

# Request for Proposals (RFP)

---

*For Contact Center Management and Enterprise Wide Phone System*



**PROPOSALS DUE**

**Friday, June 19, 2015**

**BY 5:00 PM EST**

Send Electronic Copy (PDF file) to:

Tyler Skillings, MARC Director

[tskillings@seiu509.org](mailto:tskillings@seiu509.org)

SEIU Local 509

100 Talcott Ave.

Building 313, 2<sup>nd</sup> Floor

Watertown, MA 20472

(617) 678-8109



## Table of Contents

I.	Purpose/Background .....	5
A.	Purpose.....	5
B.	Organization Background .....	5
II.	Timeline/Schedule.....	6
A.	Timeline .....	6
B.	Schedule .....	7
III.	Communications Regarding RFP .....	7
A.	Proposal Response, Deadline and Delivery.....	7
B.	Contacts.....	8
C.	Vendor Questions .....	8
D.	Oral Communications.....	8
E.	RFP Changes or amendments.....	8
F.	Clarifications .....	9
IV.	General RFP Procedures.....	9
A.	Incorporation of Proposal in the Final Agreement.....	9
B.	Right of Selection/Rejection of Proposals .....	9
C.	Cost of Development of Proposals .....	10
D.	Vendor Prime Contractor Responsibility.....	10
E.	Period of Validity of Proposals .....	10
F.	Confidential and Proprietary Material .....	11
G.	Proposal Disposition.....	11
V.	Scope of Services.....	11
A.	Current Specifications .....	11
B.	General Features and Functions Required.....	12
C.	Main Features and Functions to be provided .....	12
VI.	Proposal Format.....	21
	<u>Section 1</u> .....	22
	<u>Section 2</u> .....	22
	<u>Section 3</u> .....	22
	<u>Section 4</u> .....	24
	<u>Section 5</u> .....	24

<u>Section 6</u> .....	24
<u>Section 7</u> .....	25
VII. Evaluation .....	25
VIII. Proposal Approval and Agreement Execution.....	26

## **I. Purpose/Background**

### **A. Purpose**

The purpose of this Request for Proposal (RFP) is to acquire the services of a qualified vendor who will provide and install an inbound and outbound “hosted” or “on premise” contact center system that may also be utilized as the enterprise wide telephony solution to replace the current system which does not have the capacity to support a contact center and is nearing its end of usefulness, as the organization expands its business model.

Vendors responding to this request are expected to use the requirements outlined in this document as a guideline for the proposed solution. We are relying on you the vendor to use your knowledge and experience within the communications industry to provide the best and most fiscally responsible, scalable, reliable, and maintainable solution possible. We also will rely on you to identify additional needs of the organization as part of a discovery process, should your company be selected, given that our area of expertise does not lie in telephony or communication systems.

### **B. Organization Background**

SEIU Local 509 (Local 509) is a labor union, which represents over 17,000 workers in Massachusetts. Our members are: human service and education professionals who work for the state; private sector human service workers; family childcare providers; and non-tenured faculty at private universities. As part of our shift and expansion of our “business model,” we are in the midst of creating Member Action Resource Center (MARC), whose staff will handle incoming calls for the local and assist in the handling of grievances. Other SEIU locals across the United States, Canada, and Puerto Rico have already shifted to this model, in a sense creating “call centers” or “contact centers” commonly used in many other industries. We are seeking a single phone system that can serve both the MARC with its needs as an inbound and outbound contact center and our normal daily operational business call needs. Although the MARC staff could be trained to use a soft phone solution, the remainder of staff may need the ease of an actual desktop phone. We desire to enter into a business relationship with a vendor that will meet our needs as a customer and are responsive to our requests for repairs or assistance.

Local 509 is a statewide organization and currently has two offices around the State of Massachusetts. The phone system should be user friendly and easy to call between the offices, to outside entities, and have the flexibility to accommodate staff that travel

between offices and perhaps in the future work from a home office regardless of their job title or basic function with the organization.

Local 509 wants a phone system that has full call center functionality as well as reporting capabilities which has been successfully deployed for other customers who can be contacted as references to verify the meeting of customers' needs both on the product and the service provided by the vendor.

