

## REQUEST FOR PROPOSAL (RFP) 2018-3019

Martin County Board of County Commissioners  
2401 S.E. Monterey Road  
Stuart, Florida 34996  
(772) 288-5481

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[www.martin.fl.us](http://www.martin.fl.us)

The Board of County Commissioners, Martin County, Florida, will receive sealed proposals for:

### TELEPHONE SYSTEM

Sealed proposals will be received by the Information Desk on the 1<sup>st</sup> Floor at the address above until **2:30 PM** local time, on **Wednesday, January 17, 2018**.

A pre-proposal conference call will be held on December 6, 2017 at 10:00 AM. Call 408-792-6300, access code 620 935 834, password phone1. Click on this [link](#) for WebEx.

The basic proposal document is available at [www.martin.fl.us](http://www.martin.fl.us). Type “bids” in the Search field and then click on Bid Search.

The complete bid document may be downloaded from [www.publicpurchase.com](http://www.publicpurchase.com) (online bidding site).

Martin County is an equal opportunity/affirmative action employer.

By order of the Board of County Commissioners of Martin County, Florida.

## REQUEST FOR PROPOSAL (RFP) DOCUMENTS

Bidders must register with the online bidding site in order to receive all required documents and notification of addenda.

1. Specifications
2. Proposal Requirements
3. Cost Worksheet
4. Submittal Format

## INSTRUCTIONS TO PROPOSERS

1. Proposal to be provided in the order and format outlined in the Submittal Format document.
2. The Respondent agrees and shall comply with all provisions and specifications as stated in this RFP unless otherwise stated in the Exceptions section of this RFP. Any additional cost or factors to meet a specification or requirement must be noted in the Exceptions section. Failure to respond to these requirements may result in the proposal being considered non-responsive.
3. A Selection Committee will score the proposals based on the criteria below and may develop a short list of firms that will make a presentation to the committee. If presentations are required, ten (10) additional points will be available to the firms.

<b>Selection Criteria</b>	<b>Point Value</b>
<b>Total Five-Year Cost</b>	25
<b>Technology</b>	
Redundancy/Resiliency	5
Design Complexity	5
System Management & Active Directory Integration	5
UM and UC Application	5
Telephones	5
<b>Organization</b>	
Financial Stability	5
Industry and Product Experience	5
Implementation and Testing Process	5
Maintenance Support	5
References	5
<b>Manufacturer</b>	
Financial Stability	10
Product Life Cycle Status	15

## ADDITIONAL INFORMATION

1. Cone of Silence. The County prohibits any communication by a vendor or sub-vendor with Selection Committee members or any other employee or agent of the County regarding this RFP

outside the Purchasing Division including but not limited to the County Administrator and County Commissioners about the project during the selection process from the time of advertisement until contract award except during public meetings. Violation of this policy shall result in disqualification of the vendor.

2. All questions concerning this selection process or this document, and protests, or appeals of the decision of the Selection Committee must be addressed in writing to the Purchasing Division and e-mailed to [pur\\_div@martin.fl.us](mailto:pur_div@martin.fl.us). Questions shall be received no later than 12:00 PM on Monday the week prior to the bid due date and the last Addendum will be issued no later than end of business Wednesday the week prior to the due date.
3. No oral interpretation of this RFP shall be considered binding. The County shall be bound only when such statements are written and executed under the authority of the Purchasing Manager. Any and all interpretations and any supplemental instructions will be in the form of written addendum via [the](#) online bidding site. Failure of any Vendor to receive such addendum shall not relieve said Vendor from any obligation under the RFP submitted. All addenda issued shall become part of the Contract Documents.
4. The County reserves the right to reject any and all submittals with or without cause, to waive technicalities, or to accept those submittals which best serve the interests of the County.
5. All submittals shall become a public record upon receipt by the County.
6. Submittals may be withdrawn prior to due date by written request by the Vendor proposal deadline.
7. The County reserves the right to request clarification of information submitted and to request additional information of one or more Vendors after the deadline for receipt of Submittals.
8. Costs for preparation of a response to this request are solely those of the Vendor and the County assumes no responsibility for any such costs incurred by the Vendor. The County will not be liable for any costs incurred by the Vendor prior to execution of the contract by the parties.
9. Submittals shall be formatted to letter sized paper and with a minimum 12 point font.
10. Vendors are instructed NOT to fax or e-mail their submittal as they shall be rejected as non-responsive.
11. Vendors must indicate on the outside of their envelope the following:
  - RFP Number and Name
  - Due Date and Time
  - Name of Proposer
12. All Submittals must be manually and duly signed by an authorized corporate officer, principal, or partner (as applicable) with a signature in full on the Cover Letter/Statement of Interest. Vendors who are nonresident corporations shall furnish to the County evidence of their ability to transact business in the State of Florida along with their RFP.
13. Submittals that contain any limiting terms and conditions that do not explicitly agree to provide the

scope in the contract documents may be disqualified.

14. Any Vendor who presents in its RFP to the County, any information which is determined by the County, in its sole opinion, to be substantially inaccurate, misleading, exaggerated, or incorrect, may be disqualified from consideration.
15. All Submittals must be in ink or typewritten. No erasure permitted. Mistakes may be crossed out and corrections typed adjacent and must be initialed and dated in ink by person signing the RFP documents. All Submittal documents and/or necessary forms must be signed with the firm name and by a responsible officer or employee. Obligations assumed by such signature must be fulfilled.
16. The Vendor shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. The Vendor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of U.S. Department of Transportation assisted contracts. Failure by the Vendor to carry out these requirements is a material breach of the contract which may result in the termination of the contract or such other remedy as the recipient deems appropriate.
17. It is the policy of the United States, the State of Florida, or the County that small business concerns, veteran-owned small business concerns, service-disabled veteran-owned small business concerns, HUBZone small business concerns, small disadvantaged business concerns, and women-owned small business concerns (hereinafter "small business concerns") shall have the maximum practicable opportunity to participate in performing contracts, including contracts and subcontracts. It is further the policy that its prime contractors establish procedures to ensure the timely payment of amounts due pursuant to the terms of their subcontracts with small business concerns. The Contractor hereby agrees to carry out this policy in the awarding of subcontracts to the fullest extent consistent with efficient contract performance. The Contractor further agrees to cooperate in any studies or surveys as may be conducted by the appropriate government agency as may be necessary to determine the extent of the Contractor's compliance with this clause.
18. The successful proposer(s) will be required to monitor the performance of his employees on a periodic basis while they are assigned to the County. The successful proposer(s) is required to comply with the Immigration Reform Act of 1986 (IRCA) which requires all individuals hired after November 6, 1986, to provide employers with proof of citizenship or authorization to work in the United States.
19. As required by FS 287.133; "A person or affiliate who has been placed on the convicted vendor list following a conviction for Public Entity crime may not submit a bid on a contract to provide goods or services to a public entity, may not submit a bid or contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or Vendor under a contract with a public entity, and may not transact business with any public entity in excess of the threshold amount in Section 287.017, for category two for a period of thirty-six months from the date of being placed on the convicted vendor list". Questions regarding this statement should be directed to Bureau of State Procurement (904) 488-8131.
20. It is the policy of Martin County that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, shall have the maximum opportunity to participate in the performance of contracts and subcontracts financed in whole or in part with funds derived from the U.S. Department of

Transportation, Federal Transit Administration (FTA). Martin County utilizes the Florida Department of Transportation (FDOT) Certified Business Directory (BizNet) database to identify all firms eligible to participate as DBE's. Martin County is not a certifying member of the Unified Certification Program. The COUNTY recognizes the DBE certification from FDOT and other certifying members that are FTA grant recipients in the State of Florida. DBEs responding to this RFP shall provide DBE certification information as part of their response.

21. Protests shall be in accordance with the procedure outlined in the Martin County Purchasing Manual which is available at [www.martin.fl.us](http://www.martin.fl.us). Type Purchasing Manual into the Search field.
22. Selection Committee meetings are posted on the County's website at [www.martin.fl.us](http://www.martin.fl.us) in accordance with the Florida Sunshine Law. Selection Committee meetings are open to the public except where a vendor makes a presentation or demonstration.
23. Notification of shortlist shall be within 72 hours of a selection committee meeting via e-mail to all proposers. Proposers that do not provide an e-mail address as requested above shall not be notified.
24. Section 112.313, Fla. Stat., prohibits contracts with County employees, officers and advisory board members. All bidders must disclose the name of any Martin County officer or employee who owns, directly or indirectly an interest in the bidder's firm or any of its branches.

## SPECIFICATIONS

### 1 PROJECT SCOPE

- 1.01 Martin County is seeking proposals from highly experienced and professional firms to provide, install, and service new premise or hosted telephone system (system) to support all County locations.

- 1.02 We plan to upgrade or replace the current Alcatel telephone system over the next two budget cycles in three phases beginning in March 2018.

The County Utilities department will be moving to a new facility in March of 2018. For the first phase of the project the system will be configured to meet the requirements of the Utilities department and provide the foundation to allow the system to be expanded in phases two and three to support all County locations.

The system configuration shall provide PRI tie line connections to the existing Alcatel system and be flexible to allow hardware, software and licensing to be purchased as needed to support the phased implementation.

- 1.03 Four-digit dialing shall be maintained between the new and existing system throughout the migration process.

- 1.04 Upon completion of this project, County. shall have a system/service provider capable of providing the following:

- A. Equipment & Systems: All equipment and systems shall be new and currently manufactured.
- B. Voice Platform: All locations shall be served by a single IP-based telephone system platform capable of providing feature transparency for all described County locations.
- C. Fault Tolerance: The system shall be redundant/resilient and shall be designed to ensure that internal and external traffic can be rerouted or reconnected in the event of a system or major component failure.
- D. Survivability: All IP telephones at the locations designated as survivable in the configuration section shall register with the local survivable gateway during an outage of the primary controller/server or if the WAN connection is lost, and shall have continued access to locally equipped trunks.
- E. System Management: The management systems shall provide a single point of access to the system for day-to-day administration, reporting, and telephone system maintenance.
- F. Voice Mail The voice mail system shall be distributed and provide service for all County locations. In addition, it shall support integration with the County's email platform.

- G. Paging through Telephone Speakers: The system shall support group paging the through the speakers on the telephones. Page groups shall support a minimum of 32 telephones in a single group.
- H. Applications: The system shall be capable of supporting a wide variety of applications including unified communications, presence, instant messaging, mobility, audio conference bridge, collaboration, PC desktop call control and video conferencing.
- I. Headsets: Telephones shall support Electronic Hook Switch Control compliant headsets or similar device to eliminate the need for handset lifters.
- J. T.38 Fax over IP: The majority of FXS ports requested in the RFP will be utilized to support fax machines. The system shall be equipped with T.38 as required to support fax service across all County locations.
- K. Contractor: The solution shall be provided by an experienced Contractor who has extensive IP telephony, data networking, and unified communications experience. The Contractor shall provide a turnkey system including but not limited to all hardware, software, installation, training, and support.
- L. Serviceability: All systems shall provide a single system management solution.

#### 1.05 Existing Infrastructure

##### A. Telephone System:

- 1. Multi node Alcatel Omni PCX system comprised of the following:
  - a. Node 1 (1) PCX 4400 M3 cabinet release 11.2.1.
    - i. (2) Remote PCX 4400 wall mount cabinet
    - ii. (3) Remote PCX 4400 rack mount cabinet
  - b. Node 2 (1) PCX 4400 M3 Cabinet release 10.1.1
    - i. (1) Remote PCX 4400 wall mount cabinet
  - c. Node 3 (1) PCX 4400 M2 cabinet release 10.1.1
    - i. (1) Remote PCX 4400 wall mount cabinet
    - ii. (1) Remote PCX 4400 rack mount cabinet
  - d. Node 4 (1) PCX 4400 wall mount cabinet release 10.1.1
  - e. Node 5 (1) PCX 4400 M2 cabinet release 10.1.1
  - f. Node 6 (1) PCX 4400 wall mount cabinet release 10.1.1
  - g. Node 7 (1) PCX 4400 rack mount cabinet release 10.1.1
  - h. Node 8 (1) PCX 4400 rack mount cabinet release 10.1.1

- 2. Voice Mail:
  - a. (7) Node AVST release 8.5 build 733 update 2
- B. LAN/WAN
  - 1. LAN: Foundry/Brocade Networks L3 Core and Distribution, L2 Access mostly non-PoE.
  - 2. WAN
    - a. 10 Gb County owned fiber ring between the Data Resource Center, Public Safety and the Admin Building
    - b. 1Gb County owned fiber to all other County locations.
- C. Cable: Mostly CAT5 with a mix of CAT5e and CAT 6.
- D. Data Centers: Active/Active
  - 1. Core 1: Data Resource Center
  - 2. Core 2: Public Safety Complex
- E. VMware:
  - 1. ESXi 6.5
- F. Servers:
  - 1. Cisco UCS 5108
- G. E-mail Platform:
  - 1. Martin County Exchange 2010/2016 Premise and Office 365 Hosted.
  - 2. Tax Collector
- H. Desktop Software:
  - 1. Operating: Microsoft Windows 7 Professional with plans to upgrade to Windows 10 Enterprise
  - 2. Office: Office 2010 with plans to upgrade to Office 365/Office 2016
- I. Contact Center: Alcatel Omni Touch
  - 1. Node 1 CCS Release 10.4.92.0
  - 2. Node 2 CCS Release 8.1.90.11
  - 3. Node 3 CCS Release 8.1.90.11
- J. Call Recording: Alcatel Omni Record
- K. Fax Server: Alcatel Omni Fax Server Release 6.6.0.16



L. Cell Phones/Smart Phones/Tablets mix of iPhone and Android

1.06 Any applications provided that require Windows server shall support server 2012-R2.

## **2 CONTRACTOR, INSTALLATION, AND MAINTENANCE**

### **2.01 Contractor**

- A. For any items/systems/alternates accepted by the County and made part of the contract, the Contractor shall provide a turnkey solution including but not limited to delivery, installation, configuration, database collection, database entry, testing, training, cutover, and post-cutover support.
- B. The Contractor and/or its subcontractors are fully authorized/certified to supply, upgrade, install, configure, provide warranty service, and troubleshoot/support the proposed equipment.
- C. The Contractor shall provide manufacturer trained and certified personnel who specialize in deployment of all items/systems/alternates accepted by the County.

