimum and/or Mandatory requirements for the proposed solution and each question must be answered in order to be considered responsive. Questions should be interpreted by Premise and Cloud/Hosted/SaaS/Hybrid providers as needed to be applicable to their Solution.

* 1. Mandatory Reliability

The following is Customer’s minimum requirements for resiliency of the quoted solution. Explain below how this level of reliability is provided by the system for core features/functionality such as UC and Contact Center, at the turnkey price.

* + - 1. No Single Point of Failure (99.999% availability) for core applications – Any element in your design that would cause the failure of a significant portion of the system should be made redundant. If redundancy is not available for this element, then the element should be duplicated or made highly available by adding hot swappable redundant power supplies, RAID hard drives, etc. In addition, software upgrades should be able to be loaded to the system while in operation, with no, or momentary, downtime to implement the software patch. It is acceptable for ancillary systems such as Collaboration, IM/Presence, reporting, and call recording to be unavailable while a cold spare is provisioned or a server rebuilt/recovered. Vendor should return the server to service from a recent backup to ensure maximum business continuity.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Geo-Redundancy is required (mandatory) in the quoted solution, where separate, redundant server pairs of the UC & CC solution must be located in separate Data Centers (i.e., Los Gamos and Civic Center). Ancillary systems do not need to be geo-redundant.

* + - 1. Can you separate the primary and redundant servers for each application between the Primary Data Center and a DR Data Center for Geographic Diversity?
      2. What WAN bandwidth, latency and architecture will be required to implement geographic redundancy?
      3. Will the servers be active/active or active/passive?
      4. If connectivity to the Primary Data Center is lost will phones and softphones automatically failover to the DR Data Center; and if not, what manual steps must be taken?
      5. How long will the failover from Primary to DR take, and how would the Solution recover to normal operation upon recovery of the Primary DC?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Virtualization – Customer prefers virtualized servers to minimize hardware requirements, and allow for transparent server hardware replication and failover. Which parts of your equipment stack will support server virtualization and which hypervisors do you support for these? Would you encourage or discourage the use of virtualization in the quoted Solution? If you are virtualizing any of the Server/Application/Compute loads in your Solution, how will you manage the infrastructure to ensure that there is no oversubscription of CPU, I/O, Storage, Memory, NIC and other shared resources?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Contact Center Redundancy – Contact Center (CC) queuing, announcements and routing should be able to survive a failure of the WAN. The Redundant Data Center (DC) should stay automatically synched with CC changes at the other DC during normal operating mode, but be able to operate independently if the Primary Data Center is unavailable. Historical reporting does not need to be maintained during a failover; however, the DR Contact Center should continue to compile statistics during the failure. Upon recovery, the Primary Contact Center should re-compile statistics from the failure duration DR CC with the main statistics store, and full reporting should be available for the outage period. How would the proposed solution provide this functionality?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Centralized Trunking – Incoming calls, DID numbers, and trunks will be centralized to the primary Data Center and (if applicable) a Disaster Recovery location, and extended to the branches through the WAN and the UC system. If the remote branch is not available to take calls due to a failure of the branch or the WAN, calls should be directed to a pre-determined alternate destination (main company greeting, HQ operator, outside phone number, or the voicemail box) automatically.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Resilient PSTN Gateway – Redundant hot swappable power supplies in each gateway that terminates PSTN/PRI/SIP circuits, or two gateways that will continue to operate independently if the other gateway fails will be accepted as an alternative if PSTN ports and DSP resources are distributed among the gateways to allow for resiliency.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Branch locations –Customer requires branch survivability for Telephony features at the “Medium Locations” in Schedule should WAN connectivity to the primary and secondary UC & CC servers be lost. Customer requires two (2) 1MB or CO analog lines per location for 911 failover.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Unified Communications, Conferencing, and Collaboration Requirements

Customer requires a solution that provides a Unified Communications (UC) platform for its employees. Please include pricing for these applications on Schedule A, and describe below, your UC solution that will provide:

* + - 1. Telephone system and voicemail functionality – as defined within this RFP including Schedule C
      2. Hardware and Software Phone capability, Conference room audio endpoints, SmartPhone application
      3. Unified Messaging
      4. Mobility - Extend Calls to Cell Phone
      5. Find Me, Follow Me
      6. Instant Messaging and Presence (IM/P) Collaboration Client
      7. Microsoft Skype for Business Integration
      8. Audio and Web Conferencing (Optional)
      9. Click to Call
      10. Texting (Optional)
      11. Fax Mail (Optional)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. UC Telephony Requirements:

Telephone Specifications for Customer Telephone Specifications are noted on Schedule B in a comment box that can be seen when you hover over the Station name in Column A.

* + - 1. All telephones should be GigE 10/100/1000Mbps, meaning that they can supply a switched Ethernet port to an attached computer at Gigabit Ethernet speeds.
      2. Phones that utilize paper designation strips for button labels will not be accepted.
      3. Analog Stations - The proposed system must allow analog stations to access substantially all of the features available to VoIP telephones through the use of feature access codes – especially conference and transfer.
      4. FXS (analog station) ports must provide Telco Central Office Line equivalent standard 90v AC at 20 MHz with 5 REN ringing voltage and 48v DC talk voltage in order to interface with 3rd party equipment such as fax machines, modems, etc.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Provide a brief description and picture for each telephone being proposed below, including data speed (10/100/1000), number of buttons available, how any soft-keys work, and which PoE class (including nominal/max power usage, as well as average/actual power usage). Please note if any of the phones require a wall mount kit and include pricing in the Schedule A. Please fill in the model number that you have quoted for each phone type onto the appropriate line of Schedule B.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Provide a screenshot and brief description for the PC softphone highlighting its features and functionality. Show examples for both Windows and Mac computers. Will calls to a soft phone be able to ring simultaneously on an attached (USB) headset/handset as well as at the PC? Will computers that do not have multimedia speakers be able to ‘ring’?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Phone Dual Register - As further addressed elsewhere in this document, Customer has deployed Skype for Business (SfB) to several hundred users – where all County staff have the Microsoft E3 license (no PSTN calling). Please describe whether your proposed telephone stations or softphones are able to “dual register” to both the proposed UC system and/or with SfB. If so, would the phone be able to search the SfB directory by name and instant message (IM) them?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Generic Phones - Customer is interested in knowing whether generic (3rd party) telephone stations will operate on the proposed UC system. Please list those here, if available, and describe any limitations in functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If a color display option is available (and not already included in your proposal) include the incremental cost to upgrade all telephones to color in the options section of Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Do headsets require an external amplifier to provide adequate sound quality and volume? Do the telephones quoted have a “headset” mode where the handset does not need to be removed from the cradle, or is a handset lifter required? Does the phone have a separate headset jack, or does it connect in line with the handset?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer intends to place display sets in Fire House sleeping areas and would like to know if the display automatically turns off or dims after non-use for a period of time.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer is interested in cordless telephones that would allow their personnel to move around their buildings. A cordless telephone will allow selected staff to answer calls to their shared phone while away from their station and provide basic call transfer and rudimentary multiline functionality. Describe any Digital Enhanced Cordless Telecommunications (DECT) capable telephones available with multi-line functionality. Describe any WiFi capable telephones available with multi-line functionality. If this capability is 802.11 based, will it work with access points from multiple Vendors? How is QoS over WiFi provided by the solution? What Codecs are supported by the devices? What security and authentication protocols are supported? What type of headsets are supported on the WiFi phones? Specify DECT phones in the base price to the count shown in Schedule B.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Telephony Features – Customer currently uses the following features which should be supported in the quoted solution: distinctive ring (internal vs. external call), ring groups, hunt groups, simultaneous ring groups, pick-up groups, directed call pick-up, directed hold pick-up, directed call park (park+extension to park, unpark+extension to retrieve), personal speed dial lists, department speed dial lists, list of most recent received phone numbers, list of most recent dialed phone numbers, and authorization codes to override toll restriction. Please let Communication Strategies know if any of these features needs to be further defined in order to answer this question. Please respond with your compliance to these features, any features that are not supported, any required work-arounds, and any limitations to the number of phones in a pickup group, ring group, page group, or shared extension.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Telephone Outbound Caller ID (always)– Customer requires that the UC system have the ability to program the caller ID behavior for outbound calls (for non E911 calls) for individual extensions, selecting from caller ID will be one of: extension primary DID number, designated extension number (e.g., for executive wanting caller ID to show as their assistant’s DID), designated department DID number, or block caller ID (NO caller ID).

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Telephone Outbound Caller ID for Individual Call - Customer desires the ability to disable outbound caller ID on an individual call basis (for non E911 calls), if that extension normally has a caller ID. Customer also desires the ability to enable caller ID on an individual call basis, if that extension normally has caller ID blocked. Customer desires individual caller ID disable/enable to be a button on the phone that selects that behavior for the call. Please respond below whether your system provides these abilities or similar.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Voicemail ease of use – It is imperative that any new voicemail platform be easy to use and require users to only press one (1) button for single digit prompting to access commonly used features. The voicemail platform should allow recording and saving of multiple greetings per user, and allow easy selection of which saved greeting to use. Please describe whether individual voice mail users can set the play order of saved messages (e.g. play newest saved messages first) and whether users can enable/disable the message envelope (date/time and caller ID) and set playing the envelope before or after the message. Provide a copy of the training document that is provided to new users with the VM Telephone User Interface (TUI) map. **The Vendor is required to set up two guest voicemail boxes on a demo system so that we can test the user interface. Please provide a phone number and login information below**.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Voicemail multiple telephone user interface (TUI) – Customer intends to move all users to the new voicemail TUI as part of this project. However, Customer is interested in knowing whether the Vendor voicemail solution has the ability to have multiple TUIs. If so, please list those TUIs by name and if there is an optional cost, please add that to Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Voicemail Web Interface – Customer desires the ability for users to manage their voicemail from a web interface without needing to log into Unified Messaging (UM). Describe your voicemail web interface capabilities, whether it will use single sign on (SSO) with Active Directory (AD) authentication, confirm that reading/deleting messages in the web interface will appropriately update the phone message waiting indicator (MWI), and describe any limitations in the interface.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Music on Hold – Customer requires music on hold (MoH) at all locations. In order to minimize traffic on the WAN in a VoIP implementation, the system should be able to provide music on hold from the PSTN gateway at each location. Please describe if the system provides the ability to play standard .wav or .mp3 files as music on hold from a file saved on the gateway. Please describe if the system can provide multicast music on hold that would stream one audio connection to each location (not one audio connection for every call on hold). Please describe if the system can be configured to stream music on hold as G711 while the rest of the VoIP traffic between locations is G729. Please note if conference calls that are put on hold while adding parties are able to speak with each other and not hear music on hold.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

911 – The proposed solution should be 911 compatible, which we define as:

* + - 1. Route calls over appropriate local PSTN connections that are identified by the Telco Central Office with the correct address at the Public Service Answering Point, even if that route is different from the standard Least Cost Routing route for that station and location;
      2. Allow a 911 call to be made from any station, even if that station is restricted to extension dialing;
      3. For stations that do not have local PSTN connections, calls over the WAN/VoIP infrastructure should correctly send a default location for that station to the PSAP that will differ from the rest of the stations that connect over those PSTN connections;
      4. The operator or system administrator should be notified when a 911 call is made from the phone system.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Enhanced 911 (E911) – The following functionality, generally referred to as E911 compliance, is required by Customer in addition to basic 911 compatibility. Please state your compliance, and briefly describe how your solution would meet the following requirements, as well as your overall E911 strategy and abilities.

* + - 1. Complete calls to the Public-Safety Answering Point (PSAP) from any live extension when it dials either 911 or 9911.
      2. Send calling station DID number or an alternate ELIN (Emergency Location Identification Number) to the Public-Safety Answering Point (PSAP) on the PSTN trunks (SIP). Customer anticipates providing the PSTN carrier a Public Safety Automatic Line Identification (PSALI) database with every DID/ELIN number associated with an exact location for that station to the individual room (i.e., street address / building / room number).
      3. Provide an export from the telecommunications platform of the ALI database in a format (e.g. NENA) suitable for upload to the carrier (e.g., using West/Intrado or the Telco’s designated interface).
      4. Notify internal extensions through on-display, email, or other real-time means when a user dials 911, and what extension has placed that call. This notification should be immediate as 911 is dialed and not delayed until after the 911 call is completed.
      5. Provide generic ELIN (matches to ALI) information to the PSAP to allow for correct identification of the caller’s general location (site and building) in the event a station is not in the ALI database provided to the carrier. Assign a temporary ELIN/DNIS number to any extension that does not have a DID number to allow the PSAP to call the station back in an emergency.
      6. Automatically update the user’s location for E911 when they log in to a different phone with their same extension or move their phone to a different area of the building, or to a different office. Vendors are asked to explain their solution for this changed-location E911 requirement in detail, where it is anticipated that either each LAN port will have an associated ELIN or that the proposed system will poll LAN switches periodically for attached MAC addresses on every port and then match any changed phone station locations using the station MAC address for its DID number, in either case the solution having the exact room location served by that LAN switch port. Ideally, the solution will integrate with the PSTN carrier PSALI database so that the Customer does not need to manually update the PSALI database.
      7. Provide the ability for the PSAP to dial back to the station ELIN that made the 911 call, including the situation when more than one 911 call is placed in a short time period.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Departmental “must answer” line shared on multiple phones. This is a button that appears on a group of telephones to be answered by anybody in a department. Callers would access this line either by direct dial, operator transfer, or zero out of voicemail. It should have multiline attributes so multiple calls can be ringing into the group simultaneously. This button should include a Message Waiting Indicator (MWI) for voicemails to this extension in addition to the user’s voicemail. Please describe how this is accomplished and any drawbacks.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

ADA Americans with Disabilities Act – Please describe the features in the proposed telephones for use by those with hearing or vision impairments as required of Electronic and Information Technology (EIT) by Section 508 of the 1998 amendment to the Rehabilitation Act, as specified in the Information Technology Industry Council (ITIC) Voluntary Product Accessibility Template (VPAT). If special telephones and/or software are required for compliance, please provide a brief description and picture. Please provide any optional pricing in the appropriate line of Schedule A. The Customer anticipates using soft phones with headsets for the hearing impaired. The Customer will continue to support necessary TTY devices using standard analog lines, which TTY devices are out of scope for the present quotation.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Dial by Name – All telephones should have the ability to search a Customer directory by name (Dial by Name). Due to the number of people and duplicate names in this directory, Customer would like the ability to search for a name within a location. Ideally, the directory and associated dial-by-name would provide entries for the “local directory” (e.g., caller first selects a site from a directory, then the system shows the names for that site only), perhaps as an alternate to the “full directory” of all names. Describe your proposed system’s dial by name capability and any local directory capabilities for dial by name.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Overhead Paging – Several Customer locations have overhead paging systems that are integrated to the phone system using analog lines and DTMF signaling, and these systems will be retained (see counts in Schedule B) and must be integrated to analog ports on the proposed UC system gateways at the respective sites.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Paging over VoIP –Describe your ability to page through the proposed system’s telephones, note any restrictions in the number of telephones that can be in a page group. Is paging (as described here) a unicast or multicast data stream? If unicast, can paging be programmed to utilize a lower bandwidth codec than normal inter-office calls?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Call Accounting System – Customer requires an enterprise wide Call Accounting System, also called a Call Detail Recording (CDR). Preferably, Vendor will be able to interface to Customer’s existing Calero VeraSMART eCAS call accounting system, which currently uses Avaya Reliable Session Protocol (RSP) for that interface. Alternately, Vendor should specify a call accounting system that provide reports for inbound/outbound/internal phone calls per employee and department, traffic reports for Telco trunk groups and station hunt groups, and peak busy hour usage reports with grade of service and recommended trunking, where Vendor is responsible for fully programming the Call Accounting system and ensuring that it is loaded with appropriate rate tables, reports and alarms. Please describe whether you will interface to VeraSMART or a different call accounting software package below. Provide pricing in Schedule A where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If Vendor is specifying its own call accounting system, will the package provide alarms and notification for suspected toll fraud activity (hacking)? Will the software provide exception reports for long calls, expensive calls, or restricted calls? Software should allow for accurate charge-back billing to individual departments. Reports for individual departments must roll up to a consolidated system wide report. Please describe procedures and pricing for rate table updates.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Unified Communications:

Unified Messaging with Microsoft Office 365 – confirm that all of the following features/functionality can be attained simultaneously by a user on the quoted Solution as integrated to Office 365 Exchange, and briefly discuss how this functionality is provided. Note any exceptions or workarounds.

* + - 1. Voicemail messages appear in user’s Email Inbox on their computer, Outlook Web Access, and iPhones/Android/other smartphones (ActiveSynch);
      2. Voicemail messages which appear in the user’s Inbox have the actual voicemail attached as a .wav or mp3 file that can be played from the computer or SmartPhone;
      3. Email Inbox, SmartPhone Inbox and Voicemail Mailbox remain in synch as messages are played and deleted from each and the other interfaces;
      4. Voicemail messages that are listened to from the computer or SmartPhone will turn off the Message Waiting Indicator (MWI) on the UC system;
      5. Messages that are deleted from the computer or SmartPhone are deleted from the voicemail store and moved to the deleted items folder;
      6. Messages that are deleted through the telephone user interface of the voicemail are deleted from the email and SmartPhone inbox and moved to the deleted items folder.
      7. Messages can be saved to personal folders, .pst files, or document management system by dragging and dropping from Outlook or OWA (does not require a user to “Save As” a message for retention).