Local 509 currently has a total of sixty (60) employees throughout our organization. We are anticipating shifting three to five of those current employees into the MARC at the startup of our new venture. However, flexibility and scalability is important to the solution we decide to proceed with, as other SEIU locals have quickly expanded their own Member Resource Center after proving its success. Because this is a new venture for Local 509, we will be conducting a "time-study" for a one-week period of time to capture and idea of what our call volume may look like, as individuals before have not really tracked it.

Local 509 currently houses its state office in Watertown, MA as a tenant in a business complex. However, the owner of the complex is motivated to allow tenants to break their lease due to their own desires to expand. Local 509 is actively looking at potential new locations for the main office, which should be considered as part of the proposal you are submitting. It will be critical for the vendor to indicate the process and costs associated with relocating the services should Local 509 decide to proceed with implementation prior to the relocation of the main office.

## II. Timeline/Schedule

### A. Timeline

Following are key dates related to this RFP. Local 509 is committed to adhering to this schedule, but reserves the right to make modification as necessary.

Benchmark	Date
RFP Published	May 14, 2015
RFP Questions due from vendors by 5:00 pm EST	May 28, 2015
Responses to RFP questions from vendors sent out	June 6, 2015
Proposal due by 5:00 pm EST	June 19, 2015
Decision on Vendor targeted	July, 2015
Identify staff for the MARC	July, 2015
Target to be operational	September 2015

## B. Schedule

The schedule for implementation will be mutually agreed upon, but the vendor should lay out what they believe to be a viable implementation schedule. Please be clear should there be a need on the vendor's behalf to schedule a time that may be outside of the general timeline that Local 509 is considering as laid out above. Clearly explain what the transitions look like between each phase of the process once a decision is made by Local 509 on which vendor to enter into a relationship with (i.e. within two weeks of signing agreement with the sales team, project manager is assigned).

## III. Communications Regarding RFP

### A. Proposal Response, Deadline and Delivery

Vendors shall provide electronic copy of proposal in the form of a PDF file to:

Tyler Skillings, MARC Director  
[tskillings@seiu509.org](mailto:tskillings@seiu509.org)

SEIU Local 509  
100 Talcott Ave.  
Building 313, 2<sup>nd</sup> Floor  
Watertown, MA 02472

Phone: (617) 678-8109

Proposals must be received by 5:00 pm EST on Friday, June 19<sup>th</sup>. All responses must be submitted following the format of this RFP. Should it prove easier to attach an appendix to explain a portion of the response to this RFP, please clearly indicate the appropriate appendix as follows: *"See appendix A for this response"*.

Extensive marketing material and sales documentation are not required and will bear no weight in our evaluation. Limited sales and marketing literature may be used to provide clarity on specific items but should be limited to a screen shot or image that accompanies the response.

## **B.     Contacts**

Upon release of this RFP, all vendor communications concerning this solicitation shall be directed to the Local 509 contact(s) listed below:

Tyler Skillings, MARC Director

SEIU Local 509  
100 Talcott Ave.  
Building 313, 2<sup>nd</sup> Floor  
Watertown, MA 02472

Phone: (617) 678-8109

E-mail: [tskillings@seiu509.org](mailto:tskillings@seiu509.org)

## **C.     Vendor Questions**

Questions concerning the RFP must be submitted electronically no later than Thursday, May 28<sup>th</sup> by 5:00 pm EST. A response to all questions relevant to the RFP process will be transmitted to each vendor that submitted a question by the response due date of Friday, June 5<sup>th</sup>.

## **D.     Oral Communications**

Any verbal communications should be limited to issues that arise due to technology issues of transmitting written communication and responses to this RFP. If local 509 should have any difficulties opening any vendors' electronic communication, we will contact the appropriate vendor to work through those issues. However, any issues that arise will not be allowed to interfere the prescribed timelines above. All vendors will be required to follow the same deadlines regardless.