### **2.02 Project Manager**

- A. The Contractor shall appoint a project manager who shall be the main point of contact regarding the project for the County. The project manager is responsible for the following:
  - 1. Developing a project schedule that identifies in detail the exact tasks and timelines that the County, Contractor, and PSTN providers must perform and/or be responsible for to complete the delivery, installation, and cutover of the system.
  - 2. Guaranteeing the work and performance of all employees and subcontractors who have been hired by the Contractor.
  - 3. Verifying closet locations with the County's project manager prior to installation.
  - 4. Completing and submitting all required documentation.
  - 5. Attending all project coordination and/or construction meetings as required by the County, plus chairing a weekly project status meeting throughout the duration of the project.
  - 6. Maintaining the project status meeting minutes and distributing them to all participants within two days following the meeting.
  - 7. Informing the County of all unexpected conditions and problems that may result in delay or expense. The Contractor must report issues immediately upon discovery and must provide the County with the option(s) for resolving them.

8. Scheduling and coordination of all cutovers and porting of telephone numbers with all PSTN service providers.
  9. Arranging for provided training and coordination of scheduling for all training classes.
- B. If the Contractor seeks to change the project manager during the course of the project, such change is subject to prior written approval from the County.
  - C. The County reserves the right to request a new project manager during the course of the project if the project manager does not perform to the County's satisfaction.

#### 2.03 Permission to Proceed

- A. Prior to ordering, furnishing, or installing any equipment, the Contractor shall obtain the County's written approval of equipment, locations, layout, and installation.
- B. The Contractor shall coordinate location of all equipment placements for each location prior to commencement of work.
- C. The Contractor must obtain the County's permission before proceeding with any work necessitating cutting into or through any part of a building structure.
- D. Existing floors, walls, ceilings, or any structural piece shall not be drilled or cut without prior approval of the County.

#### 2.04 Damage and Cleanup

- A. The Contractor shall be held responsible for and make payment on any damage caused from the delivery and/or installation of its work.
- B. The Contractor shall keep the premises clean from debris and rubbish. After each workday, the Contractor shall remove any rubbish or waste from the working area. If the County is required to clean up, the cost shall be charged back to the Contractor.

#### 2.05 Ordering and Delivery

- A. The Contractor shall take responsibility for proper ordering, shipping charges, storage and delivery of all component parts. This includes any components to be ordered from any third-party companies. The Contractor shall be responsible for proper storage of delivered equipment.
- B. The Contractor shall inventory and unpack equipment from shipping material, arrange for replacement of any damaged equipment and organize equipment for deployment. The Contractor shall remove and dispose of all empty boxes and packaging.

#### 2.06 Data Network

- A. The Contractor shall have as part of its implementation team a data network resource capable of analyzing and implementing proper VLAN and Quality of Service configurations necessary to support advance real time voice and video applications across the County's data network. This person shall work with the County to develop a mutually agreeable design/scheme to ensure that all network devices are configured to support these applications.
- B. Currently, the County uses a mixture of static addressing and DHCP. The County shall work with the vendor to enable DHCP addressing for all telephony devices.
- C. The Contractor shall:
  - 1. Work with the County to understand its IP addressing scheme and to implement this scheme in the furnished devices, and ensure network visibility of those devices.
  - 2. Work with the County to understand its VLAN scheme and to implement this scheme in the furnished system.
  - 3. Work with the County to develop SNMP configurations, community strings, and passwords for all devices and to implement these in the furnished system.
  - 4. Work with the County to implement security features as required by the County.
  - 5. Work with the County to ensure the proper QoS configurations are implemented to support all applications provided under this RFP.
  - 6. Learn and understand the County's device naming convention, and implement appropriate device names on all new devices.
  - 7. Label all equipment and cables as required by the County.
- D. Work shall be performed during normal hours of operation for the building where the work is taking place. Any deviations must be discussed with and approved by the County's Project Manager prior to work occurring.

## 2.07 Equipment Installation

- A. Standards
  - 1. These standards shall govern the work:
    - a. IEEE 802.3 (all letter suffixes)
    - b. ISO/IEC-11801 (all updates)
    - c. TIA/EIA 568A & 568B
    - d. TIA/EIA 569

e. ANSI TP-PMD

- B. The Contractor shall install hardware in a secure manner.
- C. If there is insufficient space in any rack for installation of devices, the Contractor must notify the County's Project Manager immediately and wait for a decision before proceeding with installation at that location.
- D. All rack-mount equipment shall be secured as recommended by the manufacturer with consideration to airflow, power, and patch cable connections.
- E. The Contractor shall provide all hardware required to rack mount equipment including rails as required.
- F. The Contractor shall neatly dress all power cables and secure with Velcro tie wraps between devices and PDUs, UPS systems, or wall power plugs.
- G. Provide additional system components typically and reasonably required to make the system operational even though not specifically indicated in appendices, or specifications, including but not limited to patch cables, connectors, connecting accessories, power supplies, power cords, rack mounting adapters and shelves, cover plates and related connector and termination hardware required by but not supplied with the equipment.
- H. Velcro straps shall be installed snugly without deforming cable insulation. Straps shall be spaced at uneven intervals not to exceed four feet.

2.08 Grounding

- A. Install products in accordance with manufacturer's instructions. Mechanical connections shall be accessible for inspection and checking. No insulation shall be installed over mechanical ground connections. Ground connection surfaces shall be cleaned and all connections shall be made so that it is impossible to move them.

2.09 Data Center/Closet Patch Cords & Cables

- A. Provided and install CAT 5e patch cables with appropriate connectors to interconnect all systems provided under this contract. This is inclusive of any required crossover cables or special stacking cables, both copper and fiber.
- B. The finished installations must be tidy and the cabling well supported. No plastic tie wraps may be used. Hook and loop type material (e.g., Velcro) ties may be used to bundle cables. Patch cables may not be twisted, bent, or otherwise deformed beyond standard allowable bend radius.
- C. The Contractor shall use the County's cable management system where equipped to provide a neat and efficient means for routing and protecting fiber and copper cables and patch cords on telecommunication racks and enclosures.

## 2.10 Labeling

- A. The Contractor shall be responsible to label all cables and equipment components installed as part of this project. In doing so, make the labeling of each component:
  - 1. Unique, to prevent it from being confused with other similar components; and
  - 2. Legible and permanent enough to last the life of the component. Handwritten labels are not permitted.

## 2.11 Removal of Existing Systems

- A. The Contractor shall be responsible for the collection, removal, and disposal of all existing voice, equipment not incorporated into the new system, including but not limited to items listed below.
  - 1. All existing telephone and voice mail components except hard drives and other hardware that may contain proprietary data/information
  - 2. Switch tails and the blocks they are terminated on.
  - 3. Unused MDF cross-connects
  - 4. Telephones
  - 5. Old patch cables

2.12 Decommissioning and removal of any PBX or voice mail equipment shall only take place once it is no longer required to support any voice service and shall be fully coordinated with the County

2.13 The Contractor shall remove all hard drives from all voice and voice mail equipment prior to disposal and deliver them to the County's project manager.

## 2.14 System Design Reviews & Database Collection

- A. Client quantities included in this RFP are estimates. The Contractor shall be required to perform station surveys to verify quantities. Any increases in components prior to acceptance shall be at pre-cutover costs, and deletions shall not be charged restocking fees.
- B. The Contractor shall include a minimum of one informational presentation to the County's Project Manager and supporting IT staff. The purpose of the meeting is to provide the County with an overview of the system capabilities and establish standards for how the system is to be installed.
- C. The Contractor's project manager shall inform the County's project manager of decisions that they need to make regarding the items/systems/alternates being installed. The County's project manager shall set standards and determine which decisions are available for the departments to make. Any

decisions or requests at the department level that either increase cost or are outside of the County standards shall need the written approval of the County's project manager.

- D. The Contractor's Customer Service personnel shall hold departmental meetings with each department across all County locations to determine telephone type and physical location, features and applications assignments, auto attendants, call routing, restrictions, etc., on a per department and user basis. The County shall assist with scheduling, but the Contractor is responsible for collecting any and all information required to install and cutover all systems.
- E. The Contractor shall be responsible for collecting and documentation all information needed to complete all station surveys including identifying and marking the exact location of all telephones, modems, and fax machines on customer-provided floor plans.

#### 2.15 Security

When deploying any product, software, or application associated with this RFP, the Contractor shall harden the resulting system(s). Hardening includes the following actions:

- A. Determining the purpose of the system and minimum software and hardware requirements
- B. Documenting the minimum hardware, software, and services to be included on the system
- C. Installing the minimum hardware, software, and services necessary to meet the requirements using a documented installation procedure
- D. Installing necessary patches
- E. Installing the most secure and up-to-date versions of applications
- F. Configuring privilege and access controls by first denying all, then granting back the minimum necessary to each user
- G. Configuring security settings as appropriate, enabling allowed activity and disallowing other activity
- H. Enabling logging sufficient for the County IT staff to determine equipment faults or configuration problems in the telephony equipment
- I. Archiving the configuration and checksums in secure storage prior to system deployment
- J. Testing the system to ensure a secure configuration
- K. Using secure replication procedures for additional, identically configured systems, making configuration changes on a case-by-case basis

- L. Changing all default passwords
- M. Test the resulting systems to include but not limited to penetration test on all external facing systems and IP addresses
- N. Document all test results and provide to County.

#### 2.16 Database Entry

- A. The Contractor shall provide all system programming and database entry, including but not limited to stations and station features, voice mail boxes, auto attendants, trunks, least cost routing, networking, and integrated connections to the voice mail system, system management, contact center, and data network to provide a fully operational turnkey system.

#### 2.17 Telephone, FXS, & Trunk Placement and Connections

- A. The Contractor shall provide and complete all required cross-connects or patch cord connections between the telephone system equipment and the telephones at the telco demarc, main equipment room (MER), and all telecommunication room (TR) locations, including all required connections between the data switch and VoIP telephones.
- B. The Contractor shall tone, test, and identify all cable and make all required cross-connects needed to extend PRI and analog trunks, fax, modem, or telephone services between the telephone system and the demarc or end device.
- C. The Contractor is responsible for placing, testing, and labeling all phones. Every phone, fax, and modem line shall be tested to ensure it can make and receive calls at the assigned number and the assigned features and PSTN connections function properly when placed.

#### 2.18 PC Desktop & Mobile Client Software Distribution

- A. The County utilizes Altris desktop management suite to distribute desktop software.
- B. The Contractor shall work with the County desktop support staff to determine the most efficient method of deploying UC desktop and mobile software applications utilizing the Altris desktop management suite.

#### 2.19 Interconnection and Coordination with Local Telephone Utility

- A. The local exchange carrier and/or alternate carrier shall provide PRI, analog, and SIP trunks. The Contractor shall provide complete coordination with the County and local telephone utility regarding connection and testing of trunks and SIP services to the telephone system.

#### 2.20 Documentation

- A. When installation is complete, the Contractor shall furnish the County a complete set of project documentation in electronic format as follows:
  - 1. All naming standards/schema to be used in documentation must comply with the existing County standards and be pre-approved by the County's project manager.
  - 2. Acceptable documentation formats include Microsoft Word, Microsoft Excel, and Microsoft Visio.
  - 3. Logical diagrams for the voice and data products provided, installed, and connected to the network
  - 4. Static IP numbers assigned to all voice and data equipment, noted both on diagrams and on a separate table/spreadsheet
  - 5. Additional Voice Documentation:
    - a. Contact center call flow diagram
    - b. Diagram of all auto attendants/self-service trees/menu services

#### 2.21 Training Requirements

- A. All costs for training shall be included in the proposals.
- B. Telephone and Voice Mail End User: The Contractor shall conduct on-site, live hands-on user training sessions for all users, limited to a maximum of 15 people in any one session. Training will be conducted at multiple location (s) that will be determined by the County.
- C. UC, Mobility and UM Applications End User: The Contractor shall conduct (4) webinar training sessions and record them for future access on the utilization of all UC Mobility and UM applications purchased by the County as a result of this RFP.
- D. Contact Center
  - 1. Supervisor/Agent Telephone User – The Contractor shall provide separate training sessions for all contact center telephone users, limited to six (6) people maximum in any one session. Sessions shall last approximately two (2) hours each. Training will include telephone operation and any advanced Contact Center features provided through a PC desktop application.
  - 2. Supervisor Applications – The Contractor shall provide supervisor/management four (2) hour overview training session per phase for the following:
    - a. Contact Center Application:
      - i. Supervisor display, monitoring and messaging capabilities



- ii. Report generation
    - iii. Skill set creation
    - iv. Setting agent priorities and skill sets
  - b. Call Recordings:
    - i. Supervisor display and monitoring capabilities
    - ii. Call review and evaluation tools
    - iii. Report generation
  - c. Provide overview of system documentation and use of all system manuals.
- E. System Management: The Contractor shall provide in depth training for at least (2) system administrators on the use of the management tools for the telephone system and all applications purchased. The training shall include the following:
1. Review daily, weekly, monthly, and annual maintenance and backup tasks.
  2. Overview of system documentation and use of all system manuals
  3. Familiarization with features of all components and systems
  4. Process for obtaining technical support
  5. Telephone and Voice Mail System
    - a. Client installation
    - b. Database management
    - c. Adds, moves, or changes
    - d. Add or change user templates
    - e. Add or change class of service and trunk group restriction
    - f. Add or change auto attendants
    - g. Configuration details of purchased applications, and how to configure new users, groups, and reports
    - h. Generate reports
    - i. Find unused numbers
    - j. Use IP troubleshooting tools
  6. Contact Center
    - a. Supervisor Display, Monitoring and Messaging Capabilities

- b. Report Generation
  - c. Skill Set Creation
  - d. Scripting
  - e. Setting Agent priorities and Skill Sets
  - f. Moving Agents
7. Call Recording:
- a. Supervisor Display and Monitoring Capabilities
  - b. Call Review and Evaluation Tools
  - c. Evaluation Form Design
  - d. Report Generation and Configuration

## 2.22 Cutover and Post Cutover Requirements

- A. Cutover Time: To prevent business interruption, all cutovers shall take place outside the County's normal hours of operation to avoid any disruption of service.
- B. Cutover Support: The Contractor is required to provide a project team for all cutovers including on-site technical and training support for all systems and options purchased and remote helpdesk support.
- C. First Day of Service: At a minimum, the Contractor shall provide an on-site project team to include help desk/trouble ticket call takers and technical and training resources that are fully capable of supporting all systems and options purchased for the first business day following all cutovers.
- D. Technical Issues: The Contractor will provide on-site resources for as many days as required following the first day of service to resolve any outstanding technical issues.
- E. Adds, Moves, or Changes: The Contractor is required to complete any outstanding adds, moves, or changes within the first 30 days following the cutover of each location.