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Voicemail Transcription (Option) – Customer is very interested in the ability for the UM solution to transcribe voicemails to text in an email through Speech Recognition. Multilanguage translation in the transcription would be especially useful (e.g., the caller leaves a voicemail in Spanish, and the system transcribes the message into English text.) Please describe how transcription functionality can be provided in the solution that you are quoting, and price as an option in Schedule A. Vendors will not be disqualified if they can’t provide this functionality, but it is highly desired by all staff. Vendors should enable speech to text in its guest voicemail box demo system.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Mobility: Extend calls to cell phone (simultaneous ring) (Mandatory) -- Provide in the UC base price for four hundred (400) users the ability to automatically extend a phone call to a user’s desk phone and their cell phone simultaneously, in such a way that the call can be answered at either device. If a call is not answered it should forward to the user’s UM box. Describe whether the cell phone call recipient must press a digit after answering the call for the Solution to recognize answering, or whether the proposed System connects the call to the cell phone automatically on answering. When the call is extended to the cell phone, the caller ID of the original calling party should be passed to the display of the cell phone. Describe how the Solution is administered and implemented below.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Click to Call: Customer desires the ability to click to call from Microsoft Excel, Microsoft Word, or web pages with designated telephone numbers using the softphone. Please describe your solution’s ability to provide click to call.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Fax Mail Server (Option): Customer is interested in a small fax server capability as an option. Describe any fax server optional functionality of your platform. Can fax be automatically directed by DNIS/DID to a user’s personal mailbox? Will the presented document be a Tiff or .PDF (preferred) file? Can a user create and send a fax from their desktop using a custom cover page and a library of pre-existing documents? What format (word, .PDF, excel, etc.) can the pre-existing documents exist in? Please provide the optional cost in Schedule A where shown for the quantities of ports and users shown in Schedule B.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

SMS Texting (Option) – Customer is interested in the ability to do SMS Texting to and from their DID number on the proposed system. This functionality could be provided from the telephone or a UC client. Customer desires a texting solution that integrates with the proposed solution and becomes part of the quoted Unified Communications (UC) environment. Please provide a description of your ability to provide such integrated texting using hard phones, soft phones, integrated mobility phones, CC agents, and email. Provide option pricing where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Automated Attendant (AA) & Integrated Voice Response (IVR)

Automated Attendant Requirements (Mandatory) – Customer has approximately 150 automated attendants answering department lines. All incoming calls to these departments are required to direct calls based on DTMF-received dialed digits in a menu tree, i.e. Automated Attendant (AA). The AA must have time-of-day scheduling for business and after-business hours menus. Business hours vary among departments; therefor the AA must be able to use 20 different sets of business hours or allow variable definitions. Likewise, days of the week vary among departments and daily schedules must allow customization. The AA must have the ability to transfer to an extension telephone or directly to an extension voicemail box based on dialed DTMF digits. The AA must have the ability to transfer to an extension on a timeout if the caller does not dial a digit. The AA should allow Customer staff to easily change recorded announcements. Describe any ability to edit announcement .wav files (just add/delete certain sections) so the administrator does not have to re-record an entire message. The proposed system should have the ability to provide reports on Automated Attendant traffic, including which options are chosen, when and how many callers hang-up, and where callers are transferred to. Explain below how automated attendant is provided by the system at the turnkey price.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

IVR (Option): Customer anticipates the future development and deployment of IVR applications for use in self-service applications. Please summarize below whether your solution can provide this functionality, how it would be provisioned. Describe any text to speech capabilities. Describe any speech recognition (e.g., yes/no, numbers) capabilities. Provide optional pricing (rough order of magnitude) where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. System Self-Administration

Self Service Web Portal – Customer is interested in the ability of the proposed system to provide one or more of the following web-based self-service capabilities to end users. Please provide optional pricing where shown in Schedule A. Please indicate, for each feature, whether your proposed system provides that self-service ability and, if so, whether that change can be made from a hard phone, softphone, or web page:

* + - 1. Telephone display name
      2. Telephone forwarding and find me / follow me schedule
      3. Telephone personal speed call list
      4. Destination number for extend calls to cell phone (simultaneous ring)
      5. Voicemail name
      6. Voicemail “dial 0” extension
      7. Voicemail PIN (security code)
      8. Voicemail notification options
      9. Voicemail greeting selection (e.g., out of office/vacation greeting)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Conferencing and Collaboration:

UC Client and Multimedia Collaboration (Option): Customer is interested in the ability of the Solution to provide Collaboration functionality for its employees as an alternative to Microsoft Office 365 Skype for Business (SfB). Please describe the collaboration functionality, including: instant messaging and presence (IM/P), adding voice (including conferencing), adding video conferencing, and adding screen share from the Solution client. Describe integration with Office 365 Exchange calendar to schedule “meet me” meetings. Describe the ability to provide meet-me conferences with that do not require a pass code. Describe any ability to integrate with the existing LifeSize video conferencing systems in two (2) rooms. Provide screen shots as appropriate. Please provide optional pricing for all users in Schedule A options where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Microsoft Office 365 Skype for Business (SfB) Integration (Mandatory) –Customer requires integration of the proposed solution to Microsoft Skype for Business, which its users have access to through their Microsoft E3 licensing. Of primary interest is required Busy/Call presence federation from the phone system to show in the SfB client. Of secondary interest is the desired ability of a SfB desktop user to click to call from within the SfB client that then launches a call to the UC system phone to complete the extension or PSTN call, where SfB acts like a tandem switch in setting up and connecting the outbound call and the intercom call. Describe the integrated operation of the System with SfB, including 4-digit extension dialing if available. Summarize the components required for the functionality being requested, how it integrates with the phone system and the desktop computer, and screen shots of the application.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Audio/Web Conferencing (Option) - Customer would like to receive optional pricing for an audio and web conferencing bridge for up to one hundred (100) users that would be integrated into the proposed solution and displace its use of existing conferencing providers. The bridge should be configured for a minimum of 100 simultaneous participants (for premise providers, this would be the minimum number of ports) across all conferences, and at least twenty (20) participants per conference. Briefly describe the application below, how it integrates with Office 365 Exchange and Calendar for sending internal and external meeting invitations , how the application is configured supported in the Solution, the pricing model, and the ability to expand the functionality in the future. Provide optional pricing in Schedule A where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Contact Center Requirements

As mentioned earlier in this document, due to the complexity of the Contact Center (CC) requirements at Customer; this [Contact Center Requirements](#ContactCenterRequirements) in Section 5, [Contact Center Section 9](#ContactCenter), and the requirements shown in Schedule C delineate the requirements for compliance to the RFP.

* + 1. Contact Center Groups

Customer has eight (8) departments that require Automatic Call Distribution (ACD) and Contact Center (CC) functionality. Vendor should include in the base price both the ACD/CC Solution platform and the ACD/CC licensing using the agent and supervisor counts in Schedule B. Vendor should also include in the base price the discovery, design, test, and training for ACD/CC in eight (8) departments, using as a starting point the department’s existing call flows, including caller options and queue announcements. Below is a list of the groups.

* + - 1. Sheriff Court Dictation
      2. District Attorney
      3. Planning Department
      4. H & H Services
      5. Box Office
      6. Enhanced Court Collections
      7. Tax Collector
      8. Munis Help Desk.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Contact Center Advanced Requirements (Mandatory except as noted as Optional) – The County requires advanced contact center (CC) capabilities, and the proposed solution must be able to deliver advanced Skills Based Routing and Reporting functionality. Key features are highlighted below. Please state your compliance with the CC requirements of this RFP here, and describe or summarize the functionality provided as well as any architectural components that support this functionality. For requirements marked optional provide pricing where shown in Schedule A.

* + - 1. Skills based routing where calls are distributed to agents based on agent skill and proficiency;
      2. Advanced CC reporting that tracks call statistics from the time that a call enters the system till the call is ended, even if the call enters or exits the built in IVR system, or is transferred between queues;
      3. CC Agent – view queue status for all groups/skills assigned;
      4. CC Supervisor – view real-time and historic queue and agent status across multiple groups;
      5. CC Team Lead – monitor queue status and listen to and train agents;
      6. Database Dips – look up caller information in Customer provided database based on phone number or other identifier provided by the caller, and make routing decisions based on that information (Optional);
      7. Screen Pops – Pop the caller’s record in a CRM application provided by Customer (Optional);
      8. Call Back – Caller is able to request that the system call them back when an agent becomes available (Optional).
      9. CC Call Recording – Recording solution that records 100% of CC agent and supervisor calls;
      10. CC Announcements - Customer staff can easily change recorded announcements.
      11. Wallboards – to show queue and agent status and performance to a room (Optional)

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Skills Based Routing – Customer has fairly advanced CC needs that require true skills based routing. Some groups have the requirement for specific skills such as being able to provide investment advice, and the ability for an agent to cover for multiple skills. Skills with **proficiency ratings** are required so that senior agents will handle more calls than junior agents that are still in training. The CC system should direct calls to the most skilled, longest idle agent. Placing agents in multiple groups and using standard CC call flow with Group overflows will not be accepted as a workaround to true Skills Based Routing. Please describe the Skills Based Routing architecture of your solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Priorities – The system should be able to assign different priority levels to different types of calls. Higher priority calls should be answered first, even if other calls have been waiting longer for the same skill. System should be able to elevate the priority of a call after a pre-defined threshold so that lower priority calls do not get stuck behind incoming higher priority calls. Describe the algorithm your system uses for this functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Work from Home (Mandatory) – Customer desires that employees be able to work from home in the base price for DR conditions. How can allowing Agents to work from home be provided by your solution – describe the functionality and any architectural implications?

* + - 1. How will the user experience for agents and supervisors differ from normal “in the office” mode? Will the features and functionality available to CC staff be identical to being in the office? Will supervisors still be able to monitor and listen to agent calls? Will CC calls be recorded? Will real-time dashboards correctly show the status of remote agents as well as be available for viewing by remote agents?
      2. Customer would like to configure remote agents in California. These agents would be able to log into the Call Center over Internet VPN and receive calls distributed by the HQ system. Agents should be able to select either the softphone client (data connection for voice path) or a 10-digit number for their home or cell number to receive CC calls.
      3. Describe any implications regarding related to where PSTN connections are made, where greetings are played, where CC recordings are stored, etc.
      4. Describe the applications and per unit pricing required to achieve each of the business goals above for remote agents. Is this base system functionality or additional cost – in either case provide pricing on Schedule A?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

In order to avoid potentially poor sound quality from residential quality internet connections – can the call be extended on PSTN to the user’s home or cellular number but maintain call control with the Call Center – including recording, supervisor monitoring, and call handling such as transfer/conference?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If a VoIP or soft-phone is used how will agents be able to hear their phone ring if they are normally using a headset and they step away from the desk or take off their headset?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Multimedia (OmniChannel) Contact Center (MM CC) (Option) – Customer requires the CC to have the ability to receive and route interactions other than voice. These interactions should be treated in the same manner as voice calls and be assigned priorities, call handing scripts, skills, overflows, etc. Please describe your system’s ability to support the multimedia interactions listed below. List the optional price per agent (uplift from voice only) in Schedule A.

* + - 1. Email – received and routed
      2. Web Chat – Customers press a Web Chat “button” to open a web chat session with a customer service agent

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can an agent work a live and deferred interaction (such as phone call and email) simultaneously? Can a deferred interaction be “put on hold” while the agent answers live interactions? Can a deferred interaction such as an email or IM be “transferred” to another group or agent? Can an agent manually ‘pull down’ a deferred interaction while dealing with a live interaction to work both simultaneously? Will the system deliver two interactions (such as 2 chats) so they can be handled at the same time?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

MM CC Reporting – Time spent by agents responding to live and deferred interactions should be tracked similarly for agent occupancy, average time to answer, contact duration, etc. Describe any differences for MM CC interactions versus standard voice interactions. How is an agent working multiple interactions at the same time reflected in reports?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Personal Queue – It would be ideal for an agent to be able to give out a special phone number or extension, so that callers can call them back, and have the system direct the call to them – but have it still tracked as an CC call. This call should be treated as an CC call for reporting and functionality. If the specific agent is not available when the call is received, call flow should present the call to others in the agent’s queue, and then to the overall Customer Service group if it still not answered. This overflow should be immediate or after a slight delay, as desired by Customer. Describe how your system would be configured to provide Personal Queue functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Agents should be able to see how many calls are in the queue, how long the longest call has been waiting and how many agents are logged in and ready to receive calls. This information may be presented on the telephone, on a PC based agent software, or both. However, at least one of the methods above is required. Please describe how this functionality will be provided by the proposed solution and include a screen shot below your description. Does the dashboard have the ability to flash, beep or change color when certain pre-determined alarm thresholds are met, such as: no agents available, or time that a call has been waiting in queue?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Extension calls – A number of the calls received by each of the CC queues at Customer are from internal callers or extensions at other branches. For this reason, it is critical that extension calls and intercom calls are properly reflected in all CC reports, just as if they had been an outside caller. Additionally, when an CC agent transfers a call to an employee that is not configured as an CC agent, the CC system should treat this call as transferred or outflow, but never as abandoned.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If a caller is transferred to multiple queues during a single call these calls should be tracked in the peg counts of each of the groups, but also be reflected somehow by the system as a multistage call so that total call statistics can be reconciled against total system statistics as a single call. How can your Solution accommodate this?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer would like the CC system to provide the ability to customize and enter wrap-up codes electronically, and to have the system prompt the agent to enter the code. Ideally, an agent should not receive another call until a code is entered. Does the system provide the ability to mark calls with disposition or wrap-up codes that can be used in reports to determine the source or type of call? Are wrap-up codes entered from the telephone or the PC? Can multiple codes be entered against a single call? Will the system prompt or require an agent to enter a code at the end of a call?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Database Dip and Caller Self Service (Option) – Customer anticipates the future integration of the IVR and CC system to one or more customer-service applications for self service. Please describe the general capabilities of your proposed system for this functionality. For instance, are callers able to have limited IVR functionality while waiting in the CC queue. Can your system first identify the expected wait time (EWT) for a caller, and if it exceeds a threshold, then allow the caller to enter their account number and PIN, and get basic information about their account or case read to them? Callers should be able to ignore the request and continue to queue, or enter the information requested while still retaining their position in queue. Please summarize below whether your solution can provide this functionality, how it would be provisioned, and provide optional pricing (rough order of magnitude) where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Screen Pops (Option) – Customer anticipates the future integration of the CC system to one or more customer-service applications for improved CC call routing and handling. Please summarize below whether your solution can provide this functionality, how it would be provisioned, and provide optional pricing (rough order of magnitude) where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Call Center Personal Lines - Describe whether CC hard phones allow agents to make and receive personal calls on their phone that are not tracked as CC calls and are able to have personal calls forward to their personal voicemail, but CC calls will not go to voicemail.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Caller option to remain in Automated Attendant – caller should be able to listen to IVR or automated attendant menus while waiting in queue, and press digits to choose options (such as to leave a message, return to the AA, or listen to information). Once the call is ready to be answered by an agent the caller should be allowed the choice to speak with someone live or continue in the information menu.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

CC Wall Board (Option) – Customer currently has no CC wallboards, but is interested in knowing whether the proposed CC system can support live wallboards with queue status, agent status, and SLA status. Please provide optional pricing where shown in Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Call Recording

Ad-hoc (option): Customer desires the system to provide ad-hoc “on demand” call recording for selected users as an option. Describe your system’s ability to initiate and stop call recording using a button on the station. Describe whether ad-hoc recordings could be done from the beginning of the call (i.e., all calls are recorded all the time for selected extensions, but only saved for a particular call when the button is pushed. Please include the option cost (per user) in Schedule A where shown.