## **E.     RFP Changes or amendments**

Local 509 reserves the right to change the schedule or issue amendments to the RFP at any time. Local 509 also reserves the right to cancel or reissue the RFP at any time. If any such amendments or cancellations occur, they will be posted the following



locations: the RFPDB ([www.rfpdb.com](http://www.rfpdb.com)) and SEIU Local 509's websites ([www.seiu509.org](http://www.seiu509.org)) and will be distributed to all vendors of record by email prior to the response due date.

It is the responsibility of each vendor to monitor the website or to ensure that Local 509 has their correct business name and contact information on file. Proposing vendors must acknowledge and return a copy of all Addenda as part of their submitted proposal.

## **F. Clarifications**

Local 509 reserves the right to obtain clarification of any point in a vendor's proposal or to obtain additional information necessary to properly evaluate a proposal. Failure of vendor to respond to a request for additional information or clarification may result in rejection of the vendor's proposal. Local 509's retention of this right shall in no way reduce the responsibility of vendors to submit complete, accurate and clear proposals.

## **IV. General RFP Procedures**

### **A. Incorporation of Proposal in the Final Agreement**

The vendor's proposal, including all promises, warranties, commitments and representations made in the vendor's proposal, shall be binding and incorporated by reference into Local 509's agreement with the vendor, provided Local 509 agrees to contract for proposed services and equipment included in vendor's proposal.

### **B. Right of Selection/Rejection of Proposals**

Local 509 reserves the right to select a proposal for telecommunications services and equipment through competitive negotiations. Local 509 reserves the exclusive right to select or reject any or all proposals for any reason, to waive any informality in the proposals received, and to waive minor deviations from the specifications. Local 509's waiver of any informality or immaterial deviation shall in no way modify the RFP documents or excuse the vendor from full compliance with the RFP requirements. Selection of vendor shall not be construed as an award of a contract but as

commencement of contract drafting, discussions and negotiations. Local 509 may award a contract on the basis of information in addition to that received in a proposal. It is emphasized that all proposals should be complete and submitted with the most favorable financial terms.

Local 509 specifically reserves the right to reject the proposal of any vendor who submits false, incomplete, or unresponsive statements in its proposal.

### **C. Cost of Development of Proposals**

All expenses incurred by vendors related to the proposal or the selection process will be bore by the vendor. No claim for reimbursement of time, material, or travel expenses; shall be made by the vendor against Local 509, regardless of the results of the selection process.

### **D. Vendor Prime Contractor Responsibility**

If a vendor's proposal includes equipment, hardware, software, or services to be supplied by entities other than the proposing vendor, it is mandatory for the proposing vendor to act as prime contractor for the procurement of all products and services proposed to meet this RFP.

The vendor acting as the prime contractor must be the sole point of contact with regard to contract stipulations including payment of any and all charges resulting from the purchase of the proposed equipment, hardware, software, and/or services. The vendor acting as the prime contractor must take full responsibility for the demonstration, delivery, installation, and acceptance testing of the items proposed to be supplied by its subcontractor.

### **E. Period of Validity of Proposals**

The vendor must certify that its proposal will remain in effect for ninety-days after the submission deadline.

## **F. Confidential and Proprietary Material**

Every effort will be made to consider that submitted proposals may contain confidential and proprietary information. Local 509 will attempt to protect legitimate trade secrets of any vendor. Examples of such information would be unpublished descriptions of proprietary aspects of the systems proposed. Any proprietary information contained in the proposal must be designated clearly and should be labeled with the words "Proprietary Information." Marking the entire proposal proprietary may result in the rejection of the proposal. The use of submitted proposals is to assist Local 509 in determining how to narrow the field of potential vendors.

## **G. Proposal Disposition**

All materials submitted in response to this RFP shall become the property of Local 509.