## 2.23 Project Closeout and Acceptance

- A. Punch List: Work or materials found to be incomplete, of unsatisfactory quality, failing to meet the specifications in the RFP package and resulting contract, and/or unacceptable to the County shall be documented in a punch list by the County and provided to the Contractor to rectify.
- B. Punch List Approval: The punch list shall be considered complete only after having been signed by the County.

- C. Acceptance: Acceptance for each phase shall occur after all of the following conditions have been met:
1. All items/systems have been delivered, installed, configured, tested, and transitioned into service.
  2. All of the work has been completed in accordance with the contract and RFP specifications (including testing procedures as outlined in the accepted response).
  3. Public Switched Telephone Network connections with desired local and long distance call routing options requested by the County (least cost, next best route, etc.) are all functioning correctly.
  4. The system operates in conformance with manufacturer's published specifications.
  5. The system, including all ancillary devices, applications, and options made part of the contract, has had 30 consecutive days with 100 percent availability.
  6. Training as specified is complete.
  7. All the documentation requirements have been met.
  8. All outstanding punch list items have been completed.
  9. The system post-cutover requirements have been completed.
  10. The Contractor has certified in writing to the County that the system is installed and operational in accordance with these specifications.

At this time, upon the County's written acceptance, operational control becomes the responsibility of the County. This constitutes Date of Acceptance. The warranty for components and service begins as of this date.

#### 2.24 Warranty Period and Maintenance

- A. Warranty: Warranty for each phase shall begin at acceptance of the system/phase by the County.
- B. A master maintenance contract shall be established which will allow the maintenance for each phase to be added at the expiration of the warranty period without extending the overall master agreement.
- C. The Contractor, guarantees to replace all materials, equipment, software, or services that may be rejected by the County due to defective materials or workmanship for a minimum of one year following final acceptance of all systems. Failure or neglect of the County to require compliance with any term or condition of the contract specifications shall not be deemed a waiver of such term or condition.

## 2.25 Maintenance Guarantee

- A. Provide letters from both the Respondent and all manufacturers guaranteeing maintenance support of the proposed system(s) for a minimum of (5) years.
- B. Should the manufacturer discontinue this product or cease to do business, the Respondent guarantees to stock an adequate supply of components to maintain the system for a minimum of five (5) years. Further, should the Respondent cease to do business, the manufacturer guarantees to provide components and services for this installation for a minimum of five (5) years.

## 2.26 Server and Software Maintenance

- A. The Contractor shall provide software maintenance on a turnkey basis during the first-year warranty period and any subsequent maintenance term. The Contractor shall be responsible for operating system and database tuning, patches, hardware and software diagnosis, recovery, and version upgrades as needed. The Contractor shall manage backups of data, application, operating system, and database management system as required to provide for full recovery in the event of a disaster or hardware failure. The Contractor shall coordinate and work with the server hardware maintenance provider in the diagnosis and repair of the server hardware.

## 2.27 Voice Systems Service and Support

- A. The following must be included in the warranty period and under maintenance contract:
  - 1. Monday-Friday, 8:00 a.m. to 5:00 p.m. remote and on-site support on minor alarms or troubles
  - 2. Seven day per week 24-hour remote support and call-out coverage shall be provided for the items listed below:
    - a. Critical alarms and or system outages including 10% or more of telephones or trunks at any County location or department shall have:
      - i. One-hour remote access response time
      - ii. Two-hour on-site response time
    - i. After hours call out on site support to be billed hourly at the rate provided in the Cost Worksheet
  - 3. Software upgrade/assurance for all systems provided
    - a. Major Release
    - b. Minor Release
    - c. Patches

4. Corrective maintenance
  5. All parts and materials
  6. Four-hour replacement of critical components for all locations
  7. Next business day for non-critical components
  8. 24-hour x 7 days a week telephone service support center to assist County's IT personnel with technical and system management issues and questions
  9. 24-hour x 7 days a week service center
  10. 24-hour x 7 days a week alarm monitoring and remote trouble resolution
    - a. Respondent must include all hardware and software required to support this application in base telephone system cost.
    - b. Alarm notifications system shall also provide notification to County personnel via email and external dialing.
- B. The Contractor shall provide semi-annual review and audit of all applications and performance and make recommendations on any required changes.

### **3 TELEPHONE SYSTEM**

#### **3.01 Architecture**

- A. The telephone system (system) shall have a single database to administer, provide survivability, offer feature transparency across all locations, and utilize the County's WAN/LAN to provide service between the locations specified in this RFP.
- B. Premise Base System:
1. The design architecture shall provide redundant/resilient call control appliances/servers to be deployed at the County's primary and secondary data centers.
  2. The telephone platform shall be designed and configured with sufficient capacity to ensure all IP telephones, PRI gateways or SIP SBC's have a secondary call control appliance/server that they can re-register with should their primary call control appliance/server fail or be unavailable due to a WAN outage.
  3. All locations designated as survivable in Telephone System Configuration Table shall be designed to ensure that the IP telephones shall continue to function and that internal and external traffic shall be rerouted to the PSTN network over locally equipped trunks if the WAN connection is unavailable.

4. All trunks, including SIP, digital and analog, shall be accessible from any location on the network.

C. Hosted System:

1. The system design shall include diverse geo-redundant data centers preferably located in the state of Florida and or the south-east region. The hosted solution shall provide dedicated diverse data connections between the host providers data centers and the County' primary and secondary data centers.
2. All locations designated as survivable in Telephone System Configuration Table shall be designed to ensure that the IP telephones shall continue to function and that internal and external traffic shall be rerouted to the PSTN network over locally equipped trunks if the WAN connection is unavailable.
3. The telephone platform shall be sized and equipped based on the specifications provided in the table below.

4. Telephone System Configuration Table

Location	Phase	Core/ Survivable	Basic User	Standard User	Admin User	Mobile User	Conference Phone	FXS Ports Phone	FXS Ports Modem	FXS Ports Fax	(1) Add- On Module	(2) O Mo
Utilities	1	Survivable	11	32	1	0	0	0	9	3	1	
Data Center 1 DRC	2	Core 1	4	0	0	0	0	8	1	1	0	
Data Center 2 LEC	2	Core 2	168	274	11	0	6	9	8	38	6	
Admin Building	2	Survivable	99	249	10	3	1	1	11	30	3	
Building Department	3		8	29	0	0	0	0	3	2		
Courthouse	3	Survivable	150	130	6	0	1	12	3	41	5	
Fire Station 16	3	Survivable	13	1	0	0	0	2	0	0	0	
Fire Station 21	3	Survivable	14	2	3	0	0	0	2	0	0	
Fire Station 22	3	Survivable	8	2	0	0	0	2	0	1	0	
Fire Station 23	3	Survivable	6	3	0	0	0	1	0	2	0	
Fire Station 32	3	Survivable	6	5	0	0	0	2	0	1	0	
General Services	3		9	30	0	0	0	0	5	8	0	
Hobe Sound Annex	3	Survivable	17	7	1	0	0	0	0	0	0	
Indian Town Annex	3	Survivable	18	14	0	0	0	1	3	6	0	
Property Appraiser	3		9	43	2	0	0	1	2	3	0	
Supervisor Elections	3		28	8	0	0	0	0	10	3	0	
Tax Collector	3		24	42	0	0	0	0	0	7	0	

Totals			581	839	33	3	8	39	48	143	14
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### 3.02 System Features

- A. AREA/OFFICE CODE RESTRICTION: The ability of the switching system to selectively identify six-digit area and office codes and either allow or deny passage of long distance calls to those specific six-digit codes. This type of restriction is usually provided on a trunk group basis and on an “allowed” rather than “denied” basis.
- B. AUTOMATIC CALL DISTRIBUTION HUNT GROUP: Ability of the system to offer uniform distribution of incoming calls to station users (called agents) on a random basis or to the station that has received the fewest calls. Inbound calls are generally queue based, on a first-in, first-out basis and provided progress announcements and music on hold.
- C. AUTOMATIC RINGBACK ON HELD CALL: When a station user or attendant places a given line circuit on hold and goes on-hook, the held line shall automatically revert to an incoming call condition after a prescribed period of time.
- D. CALL FORWARDING ALL: Provides station user with the ability to reroute inbound calls that would normally terminate on their phone directly to any internal or external number that their class of restriction allows.
- E. CALL FORWARDING – BUSY/NO Answer: Automatically reroutes incoming calls, to another number when line is busy or is not answered within a predefined number of rings or time frame.
- F. CALL FORWARDING – SOURCE DEPENDENT: Allows the system to be pre-programmed by extension to route calls when an extension is busy, not answered, or in a Do Not Disturb mode to different destinations based on a source being internal or external.
- G. CALL PARK: Once a call is placed in the “park” condition, any station within the system may retrieve it by either dialing the appropriate access code or by pressing a special feature button on a station instrument.
- H. CALL SPLITTING ATTENDANT: The ability to speak privately with one of the parties engaged in a three-party conference call and alternate between the two.
- I. CALL WAITING: The ability to hear or produce a beep tone to a busy phone, alerting the user that another call is ringing in. The user then has the choice to alternate between calls, hang up on the original call and take the new call, or ignore that beep tone.
- J. CALLING PARTY NUMBER AND NAME: The ability to display the number and associated name from which an internal or external call originated.

- K. CENTRAL OFFICE COMPATIBILITY: System supports PRI ISDN connectivity with the following central office manufacturers:
  - 1. AT&T 4ESS
  - 2. AT&T 5ESS
  - 3. Northern DMS 100
- L. CONFERENCE CALLS: The ability to connect, at minimum, (6) but preferably more internal or external parties into one phone conversation.
- M. CONFERENCE ESTABLISHED CALL: Allows station user to conference together two or more established calls.
- N. DIRECTED CALL PICK-UP: A station user is able to answer calls ringing on any other station within the system by dialing a unique answer code of that particular station to be answered.
- O. DISTINCTIVE RINGING: Provides a unique pattern of station ringing to permit the user to distinguish internal from external calls.
- P. TIME OF DAY/DAY OF WEEK NIGHT SERVICE: Allows incoming central office calls, normally answered at the attendant position or central answering point, to be rerouted to pre-selected stations within the system based on the time of day or day of week
- Q. FORCED ACCOUNT/AUTHORIZATION CODE: A feature that requires all or certain users to enter a code before dialing an outside number.
- R. HOT-LINE STATIONS: Instruments are specially programmed to dial a specific internal station number or "0" for the attendant when the station user goes off-hook.
- S. INCOMING DIGIT MANIPULATION: Ability to add, strip, or completely change the digits of any incoming DNIS, DID, or Tie Line number in order to reroute the call to the appropriate location.
- T. LAST NUMBER REDIAL: Allows station user to dial view and automatically dial a minimum of the last 10 numbers that were originated or terminated on the users phone.
- U. LEAST COST ROUTING WITH 6-DIGIT SCREENING: The ability to screen the first six digits of the dialed number, normally the NPA and NXX, to determine the least expensive trunk group(s) on which to route the call.
- V. MESSAGE WAITING: The ability to activate a message waiting lamp on the user's telephone from the attendant console, telephones with appropriate class of service, and voice mail systems.



- W. MULTIPLE TRUNK GROUPS: An indication that the switching system is capable of being equipped (and accessed accordingly by station dialing) for more than one group of outgoing trunk circuits.
  - X. MUSIC ON HOLD ACCESS – SYSTEM: Ability to connect customer provided audio source output to the system to provide music or information to all external callers while on hold or waiting for and ACD agent to answer.
  - Y. 911 DIAL PLAN: Users must be able to dial either 9-911 or 911 for access to emergency services. If a caller dials 911, the system should automatically insert the trunk access code (usually a 9).
  - Z. PROGRAMMABLE OUTGOING NUMBER DISPLAY: Allows the outgoing calling line identification for each telephone to be changed to any 10-digit number.
  - AA. TOUCH-TONE: Dual Tone Multi-Frequency signaling shall be transmitted by all instruments, attendant consoles, and softphones to establish a call or once the call has been connected.
  - BB. TRAFFIC REPORTS: Provides the customer with detailed data on the traffic carried by the switching equipment, including peg counts, CCS (centum call statistics) measurements and overflow measurements for all trunks and trunk groups' attendant consoles, stations, features, and any time slot sensitive infrastructure of the proposed system.
  - CC. TRUNK ANSWER FROM ANY STATION: A night service facility activated by the attendant, whereby incoming calls normally directed to the attendant activate a common alerting system (bells, gong, etc.) on the customer's premises. These incoming calls from non-restricted stations thereby "meet" the incoming call.
  - DD. TRUNK-TO-TRUNK CONNECTIONS – STATION: A system may provide this feature in either or both of two versions. (1) A station already in connection with either an incoming or outgoing trunk circuit is able to use the Add-on Conference circuitry to affect a conference with another trunk circuit. (2) Once a three-way conference is so established, the system shall maintain control and supervision of the two trunk circuits in connection.
  - EE. PAGING THROUGH TELEPHONES: Allows attendants and station users to page all users or a group of users through the telephone speakers
  - FF. UNIFORM CALL DISTRIBUTION: Hunt group that distributes calls evenly to all group members.
- 3.03 Maintenance Alarm
- A. The system should define an alarm as an event that takes place when an anomaly is detected and corrective action is required.
  - B. An alarm condition is cleared when the fault is resolved.