All Calls (mandatory): Customer requires the system to provide all calls recording for CC calls and selected public safety lines (see count in Schedule B). The following items are mandatory (or optional requirements where noted), and should be included on Schedule A:

* + - 1. All calls to Contact Center agents should be recorded and recording should continue as calls are transferred around the UC system or to CC supervisors.
      2. Inbound and outbound calls to the Contact Center stations should be 100% recorded.
      3. Recorded calls should be easily searchable by the extension that handled the call, the time the call was recorded or the phone number of the caller. “Pause recording” which allows an agent to pause a recording when a Social Security number or Credit Card number is being read. Recording should continue after the pause as a single recording.
      4. Ability to make notes in the call recording player application that allows for search and/or retrieval.
      5. Certain telephones that are recorded should have a special line appearance that is not recorded to allow for private conversations. The should be able to pick the non-recorded line manually for personal calls.
      6. A solution that will automatically beep periodically when the call is being recorded would be an additional means to meet notification requirements.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. API and Integration Tools

Customer wishes information about the integration tools and environment for all components of the proposed solution, including: UC, CC, AA, IVR (option), and call recording. Customer is interested in the ability to make changes itself in the integration and/or add customizations for new or changed applications. Please describe whether such a self-development capability exists and how it works. Include a description of the development language, APIs, etc. and provide documentation in an attachment (or web links) as needed to show the full capabilities of those integration tools.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Integration with Current LAN/WAN

Customer will be retaining its current IT infrastructure. Vendor is expected to work in concert with Customer, outside Vendors and other specialists to configure a LAN, WAN, and PSTN configuration that is 100% operational and suitable for the Solution. Vendor will be responsible for providing consultation, best practice recommendations, sample configuration scripts and programming guides for the network hardware and software revision levels that Customer has deployed. Network consultation and engineering will include all existing LAN/WAN switches, routers, and firewalls. Typically, Customer will provide a copy of the current configuration, and Vendor will provide a change control document that will amend the current configuration to support the requirements of the implementation. Customer (or 3rd party specialist) will then implement the changes that are designed and vetted between Customer and Vendor into existing IS systems.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer has implemented VLAN segmentation and basic quality of service (QoS) at most locations. Customer will coordinate with Vendor’s recommendations for QoS, as well as creating VLANs for other types of data devices, and configuring trunking on access layer ports. Vendor will consult with Customer to obtain satisfactory QoS and will provide sample configuration files for Cisco switches and routers.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. VoIP Network Readiness Assessment

VoIP Quality and Performance Expectations – It is expected that a Voice over IP installation will be reliable and provide high quality voice. We define the following as our minimum acceptable performance for VoIP telephone systems:

* + - 1. Provide 99.999% uptime of all applications during regular office hours;
      2. For LAN calls using G711 or G722, telephones should deliver an average Mean Opinion Score (MOS) of 4.5 (better than toll quality), and minimum Mean Opinion Score of 4.0 (toll quality);
      3. For WAN or G729 calls between locations, telephones should deliver an average Mean Opinion Score of 4.0 (toll quality), and minimum Mean Opinion Score of 3.5 or better (cell phone quality);
      4. Telephone calls will be free of echo, choppiness, sound artifacts, poor sound quality, and dropped calls.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Best Practice Configuration – An initial discussion (upon contract award) will be held between the Vendor and Customer to review all IS infrastructure systems (including all hardware versions, software revisions, and routing/switching programming), and important applications and data flows on the LAN/WAN. Upon completion of this initial discovery, Vendor will provide recommendations for upgrades and remediation as needed, as well as Best Practice documentation and recommendations for deployment of Network and QoS configuration.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Readiness Scope of Work – Once the production LAN infrastructure has been upgraded to support VoIP (per the results of the Vendor recommendations above), Vendor will conduct a VoIP Readiness Assessment of the newly upgraded LAN. This assessment should be performed within one week of the installation of any new LAN equipment to support VoIP, and configuration of QoS on all links, so that Customer has sufficient time to address any shortcomings discovered by the assessment prior to full deployment. **The Network VoIP Readiness Assessment Scope of Work will consist of the following:**

* + - 1. Use of a standard testing tool such as Fluke, Vivinet NetIQ, Viola NetAlly, Verint, or equivalent;
      2. Testing Server shall be positioned on the core network switch expected to support the voice communications call server, with testing end-points strategically positioned in the voice VLAN of each office;
      3. VoIP Assessment should test mesh connectivity between all WAN segments and offices (not just remote to core);
      4. An initial test should be performed where call traffic is gradually “throttled up” to the limit set in Call Admission Control to ensure that the QoS bandwidth allocations are sufficient to prevent discarded packets;
      5. Once voice capacity is established, Vendor should generate data traffic, such that the uplink from an IDF to the MDF is saturated to near 100% utilization while generating test voice traffic, to ensure that QoS on the LAN is properly implemented to prioritize voice packets over data packets.   
         This test will be repeated one time for each different access layer switch type to ensure that implemented QoS methodology is working correctly;
      6. In order to test end-to-end QoS, Vendor should generate data traffic, such that the uplink from the Core Router to the Provider Edge (PE) Device is saturated and the Edge router is forced to shape traffic and drop excess data packets in favor of higher rated QoS voice packets, before putting traffic into the WAN link. Voice traffic will be generated and measured during the saturation test and Vendor will provide a Mean Opinion Score (MOS) for the voice traffic under load;
      7. In order to test QoS over the WAN, Vendor should generate data traffic from multiple remote locations, such that the uplink WAN link from the WAN provider to the PE WAN router and CPE Core Router is saturated and the WAN provider is forced to shape traffic and drop excess data packets in favor of higher QoS voice packets, before putting traffic into the WAN link. Voice traffic will be generated and measured during the saturation test and Vendor will provide a Mean Opinion Score (MOS) for the voice traffic under load;
      8. For the saturation tests above, the Vendor will provide all testing methodology, hardware and software that will be used to generate sufficient traffic to flood the uplinks from the IDF to the Core in the LAN, and between locations on the WAN. These tests will need to be conducted after business hours so that they do not impact business processes;
      9. A normal testing session will then be initiated between all end points using expected voice loads and actual data traffic and should last no less than 3 days;
      10. Testing shall use the G.711/G.722 codec using ~64kbps with a 20ms jitter buffer on the LAN. If your system recommends other “Best Practices” then testing should match manufacturer recommendations;
      11. Testing shall use the G.729 codec using a 20ms sampling rate and 40ms jitter buffer on the WAN. If your system recommends other “Best Practices” then testing should match manufacturer recommendations;
      12. Test results should include: throughput (bandwidth), packet loss, packet delay (latency), jitter (variable latency), and the minimum and average Mean Opinion Scores that can be expected per LAN/WAN segment;
      13. Vendor will then interpret, and summarize the findings and provide a verbal and written recommendation for any remediation;
      14. If the initial test of the network fails, and remediation is required. Vendor will retest the network one time (with the same process as above) after remediation is complete, and prior to bringing the new voice system into production.
      15. This Network Readiness Assessment Scope of Work is our minimum acceptable SoW and may not be reduced or answered as non-compliant by the vendor. Nonresponsive or noncompliant responses may be eliminated from further consideration. Please note your compliance below and comment on any additional methodologies recommended or variance recommended by your prior experience or the Manufacturers specifications.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please comment on the diagnostic tools you will use and the type of report that we would expect to see. Please include a sample VoIP Readiness report in the softcopy provided with this response (paper copy not required). It is expected these tests will be performed by the awarded Vendor, or a sub-contractor that specializes in this type of analysis.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What tool will be used to generate the required data traffic load on the LAN and WAN, in order to flood the uplinks and WAN circuits? Please note that this traffic generator may need to generate 10G worth of data on uplinks from the IDF to the MDF and 1G at other points in the network.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

After the initial VoIP network readiness assessment, Vendor will be required to explain and price any additional remediation recommended in order to achieve the goals above. Once Customer has implemented the remediation, and the network has been certified through a follow-up assessment, the Vendor and Service Provider/Manufacturer are expected to guarantee the installation (other than WAN carrier quality issues). If the installation fails the requirements in this Section(for example due to dropped calls, poor quality calls, static, echo):

* + - 1. Vendor will have five days to identify the problem,
      2. Customer (and WAN provider) will assist in problem identification/resolution under the direction of the Vendor,
      3. Vendor will need to provide definitive proof that the problem exists in the underlying Cabling/LAN/WAN/Network fabric if there is an assertion to that effect,
      4. Vendor will have five additional days to correct the problem if it is in the hardware they have provided.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If the Vendor cannot provide a voice solution that supports VoIP to Industry Standards, and this RFP (after Customer’s implementation of any LAN/WAN remediation or upgrades recommended by Vendor), and cannot rectify the problem per the section above, it will be considered a material breach of contract on the part of the Vendor/Service Provider. Vendor will allow Customer to return the Solution for a full refund, and remove the system once an alternate solution has been put in place by Customer.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Proof of Concept

Implementation of the new system will follow the Proof of Concept (PoC) model for deployment. All required servers will be deployed within Customer’s network, and PSTN access will be installed onto the system. Customer will then fully deploy required functionality to a pilot group of users in three (3) locations. If it is discovered that the system is materially non-compliant with the requirements of this RFP, or the specified reliability and quality cannot be provided (and cannot be remediated by Vendor within a reasonable amount of time); Customer will be allowed to cancel the contract for material breach of contract by the Vendor. Once the functionality desired in this RFP is proven through the PoC, installation will continue for the rest of the system. At that point, all remedies provided in this RFP and by rule of law will remain available to Customer.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

PoC acceptance will be defined as follows. Customer expects that they will move from Proof of Concept to full, phased implementation upon completion of a PoC Delivery and Acceptance agreement that is contingent on:

* + - 1. Installation of all applications required by this RFP.
      2. Solution is complete, reliable, and meeting manufacturer specifications.
      3. All integrations and functionality specified in RFP and SoW perform to expectations.
      4. Solution runs reliably with no outages or downtime for at least two (2) weeks.
      5. System successfully completes mutually agreed System Integration Testing (SIT – Vendor led), and User Acceptance Testing (UAT – Customer led), which will formalize testing of the functionality required in the RFP.
      6. Features of the system are easy to use and logically deployed.
      7. Contact Center (ACD) call flows and functionality are demonstrated to meet design criteria.
      8. Solution is able to generate reports and alerts to the specifications of the RFP.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Phased Deployment/Migration

Once the Proof of Concept (PoC) is complete, Customer intends to deploy the solution to its locations over a period of an estimated 6-8 months per a mutually-agree schedule in the Project Plan, with the phased deployment to complete before the end date shown in the Schedule of Events. This deployment plan takes into account resource constraints within Customer. During phased deployment the existing telephone system and proposed UC systems must interoperate for extension and PSTN calls. During phased deployment Vendor is expected to provide post-implementation support for moves/adds/changes (MACS) programming as part of the base price.

The proposed solution must support Uniform Coordinated Dialing between disparate telephone systems (e.g., using QSIG over ISDN PRI inter-system integration) where a user simply dials an extension number and the phone system inserts, deletes or modifies digits to place the call through dedicated connections to the existing phone system. This is required to simplify integration to the old system during deployment and testing, and phased branch-by-branch rollout of the new system.

The PRI/T1 card used to integrate with the existing Customer voice network will only be required through the implementation period and will no longer be required once the final location is cutover. Customer would be interested in any ability to rent or borrow the required PRI/T1 card so that unnecessary equipment is not purchased. Please explain below how the proposed solution provides the required PRI/T1 card for integration to the existing Customer voice network.

Customer expects to give managers/departments a choice on which type of phone (hardware/software) and the number and type of headsets they will receive. While Customer has provided its best estimate of the counts and types of phones/licenses/headsets in Schedule B that the Vendor is to use for its base pricing in Schedule A, Vendor should expect that these counts will vary somewhat due to the manager choices, so Vendor and Customer will use the add/delete schedule (and unit pricing) and place orders in advance of phased deployment to manage to this expected variance.

Customer expects that surveys of individual buildings and departments (site database) will result in the need for Customer’s cabling contractor to install some additional cable runs and jacks, and to activate some additional NW ports. Vendor will coordinate deployment schedules with this construction/cabling activity and contractor(s).

Vendor should state their compliance with the phased deployment requirements described above. Vendor is asked to list their recommendations for deployment with a multi-site, phased deployment, including any recommendations for Customer to consider based on Vendor’s experience, unique Solution characteristics, and best practices.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Implementation Requirements

Full details about Implementation/Installation **mandatory requirements** are detailed in the [Implementation Requirements](#ImplementationRequirements) section for general requirements, and in the [Premise Based Solutions](#PremiseBasedSolutions), and [Hosted Cloud SaaS Solutions](#HostedCloudSaaSSolutions) sections for platform specific issues and questions. Please review the relevant sections, as well as notes throughout the RFP (such as for LAN integration and VoIP Network Readiness Assessments), for details on the Mandatory Requirements for the RFP.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Warranty, Maintenance and Support

**ALL** hardware, software, and installation labor provided by the Vendor, Manufacturer or Service Provider should be covered by a 1-year parts and labor replacement warranty or first year maintenance plan, and years 2-5 should include Warranty/Maintenance Support, including onsite support if required. All maintenance during the warranty period and under any maintenance agreements shall be performed by Manufacturer certified personnel that are full time employees of a Manufacturer Certified Vendor.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Vendor shall provide 24 hours X 7 days per week X 365 days per year 4 hour response time maintenance support with a defined Service Level Agreement (SLA) on the core Telephone System hardware and software, and hosted services as applicable, listing the price in Schedule A where shown, service including support for:

* + - 1. All Core Telephony, Call Processors and Voicemail servers and applications;
      2. Critical applications such as Contact Center routing, E911, Conferencing servers and applications;
      3. Voice, SIP, PSTN, DSP gateways, appliances, servers and applications;

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Vendor is asked to quote 8x5xNBD support as compared to 24/7/365 maintenance if Customer chooses an option 8x5xNBD support to minimize ongoing yearly cost. This means that service and support would be provided during business hours Monday through Friday Pacific Time 8am to 5pm with replacement equipment delivered by the next business day. Show the decremental cost (a negative number) price in Schedule A where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe below the method(s) Customer can open a ticket with the Vendor, your SLAs for response time and provide a sample escalation document. Customer very strongly desires the ability to directly open a ticket with the manufacturer or service provider if necessary – describe here whether that ability is open to the customer with your solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Telephones do not require a maintenance contract; Customer will maintain spares and purchase replacement telephones as required. However, please provide an optional price for 8x5xNBD maintenance of the telephones where indicated on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Formal Admin Training – Vendor should include tuition or course credits to a Manufacturer/Service Provider recommended and certified for UC, CC, and call recording system administration training classes for three (3) Customer administrators. Please describe the course syllabus, where they are offered and duration of the courses.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Admin Effort – Please estimate how long it would take a trained System Administrator to add a newly hired employee to the Solution, assuming that they will need a new DID number, a new phone, a new voicemail box, they will be a UC Client user, a Call Center agent in 2 groups with Skills and proficiency in each, and mobility “extend call to cell phone” enabled. How long would it take to add 20 users at one time that have the same characteristics as above?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe any additional features of your standard maintenance plan beyond what is delineated above.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe any additional features of your optional maintenance plans beyond what is delineated above. Provide pricing in Schedule A where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Premise Based Solutions

Only answer the following section if you are quoting a Premise based solution.

* 1. Solution Architecture and Platform

Provide a brief description and discussion of the recommended system architecture. Describe connectivity and communication between its integral parts. Include a Visio or Bay Face diagram to illustrate the quoted architecture (not a generic drawing). Also, include a standard data rack elevation showing all Data Center equipment including servers, cabinets, switches and routers. If not already answered in previous sections, please describe which resiliency features have been included into the base price of this RFP response. How does the proposed Solution provide for fault tolerance in all major systems? Please describe any functionality that makes the Solution inherently fault tolerant.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

The Vendor is required to provide, install and maintain all computer servers, OS, VM licensing, and software for the Solution. Vendor is required to coordinate with Customer internal teams to configure antivirus, network, and other security settings. Please describe and provide the specifications of the platform you will be providing below. Explain, which parts of your Solution will be installed on Physical servers, and which parts will be installed on Virtual servers. Provide complete vCPU, NIC, I/O, Storage, RAM, etc. requirements for each server that you plan to virtualize as well as an aggregate count of the vCompute that you will require. Provide this vCompute load for both the Primary and DR Data Centers. The cost for servers and OS(s) should be included on Schedule A where indicated, and the items should be included in the BOM, where it is noted that the Customer may decide to host servers in their virtual compute environment, and/or provide virtualization or other OS(s), in a later negotiation before final contract execution, however including the cost of servers in the evaluation process provides for an apples to apples cost comparison and is a mandatory requirement.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

OS Software – What underlying operating system is used for the applications that form the UC,C,C,&CC Solution (i.e. Windows, VXWorks, Linux, Unix, etc.)? List all applicable operating systems as well as the recommended Manufacturer upgrade cycle for the OS. Will upgrading the OS cause an outage of the Solution? Please describe how the underlying OS has been “bolstered” to prevent exploitation of OS security flaws.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If your solution uses any commercially available software for the Operating System, database, connectors, API, or other, please explain how the software is patched when the manufacturer of that software issues bug and security patches (Microsoft, Linux and VMware as examples).  Will Customer be able to install these patches as soon as they are released, or must they wait for the Manufacturer to validate and support the patch?  What SLA will the Manufacturer commit to validating and releasing compliance with “High Risk” security patches?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer prefers to implement a new software release after it has been generally available (G.A.) for at least 3 months. The software can then be considered stable and there should have been an x.1 type software release to resolve any software bugs. Please make note if you are recommending the installation of any software that does not meet this criteria, and your justification for doing so. When is the next release due?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

The proposed system must be able to provide traffic reports and report historic trunk utilization by trunk group or for specific lines, in the base system being quoted. The system should provide a peak busy usage report that shows the maximum number of lines used during specified periods. Describe voicemail port, disk utilization and user status reports available. Please include samples of these reports in your response.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer will provide any required battery back-up. Will the proposed system require any non-standard plugs or voltage (DC, 220v, twist-lock), if so please specify?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Voice Messaging System Description

Include a brief overview of the hardware, software, architecture, and components of the voicemail system. Is the voicemail built by the manufacturer of the core Solution? If not please provide information regarding the OEM company, their history, and relation with the core Solution manufacturer.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What physical connection will be established from the voicemail to the phone system? If additional voice ports are required in the future, how is the hardware/software added? Explain how the system scales beyond the number of proposed ports.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Are voice messages stored in an industry standard format? How many Mbytes of disk space are required for each hour of voice storage?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

When a backup is performed what is backed up – programming, greetings, messages? Do back-ups happen automatically, and can they be directed to a NAS hard drive? What format options are available, e.g. SFTP, FTP, etc.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What, if any, limits are there to greeting, message or announcement length? What will the voice mail do if an individual mailbox is full? What will the remote caller hear? How will the user be notified and what options will the user have?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Implementation Requirements

Vendors must furnish all space, power, and environmental requirements for the proposed system equipment.