# **V. Scope of Services**

## **A. Current Specifications**

Computers: Intel Core 2 Duo  
CPU 3.07 GHz 32 Bit  
Gigabit Ethernet Card  
Windows 7 Pro

Network: 10/100 switches, cable CAT5

ISP: DSL 15/8 Cable 60/10 with Untangle WAN Balancer, WAN Failover and Bandwidth Control

Untangle Firewall (NAT/GATEWAY) with WEB filtering, Virus Blocker, Spyware Blocker, Phish Blocker, Intrusion Prevention, AD Blocker, Attack Blocker

VPN: Barracuda VPN or Google Remote Desktop

Backup: Barracuda local and Cloud Backup  
Symantec Server Local Backup

## **B. General Features and Functions Required**

Local 509 is seeking proposal for hosted or on premise solutions offering the following general features and functions:

1. Automatic call distribution (ACD) and Skills Based Routing
2. Interactive Voice Response (IVR)
3. Automated Attendant
4. Computer Telephony Integration (CTI) with scripting to display member records
5. Voice Recording – with control settings
6. Voicemail
7. Call Back Messaging
8. Call transfer capabilities
9. Agent status Display (busy, available, away, etc.)
10. Supervisor controls
11. Surveys
12. Reporting features in real time, scheduled, and customizable
13. Security and Reliability
14. Functional for multiple worksites (flexible enough to allow for home based reps)
15. Predictive dialing capabilities
16. Integration with Google apps (Gmail)
17. Call monitoring
18. House a knowledge base
19. Ease of use for all users
20. Operating Software flexibility
21. Schedule follow-up calls with member
22. Ability to expand handling other forms of inquiries
23. Customer self-service
24. Scalability ease
25. Portability ease
26. Flexibility to use as enterprise wide telephony solution
27. Able to manage on-site
28. Service agreements

## **C. Main Features and Functions to be provided**

1. Automatic call distribution (ACD) and Skills Based Routing

Describe how the vendor's ACD solution addresses each of the features below:

- a. Describe how the ACD solution provides for the ability to have Skills-Based call Routing.
- b. Describe the number of skills that can be assigned per agent.
- c. Describe how a call can be rerouted if an agent does not pick-up the call.
- d. Describe how many agents can be logged into the system simultaneously.
- e. Describe the Administration and Supervision functions of your ACD features; including administering agent login ID's.
- f. Describe if and how agents can automatically be made available/unavailable immediately after each call.
- g. Identify the procedures for transferring a call outside of the ACD.
- h. Describe the capability to handle multiple ACD Calls.
- i. Describe the capabilities for supervisors to monitor and observe agents by agent ID, and join call to talk, listen or monitor the entire caller experience.
- j. Describe any other capabilities of the solution that would be of interest.

## 2. Interactive Voice Response (IVR)

- a. Describe, in detail, the vendor's IVR solution.
- b. Is it an open system that can be integrated with other vendors' equipment? If yes, list the systems with which the vendor's IVR can integrate.
- c. Does vendor support standard interfaces to other IVR vendor switching systems? If yes, list the standards supported by vendor.
- d. Describe the total capacity of the vendor's IVR solution including self-service functionality.
- e. Describe the telephony interface hardware.
- f. Does the hardware support industry standards or is it proprietary in nature? Please explain.
- g. Describe the capabilities to administer the IVR system remotely.
- h. Describe the IVR management tool and the skill set required to utilize the tool.
- i. Describe and provide screen captures to illustrate this interface.
- j. What changes can be managed by the customer vs. what is required to be changed by the vendor?
- k. Describe any other IVR capabilities of the vendor's solutions.

## 3. Automated Attendant

- a. Describe how the Automated Attendant provides single digit menu choice and the layers of depth to callers for automatic transfer.