### 3.04 Security

- A. The system offers comprehensive Toll Control as an integral part of the Call Control. It allows restriction of user access to trunk routes and/or specific external directory numbers. It also allows Class of Restriction (COR) and Class of Service (COS) features that can substantially reduce the risk of toll fraud.
- B. Authorized access to the system tools provides protection for various administration commands from unauthorized users. The web-based system tools are as follows:
  - 1. System Administration
  - 2. Group Administration

### 3.05 Telephone Desktop Sets

- A. The phones shall be manufactured in accordance with FCC hearing aid compatibility technical standards codified at 47 C.F.R. § 68.316 and the Telecommunications Act of 1996.

	Basic User	Standard User	Advanced/ Admin User	Mobile User	Add-On Module	Conference Phone
Integrated Messaging		X	X	X		
Unified Communications		X	X	X		
Unified Communications Mobile User				X		
Twinning		X	X	X		
Hoteling		X	X	X		
IP Telephone	X	X	X	X	X	X
Electronic Hook Switch Control	X	X	X	X		
Message Waiting	X	X	X	X		
Hold Button	X	X	X	X		X
Volume Control	X	X	X	X		X
Transfer	X	X	X	X		X
Conference	X	X	X	X		X
Display (#characters X #lines)	24X6	24X6	24X6	24X6		24X3
Line Appearances	4	4	6	4	20	1
Feature Buttons	4	4	4	4		
Multi Point Microphone						X
Self-Labeling Phones	X	X	X	X	X	X

Support Addition of (1) or (2) Add-On Modules			X			
Headset Jack	X	X	X	X		
Wireless Headset Hook Switch Control (EHS)	X	X	X	X		
802.1P/Q	X	X	X	X		X
802.3af	X	X	X	X		X
(2) 10/100/1000 Switch Ports	X	X	X	X		X

### 3.06 Networking

- A. The telephone system supports four-digit dialing to all locations without dialing a leading digit.
- B. The telephone system allows users to transfer calls across the internal or external network via Tie Lines including SIP, ISDN, T-1, Analog 2WE&M and Analog 4WE&M. There shall be no limit on the number of times a call can be transferred between locations.
- C. SIP and ISDN connection shall utilize trunk optimization to ensure that redundant paths are released when both the transferred and terminating station/trunk are within the same network location.
- D. If a call is transferred across the internal network, it recalls the original phone on a busy or no answer condition.
- E. Users with display phones or UC application shall have caller ID name and number appear on display before answering when a call originates over the internal network.
- F. The following features should be available from one site to another over an internal transparent network:
  1. Callback busy/no answer
  2. Call forwarding
  3. Call hold
  4. Called line identity
  5. Calling line identity
  6. Camp on
  7. Conferencing
  8. Distinctive ringing

- 9. Do not disturb
- 10. Centralized SMDR
- 11. Centralized voice mail
- 12. Centralized trunks
- G. PRI, SIP and analog trunks shall terminate at specified County locations and shall be accessible by all locations on the network.
- H. Proposed system(s) shall support centralized voice messaging over the IP network. User interaction with the voice messaging system shall be the same no matter where the user is located on the internal network. This includes, but is not limited to, multi-hop forwarding, message waiting lights, call forwarding to personal greetings, and message retrieval.
- I. Proposed system(s) must allow for a common numbering plan.

### 3.07 E-911

- A. All 911 calls originating from an County location shall provide an emergency line identification (ELID) number that could be used by the public safety automatic line identification (PSALI) database to identify the location of the calling party. The ELID number shall be a DID number that is assignable to a single telephone or group of telephones that are in the same area.
- B. The system must have the ability to provide multiple levels of notification that a 911 call has been made. The system shall provide notifications via the following:
  - 1. Email to as many recipients as the County requires
  - 2. Telephone displays
  - 3. UC client screen-pop
  - 4. SMS to cell phones
- C. Call back from the PSAP, the system shall automatically route an inbound call to the ELID number to the most recently associated telephone or group of phones associated with the ELID.

### 3.08 Voice Data Network Integration

- A. MS Active Directory. The interface shall allow the following system management functions to be accessed:
  - 1. Add a new user and assign them to a predefined user group profile
  - 2. Change a user's telephone number.
  - 3. Change a user's name.

4. Change a user's VM password.
5. Update the system telephone directory.

### 3.09 System Management

- A. The system must offer a complete telecommunications management tool that enables the following:
  1. Provides multiple levels of system administrative access based on login credentials.
  2. Manages multiple systems (locations).
  3. Provides user data administration across multiple systems, including the ability to schedule updates (e.g., integrate network telephone directory with network directory service database, schedule MACs, add and delete users, audit status of managed devices).
  4. Provides templates for all telephone models and configurations.
  5. Provides alarm monitoring and management with remote notification including email.
  6. Provides scheduling of maintenance functions such as data upgrades, backup, and restore.
  7. Provides remote software distribution and installation.
  8. Locates unused directory numbers and unused circuits.
  9. Provides tools that allow maintenance personnel to troubleshoot IP-related issues down to the telephone level, including but not limited to congestion, packet loss, jitter, and CMOS scores.

### 3.10 Integrated Messaging

- A. The Integrated messaging system shall be configured to allow messages to be delivered, stored, and retrieved on the primary and secondary data center locations even when the WAN connection is down. Both Integrated systems will act as a single platform and be fully synchronized during normal operation:
  1. All messages shall be stored on the Integrated messaging servers.
  2. Total equipped voice mail ports: 32 with a capacity of 48
  3. Fax ports (8)
  4. 100 auto attendants
  5. 300 hours of storage; minimum capacity of 500

- B. Any proposed system shall provide integrated messaging interoperability with the County's e-mail system.
- C. E-mail Delivery: The system shall have an option to deliver voice and fax messages to a user's e-mail inbox with unique identifiers for each. The option for this delivery must be controlled by the individual user with an administrative override to force the capability on or off for any given individual or group of individuals.
- D. Message Management
  - 1. New messages will be delivered to users' voice mailbox and optionally to the e-mail inbox regardless of the status of the Outlook client.
  - 2. Users must be able to reply to an internal voice mail message with voice or e-mail response.
  - 3. System shall provide the option to allow a user to place a voice call directly to the caller while listening to the message.
  - 4. System shall allow users to save a voice message as a .WAV/MPEG file so that it can be save to file folder or attached to an e-mail and sent to any e-mail address.
  - 5. Deleted voice mail messages will be removed from the e-mail inbox and voice mailbox regardless of the interface used to delete them.
  - 6. Message waiting will be turned off no matter what interface is used to listen to a new message.
  - 7. The message status will be changed from "New" to "Listened to" no matter what interface is used to listen to a message.
  - 8. PC Playback Options
    - a. Provide a playback tool that has the following attributes:
      - i. Does not require any secondary login to voice mail or PC playback control client or playback browser in order to play message.
      - ii. Allows user to control playback of message through any user-defined multimedia device or telephone.
      - iii. PC playback control will allow user to respond via e-mail, voice mail, or direct dial, delete message, forward message, or save message.
- E. Password Protection: Access to a subscriber's mailbox will be password protected.
- F. Answer Greeting: Individual personalized greetings of up to three minutes for each mailbox are required. At a minimum, the system will provide standard and extended absence greetings.

- G. Message Waiting Light: Provide a message-waiting light on the telephone, along with the option to allow a user to set up external notification to pager, cell phone, or other telecommunications device when a new message has arrived.
- H. Find Me Follow Me: Allows callers to reach a user at an alternate number based on rules the user defines, such as time of day, day of week, and calling line ID.
- I. User Mailbox Administration: Allows users to manipulate their personal voice mailbox features such as attendants, schedules, and greetings.
- J. Distribution Lists: Allow users to create personal distribution list with a minimum of 50 mailboxes.
- K. Auto Attendant: Provide multiple auto attendants or trees with the ability to do the following:
  - 1. Play different multi-level greetings depending on the time of day, day of week, or day of year.
  - 2. Provide a company directory that allows dial-by-number or dial-by-name.
  - 3. Provide separate auto attendant or trees for departmental use as required. Can be configured/revised by user-department staff.
  - 4. Allow single-digit option extension.
  - 5. Provide zero-out option to predefined extension number or secondary tree.
- L. Call Answer: Calls will be answered on the first ring and be time and date stamped.
- M. Disconnect Detection: Detect that a caller has hung up and immediately disconnect and restore the line to service.
- N. DTMF Signaling: Must be able to receive and generate standard DTMF tone signaling.
- O. Escape: A caller shall have escape options before, during, or after leaving a message by dialing 0 to reach an operator or up to five digits to an extension.
- P. Integration: Must fully integrate with the proposed unified communication and contact center systems.
- Q. PSTN Connection Blocking: It shall not be possible for a caller connected to the PSTN to be reconnected to the PSTN.
- R. Security: A caller shall not be able to pass through any auto attendant to reach an outside line.

- S. System Backup: Provide a means to back up all system configurations, including mailboxes, greetings, auto attendants, and messages. This is normally provided via connection to a separate storage device through the LAN/WAN.

### 3.11 Unified Communication

#### A. PC Desktop Call Control

1. Directory/Contacts Dialing: Provide a drop-down box for name entry and dialing from internal directory or Outlook contacts.
2. Call Control: Provide call control, including dialing, disconnect, transfer, and conference.
3. Video: Allow UC desktop users to establish one to one video call with any other UC desktop or mobile user.
4. Speed Call List: Allow user to program numbers into a personal speed call list.
5. Call History: Allow user to view and redial a minimum of the last 100 calls placed or received at their telephone extension. The history must include the following:
  - a. Date
  - b. Start and end time
  - c. Telephone number
  - d. Name from system directory and Outlook contacts database
2. Status Change: Allow user to select a status that approximates their current state from a group of predefined definitions

#### B. PC Desktop Presence Application

1. Presence: The ability to dynamically display a person or group of peoples' availability or status for various communication systems, including desktop and mobile telephone, IM, PC activity, and MS Outlook/Exchange calendar information.
2. Work Groups/Buddy List: Each user must be allowed to define work groups or a buddy list and assign other users as required, provided their restriction class allows.
3. Collaboration: Allow real time file and screen sharing, and white boarding.

- C. Instant Messaging: Provide the ability to send and receive secure text messages within the County's network. The system must provide logging and archive capabilities and support authentication and encryption.



- D. Docking: Allow user to dock the application on the top, side, or bottom of monitor or minimize to system tray if desired.

### 3.12 Unified Communications Mobility

- A. The County is interested in deploying UC mobile clients on County-provided IPADs and other smart devices with data plans. The primary purpose is to provide field personnel with communication access to support audio, video, chat and collaboration sessions. The Contractor will work with the County to develop a proof of concept for testing the application in a wide variety of field trials prior to any purchase of additional licenses to support all devices.
- B. Unified Communications Application on Smart Phones and Tablets
  - 1. Provided Softphone capabilities
  - 2. Enterprise wide Presence
  - 3. Internal or external calls placed from Smart Phone using UC application will present user's office telephone number.
  - 4. Provide visual voice mail review and access.
  - 5. Mobile device users' availability shall be updated based on the current state of the telephone.
  - 6. Instant Messaging: Provide the ability to send and receive secure text messages from the presence application to the user's mobile telephone.
  - 7. Video: Support video calling to any video enable UC device.
  - 8. Shall be available utilizing public and private networks. Contractor to include any hardware or software required to allow access between the public network and the County network. System shall support a minimum of 20 simultaneous public connections to the County's network and be expandable to support growth on the UC mobility to 50 or more simultaneous devices.

### 3.13 Hoteling

- A. Allows any user to log into a telephone to change their profile Including telephone number, feature keys, and message waiting lamps.

### 3.14 Twinning

- A. Single Number Reach for Mobile User: Allow user to define when and how calls that are presented to a user's PBX telephone are distributed to their mobile or stationary device, including the following:
  - 1. Time of day and day of week
  - 2. Call ringing location

3. Desk phone
  4. Cell phone
  5. Other location
  6. Simultaneous ring at desk phone and designated alternate
  7. Number of rings before forwarding
- B. Call Hand-off: Allow user to hand off active call from desk phone to mobile or from mobile to desk phone without interrupting the call.
- C. Call Control: Allow user to access PBX features, including the ability to transfer, conference, and place outgoing calls utilizing simple feature/access codes.

### 3.15 Call Accounting System

- A. The system must provide browser access for system administration, reporting, and maintenance.
- B. The system shall be capable of collecting all inbound (including CLID if provided), outbound and internal call records from the telephone system.
- C. The system shall support Authorization/Account codes.
- D. The user database shall support the following inputs or fields:
1. Telephone number
  2. First and last name
  3. Department or account number
  4. Authorization/account code
  5. Telephone type & associated cost
  6. Location, including building and room number
- E. The system shall allow customized call costing for each trunk group.
- F. The system shall provide standard and customizable report options, which can be generated monthly, weekly, daily, or ad hoc as needed.
- G. The system shall allow monthly reports to be automatically generated and distributed via email or accessed via web browser as designated by the County.
- H. The system shall allow reports to be generated on any of the defined user fields.

- I. The system shall provide call tracing capability—i.e., the ability to trap individual internal and external telephone numbers and generate alarms when a call is received or transmitted from a predefined number.