* + - 1. Space – Provide the physical dimensions of all equipment that will not be rack mounted.
      2. Rack elevation – Total count of rack space used (in U) at Head Office, and at each location.
      3. Power – Total power draw per location in Watts or VA. Also, any special all power requirements, including any special plugs, conditioning or grounding requirements.
      4. Heat – Vendor must provide heat dissipation (BTU) for proposed switch room and the recommended safe temperature operating range for the proposed system.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. System Administration

Describe the database which contains user programming information for the phone system, voicemail, and other major system components. Generally describe how the programming database might be integrated with Client’s current Active Directory, Email, and HR databases.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

The manufacturer must provide software updates to address security flaws in the OS and applications at no additional cost (other than labor to implement) during the warranty and maintenance period.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

How does your company provide future software releases as part of the Solution or the maintenance package? After installation will the system need to reboot, or can these upgrades take place in an online environment? Briefly describe the process for installing a software update, and reverting to a previous software load if required. Specify for each major component proposed.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Is it possible to perform a software upgrade on a standby/redundant processor and then force a failover to minimize down time during a software upgrade? Is this functionality included in the base price? Can the 2nd processor stay on the old software level in case you need to revert to the previous software level?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Administration Portal – Customer requires a system administration tool capable of supporting all offices within the enterprise from a simple to use, intuitive user interface. Ideally, this program will allow management of the phone system, voicemail, UC applications, Contact Center, etc. from a single unified interface. Please describe all functions and applications the administration tools can support and include screenshots for each application.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Administration Access – How is security provided to prevent unauthorized access to the administration application? Is there any limit to the number of administrative users that can be given access passwords? Can different administrators be given individualized permission levels? Can some administrative users be defined with “view-only” permissions? How many administrative levels can be defined? Will the Solution track a Change Log of which administrator made what change to the system? What other methodologies does your Solution provide to prevent Administrative User Error from affecting the reliability of the system.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Coordinated Administration – Does the system support synchronization to Active Directory? If a user is added or a name change made in Active Directory, will it download to the Solution? Does Active Directory synchronization happen automatically, or must it be manually ‘run’? What % of your customers would you estimate run Active Directory integration, and are there any inherent benefits or drawbacks?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

After the telephony servers recognize an addition or change from Active Directory, what additional steps must an administrator take to complete the creation of a new user in the quoted Solution?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

The solution should support Single Sign On (SSO) for the user to any desktop applications and web portals. Is this supported in your solution? What authentication framework (e.g., Active Directory) does Customer need to use for passwords in the network?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Troubleshooting – What diagnostic tools, logs and reports are available to aid in isolating faults in the Solution? Are the system’s diagnostic tools SNMP compliant? Are all tools available to Customer, or must some of the tools be administered by the Manufacturer or Service Provider?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Alarms – Describe the system alarms and alarm notification available from each sub-system in your Solution. Will the Solution automatically open tickets with the Service/Maintenance Provider for proactive resolution, or does the customer have to open a ticket upon noticing a fault? Will the Solution automatically notify Customer administrators or help desk for alarms or outages, if so how?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

QoS/QoE – Does the proposed system have the ability to monitor VoIP Quality of Service? Does this application simply monitor for underlying network issues (latency, jitter, packet loss) through the use of some kind of probe or error logs? Or, does it monitor actual phone calls through data provided by the telephones and applications? If data is provided by the telephones, can it be monitored in real-time, or are the statistics sent at the end of a call? Can this data be exposed in a simple network management protocol (SNMP) management information base (MIB) for easy access with traditional network management system applications?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Warranty Questions

What is the Manufacturer’s standard warranty period on hardware, software, and installation without the purchase of additional maintenance or warranty?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Is post implementation warranty/maintenance support provided by the Vendor, the Service Provider, or the Manufacturer? Please describe briefly the options available, the cost per year, and what is covered. Which of the maintenance options available (Vendor vs. Manufacturer, and which service level) has been included in the base pricing for 1st year Warranty and 2-5th Maintenance support? Why was this level of support quoted?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please describe your ability to provide routine system monitoring to assure the continued operation of all system components. Will the Vendor implement software or hardware that will “phone home” proactively to inform the Vendor that there is an alarm in Customer’s infrastructure? Will the Vendor automatically notify Customer if there is a fault detected in the system? How (phone, pager, email, escalation trees), and how often during the incident response will the service provider provide updates to Customer?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe any portals or reports where Customer can view past and current service calls, and moves/adds/changes with detailed resolution notes.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Emergency service will be defined by the warranty/maintenance contracts to include resolving problems which interfere with the normal operation of the business, and include the failure of >10% of stations, >25% of trunks, any core telephony server, an attendant console, or a substantial sub-system of the Telephony system. Emergency service shall consist of remote diagnostics within 30 minutes of the origination of the service ticket. Service Provider will provide a four-hour onsite response time for emergency services. Service Provider should update Customer with a completion notification for emergency services immediately upon resolution of problem.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Response time for minor system problems should be 24 hours. Service Provider should complete routine requests for additions, deletions, and feature changes within 48 hours of request. Service Provider will respond with a confirmation of completion for routine service requests within 48 hours of fulfilling the request.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Maintenance cost increases should be limited by the cost of living as measured by the Consumer Price Index.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Hosted, Cloud, SaaS Solutions

Only answer the following section if you are quoting a Hosted, Cloud, SaaS, Hybrid System (generically referred to as Cloud). Service Provider (SP) is hereby defined as the company that hosts, provisions, runs and maintains the Cloud Solution. Manufacturer refers to the SP if the Solution is internally developed, or the maker of the underlying SaaS technology, if it is not internally developed by the SP (such as Broadsoft, Cisco HCS, Avaya, etc.)

* 1. Solution Architecture and Platform

Provide a brief description and discussion of the architecture of your Cloud Solution. Describe connectivity and communication between its integral parts. Include a Visio to illustrate the quoted architecture (not a generic drawing).

* + - 1. How is redundancy, resiliency, and failover accomplished within the platform? If not already answered in previous sections, please describe which resiliency features have been included into the base price on this RFP response. Please describe any functionality that makes the Solution inherently fault tolerant.
      2. Where will the Call Processing for our implementation be located? Where will it failover to?
      3. What redundancy exists for power, cooling, Telco services, and WAN connectivity? What tier of Data Center is the solution located in? How does the proposed Solution provide for fault tolerance?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Virtualized Compute – Describe what virtualized compute platform your Solution will utilize. Best practice would be to add additional compute resources whenever utilization goes above 50%; at what utilization % will the Service Provider add more server resources to a compute node? How does the Service Provider manage the compute environment over time to ensure that additional or growing customers within a compute node don’t start to exceed utilization over time? If Customer needs to be moved from one compute node to another due to overutilization of compute resources within a node, will there be any interruption in operation or functionality? Also, will all historical data (such as call recordings, CC reporting, CDR records, etc.) remain intact and referenceable?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* + 1. DID numbers – Describe methodology and any limitations concerning porting and/or provisioning DID and toll free numbers. **Vendor must allow** Customer to retain ownership of DID and Toll Free numbers that they bring to the Provider, or allow a change of ownership back to the Customer at the end of the contract term if the Customer decides to move to another solution provider. Describe any capabilities for customer to retain ownership of DID and toll free numbers assigned by the Vendor in the event they move to another solution provider.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

HIPAA compliance – the solution must be HIPPA compliant and Vendor must be willing and able to sign a Business Associate Agreement (BAA).

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. System Administration Questions

Describe the system administration portal for programming users and functionality in the Solution. Are all aspects of the system programming accessible to Company’s administrators, or can certain features only be administered by the Service Provider?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe the system administration access control and auditing of changes in the Solution, and answer the following questions for each component of the Solution that has separate administrative access. Are there multiple levels of administrative control and, if so, what are they? Does the administration system maintain a change log of programming changes and which administrator made the change?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please create a demo customer profile for Customer, and add our main contact as a phone user and as a system administrator. Please provide the login information below to allow RFP evaluators to login and review the system administration portal.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Upgrade Notification – How will Customer be advised of additional software updates/patches/upgrades that will be made to their production environment that could potentially be service impacting? How much notice, and what is the outage window, for updates/upgrades; and how much notice, and what is the outage window for critical fault repairs. How will Customer be notified of feature/functionality updates that do not require a full upgrade to the system. Will Customer have the ability to forgo or delay updates and feature enhancements? What times will service impacting changes be made to Customer’s hosted environment?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Warranty Questions

What is the Manufacturer’s standard warranty period on any hardware, software, or other equipment that will be installed with the Solution, without the purchase of additional maintenance or warranty?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Is warranty/maintenance support included in any recurring charges for the Solution. Are there any aspects of the Solution that will not be warrantied? Is post implementation warranty/maintenance support provided by the Vendor, the Service Provider, or the Manufacturer? Please describe briefly the options available, the cost per year (if it is priced separately) placing the priced in Schedule A where shown, and what is covered.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please describe your ability to provide routine system monitoring to assure the continued operation of all system components. Will the Service Provider automatically notify Customer if there is a fault detected in the system? How (phone, pager, email, escalation trees), and how often during the incident response will the service provider provide updates to Customer?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe any portals or reports where Customer can view past and current service calls, and moves/adds/changes with detailed resolution notes.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. UC Solution

Most telephone system Manufacturers are beginning to group together applications that empower onsite and remote workers through a new paradigm referred to as Unified Communications (UC). This umbrella term may include Telephony, Unified Messaging, Mobility, Instant Messaging, Presence, Computer Telephone Integration, etc. Unified Communication requirements have been documented in the RFP Requirements section, Schedule C, and below.

This section asks questions that are generically applicable to Premise and Cloud providers, and should be interpreted accordingly to apply to the Solution being quoted by the Vendor. Additional requirements, are listed in Schedule C and elsewhere in the RFP.

* 1. Telephone System

Branch Survivability – Whether it is quoted in your solution or not, what functionality exists to allow for a branch to continue operating with local PSTN lines in the case that connectivity to the central call processing server is lost (such as a last mile WAN outage at the branch). What features will continue to be available, and what key features will be lost by the users.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Voicemail System

Describe your voice messaging product offering.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Users should be required to enter a password to access their voicemail box. What is the minimum and maximum password length? Can it be different for different classes of users? Will the voicemail system prevent the use of trivial passwords such as sequential digits, repeating digits, and re-use of the extension number (i.e. 1234, 1111, 4567)?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the system track failed password entries in a single session and disconnect the caller? Does the system track failed password entries across multiple sessions and automatically lock the mailbox? Does the system create a log and alarms (SNMP, email, pager) based on failed log-on attempts?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Unified Messaging Architecture – Unless already provided elsewhere, please provide a general description of your Unified Messaging offering, including where its messages are queued and stored, physical connectivity to the phone system and Email Server (Exchange), logical connectivity to the Email Client (Outlook), server and desktop requirements, and architecture.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Unified Messaging – Does the system install an Email Client add-in to allow for message playback and management without having to open a 3rd party media player such as Windows Media Player? Does the user have the choice to play the message through their telephone, or through their PC speakers, while still controlling the call through their Email Client? Provide a screen shot of the software used to control Unified Messaging.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Advanced Messaging applications – Briefly describe any advanced capabilities for text to speech playback of emails over a telephone interface, speech to text transcription of voicemails, voice control of message playback, integration with email calendars to play a different greeting, voice integration with email system to manage emails and calendars, etc. Describe what upgrades are required to add these advanced features to the Solution you are quoting.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Unified Communications, Collaboration, Conferencing

Unified Communications Client – Unless already provided in the RFP Requirements section or Schedule C, please describe any Unified Communications functionality available with the proposed solution. Please summarize the components required to add Presence, Instant Messaging, Collaboration, desktop video, and buddy lists through the telephone system’s native application or your recommended alternate. Vendor should state what, if any, Unified Communications functionality is provided in the base Solution at the price quoted, and what functionality is available at additional cost. If possible, provide budgetary numbers for the applications on a per user basis.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can you start a voice call, then add video, then add document sharing, then move the call to a room videoconferencing solution, etc.? How does it work?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Conferencing and Collaboration - Describe whether the proposed system would allow for audio/web/video conferencing, screen sharing, collaboration, screen sharing, whiteboarding, presentations, meetings, etc. (similar to WebEx or LiveMeeting). Although this functionality is not required at present, provide general overview of how this functionality can be provided in the future.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the system currently integrate with Microsoft Skype for Business Server/Premise or Online/O365 (SfB), and Skype for Business clients? Will the phone system send and receive status updates to/from SfB for presentation in the Skype for Business client and in the phone system’s native applications? Is the system certified to integrate/federate with SfB Online through Office 365? If not currently available, what is the manufacturer’s long-term vision regarding these integrations? Describe architecture, licensing and integration method.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Has the Vendor implemented SfB integration for another client? Please describe any best practices or constraints regarding this implementation. What unique abilities or integration points does the system provide with SfB?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the system currently integrate with Microsoft Teams? Is the system certified to integrate/federate with Teams through Office 365? If not currently available, what is the manufacturer’s long-term vision regarding this integration? Describe architecture, licensing and integration method.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Video – Does your Solution support desktop videoconferencing? What is the maximum number of parties in a multi-person desktop videoconference? Will your Solution allow for desktop video users to communicate with room based videoconferencing solutions from other vendors? How do your videoconferencing solutions integrate with hosted collaboration solutions such as WebEx and Live Meeting? Provide a general overview your ability to provide room based video conferencing solutions that are natively integrated with your solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Briefly describe and price any other relevant CTI applications that could improve employee efficiency. Examples might include the ability to Click to Dial from Outlook/Email or a web page and have the call dialed from the desktop telephone or softphone, screen pops into desktop applications or CRM, etc.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Mobility Applications

Mobility Applications – Unless answered previously, describe any functionality that the system has to ring a call to a person’s cell phone and desk phone simultaneously. Will the user see the inbound caller’s Caller ID? Does the cell phone interface allow for pressing a digit to accept the call? If the call is answered on the cell phone, how do you get the call back to the desk phone? If the call is answered on the desk phone, how do you extend the call to the cell phone?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Smart Phone Mobile Client: Describe your smart phone mobile client, the platforms you support (e.g. Android and IOS), and its capabilities. Will it automatically extend the audio for a call over WiFi while in the office, on Cellular 4G where available, and on Cellular voice minutes where data coverage is inadequate for high quality audio?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. VoIP Specifications

What is the manufacturer’s recommended best practice for CODEC choice, sampling rate, packet size, jitter buffer, etc.? What bandwidth, including overhead and QoS, will each recommended CODEC require? What VoIP CODECs are supported on the platform, i.e. G.711, G.722, G.729A, G.729B, H.323, SIP, etc. (list all applicable)? What network parameters are, or should be observed with the platform, i.e. 802.1p/q, Differential Services (DSCP), weighted fair queuing, Rapid Spanning Tree, VLAN pruning, device discovery, etc.?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

CODEC – What is the highest common denominator Codec across all applications/components being quoted? Will calls require transcoding between applications (voicemail, call recording, etc.)? Which CODECs are supported natively by the telephones? Will telephones auto-negotiate CODEC over the LAN/WAN when connecting between offices without the need for an intermediary translation or transcoding? If not, how is transcoding provided?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

QoS – Do the telephones natively tag packets with both QoS (DCSP or IP Precedence – Layer 3 in IP Header) and CoS (Layer 2 in Ethernet Header) bits? Do all telephony servers and services automatically tag packets with both QoS and CoS bits? Which Layer 3 DSCP or IP Precedence tags are recommended by the manufacturer for voice RTP traffic and VoIP call control traffic?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Phones – Does the system provide an option of running SIP for a telephone’s call setup? Does the Vendor propose using SIP or proprietary signaling for call setup? How are advanced features supported if using SIP telephones? If Vendor recommends deploying SIP telephones, how is call setup and teardown encrypted and secured?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

SIP – Does the system support SIP trunks, SIP compliant gateways, or SIP telephones from other 3rd party manufacturers? Which manufacturers and telephone companies have been certified with the system? Describe any capabilities or limitations regarding the SIP implementation above or beyond the generic SIP feature set.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Soft Phones – Does the Solution softphone application have the capability to mark voice and call control packets with QoS? What needs to be done on a computer in order for the QoS packets to be preserved into the network? Do softphones use SIP and RTP, or some other standard for call setup and voice traffic. Do softphones support WebRTC for VoIP?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Encryption

Encryption – Can the proposed solution encrypt the Call Control and Call Media (voice) between telephones, between telephones and PSTN gateways, and between/within phones and solution servers/applications? Are you quoting any solutions that will not support encryption (e.g., call recording)? What encryption techniques will be used? Does encryption reduce the overall system capacity of the VoIP network? Does encryption restrict any system features or functionality (for example conference calls, CC monitoring, call recording)? Does the Vendor recommend implementing encryption as part of their proposed solution – why, or why not?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Certificates –If the encryption method is certificate based, which server will mint certificates? How can certificates be managed by Customer IT staff? How will encryption integrate with Customer network security devices such as Active Directory, 802.1x and Radius servers?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Contact Center
   1. Contact Center Questions

