

The Michaels Organization

REQUEST FOR PROPOSAL

VoIP Services

August 1, 2017

SUMMARY

The Michaels Organization, hereinafter referred to as the “Company”, is soliciting proposals from qualified firms to provide a solution for VoIP telephony services at certain affordable housing community locations throughout the United States, hereinafter referred to as “VoIP Telephony”, with the required technologies and services to implement the defined solution.

BACKGROUND

The Michaels Organization is a privately-held family of 8 integrated but independent companies dedicated to excellence in affordable, mixed-financed, military, and student housing. We create high-quality and well-managed housing that stands the test of time and that enhances the lives of our residents and enriches communities.

The Michaels Organization companies include:

Interstate Realty Management Company - provides exceptional property management services to a diverse range of affordable and mixed-income communities owned by Michaels Development Company and other affordable housing owners. With a nationwide portfolio valued at \$1.5 billion, our long-term success can be credited to our focus on best practices, expert procedures, and our commitment to providing our residents with a great place to call home.

Michaels Development Company - is among the leading private sector affordable housing owners and developers in the nation. From small scale properties to massive neighborhood transformations, Michaels Development has created high-quality, environmentally conscious and financially successful communities that offer affordable housing opportunities to more than 100,000 residents.

Michaels Military Housing - is a unique leader in military housing privatization, enjoying success as the owner, developer, asset manager and renovation proposer on projects for the U.S. Department of Defense.

University Student Living - provides an unmatched flexibility and expertise for creating successful on-campus and off-campus communities almost anywhere in North America.

Prestige Building Company - is a full-service construction company providing general proposer, construction, and construction management services to housing owners and developers. Prestige Building Company has a solid track record of delivering the highest quality at the lowest possible costs.

Michaels Management Services - provides best-in-class community management services to Michaels Military Housing and other owners of privatized military housing. The company's current portfolio includes four Army bases and two U.S. Air Force bases, where they are managing over 10,000 on-post homes valued at \$1.9 million.

Prestige Affordable Housing Equity Partners - is a privately held syndicator of Low Income Housing Tax Credits. We work with investors, developers and managers to assure competitive pricing and long-term value to our partners.

Continental Mortgage Corporation - an FHA-approved mortgage company, structures sophisticated funding transactions for Michaels' developments and acquisitions, and arranges favorable refinance transactions that ensure the continued preservation and re-capitalization of affordable housing. Continental can also arrange bridge and construction financing for Michaels Development Company.

Continental has arranged more than \$447 million in financing for Michaels' portfolio of affordable and mixed-income communities.

PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals are due by close of business on September 15, 2017. Proposals received after 5:00pm Eastern, Friday, September 15, 2017, will not be considered and will be returned unopened.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

If you wish to submit alternate solutions, please do so.

The price you quote should be all inclusive. This price must include applicable taxes, fees, E 911 and any other related costs, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

The proposal shall be written in sufficient detail to permit the Company to conduct a meaningful evaluation of the proposed services.

1.1 Review for Responsiveness

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in this Solicitation. A responsive proposal is one which follows the requirements of this Solicitation, includes all documentation, and is of timely submission. Failure to comply with these requirements may result in the proposal being deemed non-responsive.

1.2 Evaluation Criteria

Proposals will be evaluated by an Evaluation/Selection Committee which will evaluate and rank proposals on criteria listed below. The Evaluation/Selection Committee will be comprised of Company personnel with the appropriate experience and/or knowledge. The criteria are itemized below with a relative weight assigned. **It should be noted that these are guidelines, meant to convey to the proposer the relative merits of each criteria.**

| | Technical Criteria | Weight |
|---|---|--------|
| 1 | Proposer's relevant experience, qualifications, past performance, and financial capabilities | 15 |
| 2 | Relevant experience and qualifications of key personnel that will be assigned to this project | 15 |
| 3 | Proposer's product and its compliance, functionality, and technical capabilities, as requested in this Solicitation | 25 |
| 4 | Proposer's approach to providing the services requested in this Solicitation | 25 |

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| 5 | Proposer's solution additional value-added benefits. | 20 |
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1.3 Oral Presentation

Upon completion of the criteria evaluation indicated above, rating and ranking, the Evaluation Committee may choose to conduct an oral presentation with the Proposer(s) which the Evaluation Committee deems to warrant further. Upon completion of the oral presentation(s), the Evaluation Committee will rank proposals remaining in consideration based upon the written documents combined with the oral presentation.

1.4 Negotiations

Each initial offer should contain the Proposer's best terms from a monetary and technical standpoint.