#### **4 OPTIONAL EQUIPMENT, APPLICATIONS AND SERVICES REQUIREMENTS**

##### **4.01 Option 1: Conference and Collaboration Bridge (Projected for Phase 2)**

- A. The conference and collaboration bridge shall be sized based on the details below:
  - 1. Total equipped voice and video ports: 32 with a capacity of 96
  - 2. Total equipped collaboration ports: 32 with a capacity of 96
- B. The audio conference bridge shall be fully integrated with the proposed telephone system and shall support features such as authorization codes, call detail recording, and charge accounts for billing.
- C. The system administrator/users shall have access to the system via Web-based tools for scheduling, conference control, adding users, and running reports.
- D. The system shall support scheduled one-time or recurring calls or nonscheduled ad-hoc calls.
- E. The system shall support automatic dial-out and/or participant dial-in.
- F. User access shall be password protected and support multiple levels of system/user privileges.
- G. Conference chairperson shall have the ability to add or remove conferees with either touch tone or Web-based commands.
- H. Support both private and public instant messaging between all call participants.
- I. The system shall support several simultaneous conferences or a single conference and allow for complete utilization of all equipped channels.
- J. The system shall provide collaboration capabilities that shall allow conference attendees to view or share files, applications, or presentations. This service shall support one-on-one or one-to-many collaboration sessions.
- K. Shall allow user to preload files to a public or private meeting room prior to the start of the meeting and allow participants to download the files.
- L. System may optionally allow all voice or collaboration meetings to be recorded.

##### **4.02 Option 2: Cordless Headset (1)**

- A. Multiuse connectivity including desk and softphones.

- B. Range up to 350 feet.
- C. Talk time 9 hours.
- D. Convertible wearing style including headband and ear hook.
- E. Noise-canceling microphone.
- F. Provide required options to support electronic hook switch control on the proposed telephone system.
- G. Provide indicator light on headset to indicate user is on a call.

#### 4.03 Option 3: Contact Center

- A. The contact center shall be sized and equipped to support (100) simultaneous logged in agents/supervisors and up to (30) skill or contact center groups.
- B. The system shall be expandable to support (60) skill or contact center groups and (200) simultaneous agents at a minimum.
- C. The contactor shall configure a minimum of (30) custom reports.
- D. The contractor shall configure a minimum of (20) call routing scripts.
- E. The contractor shall configure a minimum of (30) skill groups.
- F. Below is a list of the agents and recorded announcements to be configured for each skill/ACD group.
- G. Contact Center Configuration Table

Department	Phase	Queues	Skill Sets	Number of Agents	RAN
Utilities Phase	1	2	3	11	3
Transportation Phase	2	2	4	5	3
Building Department	2	1	2	8	3
Building Inspections	2	1	3	2	3
IT Support	2	1	2	9	3
Rumer Control	3	1	2	8	3
Property Appraiser	3	1	3	10	3
Tax Collector	3	1	3	7	3
Traffic	3	2	4	13	3
TRIM	3	1	1	10	

- H. All applications provided in support of the Contact Center under this RFP shall be available to all the County offices, including home office workers.
- I. The system will be fully integrated with the unified communications and messaging system and provide transparent feature functionality.

- J. The Contact Center Call Routing and Reporting Application will support the following:
1. ACD GROUP – Multiple telephones or agents assigned to the same incoming number. The ACD feature of the switch distributes incoming calls evenly to all telephones or agents in the group based on customer-defined parameters such as longest idle, priority, agent status, and occupancy.
  2. ACD TEAMS – The ability to sub-define an ACD group into different teams of agents. Teams can also be used to define subgroups of agents across ACD groups.
  3. AGENT – The number of agents that can be simultaneously logged on to the system. Agents are assigned an identification code that they use to log on to a telephone instrument. The Agent ID brings the agent's individual agent characteristics; skill set assignments, priority levels, to that instrument.
  4. USER DEFINABLE ACTIVITY CODES – The ability of the system to accumulate and report information regarding the types of calls handled by agents through use of event recorders or "stroke counts" at the agent set, typically provided via a feature button on the agent set. The system must support use of multiple Activity Codes per call, with agents allowed to enter these codes at any time during or after the call and with each registration silent to the caller.
  5. AUTOMATIC AGENT BUSYOUT – The ability of the system to recognize when a caller is presented to the next available agent and the agent does not answer the call. When such an event occurs, the system automatically removes the agent from the queue, flags the event for reporting, and returns the call to the front of the queue for delivery to the next available agent.
  6. AUTOMATIC REPORTING – The ability to program the system to generate historical reports automatically at preset intervals.
  7. CALLS WAITING DISPLAY – For those agents equipped with digital phones, a light can be programmed on their set to indicate the level of the number of calls waiting in queue. For those agents equipped with display sets, this information must be capable of being displayed on the set's display.
  8. DNIS ROUTING – The ability to route incoming calls to specific Automatic Call Distribution (ACD) groups or routing tables based upon the DNIS or DID number of the call.
  9. DNIS Name Display – Allow a name to be associated with the dial number terminating on an agent's telephone.

10. **RECORDED ANNOUNCEMENT** – Each ACD group will have the ability to play a minimum of three separate announcements to a caller placed into queue. The first would be provided to a caller upon entering the queue when the ACD group is open. The second would be provided/repeated once a caller has held beyond a predefined threshold. The third would be played when the ACD group is closed.
11. **MUSIC ON HOLD** – The ability to provide a caller in queue a music or information source in between announcements. The system will be capable of supporting multiple music inputs that can be assigned individually to a single queue or skill group or can be shared across several queues or skills groups.
12. **SILENT MONITOR** – The ability of the system to allow supervisors to silently monitor conversations of agents assigned to their groups.
13. **SUPERVISOR AS AGENT** – The ability of the system to allow supervisors to temporarily handle incoming calls during busy periods, usually provided by the supervisor's use of an Agent ID.
14. **SUPERVISOR ASSISTANCE** – The ability of the agent to press a single button on the telephone to signal a supervisor for assistance with the call.
15. **AGENT CHARACTERISTICS** – The ability to separately define for each agent specific restrictions/allowances to system features and facilities, based on a class of service or similar basis. Up to 10 such classes of service must be individually assignable to agents, with the system permitting multiple classes of service to be assigned to agents within the same group.
16. **CLID ROUTING** – The ability to route incoming calls to specific ACD groups or skill set routing tables based upon the CLID (Calling Line Identification ) or account number information provided by caller in the IVR system.
17. **AUTOMATIC PRIORITY UPGRADE** – The ability of the system to automatically upgrade the priority level of an individual call, typically based upon the length of time that the call has been holding.
18. **AUTOMATIC ROUTING BY SHIFT SCHEDULE** – Like the Time-of-Day Routing feature, the ability of the system to automatically change the routing patterns of incoming calls based on the shift schedule of the ACD group. Shift schedules must be capable of being individually defined for each group with at least three shifts per group supported.
19. **CONDITIONAL CALL ROUTING** – Monitors real-time parameters such as calls waiting, available agents, and wait time, and automatically reconfigures the routing sequence of calls to continually optimize the handling of incoming calls.

20. DYNAMIC RECONFIGURATION CAPABILITIES – The supervisor can dynamically change certain system, call routing, agent, and group parameters on a real-time basis to quickly respond to dynamically changing conditions. For each parameter listed below, indicate whether the system can allow supervisors the ability to make such changes on a real-time basis:
- a. Sign-On/Off Agents
  - b. Moving Agents between Groups/Skills and Teams
  - c. Change Incoming Routing Patterns for all forms of contact.
21. EXPECTED WAIT TIME – Upon entering the system, the caller will be told what their expected wait time is based on the current call volumes and agent availability when they entered the Queue.
22. MULTI-GROUP QUEUING – The ability of the system to queue a call to up to three groups or skill sets at the same time.
23. OFF SITE ACD AGENT – Allow an ACD agent to be located off site (at home) with all features and functions available as if they were located on site.
24. TIME-OF-DAY ROUTING – The ability of the system to automatically change the routing pattern of incoming calls based upon the time of day. At least three automatic time-of-day changes per group/routing pattern must be supported.
25. SKILLS BASED ROUTING – The ability to route a caller to a group of predefined agents who have the expertise or skill required to manage the call. Call routing is determined by the DNIS or ANI digits or account number presented when the call enters the Contact Center System. The call can be queued against a single skill set or multiple skill sets as needed.
26. SKILL SETS – Skill sets are defined by the supervisor or system administrator based on the type of call to be handled. Agents are assigned to a skill set with priority rankings based on their level of subject matter expertise. An agent may be assigned to multiple skill sets and have a
27. CUSTOMIZED REPORTING – The ability of the system to provide reports that can be customized by supervisors in both format and the calculation of data. At a minimum, attach a copy of a system manual that details the process by which supervisors can customize their reports.
28. GRAPHICAL REPORTING INTERFACE – The ability of the system to present both real-time and historical reports in a graph form to enhance both the presentation and understanding of the data. Indicate which of the following types of graphs are supported:

- a. Bar
- b. Stacked Bar
- c. Pie
- d. Area

29. HISTORICAL REPORTING – The ability of the system to accumulate data regarding system performance and generate appropriate reports detailing system operation over a specified period. Reporting periods that can be specified must be interval, hourly, daily, weekly, and monthly at the very least. Reports must be capable of being directed to external printers or the supervisor’s terminal screen at the supervisor’s discretion, as well as being stored in a file format suitable for export to an external computing platform for additional processing. Attach documentation to your proposal detailing the reports and the information included in each report that has been included in the cost of the proposed system.

30. ON-DEMAND REPORTING – The ability to request historical reports at any time (for example, shift totals) with the entire reporting format options made available to the supervisor requesting such reports.

31. SUPERVISOR ACCESS – Supervisors can view the status of their assigned agents and groups, the number of calls waiting for each group, the duration of the longest call waiting for each group, the average speed of answer for each group, the status of each agent, and the length of time that each agent has been in that state. Screen refresh time (the time it takes the system to update the real-time information of the screen) must not be any longer than two seconds.

32. SUPERVISOR ACCESS RESTRICTIONS – The system will support multiple levels of system administrative and supervisor access to be defined from fully restricted view only to fully unrestricted system access.

4.04 Option 4: Quality Control Call Recording (16 ) seats initially with a capacity of 100 minimum. (Phase 1)

- 1. VoIP Integration – The system will provide VoIP integration with the proposed telephone platform and allow a combination of scheduled and on demand a Contact Center call recording to be used at any County location.
- 2. Scheduled Agent Call Recordings and Screen Capture – Schedule recordings shall capture agent-customer conversation and all agent PC activity is recorded and automatically synchronized with the recorded phone conversation.
- 3. On Demand Call Recording – On demand recordings shall be initiated with a single point and click on the PC or by depressing a key on the



telephone. The system will capture agent customer conversation from the point of initiation.

4. Playback – The system will allow Supervisors to simply choose the recorded interaction to be reviewed, and the recorded PC activity and conversation is replayed in a full motion format.
5. Performance Evaluation – The system will provide browser-based evaluation tools which can be customized to meet the Banks unique grading requirements. It will support standard grading formats including Yes/No, Pass/Fail, Excellent/Good/Average/Poor, and allow the Bank to customize scoring as needed. Questions or sections can be weighted differently. In addition, it will automatically calculate the scores and store the results on the server.
6. Historical Reports – System will allow reports to be generated for a specific agent, group/skill set or evaluation form. Reporting periods that can be specified must be interval, hourly, daily, weekly, and monthly.
7. Report Format – Supported formats include Crystal Reports, PDF, and MS Excel.
8. Automatic Evaluation Scheduling – Allows the scheduling of a predetermined number of recorded calls per agent to be automatically located and presented to the Supervisor to grade.
9. Call Location – Supervisors can quickly locate all calls that have been recorded or graded for their agents using a wide variety of search criteria such date and time, agent id, calling number, and DNIS digits.
10. Agents Access – From their desktop, the agents will be able to review and grade their recorded calls and view performance evaluations.

#### 4.05 Option 5 SIP Trunking: Replace PRI trunking with SIP

- A. Provide Session Border Controller
- B. Replace PRI trunks at the primary and backup data centers with the equivalent number SIP trunks
  1. What is the cost difference if the SIP trunking is purchased instead of PRI service at the time of contract signing? If the cost to provide SIP service is less than the PRI service show the cost on the cost work sheet as negative number.
  2. What would the cost be to replace the PRI services with SIP if purchased after the systems have been cutover?

#### 4.06 Option 6: Music On Hold Source

- A. Provide music on hold device equipped to support connection to proposed telephone system.