Provide a general overview of how Contact Center routing is achieved in your solution. Include a screen shot of a typical CC routing programming screen from the system administration console.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer’s CC requirements are delineated in this RFP as well as in Schedule C. If you have multiple software levels to your CC solution, please explain which level you would recommend to satisfy our required functionality, and why you chose this level. Please include a chart that shows a comparison between the levels. Please specify and price the next higher level of CC software as an option on Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Indicate the maximum number of agents and supervisors your system can support with the software and hardware quoted. Specify any system capacity limitations for CC components, including but not limited to:

|  |  |
| --- | --- |
|  | **Capacity** |
| Agents |  |
| Routing scripts |  |
| Skills |  |
| Groups or Queues |  |
| Lead Directory Numbers (used to direct traffic from DNIS to Queue) |  |
| Simultaneous groups or skills per agent |  |
| Agent priority levels within a skill or group |  |
| Priority levels for Queues into a single group (standard, emergency, etc.) |  |
| Number of groups/skills that a call/script can queue to simultaneously |  |
| Built-in Reports (# of historical/# of real-time) | Historical = ?  Real-time = ? |
| Please provide system limits for saving detailed historical data for each of the following (how many days, weeks, years of data can be kept): |  |
| Individual call information with wait time, agent disposition, call handling, and call resolution |  |
| Interval/Hourly/Real Time |  |
| Daily |  |
| Weekly |  |
| Monthly |  |
| Yearly |  |

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe and provide a screen shot of a supervisor real-time monitor PC screen that shows all agents, skills and variables that have exceeded threshold levels. Can the screen change color or generate an audible alarm when queue statistics exceed pre-determined thresholds?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe the system’s ability to have an Agent “dashboard” on the Agent’s PC with real-time CC statistics? Please include screen shot. Is this functionality included in the quoted base price?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Supervisors should be able to listen in on agent calls without the agent or caller being notified. Can a supervisor stay logged against a single agent and listen to multiple calls in a row, or do they need to monitor on a call-by-call basis? Can the agent join the call in speak mode if they need to take over the call or assist the agent? Can the agent press a “Supervisor Assist” button to notify their supervisor that they need to listen in on a call? How is this feature implemented in your Solution?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Expected Wait Time (EWT) is required. How is Expected Wait Time calculated? Can Expected Wait Time be announced to caller? Can CC provide a bracketed wait time based on EWT calculation? For example, if the EWT is 2 minutes can the system play a message that states, “The expected wait time is 1 to 3 minutes.” Can system proactively route calls based on Expected Wait Time without waiting for the timer to elapse? Describe this functionality and state whether it is included in the base pricing.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can the system perform routing decisions based on user definable variables and Boolean logic? For example; if call priority is high, and the number of agents with proficiency of more than 5 is less than 2, then present call to overflow group 1. Describe the functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can the system allow programming changes to Queues/Vectors/Scripts to occur in an online environment with changes immediately implemented in the CC call flow without having to restart the CC or re-log agents? Will the system validate CC scripts for breaks in logic prior to implementation? Describe the functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If caller decides to leave a message, can that message be queued to an agent group as if it were a call, with appropriate CC call flow and reporting? Describe the functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What is required to support remote (home or VoIP) CC agents? Will there be any functionality differences to directly connected agents? Describe and price below your recommended model for this functionality?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Contact Center Reporting

Please provide examples of available Contact Center (CC) reports in the Soft-Copy that the Vendor will be providing with their response.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the quoted system provide all of the following standard reports?

* + - 1. Average Speed of Answer (ASA) and/or Delay before answering
      2. Average talk time
      3. Average call duration (total including time to answer, and talk time)
      4. Average time to abandon
      5. Service level attainment (X% of calls answered within Y seconds)
      6. Detailed Call Log showing number called, hold time, who answered, who hung up, for each call - from cradle to grave
      7. Total number of received, answered and abandoned calls
      8. Spectrum reports that show number or percentage of calls received and answered within 5 seconds, 10 seconds, 15 seconds . . .
      9. Interval reports showing Queue and agent statistics for 15 minute periods
      10. Agent activity and productivity reports
      11. Queue/skill activity and utilization reports
      12. Group/Department activity and utilization reports
      13. Peak time reporting (daily, weekly and monthly) with historical trend analysis
      14. Trunk group utilization reports

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Please discuss any limitations the system has regarding creating cradle to grave CC reports from the moment that the call hits the phone system and is placed into queue, through automated attendant scripts, announcements, overflows, interflows, queuing to multiple groups, transferring to voicemail, being answered by an agent, being escalated to a supervisor, being transferred to another agent, etc.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the system track individual call-by-call statistics such as the wait time, which agent answered the call, whether the agent transferred or put the call on hold, who hung up the call, etc? If so, how long is the individual call information available and how is a query for this data generated? If individual call information is rolled up to average call statistics, what is the interval for this roll-up?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

If a caller is transferred to multiple queues during a single call (for instance they call into Customer Service, are transferred to Tech Support, and then transferred to a SME agent) these calls should be tracked in the peg counts of each of the groups, but also be reflected somehow by the system as a multistage call so that total call statistics can be reconciled against group call statistics. Describe your solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does the system provide the ability to mark calls with disposition or wrap-up codes that can be used in reports to determine the source or type of call? Are wrap-up codes entered from the telephone or the PC? Can multiple codes be entered against a single call? Will the system prompt or require an agent to enter a code at the end of a call?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Describe the ability to create custom, user-definable reports from within the Call Reporting platform. What is the native call reporting engine for the reporting platform? Can reports be exported to Microsoft Excel, Access or other formats?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can reports be scheduled to run automatically? Can they be sent to a network printer? Can reports be sent to a file? Will scheduler create a unique file name for each report and date? Can reports be scheduled to automatically email to various people without human intervention?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can the reporting database be accessed through Crystal Reports or other 3rd party report writer? Describe the functionality.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Contact Center Recording

Recording of all Contact Center (CC) calls is required. Describe the CC recording application including hardware, software, voice quality codec, recording file name nomenclature, agent and supervisor interface, indexing system for finding archived recordings, and recording medium.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Does your platform provide the ability to support the following?

* + - 1. Recording of all CC voice interactions (inbound, outbound, intercom/extension) for later review and evaluation;
      2. Recording an agent through a series of calls without Supervisor intervention;
      3. Index recordings by agent ID, Caller ID, phone system call identifier, time and date.
      4. Random scheduling of recording sessions on multiple agents;
      5. Recording of a % of total queue calls, or % of calls by agent;
      6. On-Demand recording by either the agent or supervisor if there is a “trouble” call;
      7. Certain telephones that are recorded should have a special line appearance that is not recorded for private conversations. The user would be able to pick the non-recorded line manually for personal calls.
      8. In order to ensure legal notification compliance in any of the call recording scenarios above, please describe how the quoted solution will provide notification to callers. This may include a “your call is being recorded” announcement, a repeating beep that is audible to both recorded parties, as well as a way of proving that a caller was notified that the call would be recorded.
      9. System should be sized for the number of agents in Schedule B simultaneous x 10 hours per day x 5 days per week x 52 weeks x 7 years retention = 364,000 hours maximum capacity. How much storage will be consumed by this much recording? Will this storage be provided by the recording solution, or will it be offloaded to Customer provided SAN?
      10. Agent Screen Recording (Optional):- Record agent desktop/PC recordings along with the voice interaction to see what the agent was doing on their computer. Provide pricing in Schedule A where shown.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Can the system be programmed to restrict Supervisors from listening to recordings of agents that are not part of their group? Can Managers be allowed to listen to multiple groups, but not the calls of agents that don’t report to them? How are these groupings and permissions programmed and administered?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Omni-Channel Contact Center

Customer requires the proposed CC system to provide Omni-Channel Contact Center features for email and web chat, as it intends to provide those as an option to County departments. Please note below which channels you support – including voice, video, web chat, instant messaging, texting, email, co-browsing, etc. Please describe in general terms your Omni-Channel solution. Please explain how Omni-Channel is incorporated into the CC reporting package. Vendor should place optional pricing for Omni-Channel agents (uplift form a standard voice-only agent) where shown in Schedule A.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

What artificial intelligence (AI) type features are available on your Solution such as Automated Chatbots for Web Chat, auto-response to emails, etc.?

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Implementation Requirements

The entire “Implementation Requirements” section reflects Mandatory requirements of Customer. Vendors should ensure that their proposal will meet the required Scope of Work in this section, as well as other Mandatory requirements throughout the RFP. Due to variability between Premise, Multi-tenant Cloud, Single-tenant Cloud, Cloud, SaaS, and Hybrid deployments – Vendor should read and interpret each requirement as broadly as is applicable to their scenario, understanding that some aspects might not be applicable for their Solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Installation

Please indicate your intended compliance with each of the following once you are awarded the contract. The plans and charts do not need to be created at this time.

***Responsibility -*** The selected Vendor is solely responsible for the complete turn-key implementation of the new Solution and all component hardware, software, services, labor, taxes, duties, shipping, travel and training charges. Vendor may designate their affiliates (including sub-contractors, Service Provider, and Manufacturer), but Vendor remains responsible. Furthermore, Customer is not responsible for the installation of the Solution.

***Single Point of Contact*** – Successful Vendor will provide a single point of contact for all installation work. The Successful Vendor shall appoint a Project Manager for the duration of the project. The Project Manager will be subject to Customer approval.

***Programming Information*** *–* Successful Vendor will be responsible to perform needs analysis, station reviews, cut sheet database discovery, application discovery, cutsheet completion, and all programming, with Customer oversight.

***Telco Coordination*** *–* Customer or Communication Strategies will coordinate the ordering of all PSTN, WAN, and internet facilities as deemed necessary.

***Installation -*** Vendor will be responsible for placement and installation of all servers, gateways, telephones, and all other supplied hardware.

***Removal of Equipment*** – Vendor will also be responsible for removing the old (existing) telephone sets, placing them into box cartons, and returning them to a central Customer site.

***Interconnection -*** Vendor will be responsible for interconnection of all newly supplied equipment, including patchcords, patching, cross-connecting, plugging, Telco terminations, specialty wire harnesses, Amphenol tails, toning of analog cable, any required analog station patch panels or termination blocks, and any additional cables or wires required to connect the new telephone system to Customer’s house cable.

***Software Version -*** Vendor will implement the most recent and stable version of all supplied software. If the manufacturer releases a software update to fix flaws, bugs, or security during the installation timeframe the Vendor will update Customer’s system at the earliest reasonable opportunity during a scheduled maintenance window. This maintenance window will be scheduled after hours for service impacting upgrades to an operational and partially deployed system at no extra cost to Customer.

***Project Plan*** ***-*** A master project schedule must be created, along with a work responsibility matrix, identifying the tasks the Vendor will perform and the tasks Customer is expected to perform to successfully implement the new system.

***Security*** – Customer requires that security compliance protocols be followed at all times. This may require some or all of the following:

* + - 1. Vendor employees being escorted to all work areas on Customer premises;
      2. Examination and certification of installed systems, programs, applications and platforms (possibly in a PoC or Sandbox environment) for compliance with Customer security requirements and protocols;
      3. Individual background checks of Vendor/Manufacturer/SP employees working on solution installation;
      4. Other factors deemed necessary by Customer CISO and management.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Training

***Requirements -*** The successful Vendor is required to include end-user training on Customer premises, with classes grouped by phone type or job classification.

* + - 1. Training class sizes will not exceed more than 15 station users at a time.
      2. Each user should have access to a live telephone instrument during training.
      3. Classes should not exceed 60 minutes (45 minutes preferred)
      4. All users will require training on the Solution including telephones and all installed applications
      5. CC agents and supervisors should receive additional CC specific training
      6. Operators will require training on the new attendant console(s). Training should occur away from the reception area prior to cutover. On the morning of the 1st day of service, Vendor should provide onsite personnel to assist the receptionist, as required, for a minimum of 2 hours.
      7. Four (4) users will require complete system administration training on all new systems implemented. Knowledge transfer should occur during the full installation cycle. In addition, administrators should be provided a full orientation on the applications and tools they will need to use.
      8. Two to three (2-3) weeks after the initial training, Vendor should conduct 2 additional training sessions at Head Office for people that were on vacation, Power Users or Help Desk staff showing how to use all advanced functionality.

***Training Materials -*** Vendor will provide a training program as well as training materials. Vendor will prepare a 1-2 page Quick Reference Guide handout that shows how to use the most commonly used features of the Solution, including the phone system and voicemail. Training materials must be provided in soft copy, and all rights to the training materials will pass to Customer once provided.

***Desk-side Training –*** Due to other commitments, it is often difficult to get Executives to attend training classes. For this reason, please add 1 full day, or 2 half days of trainer time starting the first day of service for walk-around and desk-side training at the two large locations, and 1 hour of desk-side training for medium locations.

***Computer Based Training (CBT)*** – In addition, specify what computer based training materials and videos are available and whether they are included in the quoted price.

Please state your intended compliance with the section above.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. SIT and UAT Solution Testing

SIT and UAT – 1 to 2 weeks prior to UAT testing, Vendor will complete Unit Testing (UT) of individual solution components, as well as System Integration Testing (SIT) between various parts of the Vendor provided solution and the Customer provided network. SIT should follow Vendor/Manufacturer/Service Provider best practices, but be at least as comprehensive as the User Acceptance Testing (UAT) test plan to ensure that UAT testing will be successful. Vendor will test all installed equipment to manufacturer and vendor supplied test plans and correct all defects prior to UAT.

UAT – Vendor, Communications Strategies and Customer will create a User Acceptance Test (UAT) plan that confirms the operation and resilience of all applications to the requirements specified in the RFP.

Vendor shall have a lead technician and adequate support staff onsite and available for UAT system testing at least 1-2 weeks prior to going live with the Solution.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Cutover Coverage

Cutover to the new Solution should not impact users during Customer’s normal working hours, or disrupt usage of the current telephone platforms. Cutovers will therefore need to be completed after hours for service-impacting events.

For each large or medium location (see counts in Schedule B), Vendor shall provide at least one (1) onsite Lead Engineer for programming and trouble-shooting for at least one x 8 hour day beginning with the first day in service, and continuing onsite until all punch-list items are resolved.

For all small locations (see counts in Schedule B), Vendor shall provide at least one (1) onsite Lead Engineer for programming and trouble-shooting for at least 4 hours beginning with the first day in service.

After reasonable punchlist items are resolved, additional issues will be moved to an exception list and will be tracked by Vendor with an action plan, responsible person, and deadline for completion. Vendor will provide daily updates on the remaining exception list items.

State intended compliance with the requirements stated above.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. System Acceptance

System acceptance will be defined as follows:

* + - 1. All equipment delivered and installed. All core Solution applications and functionality deployed. Certain advanced features and applications may be deployed at a later time upon Customer preference at the end of the project, in which case they should be installed and tested before System Acceptance.
      2. All training completed.
      3. All installation issues resolved to Customer satisfaction.
      4. Documentation representing the system “As Builts” is delivered and reviewed with Customer. System Administrator and Help Desk training provided that will allow Customer to manage the Solution.
      5. Customer may agree to system acceptance with a mutually acceptable exception list.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

Customer expects that they will move from installation support to warranty/maintenance support only upon execution of a Delivery and Acceptance agreement. Please define if Vendor has a different requirement for the beginning of the warranty/maintenance period.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Contract Terms and Conditions
   1. Customer General Provisions and Requirements for Contractors

The successful Vendor will execute the County of Marin’s General Provisions (attached as Appendix B) agreement as the controlling document for the contract, and should note any required exceptions as a “redline” to that document as part of their response. The successful Vendor will also be required to acknowledge the County’s Requirements for Contractors (attached as Appendix C) and provide an insurance certificate naming County of Marin as additionally insured as a condition of the work. Vendors that do not take exception will be considered to have accepted the documents as written. Vendors must note any exceptions at the time of their RFP response, and vendors that take excessive or frivolous exceptions may be eliminated from consideration as non-compliant. Vendors that state something along the lines of “Vendor will negotiate final terms of the contract upon award.” will be considered to have accepted the County of Marin’s General Provisions and Requirements for Contractors agreements without exception, or to be non-responsive and may be eliminated from further consideration – at Customer’s sole discretion.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. Order of Precedence

If there is a discrepancy in terms and conditions between any documents that will form part of the final awarded contract, the following order will prevail:

1. County of Marin’s General Provisions and Requirements for Contractors
2. RFP, Response to RFP, Addenda, and RFP Schedules
3. Vendor Contract
4. Vendor Scope of Work
5. Written correspondence between the Vendor and Customer

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* 1. General Conditions

The following conditions are typical for UC & CC projects. If you must take exception with any of the conditions below, please copy a blue “Response” line to the appropriate spot, fully explain your objection, and suggest an alternative.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

* + 1. Not An Offer to Contract

This RFP is not an offer by Customer to enter into a contract under these or any other terms. Acceptance of a proposal neither commits Customer to award a contract to any Vendor, even if all requirements stated in this RFP are satisfied; nor limits Customer’s right to negotiate in its best interest. Customer reserves the right to reject all proposals and not make a decision, or to contract for only a portion of the project. Customer shall have the right to modify the terms of this RFP without notice, and to make its selection decision on any basis, in its sole discretion. All costs for proposal preparation are the responsibility of the Vendor. All RFP responses become the property of Customer upon submission.

* + 1. Addenda

Written Addenda (including emails) issued by Customer, interpreting, modifying, or adding to this RFP shall be incorporated into the RFP response. Any oral communication concerning this RFP is not binding on Customer and shall in no way modify this RFP.

* + 1. Valid Period of Offer

The pricing, terms, and conditions stated in the RFP Response must remain valid for 3 months from the due date of the response in order to finalize a decision and enter into contract. Thereafter, pricing should remain fixed for the term of the contract.