- b. Describe how the Automated Attendant supports automatic time of day, week, and holiday greeting changes.
  - c. Describe how the administrator can customize all Automated Attendant prompts, including offering callers a choice of language in which to hear the prompts.
  - d. The system must support multilingual prompts for which the system can offer users and callers a choice of languages. Describe this feature and list available languages.
  - e. Describe the voice prompting options such as professional voices versus in-house options for recording voice prompts.
  - f. Describe the options for “music on hold” as well as the vendor’s ability to include Local 509 messages.
  - g. What changes can be managed by the customer vs. what is required to be changed by the vendor?
  - h. Describe any other Automated Attendant capabilities of the vendor’s solutions.
4. Computer Telephony Integration (CTI) with scripting to display member records
- a. Describe your CTI link features and capabilities.
  - b. Does your CTI solution integrate with WinMill Software?
    - i. What are the database access methods?
    - ii. Can the vendor provide a database solution in the event there is no integrated database of record, e.g. upload files with limited data from member record?
  - c. Describe how your system can be configured to provide member account information to agents when phone call is answered.
  - d. Describe how your system can be configured to provide member record information, such as balance due, to members.
  - e. Describe the vendor’s ability to provide text-to-speech and speech recognition applications.
  - f. Does your system time stamp member record with call date/time? And by agent?
  - g. Does your system transfer any call notes recorded, so user of database know what the call was about?
5. Voice Recording – with control settings
- a. Describe the ability for supervisors to record agent conversations, store those recording and use a browser-based tool to retrieve and listen to the conversation at a later time.
  - b. Describe ability of agents to record malicious conversations.

- c. Does your system provide ways to categorize the types of calls being recorded?
- d. Would the same recording ability allow agent to record call and store that call on member database for such things like verbal consent to be a member and pay dues, or to contribute to a political accountability fund; then that portion of call can become part of the member record?
- e. What equipment, if any, is required to record calls?
- f. Are call recordings stored on the network? For how long? How are these recording accessed?
- g. Describe administrative tools and controls to record agent conversations and settings to record conversations automatically and manually.

#### 6. Voicemail

- a. Describe the queuing options that allow callers to be provided options such as leave a message on a voicemail or remain in queue for a live agent.
- b. Describe how voicemail messages are routed, or accessed by agents.
- c. Are voicemail messages stored based on subject matter?
- d. Describe how forwarding of voicemail can occur if ACD agent is out of the office.
- e. Describe how voicemail works for enterprise users.

#### 7. Call Back Messaging

- a. Describe the ability to provide callers with queue positions and current wait times.
- b. Describe the ability to give callers the option of leaving a message requesting to be contacted later, as opposed to waiting in queue for a live agent.
- c. Describe the method that will launch a call to an available agent to deliver the call back message with the specified time and telephone number.
- d. Describe the method used to launch the callback to the member.
- e. Describe the ability to distribute callback messages to available agents.
- f. Describe the ability to receive messages after normal operating hours and route callback messages at start of business (or between specific afterhours range as afterhours work).
- g. Describe any other callback capabilities of the vendor's solutions.

8. Call transfer capabilities
  - a. Describe how the vendor's system performs the following softphone and desk phone capabilities:
    - i. Transfer (between extensions, between offices, to external numbers).
      1. Transfer to an external number; will that tie up our lines?
    - ii. Conference.
    - iii. Speed dial.
  - b. Describe how information flows if the contact needs to be transferred to another agent (member information with the contact type).
  - c. Describe how contact information is preserved during transfers when transfers are made across systems and disparate telephone networks.
  - d. Describe how the system can avoid hard phone and softphone synchronization issues.
  - e. Describe the ability for multiple calls to be taken by agent, such as contact center and direct extension calls.
  - f. Describe any other softphones capabilities of the vendor's solutions.
  - g. Describe these same processes for a desk phone.
  - h. Describe ability to reroute after hours call to one or more cell phones.
  - i. Describe ability to send notification for after hours high priority call (text, email, etc.).
  - j. Describe how the vendor's system supports time of day routing.
9. CSR status Display (busy, available, away, etc.)
  - a. Describe how your system displays status of agents, on call, available, away, etc. Provide screenshots of agent status displays.
  - b. Does vendor system provide any forecasting ability to plan the staffing levels to accommodate projected call volumes?
10. Supervisor controls
  - a. Describe the administrative and supervisor control features of your phone system, including controls for ACD call routing, supervisory and reporting functions, telephony features, and any additional call center applications such as call recording, and CTI.
  - b. Describe how the solution can be administered from a centralized point, or remotely.
  - c. Describe any other administrative tool capabilities of the vendor's solutions.
  - d. Provide screen shots of the administrative tool.