- B. Solution must offer a wide variety of licensed royalty free music for the County to select from.
  - C. Allow County to insert County or professionally recorded announcements and have them played intermittently with the music.
- 4.07 Option 7: Twenty-Four Hour by Seven Maintenance Labor.
- A. Provide cost as percentage to include 24 X 7 after-hours remote and onsite labor to the proposed maintenance.
- 4.08 Option 8: On-Site Technician One-year contract with option to renew annually.
- A. Full-Time On-Site Technician – The Contractor shall provide an on-site technician with truck and tools to provide maintenance service and adds, moves, and changes as required at all County locations between the hours of 8:00 a.m. and 5:00 p.m. Monday through Friday, excluding County holidays.
  - B. The On-Site Technician must be certified on all voice related systems or applications purchased as a result of this RFP.
  - C. During the maintenance period, the Contractor will provide a replacement technician as follows when the primary technician is unable to report to work or leaves early.
    - 1. Vacation Day – 8:00 to 5:00
    - 2. Sick Day – Within two hours of not reporting to work or of leaving early
    - 3. Emergency – Within two hours of not reporting to work or of leaving early
- 4.09 Option 10: Virtual Server Support
- A. The County is interested in understanding if any of the proposed telephone system call control, voice mail system, and/or applications could be supported on the County's existing VMware software and hardware platform.
  - B. Provide specifications for all virtual server required to support the proposed systems as requested on Form K Virtual Server Specifications
  - C. Provide cost as requested on the Cost Worksheet. If utilizing the County Virtual server network would reduce cost please show number as a negative.
- 4.10 Option 11: Mid Span Rack Mount IEEE 802.af Power Injectors
- A. Provide and install 24 port rack mount power injectors that support the following.
    - 1. IEEE 802.3 10BASE-T Ethernet

2. IEEE 802.3u 100BASE-TX Fast Ethernet
  3. IEEE 802.3ab 1000BASE-T Gigabit Ethernet
  4. IEEE 802.3af Power over Ethernet
- B. Install customer provided patch cords to connect between network switch, mid-span power injector and patch panel.
1. Phase 2 (40) Midspan Power Injectors
  2. Phase 3 (30) Midspan Power Injectors

## PROPOSAL REQUIREMENTS

### 1 FORM A: PRICE PROTECTION

1.01 Price Protection: Martin County is looking for a long-term partner. Please provide an overview of any available long-term price guaranties for the following:

A. Discount off list price for the following:

1. Year 1

- a. Hardware components such as telephones, gateways, trunk ports, and FXS port.
- b. Software such as telephone, UM, UC and UC mobile, trunks including PRI and SIP, and audio and video conference and collaboration.
- c. Labor Rates

2. Year 2

- a. Hardware components such as telephones, gateways, trunk ports, and FXS port.
- b. Software such as telephone, UM, UC and UC mobile, trunks including PRI and SIP, and audio and video conference and collaboration.
- c. Labor Rates

3. Year 3

- a. Hardware components such as telephones, gateways, trunk ports, and FXS port.
- b. Software such as telephone, UM, UC and UC mobile, trunks including PRI and SIP, and audio and video conference and collaboration.
- c. Labor Rates

4. Year 4

- a. Hardware components such as telephones, gateways, trunk ports, and FXS port.
- b. Software such as telephone, UM, UC and UC mobile, trunks including PRI and SIP, and audio and video conference and collaboration.
- c. Labor Rates

5. Year 5

- a. Hardware components such as telephones, gateways, trunk ports, and FXS port.
- b. Software such as telephone, UM, UC and UC mobile, trunks including PRI and SIP, and audio and video conference and collaboration.
- c. Labor Rates

## **2 FORM B: PRODUCT LIFE CYCLE OVERVIEW**

- 2.01 Provide a detailed life cycle overview/matrix for all proposed software and hardware components including appliances, servers, gateways and telephones including the following:
- A. Date originally released
  - B. Expected/planned end of sale date
  - C. Expected/planned end of support date

## **3 FORM C: SYSTEM DESIGN, NETWORK DIAGRAM & EQUIPMENT SPECIFICATIONS**

- 3.01 How many total appliance/servers are required to support the telephone system call control, messaging and applications?
- 3.02 Network Diagram: Provide a diagram showing overall telephone network configuration including:
- A. Hosted/Premise data center locations
    - 1. Call control appliance/servers
    - 2. Application servers
  - B. Hosted network topology and connectivity to County
  - C. Gateways
- 3.03 Provide the quantity of network connections by location that shall be required to connect the core telephone system, remotes, and all peripheral equipment (excluding telephones) to the data network.
- 3.04 The following minimal system specifications are required for all proposed equipment including call control/servers, application servers and gateways and mid-span PoE power injectors.
- A. Equipment dimensions and equivalent rack units
  - B. Detailed electrical requirements, including voltage, electrical connector and outlet type (physical configuration), amperage, grounding, etc.
  - C. Heat dissipation
  - D. Temperature ranges
  - E. EMI and UL specifications and certifications
  - F. FCC Part 68 certification

#### **4 FORM D: SYSTEM MANAGEMENT INTEGRATION WITH ACTIVE DIRECTORY**

4.01 Is system management integration with Active Directory supported on the propose system?

A. If Active Directory integration is supported, please provide an overview of the system management functions that are supported such as:

1. Add a new user's telephone and voice mailbox.
2. Change a user's telephone number.
3. Change a user's name.
4. Change a user's VM password.
5. Update the system telephone directory.
6. Enable access to UC applications
  - a. PC Desktop
  - b. Smartphone and tablets
  - c. Softphone

#### **5 FORM E: INTEGRATED MESSAGING OVERVIEW**

5.01 The County has two or more LAN's, Active Directory (AD) and domains.

5.02 Provide overview and explanation of the method utilized to provide unified messaging integration with County's email platforms and multiple domains.

A. How would multiple domains be managed?

B. What integration is used?

C. What level of synchronization is provided for the following:

Retrieval Method	Message Status Synchronized Y or N					
	UM/MW	Desktop email client	Mobile email client	UC Desktop Client	UC Mobile Client	Visual VM client
	TUI					
	Desktop email client					
	Mobile email client					
	UC Desktop Client					
	UC Mobile Client					
	Visual VM client					

D. Functional Limitations

5.03 How is the message delivered to the email inbox?

A. What format is utilized?

B. What is the size of 1-minute voice message?

5.04 Where is the voice message stored?

## 6 FORM F: UNIFIED COMMUNICATIONS

6.01 Provide an overview/matrix of the UC licensing bundles available on the proposed solution.

6.02 The County has two or more LANs, Active Directories (AD) and domains.

A. Please provide an overview on the UC federation, or centralized options supported in this environment.

6.03 What desktop and mobile operating systems are supported?

A. Desktop

1. Apple IOS

2. Microsoft

B. Mobile

1. Apple

2. Android

3. Other

## **7 FORM G: INSTALLATION METHODOLOGY & ACCEPTANCE TESTING**

### **7.01 Installation Methodology**

- A. Provide a detailed description of your implementation process for the first phase of the project including the following:
  - 1. Timeline/Gant chart beginning with contract signing
  - 2. Logical description of your organizations approach to implementation including:
    - a. Database collection for all voice systems and applications
    - b. Equipment configuration and deployment
    - c. Application deployment
    - d. Training
    - e. Testing
    - f. Cutover

### **7.02 Acceptance**

- A. Provide manufacturer-recommended installation test plan for all proposed products and applications.
- B. The installation test plan shall be used during the acceptance period to verify that the system has been installed and tested per the Manufacturer recommendation.

## **8 FORM H: COUNTY RESPONSIBILITIES**

- 8.01 Provide a complete list of any equipment that the County will need to provide, such as hardware, software, and servers required to support the proposed telephone system, voice mail, and all optional equipment/applications. The list shall include detailed specifications and be organized to allow the County to determine which alternate or option the equipment shall support.
  - A. The Contractor must provide all equipment, including but not limited to hardware, software, servers, and labor required to support and install the proposed telephone system, voice mail, and all alternates equipment/ applications proposed, unless it has been identified in this section.
- 8.02 Provide a list of any other items/resources that the County will be responsible for providing for all aspects of the project including:
  - A. Implementation
  - B. Warranty
  - C. Maintenance



8.03 Provide details of any other assumptions taken in preparing your response to the RFP.

**9 FORM I: RESPONDENT AND SUBCONTRACTOR QUALIFICATIONS, SUPPORT CAPABILITIES & REFERENCES**

9.01 Information about the Respondent

- A. Company name \_\_\_\_\_
- B. Legal name (if different) \_\_\_\_\_
- C. Years in business \_\_\_\_\_
- D. Number of years selling systems like the proposed solution \_\_\_\_\_
- E. Contact Names
  - 1. Primary \_\_\_\_\_
  - 2. Secondary \_\_\_\_\_
- F. Contact Phone Numbers
  - 1. Primary \_\_\_\_\_
  - 2. Secondary \_\_\_\_\_
- G. Contact email addresses
  - 1. Primary \_\_\_\_\_
  - 2. Secondary \_\_\_\_\_
- H. Full mailing address \_\_\_\_\_
- I. Name and phone number of bonding company  
\_\_\_\_\_
- J. Number of full-time employees \_\_\_\_\_
- K. Number of technical/installation personnel who will be dedicated to the project  
\_\_\_\_\_
- L. Names and titles of personnel who would be providing the training for the equipment in this project (attach listing of experience with similar projects)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

M. Name of person who would be project manager for this project (attach listing of experience with similar projects)

\_\_\_\_\_

N. Dunn and Bradstreet Number

1. Respondent: \_\_\_\_\_

2. Voice Manufacturer: \_\_\_\_\_

3. Other Manufacturer: \_\_\_\_\_

#### 9.02 Qualification and Requirements

A. If more than (1) company is involved in the installation, training, and/or support after installation, there must be a Prime Contractor. This Prime Contractor assumes responsibility for all other entities involved.

List Prime Contractor here: \_\_\_\_\_

B. The response shall include a statement from all involved Respondents agreeing that the configuration shall work as specified and that all Respondents shall work under the Prime Contractor to resolve any configuration or interoperability problems during the installation process at no additional cost to the County. Write statement below.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### 9.03 Experience and Existing Customers

How many similar systems has the Respondent sold/installed?

A. In the area: \_\_\_\_\_

B. Statewide: \_\_\_\_\_

C. Nationwide: \_\_\_\_\_

D. Government Clients \_\_\_\_\_

#### 9.04 References

All prospective Respondents must provide a minimum of three installation and three maintenance references using the reference format provided below. The references must be similar in scope and size to the County's project and must demonstrate the following:

- A. At minimum, one of the three references must be deployed in a multi-building campus or municipal environment.
- B. References must demonstrate that the Respondent has extensive knowledge of all equipment proposed and has at least (1) year of experience with the same system(s) in the same environment.
- C. **References will be contacted – please verify information before submitting.** Use the format below for all references. All references will be called. Please inform your contacts that a 10- to 15-minute call may be anticipated.

Reference 1:

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Type of Business \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Dates of Installation \_\_\_\_\_

Description of System \_\_\_\_\_

Number of Lines/Ports/Jacks \_\_\_\_\_

Number of Networked Locations \_\_\_\_\_

Reference 2:

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Type of Business \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Dates of Installation \_\_\_\_\_

Description of System \_\_\_\_\_

Number of Lines/Ports/Jacks \_\_\_\_\_

Number of Networked Locations \_\_\_\_\_

Reference 3:

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Type of Business \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email address \_\_\_\_\_

Dates of Installation \_\_\_\_\_

Description of System \_\_\_\_\_

Number of Lines/Ports/Jacks \_\_\_\_\_

Number of Networked Locations \_\_\_\_\_

D. Subcontractors/Partners

1. The applicable terms and provisions of the contract documents shall bind every subcontractor. Further information about subcontractors may be requested prior to award.

2. Identify all subcontractors or partners used for any purposes. Failure to disclose subcontractors/partners may lead to disqualification. Include separate sheet(s) labeled "Subcontractors/Partners," if necessary.

Business Name	Years Exp.	Function
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

#### E. References for Subcontractors/Partners

Include below (3) references for EACH subcontractor. (Duplicate this page if needed for multiple subcontractors.) Again, preference shall be given to Respondents with references for implementations at organizations most similar to the County.

**Subcontractor References will be contacted – please verify information before submitting.**

Utilize the format below for all subcontractor references. All references will be called.

Please inform your contacts that a 10- to 15-minute call may be anticipated.

#### Subcontractor Reference Format

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Type of Business \_\_\_\_\_

Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Dates of Installation \_\_\_\_\_

Description of System \_\_\_\_\_

Number of Lines/Ports/Jacks \_\_\_\_\_

Number of Networked Locations \_\_\_\_\_

#### 9.05 Telephones Service after Installation

- A. How many service personnel trained in maintaining the proposed systems does Respondent employ in the County's area? Please indicate location closest to the County.

1. Trained Service Personnel: \_\_\_\_\_

2. Location: \_\_\_\_\_

B. Provide the address of Respondent's service center(s) closest to the County:

1. Company \_\_\_\_\_

2. Address \_\_\_\_\_

3. Telephone Number \_\_\_\_\_

C. Who shall maintain parts inventory? At what location?

1. Company \_\_\_\_\_

2. Address \_\_\_\_\_

3. Telephone Number \_\_\_\_\_

4. What critical component parts are kept in stock at this location?

D. What is your guaranteed remote response time for an emergency?

E. What is your guaranteed on-site response time for an emergency?

F. Telephone System Alarm Monitoring

1. What hardware is provided?

2. What if any access to the County's data network is required?

3. What is monitored?

4. How are alarms monitored:

a. During normal business hours?

b. After hours and holidays?

5. What happens when an alarm is reported:

a. During normal business hours?

b. After hours and holidays?

#### 9.06 Financial Statements

Provide, financial statements for the Respondent, Manufacturer, and subcontractor(s) inclusive of cash flow sheet, income sheet, balance sheet, and asset liability statement for the last (3) years.

## **10 FORM J: PROJECT AND MAINTENANCE TEAM**

- 10.01 Provide names, titles, resumes, and training certificates of installation project team members.
- 10.02 Provide names, job titles, and training certificates of service personnel who shall be assigned to the County after installation.

## **11 FORM K: VIRTUAL SERVER SPECIFICATIONS**

### **11.01 Virtual Server Requirements**

- A. The County is interested in exploring utilizing the County's VMware infrastructure to support the telephone system including: call control, integrated messaging system, and/or applications
- B. Please list all items supported, resource requirements for each, and limitations or advantages of running them in the VMware environment.
- C. Provide specifications for all virtual server required to support the proposed systems:
  - 1. Telephone Systems
  - 2. Integrated Messaging System
  - 3. Unified Communications
  - 4. Mobility
  - 5. Contact Center
  - 6. Call Accounting
  - 7. Quality Control Call Recording

## **12 FORM L: EXCEPTIONS AND CLARIFICATIONS SECTION**

- 12.01 All exceptions to the RFP shall be provided in this section of your response. Respondents may find instances where they must take exception with certain requirements or specifications of the RFP. All exceptions shall be clearly identified in the Exceptions section, and written explanations shall include the scope of the exceptions, the ramifications of the exceptions for the County, and a description of the advantage to be gained or disadvantages to be incurred by the County as a result of these exceptions.
  - A. Provide the paragraph number(s) for all items that you take exception with and provide an explanation/reason for the exception.