* + 1. Inclusive Pricing

It is expected that there will be no additional charges other than those specified on Schedule A. The Vendor is solely responsible for all Time and Materials, airfare, hotel, living expenses, mileage charges, shipping, duties, tariffs and Value Added Tax. These costs should be included in the quoted “turn-key” pricing. Any error in configuration or omission of required equipment is the responsibility of the Vendor to provide at no additional charge in order to provide a functioning Solution that meets the scope of the RFP.

Vendor’s proposal should identify all services and equipment to be provided by Customer, required to implement the Vendor’s proposal. No materials (including servers or Windows OS), labor or facilities will be furnished by Customer, unless specifically requested in the RFP response.

* + 1. “Optional” Pricing

Customer wants to avoid any misunderstanding where it is assumed that a feature is included in the base pricing and turns out to be an optional, extra cost feature. As such, any question answered “Comply” will be considered included at no additional cost. Any service that is referred to in the body of this response and exhibits (does not pertain to attachments and brochures) will be considered included in the basic offer, and pricing, unless Vendor specifically refers to the service as Optional and provides optional breakout pricing on Schedule A.

* + 1. Scope of Work

Vendor’s final Scope of Work will not be able to capture every action item, deliverable or responsibility of each party. If an action item is not listed in the SoW but is reasonably required in order to meet the requirements and specifications of the RFP, it will be assumed to be included at no extra charge and the responsibility of the Vendor if it relates to the hardware, software or services being provided by the Vendor. If an action item is not listed and is solely related to the inner workings of Customer’s LAN/WAN, IT network, or business processes, it will be assumed to be delivered by Customer (but with Vendor support and consultation).

* + 1. Non-Appropriation Clause

As a public entity, Customer does not have guaranteed funding from budget year to budget year. For this reason, Customer may cancel all or a part of the awarded contract if funding for the project is lost or unavailable. There will be no penalty or early termination charge to Customer for cancellation of the contract. Vendor will be paid only for actual costs and completed work based on phase or percentage of total work completed. Vendor will make every effort to mitigate actual costs and will submit actual payroll records, if required by Customer, to prove percentage of work completed.

* + 1. Non-Collusion Declaration

By responding to this RFP, the Respondent submitting this bid declares that the bid is not submitted in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation and that the proposal is genuine and not collusive or sham. The Respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Respondent, or any other respondent, or to fix any overhead, profit, or cost element of the proposal price, or that of any other respondent, or to secure any advantage against Customer or anyone interested in the contract.

If at any time it is found that the person, firm, or corporation to whom a contract has been awarded has, in submitting a proposal, colluded with any other party or parties, said person, firm or corporation shall be liable to Customer for all loss or damage which Customer may incur as the result of the collusive activity, including, but not limited to, the cost of advertising and awarding of a new contract for the required work. In addition, the collusive Bidder will be disqualified from bidding on Customer future contracts for a period to be determined by Customer.

* + 1. Appeal

Only Vendors submitting a complete response and fulfilling all conditions of this RFP may appeal the RFP process. Appeals must be submitted in writing within five (5) days of the announcement of the successful Vendor.

* + 1. Complete Response

Failure to answer all questions in this RFP may be considered non-responsive. Customer may, at its sole discretion, waive minor inconsistencies in a response.

* + 1. Joint Response

If two or more firms are involved in a joint venture or association in order to provide a response, the proposal must clearly delineate the respective areas of authority and responsibility of each party. All parties must submit a [Vendor RFP Authorization](#VendorRfpAuthorization) section. All parties signing the agreement must be individually liable for providing the services even when the areas of responsibility under the terms of the joint venture or association are limited. This often applies when the Vendor contracts with the Manufacturer for professional services in the installation of the system.

* + 1. Sub-Contract of Work

Vendor must disclose if they intend to sub-contract any portion of the work required under this RFP response. Sub-contractors must be chosen prior to submitting a bid and their abilities will be assessed as well as those of the Vendor. Customer will contract directly with Vendor and Vendor will be completely responsible for the completion of all facets of this RFP (even if sub-contracted to others by the Vendor).

If Vendor sub-contracts work without prior disclosure or changes the designated sub-contractor, this will be considered a breach of contract and Customer may, at its sole discretion, terminate the contract. Vendor will be paid only for actual work completed to that point and Customer will pay no penalties for cancelling the contract. Please note below if any work will be sub-contracted, which work, to whom, and the percentage of the total proposal being sub-contracted.

* + 1. Assignment

Vendor may not assign their responsibilities under this contract to any other party without the written consent of Customer. Vendor contract may not be assumed by another company through a merger or acquisition without Customer’s written consent, which will not be unduly withheld. This is intended to prevent Customer from being obligated to work with a Vendor that they would not have chosen to work with, through an evaluation of the assigned company’s own merits.

* + 1. Right of Refusal

Customer retains full right of refusal over Vendor staff or resources for any, or no, reason. Upon notification of a reasonable request to change staff, Vendor will identify alternate candidates with similar or equal qualifications for Customer to interview. Upon selection of alternate resource, Vendor will endeavor to schedule the new resources to the project with minimal delay.

* + 1. Insurance, Liability, and Indemnification

The successful Vendor is liable and responsible for any damage to the premises (e.g., floor, walls, etc.) caused by Vendor personnel or equipment during installation and is responsible for the removal of all project-related debris.

The Vendor shall, at Vendor’s expense, procure and maintain satisfactory comprehensive general liability insurance to adequately protect the Vendor's personnel and Customer against damages for bodily injury, including death, and property damage, which may arise from operations under this contract, whether such operations are by the Vendor or by the Vendor's subcontractor, or anyone directly or indirectly employed by the Vendor. Customer requires $1,000,000 comprehensive general liability coverage, a policy of comprehensive vehicle liability insurance with minimum limits of $1,000,000, and worker’s compensation in compliance with California law.

In addition, the Vendor must agree to defend, indemnify, and hold harmless Customer, its officials, and every officer, employee and agent of Customer (collectively “Customer”) from any claim, liability or financial loss, injuries to property or persons arising out of any acts or omissions of Vendor, its officials, officers, employees or agents in connection with the performance of this Agreement, except for such claim, liability or financial loss or damage arising from the gross negligence, sole negligence, or willful misconduct of Customer, as determined by final arbitration or court decision or by the agreement of the parties. Vendor shall defend Customer, with counsel of Customer’s acceptance, at Vendor’s own cost, expense, and risk, and shall pay and satisfy any judgment, award, or decree that may be rendered against Customer. Vendor shall reimburse Customer for any and all legal expenses and costs incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Vendor’s obligation to indemnify shall not be restricted to insurance proceeds, if any, received by Vendor or Customer.

* + 1. Permits

The Vendor shall obtain and pay for any permits and licenses required for the performance of the work, post all notices required by law, and comply with all laws, ordinances and regulations bearing on the conduct of the work, as specified herein. On any work which requires an inspection certificate issued by local authorities, National Board of Fire Underwriters, or any other governing body, such inspection certificate(s) shall be obtained by and paid for by the Vendor. The chosen Vendor shall procure all required certificates of acceptance or of completions issued by the state, municipal or other authorities and must deliver these to Customer.

* + 1. Seismic Requirements

All systems, equipment, and materials proposed must be designed and installed to meet Universal Building Code (UBC) requirements for seismic protection. Vendor must certify that all work performed as a part of any contract resulting from this RFP will conform to the codes and other seismic protection requirements and regulations for the locality being installed into.

* + 1. Single Point of Contact

The Vendor will act as a single point of contact for all installation/warranty/maintenance issues related to all equipment provided under this contract. Vendor will not refer Customer to the manufacturer of the equipment for resolution of any service issues. Vendor will coordinate response between the suppliers of all hardware/software that the Vendor has provided under this contract, so that Customer is not affected by any “finger pointing.” Vendor will provide best effort in resolving issues unrelated to the equipment they provided but integrating with the equipment they have provided (for example Unified Messaging integration with a Vendor supplied Voicemail platform).

* + 1. General Guarantee

Neither “sign-off” of operational readiness by Customer or its representatives nor partial or full payment by Customer to the Vendor shall relieve Vendor of liability in respect to any express or implied warranties, or responsibility for faulty materials, workmanship, or code violations in labor or material supplied by the Vendor.

* + 1. On Time Performance

The successful Vendor will be required to commence work within fifteen (15) calendar days of execution of contract, to prosecute the work with faithfulness and energy, and to complete the work according to the schedule set out in this RFP. The parties hereto agree that it will be impractical and extremely difficult to fix the actual damage from a breach of the obligation to complete the work within the specified period, and therefore, agree that two hundred fifty dollars ($250) per day shall be presumed to be the amount of damages sustained for any such delay.

It shall be understood by all Vendors that time is of the essence in the prompt manufacture, shipping, delivery, and installation offered by the Vendor; and Customer reserves the right, and may at its sole election, cancel any award or purchase order arising hereunder for untimely delivery (more than 1 month after date shown in final Vendor project plan).

If the contractor shall be delayed in the work by the acts or negligence of Customer, or by changes ordered in the work, or by strikes, lockouts, fire, unusual delay in transportation, unavoidable casualties or any Force Majeure causes beyond the control of the Contractor, or by delay authorized by Customer, or by any cause, which Customer shall decide justifies the delay - the time of completion may be extended for such reasonable time as Vendor and Customer mutually decide.

* + 1. Failure to Perform

Unless otherwise specified, if an item is not provided or installed as specified in the contract or if the Vendor provides an item which does not conform to the specifications, Customer may, at its option, annul and set aside the contract, either in whole or in part, and may enter into a new contract in accordance with law for furnishing and installing such item. Any reasonable additional cost or expense incurred by Customer in making of such contract or any additional cost of purchasing or installing an item by reason of the failure of the Vendor as described in this paragraph shall be paid by the Vendor.

* + 1. Open Government and Public Records Act

The final contract for this RFP will be a matter of public record; so the Winning Vendor may not designate their RFP response as Confidential or Proprietary. Additionally, all RFP responses and documents may be considered a public record and subject to disclosure under the California Public Records Act, Open Government or other Public Records Act legislation. Vendors may not mark the entire response as Confidential and any assertions of confidentiality must be detailed by the Vendor in their response and meet the Legal requirements of the Public Records Act in question.

* + 1. Intellectual Property Rights

Inasmuch as this RFP document represents the core business offering of Communication Strategies, Com-Strat LLC retains ownership of the RFP document template. This document may not be used in whole, or in part, outside of this particular RFP engagement with Customer, nor disclosed or given to any other party for their use. Customer and the Vendor are granted unrestricted rights to use this document in procuring and responding to this RFP.

* + 1. Terms and Conditions Acceptance

Please note below your acceptance and intended compliance with the Terms and Conditions above.

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. Attachments

**Vendors are instructed to follow the detailed instructions in the RFP.  This section/checklist summarizes the documents required in the Vendor response. Please name the document files according the Number and Title below so that they we can find the appropriate document in numeric order.**

**The following documents will be provided in soft copy to all Vendors. Vendors should provide their responses inline and return their response documents.**

Request for Proposal Response – This Document with inline Vendor Responses (Microsoft Word)

Schedule A – RFP Pricing Worksheet (Microsoft Excel)

Schedule B – RFP Counts and Capacities Site Summary (MS Excel)

Schedule C – RFP Features and Functionality Requirements Summary (MS Excel)

Copies of all issued Addendum to the RFP with Vendor compliance noted

County of Marin’s General Provisions (Appendix B) redline (only if Exceptions taken)

County of Marin’s LOCAL BUSINESS PREFERENCE CERTIFICATION FORM (Appendix E) – (only if Vendor is applying for this preference)

County of Marin’s NON-DISCLOSURE AGREEMENT (NDA) (Appendix F) – (only if Vendor has not already signed and returned with the Intent to Bid - to receive information on the network)

**Vendor must provide the following required documents with their response:**

Itemized Equipment List or [Bill of Material](#BillOfMaterial) with pricing

Signed [“Vendor RFP Authorization”](#VendorRfpAuthorization) (section 4.1 of the RFP)

Vendor Provided Solution Diagram (Visio and/or PDF)

Manufacturer’s letter committing to hardware and software support for 5 years

[Manufacturer’s Guarantee of price support in absence of VAR](#ManufacturersGuaranteeOfPriceSupport)

[Vendor Financial Statements](#VendorFinancialStatements) – Income Statement, Balance Sheet, Credit References for last 2 years

[Manufacturer](#ManufacturerFinancialStatements)/[Service Provider](#ServiceProviderFinancialStatements) Financials – Income Statement, Balance Sheet for last 2 years

Gartner Magic Quadrant or similar report showing the solution being quoted

**A sample of the following documents should be provided by the Vendor in their response. They do not need to be customized for Customer at this time:**

Sample Vendor and/or Service Provider Contract

Sample Vendor Scope of Work

Manufacturer Software License Agreement and/or Service Provider Acceptable Use Policies

Warranty and/or Maintenance Agreements and Service Level Agreements

Any/all other contract documents which Vendor requires Customer to sign

Sample Installation Project Plan

Sample Acceptance Test Plan

Sample Contact Center Reports

Sample System Traffic and Peak Hour Reports – phone system and voicemail

Sample VoIP Readiness Report

**Indicate your compliance of providing all required documents.**

Response: Comply, Included Partial Comply, Included Optional Cost, Not Included DO NOT Comply

1. APPENDIX A: INSTRUCTIONS TO Vendor (PROPOSER)

**INSTRUCTIONS TO PROPOSER**

**PROPOSAL SUBMITTAL DEADLINE**

To be properly considered for award of this contract, your proposal must be received by the Marin County Purchasing Division no later than **the date and time listed in the Schedule of Events.**

Proposals received after this deadline will be rejected regardless of postmark date and will be returned to the proposer unopened.

Without law or policy to the contrary, if the proposer took reasonable steps to submit their proposal in due time, and failure of the proposal to be on hand at the time of closing was not the result of negligence or other fault of the proposer, but was the result of negligence by the County, the County reserves the right to accept such proposal.

**INFORMED Proposer**

Before submitting proposal, proposers must fully inform themselves of the conditions, requirements and specifications of the work or materials to be furnished. Failure to do so will be at the proposer’s own risk.

It is the responsibility of the proposer to carefully and thoroughly examine and be familiar with legal and procedural documents, general conditions, all forms, specifications, addenda (if any), herein referred to as contract documents. Proposer shall satisfy himself as to the character, quantity, and quality of work to be performed and materials, labor, supervision, equipment and appurtenances necessary to perform the work as specified by the contract documents.

The failure or neglect of the proposer to examine the documents shall in no way relieve him from any obligations with respect to the solicitation or contract. The submission of a proposal shall constitute an acknowledgment upon which the County of Marin may rely that the contractor has thoroughly examined and is familiar with the contract documents. The failure or neglect of a contractor to receive or examine any of the documents shall in no way relieve them from any obligations with respect to this Request for Proposal. No claim will be allowed for additional compensation that is based upon a lack of knowledge of any solicitation document.

**PRICES, NOTATIONS, AND MISTAKES**

Prices shall be stated in units and quotations made separately on each item. In case of conflict, unit prices will govern. Where there is a conflict between words and figures, words will govern.

**INterpretation, corrections and addenda**

The Proposer must carefully examine the specifications, terms and conditions provided in the request for Proposal and become fully informed as to the requirements set forth therein. If anyone planning to submit a proposal discovers any ambiguity, conflict, discrepancy, omission or error in the proposal, has any questions in relationship to the “Scope of Work”, or any other related matters, shall immediately notify the contact person as shown under “Contacts” of such concern in writing, either by mail, e-mail or facsimile, and request clarification or modification of the document(s) **no later than fourteen (14)** **days before the deadline as set forth under Schedule of Events.”**  No further requests for clarification or objections to the Proposal will be accepted or considered after this date. Any change in the proposal will be made only by written addendum, issued by email to the Vendor contacts in the Intent to Bid.

The Proposer shall sign and date the addendum and submit same with the proposal. **Any oral communication by the County’s designated contact person or any other County staff member concerning this proposal is not binding on Marin County and shall in no way modify this proposal or the obligations of the County or any Proposers.**

**addendA to rfp**

Should any question or response require revision to the scope of work as originally published, such revisions will be made in writing, by formal addendum only. During the proposal period, the County may issue written addenda to each person, firm, or corporation who has secured a copy of these specifications as issued and have responded with an Intent to Bid. Such changes or corrections shall be included in the work and/or materials covered by the proposal, and as such addenda shall become a part of the scope of work and contract. Potential contractors are cautioned that any verbal representations made by the Marin County, it’s agents and/or representatives, which appear to change substantially any portion of the scope of work, shall not be relied upon unless subsequently ratified by a formal written addendum to this solicitation.

Any changes, additions, deletions or clarifications to this proposal package, including the general/special provisions and scope of work shall be made by written addendum to the Request for Proposal. Such addendum shall be issued by email to the Vendor contacts on their Intent to Bid.

Addenda issued within fourteen (14) calendar days of the proposal opening date/time may as determined by the Purchasing Agent be cause for extension of the opening date, in order to allow prospective proposers sufficient time to prepare their proposals.

Each proposal shall include specific acknowledgement in the space provided of receipt of all addenda issued during the solicitation period. Failure to so acknowledge may result in the proposal being rejected as not responsive.

**AWARD OF proposal**

Award of proposal, if awarded, shall be made by Marin County after consideration of all Evaluation Criteria herein. Award will not be based on price alone. The criteria are not listed in any order of preference. An Evaluation Committee will be established by Marin County and/or its representatives or agents. The Committee will evaluate all proposals received in accordance with the Evaluation Criteria. Marin County reserves the right to establish weight factors that will be applied to the criteria depending upon order of importance. Weight factors and evaluation scores will not be released until after award of proposal. Marin County is not obligated to accept the lowest cost proposal, but will make an award in the best interests of Marin County after all factors have been evaluated. Receipt of the official Marin County purchase order shall indicate award of the proposal.