### 11. Surveys

- a. Describe any member satisfaction survey tools offered by vendor's system to gain member feedback on the quality of service provided by agent.
- b. Does the survey tool provide skip logic based on the responder's answers?
- c. Does the application provide feedback to the agent, as well as the managers?
- d. Are the responders' comments transcribed?
- e. How long is the data stored?
- f. Describe key metrics reported by your survey tool?
- g. What security permission levels can be customized with the survey tool?
- h. Provide screen shots of the survey tool.

### 12. Reporting features in real time, scheduled, and customizable

- a. List and describe all reporting capabilities of system to generate scheduled reports, customizable reports, and real time reports.
- b. Describe any analytics used to evaluate historical trends and make forecasts.
- c. Provide a sample of standard reports.
- d. Can the reports be exported in different file formats, and if so, which formats?
- e. How many standard reports are included in the reporting solution?
- f. Describe any other reporting capabilities of the vendor's solutions.
- g. Provide screen shots of the reporting tool.

### 13. Security and Reliability

Describe the security features of the proposed solutions. Describe the vendor's overall Business Continuity and Disaster Recovery process.

- a. Does the vendor have multiple sites to ensure uptime in case of an individual outage?
- b. Does the vendor use redundant power sources at the hosting facility?
- c. Does the vendor use redundant IP network solutions at the hosting facility?
- d. Does the vendor use redundant phone line sources at the hosting facility?

- e. Does the vendor have its equipment on backup battery power sources, in addition to generator power, in the event of a commercial power failure?
  - f. Is your Network Operations Center (NOC) manned 24 hours per day or staffed via page out?
  - g. Describe the vendor's Disaster Recovery and failover processes. How frequently are these processes tested or updated.
  - h. Describe the ability to assure phone call delivery.
  - i. Explain your process for restoration of a failed hardware component in your telecom, IP and application network.
  - j. Describe how the vendor's solution affects the clients' IT/Telecom infrastructure.
  - k. Describe any physical security for the proposed solutions.
14. Functional for multiple worksites (flexible enough to all for home based reps)
- a. Explain vendor's solution that will support multiple worksites for enterprise use and possible ACD use as well.
  - b. What are the minimum requirements to support this structure?
  - c. Is there flexibility to easily have ACD agent at the different worksites?
15. Predictive dialing capabilities
- a. What does the vendor's solution for predictive dialer look like?
  - b. Are the minimum technology requirements different for predictive dialer vs. inbound requirements?
  - c. Does the vendor's solutions have the ability to handle both inbound and outbound calls simultaneously?
  - d. Describe any other predictive dialing capabilities of the vendor's solutions.
16. Integration with Google apps (Gmail)
- a. Does the vendor's solution integrate with Gmail? Enterprise utilizes Gmail via the web-based system. Will end user be able to click on member's email address to activate email platform to send email?
  - b. Are there any special requirements to process queued email if Local 509 is using Gmail as their email solution?
  - c. Describe any other integration capabilities of the vendor's solutions.
17. Call monitoring

- a. Will the vendor's solution provide the ability to monitor calls both in real time and recorded?
- b. What are the vendor's solutions to allow for Quality Assurance scoring to be done within the system?
- c. How is a call scoring shared with the agent?
- d. What equipment is needed to perform call monitoring?
- e. Provide screenshots of the call monitoring features of the solution.
- f. Describe any other call monitoring capabilities of the vendor's solutions.

18. House a knowledge base

- a. What is the vendor's solution to providing a built in knowledge base or document library; provide the agent with a quick ability to find the supporting documents needed to handle the call?
- b. Are there limitations to this system?
- c. Will any of the possible information auto-populate based off of CTI built to identify employer of member.
- d. Describe any other procedural capabilities of the vendor's solutions.

19. Ease of use for all users

- a. End users will have a variety of experience and comfort using computers. What is the vendor's rating on how user-friendly the system is for ACD Agents? For enterprise users?
- b. What does the vendor's training program look like for implementation of its solution?
- c. Will Local 509 have full rights to reproduce any training materials as new staff is added?
- d. Are there different levels of training based on user's function within Local 509?
- e. Describe any other training of the vendor's solutions.