## **13 FORM M: COST WORK SHEET AND BILL OF MATERIALS**

- 13.01 Insert completed cost work sheet.
- 13.02 Insert Bill of Materials showing part numbers, quantities, unit cost, extended cost and total cost for all proposed hardware, software and labor.

## **SUBMITTAL FORMAT**

Proposals shall be submitted in PDF Format on a thumb drive or CD, as PDF documents in **seventeen (17) folders**, as listed below.

### **Folder 1 – Minimum Criteria**

1. Cover letter including company address, phone number, name of person preparing proposal, e-mail addresses and company officer signature.
2. Overall price and any special conditions
3. A brief profile of the firm, including the following:
  - a. A brief history of the business
  - b. Organizational structure of business
4. The overall qualifications of the business to provide the services requested

### **Folder 2 – Required Documents**

1. Certifications and/or letter from manufacturer(s) that the firm is an authorized installer and maintenance provider
2. Five-year maintenance support guarantee from manufacturer and Respondent
3. Addenda – Any addenda issued subsequent to the release of this solicitation must be signed and returned with the firm's proposal. Failure to return signed addenda may be cause for the proposal to be considered non-responsive.

### **Folder 3 – Executive Summary/Overview**

1. Written summary of the understanding of the scope of work to be performed
2. Technical summary of the system proposed, including details about any "improvements" over and above the base request (for example, resiliency/redundancy, system management, database consolidation, or larger number of ports)

### **Folder 4 – Form A: Price Protection**

### **Folder 5 – Form B: Product Life Cycle**

### **Folder 6 – Form C: System Design, Network Diagram & Equipment Specifications**

### **Folder 7 – Form D: System Management Integration with Active Directory**

### **Folder 8 – Form E: Integrated Messaging Overview**

### **Folder 9 – Form F: Unified Communications**



**Folder 10** – Form G: Installation Methodology and Acceptance Testing

**Folder 11** – Form H: County Responsibilities

**Folder 12** – Form I: Respondent and Subcontractor Qualifications, Support Capabilities, and References

**Folder 13** – Form J: Project Team and Maintenance Team Resumes/Certifications

**Folder 14** – Form K: Virtual Server Specifications

**Folder 15** – Form L: Exceptions and Clarifications

**Folder 16** – Form M: Cost Work Sheet and Bill of Materials

**Folder 17** – Sales Documents and Brochures

## Form M: Cost Work Sheet Telephone System and Options

### Company Name:

For all items requested in this section, the Respondent shall include, the cost to provide all hardware, software, equipment, shipping and labor to provide, install, configure, and cutover or make operational a fully functioning turnkey system. The pricing will be based on the requirements provided in the RFP and this table.

<b>Base System Phase 1</b>	<b>Capital Cost</b>	<b>Recurring Cost</b>
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00
<b>Base System Phase 2</b>	<b>Capital Cost</b>	<b>Recurring Cost</b>
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00
<b>Base System Phase 3</b>	<b>Capital Cost</b>	<b>Recurring Cost</b>
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00
<b>Option 1:Conference and Collaboration Bridge Phase 2</b>	<b>Capital Cost</b>	<b>Recurring Cost</b>
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00
<b>Option 2: Cordless Headset</b>	<b>Capital Cost</b>	<b>Recurring Cost</b>
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

## Form M: Cost Work Sheet Telephone System and Options

Company Name:

Option 3A: Contact Center Phase 1	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

  

Option 3B: Contact Center Phase 2	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

  

Option 3C: Contact Center Phase 3	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

  

Option 4: Quality Control Call Recording Phase 1	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

  

Option 5: SIP Trunking	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

## Form M: Cost Work Sheet Telephone System and Options

Company Name:

Option 6: Music on Hold Source	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

Option 7: Percentage Increase to add 24X7 Labor Coverage to Warranty and Maintenance a	Capital Cost	Recurring Cost
Warranty Period		0.00%
Maintenance: Year 2		0.00%
Year 3		0.00%
Year 4		0.00%
Year 5		0.00%

Option 8: On Site Technician	Capital Cost	Recurring Cost
Warranty Period		\$0.00
Maintenance: Year 2		\$0.00
Year 3		\$0.00
Year 4		\$0.00
Year 5		\$0.00

Option 10: Virtual Sever Support (Show number as a negative if utilizing the Countys virtual server network would lower base system pricing provided above.	Capital Cost	Recurring Cost
Call Control Servers	\$0.00	\$0.00
Integrated Messaging	\$0.00	\$0.00
Unified Communications	\$0.00	\$0.00
<b>Mobility</b>	\$0.00	\$0.00
Contact Center	\$0.00	\$0.00
Call Accounting	\$0.00	\$0.00
Quality Control Call Recording	\$0.00	\$0.00

Option 10A: Phase 2 Mid-Span Rack Mount IEEE 802.af Power Injectors	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	
<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00

Option 10B: Phase 3 Mid-Span Rack Mount IEEE 802.af Power Injectors	Capital Cost	Recurring Cost
Hardware & Software	\$0.00	
Professional Services Labor	\$0.00	
1st Year Warranty Following Final Acceptance	\$0.00	

## Form M: Cost Work Sheet Telephone System and Options

**Company Name:**

<b>Total</b>	<b>\$0.00</b>	
Hosted Monthly Recurring Cost (shall include all fees surcharges and taxes)		\$0.00
Maintenance cost to be paid annually based on four-year contract beginning in the second year		\$0.00
<b>Provide hourly rate to provide after hours remote maintenance and onsite technical support.</b>		
	<b>Hourly Rate</b>	
Warranty Period	\$0.00	
Maintenance: Year 2	\$0.00	
Year 3	\$0.00	
Year 4	\$0.00	
Year 5	\$0.00	
Maintenance pricing will be used for evaluation purposes. The County reserves the right to accept or not accept the maintenance pricing.		

### Provide Detailed Add and Delete Schedule

Part Number & Description	Pre-sale	Pre-Cut	Post-Cut
(1) Basic User with Phone	\$0.00	\$0.00	\$0.00
(10) Basic Users with Phone	\$0.00	\$0.00	\$0.00
(1) Standard User with Phone	\$0.00	\$0.00	\$0.00
(10) Standard Users with Phone	\$0.00	\$0.00	\$0.00
(1) Admin User with Phone	\$0.00	\$0.00	\$0.00
(10) Admin User with Phone	\$0.00	\$0.00	\$0.00
(1) Mobile User with Phone	\$0.00	\$0.00	\$0.00
(10) Mobile User with Phone	\$0.00	\$0.00	\$0.00
(1) Conference Room Phone with License	\$0.00	\$0.00	\$0.00
(1) Add On Module with License	\$0.00	\$0.00	\$0.00
PRI Trunk Card	\$0.00	\$0.00	\$0.00
(24) SIP Ports Trunk Ports	\$0.00	\$0.00	\$0.00
(1) Four port Analog FX0 Gateway	\$0.00	\$0.00	\$0.00
(1) Four port Analog FXS Gateway	\$0.00	\$0.00	\$0.00



## **ADDENDUM #1**

### **REQUEST FOR PROPSAL (RFP) 2018-3019**

#### **TELEPHONE SYSTEM**

**PROPOSAL DUE DATE: JANUARY 17, 2018**

The following information shall become part of this bid and shall be binding as if originally contained therein.

#### **QUESTIONS**

1. Do respondents need to have a certain tier of Cisco classification? (Cisco Select, Premier, or Gold)

**Response: No.**

2. For section - 1.05 Existing Infrastructure - A. Telephone System: Which of the 8 nodes will connect to the proposed solution via PRI for inter-system 4-digit dialing?

**Response: At the two data centers. Revised Telephone Configuration Table included with this Addendum.**

3. For section - 1.05 B. LAN/WAN - 1. LAN: Foundry/Brocade Networks L3 Core and Distribution, L2 Access mostly non-PoE. How many ports are non-POE?

**Response: The network equipment is not included in this project. Please provide optional pricing for Mid Span Power injector as requested in section 4.10.**

4. For section - 1.05 K. Fax Server: Alcatel Omni Fax Server Release 6.6.0.16. Replace and how many ports?

**Response: 8 ports please see 3.10.A.3.**

5. For section - 2.22 Cutover and Post Cutover Requirements-A. Cutover Time: To prevent business interruption, all cutovers shall take place outside the County's normal hours of operation to avoid any disruption of service. What is the maintenance window? What's the Change Management review/approval process?

**Response: As stated all cutovers will be outside normal business hours. The timing of each cutover will be coordinated with the Contractor.**

6. For section - 3.01-B2. All locations designated as survivable in Telephone System Configuration Table shall be designed to ensure that the IP telephones shall continue to function and that internal and external traffic shall be rerouted to the PSTN network over locally equipped trunks if the WAN connection is unavailable. For SRST sites, what trunk type for each SRST site (PRI, POTs, SIP?) How many voice channels?

**Response: PSTN PRI and FXS trunks as shown on the revised Telephone System Configuration Table.**

7. For section - 3.05 Telephone Desktop Sets. Is Mobile User - a) Wi-Fi phone registered to internal wireless network or a mobile client on any device. i.e. iPhone, iPad?

**Response: The mobile user will have a standard IP desk phone, unified communications on PC and unified communication mobile client on smart phones or tablets.**

8. For section - 3.07 E-911. # of Zones per site? # of zones per site? i.e. 3 story building => network switches per floor => 3 zones

**Response: The exact number of zones will be determined at the time of installation. However, at a minimum, the system will support the number of zones shown for each location under the e911 zones column on the revised Telephone System Configuration Table.**

9. For section - 4.05 Option 5 SIP Trunking: Replace PRI trunking with SIP:

- a. How many PRI's (B-Channels) today per site?

**Response: This option would replace the PSTN PRI Trunking connections shown in the Revised Telephone Configuration Table. There are 8 PSTN PRI's with 23 B channels each for a total of 184 B channels.**

- b. What is the cost difference if the SIP trunking is purchased instead of PRI service at the time of contract signing? How much is Martin County paying for each PRI today monthly?

**Response: Please provide the difference in hardware/software cost to equip the proposed system with SIP trunking vs PRI trunking.**

- c. If the cost to provide SIP service is less than the PRI service show the cost on the cost work sheet as negative number. Need current PRI spend.

**Response: Please provide the difference in hardware/software cost to equip the system with SIP trunking vs PRI trunking.**

- d. What would the cost be to replace the PRI services with SIP if purchased after the systems have been cutover? How many PRI's (B-Channels) today per site?

**Response: Please provide the difference in hardware/software cost to equip the system with SIP trunking vs PRI trunking.**

10. For section - 4.0.8B. B, the On-Site Technician must be certified on all voice related systems or applications purchased as a result of this RFP. What level of certification? CCNA, NP, or IE?

**Response: The contractor will need to provide verification that the technicians assigned to the project are trained and certified to configure, install, troubleshoot, restore and support any products provided as a result of this RFP.**

11. For section - 4.10 Option 11: Mid Span Rack Mount IEEE 802.af Power Injectors. How many 24-port Injectors per site? Per IDF?

**Response: Provide and install the following Midspan Power Injectors**

- **Phase 2: (40) Midspan Power Injectors. Distribution to be determined at time of installation.**
- **Phase 3 (30) Midspan Power Injectors. Distribution to be determined at time of installation.**

RECEIPT OF ADDENDUM # \_\_\_\_\_ IS HEREBY ACKNOWLEDGED

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Signature



Addendum #1 Revised Telephone System Configuration Table (Changes are highlighted in blue)

Location	Phase	Core/ Survivable	# e911 Zones	Basic User	Standard User	Admin User	Mobile User	Conference Phone	FXS Ports Phone	FXS Ports Modem	FXS Ports Fax	(1) Add- On Module	(2) Add- On Module	(3) Add- On Module	Voice Mail Only	FXO Ports	Alcatel Tie Line PRI	PSTN PRI
Utilities	1		2	11	32	1	0	0	0	9	3	1	0	0	0	0	0	0
Data Center 1 DRC	2	Core 1	2	4	0	0	0	0	8	1	1	0	0	0	200	0	1	1
Data Center 2 LEC	2	Core 2	15	168	274	11	0	6	9	8	38	6	3	1	0	2	1	3
Admin Building	2	Survivable	15	99	249	10	3	1	1	11	30	3	0	0	0	0	0	2
Building Department	3		2	8	29	0	0	0	0	3	2				0	0	0	0
Courthouse	3	Survivable	15	150	130	6	0	1	12	3	41	5	0	0	0	3	0	2
Fire Station 16	3	Survivable	1	13	1	0	0	0	2	0	0	0	0	0	0	6	0	0
Fire Station 21	3	Survivable	1	14	2	3	0	0	0	2	0	0	3	0	0	7	0	0
Fire Station 22	3	Survivable	1	8	2	0	0	0	2	0	1	0	0	0	0	2	0	0
Fire Station 23	3	Survivable	1	6	3	0	0	0	1	0	2	0	0	0	0	2	0	0
Fire Station 32	3	Survivable	1	6	5	0	0	0	2	0	1	0	0	0	0	2	0	0
General Services	3		2	9	30	0	0	0	0	5	8	0	0	0	0	0	0	0
Hobe Sound Annex	3	Survivable	1	17	7	1	0	0	0	0	0	0	0	0	0	1	0	0
Indian Town Annex	3	Survivable	1	18	14	0	0	0	1	3	6	0	0	0	0	5	0	0
Property Appraiser	3		2	9	43	2	0	0	1	2	3	0	2	0	0	0	0	0
Supervisor Elections	3		2	28	8	0	0	0	0	10	3	0	0	0	0	0	0	0
Tax Collector	3		2	24	42	0	0	0	0	0	7	0	0	0	0	0	0	0
<b>Totals</b>			66	592	871	34	3	8	39	57	146	15	8	1	200	30	2	8



## **ADDENDUM #2**

### **REQUEST FOR PROPOSAL (RFP) 2018-3019**

#### **TELEPHONE SYSTEM**

**PROPOSAL DUE DATE: JANUARY 17, 2018**

The following information shall become part of this bid and shall be binding as if originally contained therein.