**METHOD OF AWARD**

The successful contractor will be determined on the basis of both cost and criteria outlined elsewhere in this solicitation. Although cost is an important factor, it is not the only factor that will be considered. The contractor to whom the award is made will be notified at the earliest possible date. The County of Marin, however, reserves the right to reject any and all proposals, and to waive any informality in proposals received whenever such waiver is in the best interest of Marin County. It also reserves the right to reject the proposal of a vendor who has previously failed to perform properly or complete on time contracts of similar nature, or the proposal of a vendor who is not in the position to perform the contract.

**AWARD AUTHORITY**

Marin County and/or its representatives or agents, shall be the sole judge of the quality and suitability of the proposal offered in its determination of the successful vendor.

**TERMS OF THE OFFER**

Marin County reserves the right to negotiate final contract terms with any Proposer selected. The contract between the parties will consist of the RFP together with any modifications thereto, the awarded Proposer’s proposal, and all modifications and clarifications that are submitted at the request of Marin County during the evaluation process.

**withdrawal of PROPOSAL**

Submitted proposals: a) may not be withdrawn within sixty (60) calendar days after the proposal opening; and b) may be withdrawn prior to the opening date only by written request of the Proposer’s authorized representative. At no time may the Successful Proposer withdrawal his Proposal.

**COST OF PREPARATION OF OFFERING**

The County will not pay cost incurred in the offering preparation, printing, demonstration, or negotiation process. All costs shall be borne by the proposing vendor.

**CONFIDENTIALITY OF DOCUMENTS**

All documents submitted as part of the vendor’s offering will be deemed confidential during the evaluation process. Vendor offerings will not be available for review by anyone other than the county evaluation team or its designated technical and operational representatives. Following award of contract, all offerings become public documents and are available for public viewing upon written request.

**PROPOSER IS SOLE POINT OF CONTACT**

The Successful Proposer will be the sole point of contact. Marin County will look solely to the Successful Proposer for the performance of all contractual obligations which may result from an award based on this RFP, and the awarded Proposer shall not be relieved for non-performance of any or all subcontractors.

**SPECIFICATIONS DEFINED**

The term “specification” or “RFP specification” as used in this solicitation shall be interpreted to mean all the pages that make up this solicitation, including but not limited to the Request for Proposal, Instructions To Proposer, Terms and Conditions, Detailed Specifications or Scope of Work, Proposal form(s), General Provisions, Special Provisions, Experience Statement, and Workers Compensation Insurance Certificate.

**\*\*\*END OF INSTRUCTIONS TO PROPOSER\*\*\***

1. APPENDIX B: General provisions

**GENERAL PROVISIONS**

**GENERAL PROJECT DESCRIPTION**

The basic scope of work covered under this Proposal is described in the Unified Communications and Contact Center Solution RFP, RFP appendices, Schedules, and any Addenda.

**responsible parties**

Representing the County of Marin in all matters regarding the submission of the Request for Proposal shall be those listed in Contacts (RFP Section 2.2).

**Assignment and subcontracting**

The proposer shall have no right, authority or power to sell, mortgage or assign the resulting purchase order or any interest herein, or any right, power or authority to allow or permit any other person or persons or organizations to have any interest in or use any part of the rights or obligations granted hereunder for any purpose whatsoever without the prior written consent of the County of Marin. Neither the purchase order nor any interest created thereby shall pass by operation of law to any trustee or receiver in bankruptcy or to any other receiver or assignee for the benefit of creditors or any claim hereunder to any other party or parties, except as expressly authorized by the County of Marin.

**change orders**

The County of Marin may at any time, without notice to any sureties, by written change order, make any change in the work specified in the resulting Purchase Order, including but not limited to changes:

1. In the terms and conditions of the Purchase Order

2. In the written specifications

no order, statement or conduct, written or oral, shall be treated as a

change order unless in writing and signed by both PARTIES.

**FORCE MAJEURE**

Time extension for delay may be allowed the Proposer by the County of Marin for any delay in the completion/delivery of specified items which arises from unforeseeable causes beyond the control of the proposer and without fault or negligence of the proposer, including but not restricted to such causes as the act or negligence of the County of Marin, stormy or inclement weather in which specified work cannot be done, strikes, boycotts, acts of God, acts of the public enemy, acts of government, fire, flood, epidemics, freight embargo, delays of suppliers which arise from unforeseeable causes beyond the control and without the fault or negligence of both the proposer and supplier.

**termination for default – TIME EXTENSION FOR DELAY**

If the proposer fails or refuses to prosecute the work, or any separable part thereof, so as to insure that the items specified will not be completed and/or delivered within the time specified in the proposal documents and Purchase Order, the County of Marin, may, by written notice to the proposer, terminate its right to proceed with the work or such part of the work as to which there has been a delay at the County’s option. The proposer and its sureties shall be liable to the County of Marin for liquidated damages, or if no liquidated damages are so provided, then for any damages to the County of Marin resulting from the proposer’s failure or refusal to complete/deliver the items within the specified time.

**termination for CONVENIENCE**

The County reserves the right to terminate the contract at any time, for the convenience of the County of Marin, without penalty or recourse, by giving written notice to the Contractor at least thirty (30) calendar days prior to the effective date of such termination. The County may cancel this contract WITH CAUSE at any time by giving ten (10) day’s written notice to the contractor. The Contractor reserves the right to terminate the contract at any time, for the convenience of the Contractor, without penalty or recourse, by giving written notice to the County at least sixty (60) calendar days prior to the effective date of such termination. The Contractor shall be entitled to receive just and equitable compensation for services and/or supplies delivered to and accepted by the County pursuant to the contract prior to the effective date of termination. Termination compensation cannot exceed the monthly service fee, and the termination nullifies the remaining months of the contract.

1. Termination for lack of funding: The County reserves the right to terminate any contract in any user agency if said agency loses funding during the term of the contract.
2. Termination for non-performance: The County may terminate the contract in whole or in part if delivery or performance is repeatedly unsatisfactory. Unsatisfactory performance includes but is not limited to:
   1. Repeated failure to respond within requested time-frame
   2. Failure to perform services when promised or expected
   3. Inability to reach Contractor contact; lack of customer service

**GOVERNING LAWs**

This request for proposal and the resulting purchase order shall be governed by all applicable federal, state, and local laws, codes, ordinances, and regulations including, but not limited to, those promulgated by CAL-OSHA, FED-OSHA, EPA, EEOC, DFEH, the California State Department of Health Services, and the County of Marin Environmental Health Department. This contract shall be in accordance with the substantive and procedural laws of the State of California.

**NUCLEAR FREE ZONE**

The County of Marin is a nuclear free zone in which work on nuclear weapons and/or the storage or transportation of weapons related components and nuclear material is prohibited or appropriately restricted. The County is prohibited or restricted from contracting for services or products with, or investing County funds in, any nuclear weapons proposer. (Chapter 23.12 Nuclear-Free Zone)

**LOCAL BUSINESS PREFERENCE**

In accordance with County of Marin ordinance # 89-2993; whenever the County of Marin acquires services or supplies by purchase or contract, the Director of Purchasing in evaluating the price or proposal, shall award a five (5.0) percent preference on the price submitted by a local county business. (Chapter 3.10 Preference in Contracts and Purchases)

**DAMAGES**

The proposer shall be held responsible for damage to existing facilities/sites, or to completed new work, that may be caused by the proposer's work or workmen. Proposer shall properly repair damage or remove and replace damaged property as appropriate at the proposer's expense as required by the County of Marin**.**

**LIVING WAGE**

This contract is subject to the County of Marin Living Wage Ordinance #3435 (part), 2005. The ordinance requires the payment of a living wage to all covered employees engaged in providing services pursuant to a service contract as defined in section 2.50.030 (F). Proposer specifically agrees that should the County of Marin investigate allegations of non-compliance with the Living Wage Ordinance, proposer shall make available for audits its books and records relating to the service contract, as well as the books and records of its sub-proposers and proposer will make available employees in furtherance of its investigation. Misrepresentation during the procurement or contracting process in order to secure the contract will disqualify a proposer from further consideration in the procurement or contracting process. Failure to comply once a contract has been awarded will constitute a material breach of the contract and may result, among other things, in the suspension or termination of the affected contract opportunities for a period not to exceed three years. (Chapter 2.50 Living Wage)

<http://www.marincounty.org/depts/ad/divisions/management-and-budget/living-wage-ordinance>

**COOPERATIVE AGREEMENT**

Agreement may be used by other governmental agencies, school districts, and special districts upon mutual consent of both parties. The proposer shall provide firm fixed pricing for all items or services, as specified herein, and allow agencies to purchase said goods or services at any time during the effective period of the resulting County of Marin Purchase Order.

**independent proposer**

The proposer agrees and certifies that they or any of their agents, servants, or employees is not an agent or employee of the County of Marin. The proposer is an independent solely responsible for proposer's acts. The resulting Purchase Order shall not be construed as an agreement for employment with the County.

**NON-APPROPRIATION OF FUNDS**

The County of Marin warrants that it has funds available to remit payments on the resulting County Purchase Order at the time the purchase order is executed. Should appropriated funds during the term of the Purchase Order become unavailable for the purpose of the Purchase Order, the County may cancel the Purchase Order by providing the proposer with written notice. Such notice shall release both the County and proposer from all obligations under the Purchase Order, and proposer shall refund the County the balance of any advance payment made for orders of goods and/or services which are outstanding or which have not been received by the County.

**EXAMINATION OF DOCUMENTS**

It is the responsibility of the proposers to carefully, thoroughly examine and be familiar with legal and procedural documents, general conditions, all forms, specifications, and addenda (if any). Proposers shall satisfy themselves as to the character, quantity, and quality of work to be performed and materials, labor, supervision, equipment and appurtenances necessary to perform the work as specified. The failure or neglect of the proposer to examine the documents shall in no way relieve them from any obligations with respect to the solicitation or contract. The submission of a proposal shall constitute an acknowledgement upon which the County of Marin may rely that the proposers have thoroughly examined and are familiar with the documents. The failure or neglect of the proposers to receive or examine any of the documents shall in no way relieve them from any obligations with respect to the proposal. No claim will be allowed for additional compensation that is based upon a lack of knowledge of any solicitation document.

**CONFORMITY WITH LAW AND SAFETY**

Vendor shall observe and comply with all applicable laws, ordinances, codes and regulations of governmental agencies, including Federal, State, Municipal and Local Governing Bodies having jurisdiction over the scope of services or any part hereof, including all provisions of the Occupation Safety and Health Act of 1979 and all amendments thereto, and applicable Federal, State and Local Government Safety Regulations. All services performed by Vendormust be in accordance with these laws, ordinances, codes and regulations. Vendorshall indemnify and save County harmless from any and all liability, fines, penalties and consequences arising from any non-compliance of violations of such laws, ordinances, codes and regulations.

B. Accidents: If a death, serious personal injury, or substantial property damage occurs in connection with the performance of this agreement, Vendor shall immediately notify the County by telephone. Vendor shall promptly submit to County a written report, in such form as may be required by County, of all accidents which occur in connection with this agreement. This report must include all of the following information:

(1) Name and address of the injured or deceased person, and

(2) Name and address of Proposer’s subcontractor (if any), and

(3) Name and address of Proposer’sLiability Insurance Carrier, and

(4) A detailed description of accident and whether any of County’s equipment

or material was involved.

**ATTORNEYS FEES**

If any action at law or inequity is brought to enforce or interrupt the provisions of this agreement, the prevailing party shall be entitled to reasonable attorney’s fees in addition to any other relief to which it may be entitled.

**BIDDER AGREEMENT TO TERMS AND CONDITIONS**

Submission of a signed bid will be interpreted to mean Bidder has agreed to all the terms and conditions set forth in the pages of this solicitation.

**RIGHT TO AUDIT**

County shall have the right of audit and inspection of the Vendor’sbusiness records at any time during the term of this agreement. Vendorshall have readily available all records related to the performance of the agreement and shall provide office space as may be required for County to audit these records.

**TAXES**

Successful bidder shall pay all federal, state and local taxes, levies, duties and assessments of every nature due in connection with any work under the contract and shall indemnify and hold harmless the County of Marin from any liability on account of any and all such taxes, levies, duties, assessments and deductions.

**TAX, CALIFORNIA NON-RESIDENT INCOME AND FRANCHISE TAX WITHHOLDING**

The California Franchise Tax Board through the California Revenue and Taxation Code (R&TC) Section 18662 and the related regulations requires the withholding of California income and franchise taxes from payment made to nonresident California vendors performing services in this state. A withholding of 7% (the 2011 rate which is applicable to change) of all service related invoices will be withheld and remitted to the state; there is no required withholding on goods provided. In addition there are higher applicable rates that apply to nonresident foreign non-corporate partners, corporate partners and foreign bank (including financial institution partners.)

**NOMENCLATURES**

The terms Successful Proposer, offeror, bidder, vendor, and contractor may be used interchangeably in this solicitation and shall refer exclusively to the person, company, or corporation with whom the County of Marin enters into a contract as a result of this solicitation. The terms County of Marin and Department may be used interchangeably in this solicitation.

**COMPLIANCE OR DEVIATION TO SPECIFICATIONS**

Bidder hereby agrees that the material, equipment or services offered will meet all the requirements of the specifications in this solicitation unless deviations are clearly indicated in the bidder’s response and listed as such**.**

SIGNATURE BLOCK TO BE PLACED HERE

**\*\*\*END OF GENERAL PROVISIONS\*\*\***

1. APPENDIX C: requirements for contractors

**COUNTY OF MARIN**

**REQUIREMENTS FOR CONTRACTORS**

1. **LICENSES**

All Contractors and their Subcontractors shall be licensed at the time of the bid date by the Contractors State License Board of the State of California to perform the work, if such work lawfully requires such licensing.

1. **TAXES**

Contractors shall calculate payment for all sales, unemployment, old age pension and other taxes imposed by local, city, state or federal law, and shall include such expenses in the total amount bid.

1. **CONTRACTOR REGISTRATION WITH CALIFORNIA DEPARTMENT OF INDUSTRIAL RELATIONS**

A contractor or subcontractor may not be qualified to bid on or be listed on a bid proposal for a public works project unless registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5 (with limited exceptions from this requirement for bid purposes only under Labor Code section 1771.1(a)). No contractor or subcontractor may be awarded a contract for public work on a public works project unless registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5.

Contractor must comply with all applicable California Labor Code provisions and related regulations, including, but not limited to the following: Labor Code Sections 1771, 1774, 1775, 1776, 1777.5, 1813, and 1815; Title 8, Division 1, Chapter 8, Subchapter 4.5 of the California Code of Regulations (8 CCR 16451 et seq.).

This project is subject to the requirements of Division 2, Part 7, Chapter 1 of the Labor Code, as well as the obligation to furnish certified payroll records directly to the Labor Commissioner in accordance with 8 CCR 16461. This project is subject to compliance monitoring and enforcement by the Department of Industrial Relations.

**\_\_\_\_\_\_\_ If initialed by the County of Marin (the “County”) representative, the above paragraph has been determined by the County to be inapplicable on the basis that the services to be provided under this contract do not require registration with the California Department of Industrial Relations pursuant to Labor Code Section 1771.1(a). It is the Contractor’s responsibility to correct this determination if it believes the conclusion to be inaccurate.**

**4. PAYING OF PREVAILING WAGE RATES**

Pursuant to Section 1773 of the Labor Code, the general prevailing wage rates for Marin County where the work is to be done have been determined by the Director of the California Department of Industrial Relations. The General Prevailing Wage Rates are available at the Department of Public Works, and are also available at the State of California Division of Labor Statistics and research web site at <http://www.dir.ca.gov/DLSR/PWD/index.htm> . Said rates are based on an eight (8) hour day, forty (40) hour week, except as otherwise noted and currently in effect. Existing agreements between the Building Trades and Construction Industry groups relate to wages, overtime, holidays and other special provisions shall be strictly observed. In compliance with the provisions of Section 1776 of the Labor Code of the State of California, as amended the Contractor and each of their Subcontractors shall keep an accurate payroll record, showing the name, address, social security number, work classification, straight time and overtime hours worked each day and week, and the actual per diem wages paid to each journeyman, apprentice or worker employed by them in connection with the project. Said records shall be available for inspection at all reasonable hours, and copies shall be made available to the employee or their authorized representative, the State Division of Labor Standards Enforcement, the State Division of Apprenticeship Standards, and the County.

The contractor or subcontractor shall, as a penalty to the County of Marin, forfeit twenty-five dollars ($25) for each worker employed in the execution of the contract by the respective contractor or subcontractor for each calendar day during which the worker is required or permitted to work more than 8 hours in any one calendar day and 40 hours in any one calendar week in violation Labor Code Section 1813 et seq.

**5. INDEMNIFICATION**

To the maximum extent allowed by law and consistent with Civil Code Section 2782, Contractor shall effectively defend, indemnify, and hold harmless the County of Marin (“County”), their officers, agents, and employees, from any liability as a consequence of any willful act or negligent act or omission by the Contractor, any of the Contractor's employees or agents, or any subcontractor, and shall be responsible for any and all damage, injury, or death to persons, or damage to property. Contractor shall indemnify, defend and hold harmless County, their officers, agents, and employees from any and all claims, suits, actions, costs, and liability ensuing in connection with the performance of the contract, or failure to protect the safety of workers or the general public. The duty to defend shall include, but is not limited to, the payment of court costs, expert witness fees, and attorney’s fees (whether or not handled “in-house” by the County) and shall further include attorney’s fees for separate counsel if there exists an actual or potential conflict between County and Contractor.