20. Operating Software flexibility

- a. What are the operating system requirements for the vendor's solution?
- b. Does it support multiple platforms, including mobile devices?
- c. Are there any apps that work in concert with the vendor's solution that could increase staff's ability to conduct business on the go (both enterprise users and ACD agents)?

21. Schedule follow-up calls with caller

- a. Does the vendor's solution have the ability to schedule follow-up calls with callers?
- b. Is this a manual process, or can a template be applied based on the member's employer? The ACD agents will be assisting members and stewards with following strict timelines to file grievances and they are different for each employer.
- c. Will these scheduled follow-ups be handled from the queue or are they personal based on the agent who created it?

22. Ability to expand handling other forms of inquiries

- a. What is the system's ability to handle other forms of member inquiries? Calls, Email, text, social media or any other means of communications?
- b. What does this process look like? Provide screenshots.

23. Customer self-service

- a. Does the system provide the ability for caller self-service?
- b. What is the complexity of maintaining this option?
- c. What sorts of items are usually offered to callers with this type of feature?

24. Scalability ease

- a. Is the system easily scalable?
- b. How are the user licenses tracked/issued?
- c. Are there bulk licensee blocks? (I.e. 1-50, 51-99, etc.) Are blocks sold as package or are they sold per user?

25. Portability ease

- a. Portability is a critical issue for Local 509; we are also currently looking into moving our main office. If system is installed and implemented at our current location, what would a transfer of service look like?
- b. How long is the transfer process?
- c. Can a transfer of service be completed without interruption of services during business hours?
- d. Please describe any other aspects of transferring service that Local 509 needs to be made aware of before moving forward with implementation.
- e. What are the budget implications for transferring services vs. waiting for implemented until after move is completed?

26. Flexibility to use as enterprise wide telephony solution

- a. Describe how an enterprise user would use the system.
- b. Would enterprise users be able to transfer calls into the ACD?
- c. Describe how Local 509 would be able to continue to use a receptionist for the enterprise users.

27. Able to manage on-site

- a. Describe how staff can manage on-site vs. being dependent on vendor to manage changes.
- b. What sort of features and functions can Local 509 manage without being dependent on the vendor?
- c. Can restrictions be set for international calling?

28. Service agreements

- a. Provide a copy of the Service Level Agreement that the vendor typically uses with its clients.
- b. Be very clear on response times to the needs of the client.
- c. What types of changes to the system would have an impact on the handling of calls?
- d. Are the terms of the Service Level Agreement negotiable prior to execution of the agreement?
- e. What penalties are in place and defined, as part of the Service Level Agreement should the vendor is unable to meet the terms of the agreement?
- f. Can the vendor provide a solution, which is available 99.99% of the time per month?
- g. What are the different levels of priorities when it comes to repairs and what are your mean times for completing each of those repairs?

## VI. Proposal Format

This section outlines the format of vendor proposals to be submitted to Local 509 in response to this RFP.

## **Section 1**

### **Letter of introduction**

The letter of introduction should introduce your company and summarize your proposal to Local 509, including your qualifications and price proposal (please also include any budget items that would be involved in moving the office to a new location). This letter should include your project manager's name and contact information.

## **Section 2**

### **Vendor Information and Qualifications**

State the length of time your company has been in business. Provide a brief business history and structure of your organization, including manufacturing background. Describe the vendor's expertise and experience in providing cloud-based and on premise phone systems to small member based organizations. Highlight if any clients are other labor organizations that can be used as references.

1. Vendor Background information
2. Manufacturer Background information

## **Section 3**

### **Proposed System and Services**

Provide a summary of the proposed solution and describe in detail the vendor's product offering. Include an overview of the hardware, software, architecture and design, cloud environment, processes, management, implementation, and support of the proposed solution to meet the requirements as described in this RFP. Include any additional functionality offered by the vendor that is not a requirement of this RFP.