#### **QUESTIONS**

1. 1.02. Does the PRI quantities in the table include the connectivity to Alcatel for 4 digit dial?  
**Response: See Addendum #1 Revised Telephone Configuration Table.**
2. 1.04F. How many page groups? See minimum of 32 stations in a group but not number of groups  
**Response: Quantity to be determined during database collection but the system should support a minimum of 40 groups.**
3. 1.06G. Do you plan on keeping 3 Exchange servers? 2010, 2016, O365 or plans to move everyone to O365?  
**Response: Exchange 2016 has been installed and is running. We don't have a confirmed timeline to complete the transition from Exchange 2010 to 2016 & O365.**
4. 3.07. For E-911 do you contract with the carrier to provide the ELID to the PSAP or do you need a solution for E911?  
**Response: ELID will be delivered by the carrier to the PSAP.**
5. 4.03. Contact Center for 11 agents at Utilities. Will calls route from the Alcatel? Do you know what the traffic is to determine PRI connections or know how many to include or define how will calls route?  
**Response: We anticipate that one of the existing PSTN PRI circuits will be moved from the Alcatel to the new system to support calls to the Utilities contact center.**
6. 4.04 J.11. How many music on holds sources? We can support a source for each queue or skill group or shared resource. For example, Utilities has two queues and 3 skill groups.  
**Response: One.**

7. 4.04. Call Recording for 16 seat minimum for phase 1 with capacity for 100. Don't see a spot in Option 4 cost worksheet for expanded seats. Do you want to see pricing to expand or just confirm that you can expand to 100 seats  
**Response: Equipped with 16 seats with the ability to be expanded to 100 seats with the purchase of additional licenses.**
8. 4.05. SIP Trunking Option 5. 8 PRIs equal 184 channels. Do you want to size SIP trunks for the same number of sessions?  
**Response: Yes.**
9. 4.10. Mid Span Power for Phase 1. Assume Mid Span power for all 44 telephones, basic, standard, advanced?  
**Response: No, the new the Utilities Building will be equipped with PoE switches.**
10. If there are any items not listed in the Add/Delete Schedule should we add or just provide for what's listed?  
**Response: Provide for what is listed.**
11. Are you planning to replace the Alcatel fax server and looking for cost for new? If so does this get included in Phase 1?  
**Response: We requested that the integrated messaging system be equipped with 8 fax ports. It would be installed in phase 1.**
12. Reminder for Addendum for FXO ports for Utilities and Hobe Sound Annex for survivability.  
**Response: See Addendum#1 Revised Telephone Configuration Table.**
13. The RFP Specifications document states that Phase 1 scope is the Utilities department, consisting of; 11 Basic Users, 32 Standard Users, 1 Admin User, 9 Modems, 3 Faxes, 1 Add On Module, 11 Contact Center Agents
- a. Questions for Phase 1: Since Utilities is a Survivable site, what will be the voice termination type 1) PRI? # of PRIs? 2) POTs? # of POTs? 3) SIP? # of Sessions?  
**Response: See Addendum # 1 Revised Telephone Configuration Table.**
- b. Since Utilities is a Survivable site, will the DID's terminate at DRC and LEC? If Yes, for DRC and LEC, what will be the voice termination type: 1) PRI? # of PRIs? 2) POTs? # of POTs? 3) SIP? # of Sessions?  
**Response: See Addendum # 1 Revised Telephone Configuration Table.**
14. Can you please supply us with historical Monthly Data (say 2 years) of your Long Distance traffic within the USA? In addition, can we please have a summary of your Local Calling Traffic (Inbound & Outbound).  
**Response: We do not have two years of information. Monthly LD is typically less than \$2,000.**

15. Is the County willing to UPGRADE their switches to POE or would you prefer us to provide new ones?

**Response: The network equipment is not included in this project. Please provide optional pricing for Mid Span Power injectors as requested in section 4.10.**

16. Is the Inter-connectivity to each location LAYER 2 only?

**Response: No. Layer 3 routing is provided.**

17. Do you have more than ONE FIBER STRAND at each location? If yes, is it available to be connected to our Hosted PBX Network?

**Response: The County prefers that host service be delivery to the two core locations and that our network is utilized to distribute the service.**

18. Do your existing switches at all locations support VLAN Tagging and LLDP communication for VoIP?

**Response: Yes.**

19. Is it possible for bidders to conduct a Site Survey of all the locations?

**Response: Due to time constraints site surveys are not possible.**

20. 2.21 Training Requirements: Will the county require any manufacturer training to be included in this solicitation?

**Response: Please provide training as specified in the RFP, and specify your proposed method for delivering that training.**

21. 2.22 Cutover and Post Cutover Requirements E.: Contractor would assume the term (OUTSTANDING) adds, moves and changes is anything not completed as a result of contractor meeting with county on system details and reviews 2.14.? What about adds, moves or changes that were not originally agreed upon or scoped by contractor and county?

**Response: Change request that are made after database freeze but prior to cutover.**

22. Somewhere it mentions counties network is split (separate domains/forests), could the county further explain or even provide a network drawing detailing that separation?

**Response: The Sheriff, Property Appraiser, and Supervisor of Elections are child domains of Martin BOCC. The Clerk and Tax Collector are separate domains.**

23. The configuration table shows the Utilities, Admin and Hobe Sound Annex as “survivable” but these locations do not have any local trunks. Will the county be adding trunks to these locations? In addition the counts within the table to not match up (see attached).

**Response: See Addendum # 1 Revised Telephone Configuration Table.**

24. How many ACD supervisors are required who have real-time screens and will need to pull reports?

**Response: Minimum of 16.**

25. 03 Option 3: Contact Center J 23 OFF SITE ACD AGENT:

- a. How many agents will need to be supported from off site locations?
- b. Will these agents need a separate instrument for their home location?
- c. Will these agents also need an instrument at one of the facilities?
- d. Are these agents included in the counts shown in the table under 4.03 G.?

**Response: None initially the goal is to insure the solution supports this capability.**

26. J 28 GRAPHICAL REPORTING INTERFACE: How many interfaces are required?

**Response: 16.**

RECEIPT OF ADDENDUM # \_\_\_\_ IS HEREBY ACKNOWLEDGED

---

Firm Name

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Signature



### **ADDENDUM #3**

## **REQUEST FOR PROPOSAL (RFP) 2018-3019**

### **TELEPHONE SYSTEM**

**PROPOSAL DUE DATE: JANUARY 17, 2018**

The following information shall become part of this bid and shall be binding as if originally contained therein.

### **QUESTIONS**

1. How many Telephone Numbers will need to be ported if you select a Hosted PBX Solution?

**Response: Approximately 1850**

2. Will additional Telephone Numbers be required over and above those you already have?

**Response: No.**

3. How many total lines (PRI's and 1-FB's) including Alarm Lines, Analog Devices etc., does the County utilize at this time?

**Response: (8) PRI Circuits (30) 1FB**

4. Does the county require the ability to page all phones in the county in a single page alert? If not, what would be the maximum concurrent paging endpoints required?

**Response: No. 32 is the maximum per group.**

5. For any components that require windows or MS SQL server, will the county provide the licenses via an existing enterprise agreement or should the proposed solution include licensing for those components

**Response: The proposed solution should include licensing for all required components.**

6. Assuming that the county requires 5 years of support on software and hardware, should that be co-terminated for phases 2 and 3? This means that phase 1 would have 60 months, phase 2, 48, and phase 3, 36?

**Response: Do not provide co-terminating support agreements. Quote each phase with a full five-years of support.**

7. Requesting clarification. Phase 1, per addendum #1 consists of the Utilities Department only. Data Center 1 and 2 are shown as Phase 2. Please confirm that Phase 1 consists of building out the core UC/CC infrastructure for the entire Martin County enterprise but only the users in the Utilities Dept. would be cutover to the new system in Phase 1.

**Response: Correct we expect the core infrastructure to be built out in phase one with only the licensing required to support the Utilities department.**

8. What is the expected interval between the completion/acceptance of Phase 1 and the start of Phase 2? Also, expected interval between completion/acceptance of Phase 2 and start of Phase 3.

**Response: Phase 2 is anticipated to start January 2019 and phase 3 is anticipated to start January 2020.**

9. In the Submittal Format document there are 17 'Folder' defined. Folders 4 thru 16 reference 'Forms' A thru M. Where can we find these Forms to use for the response?

**Response: Forms are provided in the Proposal Requirements document.**

10. Section 4.03 of the Specifications document lists Contact Center as an 'optional' application, with the Utilities Dept in Phase 1. Is Contact Center a Phase 1 requirement or should it be priced as an option?

**Response: Price as an option.**

11. How many contact center Supervisors (ability to view real time and historical stats and manage agent skill assignments) are required for each of the Departments listed in the Specifications document?

**Response:**

Department	Phase	Queues	Supervisors	Skill Sets	Number of Agents	RAN
Utilities Phase	1	2	2	3	11	3
Transportation Phase	2	2	1	4	5	3
Building Department	2	1	1	2	8	3
Building Inspections	2	1	1	3	2	3
IT Support	2	1	2	2	9	3
Rumer Control	3	1	2	2	8	3
Property Appraiser	3	1	2	3	10	3
Tax Collector	3	1	1	3	7	3
Traffic	3	2	2	4	13	3
TRIM	3	1	2	1	10	

12. Section 1.05 states that the County has an existing VMware environment at ESXi 6.5. If the solution we are proposing supports VMware deployment, will Martin County utilize their VMware or should we include physical servers in our solution design to run the UC/CC applications?

**Response: Include physical servers with the base system and provide optional pricing as requested in 4.09 on the pricing sheet.**

RECEIPT OF ADDENDUM # \_\_\_\_ IS HEREBY ACKNOWLEDGED

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Signature



## ADDENDUM #4

### REQUEST FOR PROPOSAL (RFP) 2018-3019

#### TELEPHONE SYSTEM

**PROPOSAL DUE DATE: JANUARY 17, 2018**

The following information shall become part of this bid and shall be binding as if originally contained therein.

#### QUESTIONS

1. Add-on modules come in two sizes, 12 button or 24 button. Which type of add-on modules are required?

**Response: Provide the module which most closely matches the (20) lines requested in table 3.05 A**

2. Revised Telephone System Configuration Table shows 200 "voice mail only" for Data Center 1, DRC. Can you explain the use case for these 200 voice mail only users? Will they need an extension number assigned on the system?

**Response: They will be used to provide voice mail to people who will not have telephones or UC applications. There needs to be some method of accessing the voice mail system to leave a message or to transfer a caller to the user's voice mailbox.**

RECEIPT OF ADDENDUM # \_\_\_\_ IS HEREBY ACKNOWLEDGED

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Signature





## **ADDENDUM #5**

### **REQUEST FOR PROPOSAL (RFP) 2018-3019**

#### **TELEPHONE SYSTEM**

**PROPOSAL DUE DATE: JANUARY 17, 2018**

The following information shall become part of this bid and shall be binding as if originally contained therein.

#### **QUESTIONS**

1. Is Lync and or Skype for Business Server Deployed?  
**Response: No.**
2. Is Lync and or Skype for Business Client Deployed if so to how many users?  
**Response: No.**
3. What is your current Unified Communications platform?  
**Response: Alcatel.**
4. What is your current conference Solution?  
**Response: Verizon.**
5. What is the current license agreement with Microsoft around Office 365 (E3, E5 etc.)?  
**Response: E3.**
6. What version of Office is being run?  
**Response: Microsoft Office Professional Plus 2010 with plans to upgrade Microsoft Office 365 ProPlus.**
7. What Exchange version you running Standard or Enterprise for 201 and 2016?  
**Response: Exchange 2010.**
8. Are Martin County using Enterprise client access license (CAL) for Exchange is so how many been purchased?  
**Response: Yes, 900.**
9. Who is responsible for additional network drops for IP phone and how many?  
**Response: The County will be responsible for this.**
10. Does the paging have to broadcast of speaker system or is it just station paging?  
**Response: There is no broadcast paging over speakers, only station paging.**

11. Does Martin County have Carrier Diversity at the 2 Data Centers in order to connect to a Hosted Solution?

**Response: Martin County has diversity in DIA but not for PRI.**

12. Can you please provide the physical addresses of the 2 Data Centers in order for the contractor to price solution connectivity?

**Response: 800 SE Monterey Rd, Stuart, FL 34994 and 6000 SE Tower Dr., Stuart, FL 34997**

13. There are requirements notated in the "Specification Doc" which are not notated in the Proposal Requirements Document such as: 4 Digit Dial, Video Conferencing, SIP trunks, more. Should the contractors be responding to the Specifications document or to the Requirements document?

**Response: Both. Provide the information requested on each form provided in the Proposal Requirements. Utilize Form M: Exceptions and Clarifications Section provided in the Requirement Documents to list any exceptions taken to any part of the RFP including the specifications.**

14. Aside from the call center (Options 3 & 4), how many phone lines will be required to have call recording enabled? If so, are there different requirements than those listed in Option 4?

**Response: The call recording solution will be used to support the call centers.**

15. Prior to implementation of and/or absent Option 1, do you have any requirements for voice only conference calling ports?

**Response: No.**

16. Requesting clarification on Form M. For the Hosted Monthly Recurring Cost, please confirm the response is to include a single monthly cost and not the total for all months of the agreement (Phase 1 - 60 months, Phase 2 - 48 Months and Phase 3 - 60 Months)?

**Response: Provide monthly cost based on Phase 1-60 months, Phase 2-48 months and Phase 3-36 months.**

17. Please provide additional explanation of what you are requesting in the Add and Delete Schedule.

**Response: Unit or bundled pricing for the items requested.**

18. Please further define Pre-sale, Pre-Cut and Post-Cut and as it relates to the 3 phases.

**Response: Provide cost based on Phase 1. We expect the same discount levels to be applied to Phase 2 and Phase 3.**

RECEIPT OF ADDENDUM # \_\_\_\_ IS HEREBY ACKNOWLEDGED

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Signature