Consistent with Civil Code Section 2782, this provision does not impose upon Contractor liability for damages for death or bodily injury to persons, injury to property, or any other loss, damage or expense arising from the sole negligence, or willful misconduct of the County or their agents, servants, or independent contractors who are directly responsible to the County, or for defects in design furnished by those persons. In addition, consistent with Civil Code Section 2782, this provision neither imposes upon Contractor, nor relieves County of liability arising from the active negligence of the County.

**6. INSURANCE**

The Contractor shall maintain a commercial general liability insurance policy in the amount of **one million dollars ($1,000,000.00).** If the policy has an annual aggregate, the limit of the annual aggregate must be at least twice the occurrence limit. Where the services to be provided under this Contract involve or require the use of any type of vehicle by Contractor in order to perform said services, Contractor shall also provide comprehensive business or commercial automobile liability coverage including non-owned and hired automobile liability in the amount of $1,000,000.00. Said policies shall remain in force through the life of this Contract and shall be payable on a "per occurrence" basis only. The County of Marin shall be named as an additional insured on the commercial general liability policy. The insurer shall supply a certificate of insurance with endorsements signed by the insurer evidencing such insurance to County prior to commencement of work.

**X\_\_\_\_\_\_\_ By initialing in the space provided, Contractor warrants that the services to be provided under this Contract do not require the use of any type of vehicle by Contractor.**

Nothing herein shall be construed as a limitation of Contractor's liability, and County agrees to timely notify Contractor of any negligence claim.

Failure to provide and maintain the insurance required by this contract will constitute a material breach of the agreement. In addition to any other available remedies, may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

**7. WORKERS' COMPENSATION**

The Contractor acknowledges that it is aware of the provisions of the Labor Code of the State of California which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that Code, and it certifies that it will comply with such provisions before commencing the performance of the work of this Contract. If Contractor has employees, a copy of the certificates evidencing such insurance shall be provided to County prior to commencement of work.

Workers’ Compensation insurance as required by the State of California and Employers Liability Insurance with limit of $1,000,000. If any work shall be performed on, in, or under a body of water and governed by U.S. Longshoremen’s and Harbor Workers Compensation Act, the Jones Act or under laws, regulations or statutes applicable to maritime employees, coverage shall be included for such injuries or claims. Contractor is responsible for determining if there is an exposure to such an injury and agrees to indemnify the County for all claims arising out of such an injury.

**X\_\_\_\_\_\_\_By initialing in the space provided, Contractor warrants that no employees will be used in providing the services under this Contract.**

**8. NONDISCRIMINATORY EMPLOYMENT**

Contractor and/or any permitted subcontractor shall not unlawfully discriminate against any individual based on race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status of any person. Contractor and/or any permitted subcontractor understands and agrees that Contractor and/or any permitted subcontractor is bound by and will comply with the nondiscrimination mandates of all Federal, State, and local statutes, regulations and ordinances.

**9. INTEGRATED PEST MANAGEMENT (IPM)**

The Contractor shall strictly adhere to the guidelines established in the County of Marin’s IPM Ordinance and Policy, approved by the Board of Supervisors on July 21, 2009. All pesticide applications, regardless of material used, must be approved by the IPM Coordinator prior to use at any facility covered by the contract. Material for weed eradication and pest control shall be only those listed in the County of Marin’s approved list and categories III and IV herbicides, non-corrosive, non-staining, and shall not leave a flammable residue. Pesticides shall be Environmental Protection Agency and California Department of Agriculture approved and used in strict accordance with manufacturer’s label, recommendations, Federal, State, and local laws. All requests for application must be submitted to the Engineer four (4) calendar days prior to posting. Requests must include a map of the area, material requested to be used and dates of application requested. All applications must be approved by the Engineer in writing and applicators must have a signed Pest Control Recommendation before application. All information regarding approved applications will be posted to the County of Marin IPM website. Four (4) calendar days prior to any pesticide application, any area to receive a pesticide application shall be posted to notify the public except those areas specifically noted in the Ordinance. Chemical application must use least toxic methods and be used as the last resort and only with written approval Failure to comply with the Marin County IPM Ordinance & Policy may result in fines of up to $200.00 per incident and/or contract termination. The IPM policy and Ordinance are available at the following website: http://www.marincounty.org/depts/ag/ipm

List of Materials Within thirty (30) calendar days after award, Contractor shall furnish to the Engineer for approval a list of fertilizers, herbicides, insecticides, and other chemicals the Contractor proposes to use at each work site. Contractor shall also furnish a sample label and a MSDS for each product. Only County approved materials may be used.

Records Contractor is required to maintain records of pest control activities. Contractor shall submit reports on a monthly basis to the Engineer if fertilizers, herbicides, insecticides, and other chemicals were used at the work site. Reports are to include the date, name of the pest, the site/location the work was done, name of technician performing the work, and corrective action taken. If a pesticide was used, the product name, the amount applied, and the area treated must also be reported.

**10. STORMWATER POLLUTION PREVENTION**

In performing or delivering services at County-owned, leased or managed property, or in performance of services and activities on behalf of County regardless of location, the Contractor shall implement any and all applicable Best Management Practices (BMPs) designed to prevent and reduce stormwater pollution in a manner pursuant to and consistent with the County’s Stormwater Runoff Pollution Prevention ordinance (Chapter 23.18) and the Phase II Small Municipal Separate Storm Sewer System (MS4) National Pollutant Discharge Elimination System (NPDES) Permit, Water Quality Order No. 2013-0001-DWQ, General Permit No. CAS000004 and subsequent revisions and amendments thereto.

Guidance on current Best Management Practices is available from the Marin County Stormwater Pollution Prevention Program (MCSTOPPP) through two documents: 1) “Minimum Control Measures for Small Construction Projects”; and 2) the “Municipal Field Operations and Maintenance Activities Best Management Practices Guidelines” handbook. Both documents are available upon request from Marin County Public Works, room 304 of the Marin County Civic Center or electronically on the MCSTOPPP website:

Minimum Control Measures for Small Construction Projects:<https://www.marincounty.org/~/media/files/departments/pw/mcstoppp/development/erosionsediment-controlmeasures-for-small-construction-projects-_2015.pdf?la=en>

Municipal Field O&M Activities BMP Guidelines:<https://www.marincounty.org/~/media/files/departments/pw/mcstoppp/municipalities_only/e11h_field-ombmps_version2_060916.pdf?la=en>

Under E.11 Pollution Prevention and Good Housekeeping (E.11.g and h).

**11. LAWS GOVERNING WORK PERFORMED BY CONTRACTOR**

The contractor shall comply with all applicable federal, state and local laws, rules, regulations, and ordinances. These laws include, but are not limited to, bird and nesting laws such as the Federal Migratory Bird Treaty Act of 1918, the California Department of Fish and Wildlife codes 3503, 3503.5, 3513, and Marin County Code 23.16.010 for Pacheco Pond. Contractor is required to be familiar with and in compliance with all bird nesting buffer areas and breeding dates when work may negatively impact birds and nesting areas.

The parties stipulate that this agreement was entered into in the County of Marin, City of San Rafael, in the State of California. The parties further stipulate that the County of Marin, CA City of San Rafael is the only appropriate forum for any litigation resulting from a breach hereof or any questions risen here from.

**12. DEBARMENT AND SUSPENSION CERTIFICATION**

The Contractor under Title 49, Code of Federal Regulation, Part 29, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager: is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency; has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years; does not have a proposed debarment pending; and has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

**13. GENUINE BID**

The Undersigned hereby certifies that this bid is genuine and not sham or collusive, or made in the interest or on behalf of any person or business not herein named, and that Contractor has not directly or indirectly induced or solicited any other bidder to furnish a sham bid, or any other person or business to refrain from bidding, and that Contractor has not in any manner sought by collusion to secure an advantage over any other bidder.

**Contractor has read and understands the foregoing and agrees to be bound by all of the foregoing terms and conditions.**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contractor (Firm Name)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Authorized Signature Date**

f:\purchasing\procurement -\website uploads and hyperlinks\rfc forms\2017-12 rfc- county.doc

**\*\*END OF REQUIREMENTS FOR CONTRACTORS\*\***

1. APPENDIX D: County of Marin department list

|  |  |  |
| --- | --- | --- |
| Department | Address | City |
| [Administrator, Marin County](https://www.marincounty.org/depts/ad) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Agriculture, Weights and Measures - Marin County](https://www.marincounty.org/depts/ag) | 1682 Novato Blvd. | Novato, CA 94947 |
| [Assessor - Recorder - County Clerk](https://www.marincounty.org/depts/ar) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Board of Supervisors](https://www.marincounty.org/depts/bs) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Child Support Services](https://www.marincounty.org/depts/cs) | 88 Rowland Way | Novato, CA 94945-1408 |
| [Community Development Agency](https://www.marincounty.org/depts/cd) | 3501 Civic Center Drive | San Rafael, CA |
| [County Administrator](https://www.marincounty.org/depts/ad) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [County Clerk](https://www.marincounty.org/depts/ar/divisions/county-clerk) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [County Counsel](https://www.marincounty.org/depts/cl) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Cultural Services](https://www.marincounty.org/depts/cu) | 10 Avenue of the Flags | San Rafael, CA 94903 |
| [Department of Finance](https://www.marincounty.org/depts/df) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [District Attorney](https://www.marincounty.org/depts/da) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Elections](https://www.marincounty.org/depts/rv) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Enhanced Court Collections](https://www.marincounty.org/main/ec) | 88 Rowland Way | Novato, CA 94945-1408 |
| [Farm Advisor / UC Cooperative Extension](https://www.marincounty.org/depts/fa) | 1682 Novato Blvd. | Novato, CA 94947 |
| [Finance, Department of](https://www.marincounty.org/depts/df) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Fire Department](https://www.marincounty.org/depts/fr) | 33 Castlerock Ave | Woodacre, CA 94973 |
| [Grand Jury, Civil](https://www.marincounty.org/depts/gj) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Health & Human Services](https://www.marinhhs.org/) | 20 North San Pedro Road | San Rafael, CA 94903 |
| [Human Resources](https://www.marincounty.org/depts/hr) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Information Services and Technology](https://www.marincounty.org/depts/is) | 1600 Los Gamos Drive | San Rafael, CA 94903 |
|  |  |  |
| [Marin County Civil Grand Jury](https://www.marincounty.org/depts/gj) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Marin County Free Library[External]](http://www.marinlibrary.org/) | 3501 Civic Center Drive | San Rafael, CA 94903 |
|  |  |  |
| [Parks, Marin County](https://www.marincounty.org/depts/pk) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Probation](https://www.marincounty.org/depts/pb) | 3501 Civic Center Drive | Suite 259 |
| [Public Administrator](https://www.marincounty.org/depts/df/divisions/public-administrator) | 3501 Civic Center Drive | San Rafael, CA 94913-4220 |
| [Public Defender](https://www.marincounty.org/depts/pd) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Public Works](https://www.marincounty.org/depts/pw) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Recorder](https://www.marincounty.org/depts/ar/divisions/recorder) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Registrar of Voters](https://www.marincounty.org/depts/rv) | 3501 Civic Center Drive | San Rafael, CA 94903 |
| [Retirement](https://www.mcera.org/) | One McInnis Parkway | San Rafael, CA 94903 |
| [Sheriff[External]](http://www.marinsheriff.org/) | 1600 Los Gamos Drive | San Rafael, CA 94903 |
|  |  |  |
| [Treasurer Tax Collector](https://www.marincounty.org/depts/df) | 3501 Civic Center Drive | San Rafael, CA 94903 |
|  |  |  |

1. APPENDIX E: LOCAL BUSINESS PREFERENCE CERTIFICATION FORM

**LOCAL BUSINESS PREFERENCE CERTIFICATION FORM**

Chapter 3.10 of the Marin County Code, Preference in Contracts and Purchases, allows a 5% preference on the price submitted to local businesses which contract with, and sell **services** and **supplies** to the county.

All respondents must certify they meet the definition of local business. Please initial one of the following definitions which apply to your business and describe below:

1. \_\_\_\_\_\_ **Has its principal place of business in Marin County; or**

Describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_ **has a business license issued in Marin County for a period of six months prior to any claim of preference; or**

Describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3.\_\_\_\_\_\_ **maintains an office or other facility in Marin in which not less than five persons are employed substantially full time**.

Describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any business which falsely claims a preference pursuant to Chapter, 3.10, shall be ineligible to bid on county purchases or contracts for a period of one year from the date of discovery of the false certifications.

The Local Business Preference Certification form must be completed and returned with your bid/proposal response if you are claiming the 5% local business preference. Upon request, vendor agrees to provide additional information to substantiate this certification.

Vendor certifies information provided is true and accurate under penalty of perjury.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Firm Name Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Address City, State, Zip Code

Signature of Authorized Representative Title of Authorized Representative

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E\*Mail

**Note: In no case shall the total of all preferences for which a bid/proposal is eligible exceed fifteen percent (15%).**

**\*Return this form ONLY if you are seeking this preference\***

**MARIN WORKFORCE BIDDERS PREFERENCE CERTIFICATION FORM**

Chapter 2.50 of the Marin County Code, Living Wage Ordinances, allows a 5% bidding preference to businesses who certify that at least 50% of the workforce under the **service** contract will be Marin County residents.

All respondents must certify and describe that their business employs at least 50% of the workforce under the service contract **at the time of this solicitation are** Marin County residents as defined below:

“Employee” means an individual who is permanently or temporarily employed by a county contractor or subcontractor performing direct services during any applicable pay period on work funded (in whole or in part) pursuant to a service contract as defined under this chapter. Employee also includes a county employee, except county full or part-time employees who are in the student aide or seasonal job classifications. IHSS providers are subject to this chapter.

Direct services do not include activity not directly contracted for by the county; for example, if the contract is for providing “counseling,” then only those employees providing that counseling are affected. Employees that would not be affected in that scenario would include support staff to those counselors, staff who process payroll or bill for the counselor’s time, or staff who supervise or manage those counselors. In another example, if the contract is to provide janitorial services, only those employees providing the janitorial services in county facilities would be affected. Employees who order supplies or repair equipment used in the performance of those services would not be affected.

Employee does not include an individual who is: (1) A worker classified as a student trainee, or intern working through an approved state or academic program or working towards state licensure or a professional accreditation sanctioned by a public entity or recognized licensure agency; (2) nor does it include anyone, regardless of age, who is providing services to earn academic credit or as part of a formal government approved, time-specific training program (e.g., Marin conservation corps trainees); and (3) employee also does not include a person providing volunteer services.

Describe:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The Marin Workforce Bidders Preference Certification form must be completed and returned with your bid/proposal response if you are claiming the 5% bidding preference. Upon request, vendor agrees to provide additional information to substantiate this certification.

**\*Return this form ONLY if you are seeking this preference\***

1. APPENDIX F: County of marin non-Disclosure AGREEMENT

***<SEE NEXT PAGE>***

County of Marin, CA

Non-Disclosure Agreement

**for Vendors**

As an authorized representative and/or corporate officer of the company named below, I agree that all persons employed by this company or subcontracted by this company will adhere to the following policy:

All information belonging to the County of Marin or its affiliated agencies are considered sensitive and/or confidential and cannot be disclosed to any person or entity that is not directly approved to participate in the work required to execute this Agreement.

I certify that I will keep all project information, including information concerning the planning, processes, development or procedures of the Request for Proposal for Unified Communications and Contact Center Solution (“Project”), confidential and secure. I will not copy, give or otherwise disclose such information to any other person unless the County of Marin has on file a confidentiality agreement signed by the other persons, and the disclosure is authorized and necessary to the Project. I understand that the information to be kept confidential includes, but is not limited to, specifications, administrative requirements, and terms and conditions, and concepts and discussions as well as writing or electronic materials. I further understand that if I leave the Project before it ends, I must still keep all Project information confidential. I agree to follow any instructions provided by the Project relating to the confidentiality of materials that are part of the Project.

I fully understand that any unauthorized disclosure I make may be basis for civil or criminal penalties. I agree to advise the contract manager immediately in the event of an unauthorized disclosure, inappropriate access, or loss of data.

All materials provided for this Project, except where explicitly stated, will be promptly returned or destroyed, as instructed by an authorized County of Marin representative. If the materials are destroyed and not returned, a letter attesting to their complete destruction which documents the destruction procedures must be sent to the contract manager at the County of Marin before payment can be made for services rendered. In addition, all copies or derivations, including any working or archival backups of the information, will be physically and/or electronically destroyed within five (5) calendar days immediately following either the end of the contract period or the final payment, as determined by the County of Marin.

The County of Marin expects that all personnel assigned to this project have a non-disclosure agreement with the company named below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | |  |  |
|  | |  |  |
| Representative Signature | |  | Date |
|  | |  |  |
| **PLEASE TYPE/PRINT:** |  | | |
|  |  | | |
| Representative Name: |  | | |
|  |  | | |
| Representative Title: |  | | |
|  |  | | |
| Representative Phone: |  | | |
|  |  | | |
| Company Name: |  | | |
|  |  | | |
| Company Address: |  | | |
|  |  | | |