Please include the following:

1. Provide a description of the cloud-based call center or phone system environment.
2. How will the vendor's system works with or replaces Local 509's current PBX.
3. Describe the vendor's method for assuring Telephony Quality of Service (QoS).
4. Describe the vendor's service level guarantees that vendor is willing to put into a SLA; include specific commitments or statements.
5. Describe the vendor's standard process and timeline for any new system implementation.
6. Describe the vendor's standard process and timeline to relocate any system if there is a change in location of offices.
7. Describe and provide a copy of the vendor's training material, for administrators and end users (both ACD and enterprise).
8. Please provide illustrations of your proposed platform with detailed information regarding hardware and software requirements. Include any onsite configuration changes that would be essential for a successful implementation of managed solution including client software installations, servers, IVR, Automated Attendant, databases, PBX, etc.
9. Describe how many ACD agents can reasonably use the system simultaneously without any call quality degradation given Local 509's network specifications and Internet service level. Indicate how an outbound call campaign or enterprise use may impact the quality and performance level.
10. Provide the number of servers that would be required and any additional hardware/servers and software that might be required to store recorded calls. Please indicate if these requirements would be different should Local 509 need to store recorded voice authorizations of membership status or agreement to contribute to a political fund. Indicate if these files can be exported to a membership database.
11. Provide the topology of the proposed system, including all hardware, showing PSTN connectivity, LAN connectivity, and transport.

### **System Requirements**

Provide a description of all information detailed in *Section V. Scope of Services C. Main Features and Functions to be Provided*, within this portion of your response, to the extent that your proposed system or services can deliver the desired features and functions. Supply any required supplemental information and documentation for any exceptions.

#### **Section 4**

##### **Project Plan/Schedule/Implementation Requirements**

This section asks for your project approach and a description of the steps included planning, implementing, training, and providing service and support to ensure a successful project. Please provide proposed project schedule as part of this section in Gantt chart format using weeks as time frame increment.

#### **Section 5**

##### **Contracts/Agreements**

Submit a copy of any proposed purchase agreements, software license agreements, or maintenance contracts in this section.

#### **Section 6**

##### **Pricing and Cost Proposal**

Provide an itemized list, with per item pricing for the installed cost of each component to be installed. The total system price must include all charges (installation, hardware, software, and training) related to providing the system.

1. Describe the costing model structure for your solution. Is your pricing structure transaction based, licensed by the agent, or some other format?



2. As volumes increase it is expected that the costing model would decrease in price (i.e. by transaction or per seat price). Describe price point reductions for higher call volumes.
3. Describe the pricing for usage charges.
4. Describe the 'base' system that is included in the costing model as well as pricing for additional functionality that is not included in the 'base' system.
5. Identify how supervisor and manager positions are built into the costing model.

## Section 7

### **References and Other Attachments**

Use this section to provide at least five (5) references for your services. References should be for system deployments where your company provided similar services to preferably similar sized or larger clients. Use this section to also provide any pre-printed materials such as brochures, foldouts for charts, tables, spreadsheets, and diagrams to help illustrate various aspects of the services you are proposing to provide.

## **VII. Evaluation**

Local 509 will initially check the proposals to validate all information required to conform to this RFP is included with your proposal. Absence of required information may be cause for rejection. Local 509 will evaluate the proposals for performance requirements compliance and technical merit. Local 509 will then select a preferred vendor and enter into contract negotiations. Local 509 may request additional information or hold additional meetings with the vendors, post-proposal presentations are not guaranteed.

A contract shall be awarded to the most responsible and responsive vendor based upon, but not limited to the following criteria:

1. The quality of the system(s) proposed, conformity with technical specifications, ease

of operation, and ease of administration.

2. The ability, capacity and skill of the vendor to provide the goods and services required, including the character, integrity, reputation, judgment, experience and efficiency of the vendor.

3. The capital (purchase) cost and life cycle costs for all products and services considered or proposed.

4. Training, maintenance and ongoing servicing issues.

5. Additional system functions or capabilities beyond the specified requirements but pertinent to Local 509's use of the system.

6. Services provided to similar size municipal utilities, in addition to their satisfaction with your product and support services.

## **VIII. Proposal Approval and Agreement Execution**

Once Local 509 has selected the vendor and concluded any appropriate contract negotiations, Local 509 will execute all agreed upon agreements with the vendor.