The Evaluation Committee will evaluate, score and rank proposals, and submit the results of their evaluation to the Company Executive Team with their recommendation. The Company Executive Team will determine with which Proposer(s) the Company shall negotiate, if any.

Notwithstanding the foregoing, if the Company and said Proposer(s) cannot reach agreement on a contract, the Company reserves the right to terminate negotiations and may begin negotiations a different Proposer(s). This process may continue until a contract acceptable to the Company has been executed or all proposals are rejected. No Proposer shall have any rights against the Company arising from such negotiations or termination thereof.

The Company may decide to engage with more than one Proposer based on geographic, organizational or vendor availability concerns. Therefore, the Proposer should provide a minimum spend commitment for their proposal. In other words, "What is the minimum amount of spend that the Company needs to maintain to engage with the Proposer?"

1.5 Objectives

RFP for VOIP Phone System and service, The Michaels Organization, is requesting this type of system, and wishes to take advantage of the benefits that a VoIP system will bring. Each respondent should include in their response the benefits that their system will provide including, but not limited to, the increased efficiencies that staff will realize.

The successful respondent for this contract will be the sole authority and responsible party for this installation. The Michaels Organization's goal is to establish a relationship with a single point of contact for all support necessary for the project. If the vendor utilizes any subcontractors for any part of the system architecture, design, planning, installation or support it should be understood that the successful respondent will be the sole responsible party for all activities. It is the intent of this Request for Proposal that the responder shall provide a complete, end to end solution for the installation. The vendor shall provide all design, planning, system architecture, installation, network analysis, training and post

installation support for the project. The Michaels organization will act in oversight and advisory positions only. The vendor is also expected to provide a comprehensive training plan for all employees. It is expected that Ardaigh's staff will require technical training at various levels and that line staff will require training on the new systems. Ardaigh staff will work with the vendor to develop a training plan that achieves these objectives. The vendor is expected to plan and conduct the installation of the project with minimal impact to daily operations and staff. Staff will work closely with the vendor to create a working project plan that will achieve these goals. Vendor Response to this RFP must include a system that at a minimum will include the following:

- The ability to make and receive phone calls
- Include all local and nationwide minutes
- Voice Messaging
 - The ability to receive voice mail
- Caller ID
- Scalability
 - The system must be able to support 5000 devices.
- Failover/emergency backup options
- The ability to port in or maintain existing numbers
- Operator console capability
- Remote provisioning of phone endpoints
- Ability to reuse existing VoIP phones
 - Yealink T46G
 - Polycom VVX310 and other models
- E911 service

The following services are not required but highly desired:

- 4 or 5 digit Department dialing.
- CTI first party control- The ability for a user to click on a phone number on the computer to initiate a call on the handset.
- Ability to setup and program extensions, users and devices.

1.6 Avoid large capital payments in favor of small operational expense

The Company desires that the proposed solution will be provided on a monthly recurring payment basis.

1.7 Common Requirements

The Company has also set the following requirements which should be addressed by the respondent for each of the programs above:

- Handle all program management and administration on behalf of the Company during all phases of the project in coordination with Company staff.
- The proposer shall provide training to the Company as follows:
 - Contract start-up training session - At the start of the contract, the proposer shall provide initial on-site training to Company staff as designated by the Company. The initial training will address equipment usage (login, network connection, etc.) and how to get help on an ongoing basis.
 - Training materials - The proposer shall provide written materials that may be used by Company personnel to train individual users in the proper use of the computer lab technology.
 - Telephone support - The proposer shall provide the name and telephone number of a point-of-contact who will be available by telephone to answer questions that may arise during the Company's training of staff or to provide brief training sessions by telephone to Company personnel. Proposers shall indicate the hours this sort of training will be available.
 - Proposers shall describe any additional training programs or aids such as videos and online support and indicate their availability.
- Customer Support: The proposer shall provide customer support to the Company employees during implementation. This support shall include at a minimum:
 - A toll-free assistance number. Proposers shall describe the availability of these assistance lines and the hours they are staffed.
 - The name, title and telephone number of the customer account representative and alternate who would respond to inquiries by the Company.
 - The name, title and telephone number of the technical representative and alternate who would respond to inquiries by the Company's information technology staff.
- Payment: Payment shall be due within an agreed upon number of days after acceptance of all products or services or receipt of a correct invoice for payment, whichever is latest.
- Late Charges: If late charges will be assessed to the Company's account, proposers shall describe in full detail the rate, how and when the charges would be invoked and how the charges would be billed, including a sample calculation.
- Reports: The proposer shall provide reports that show monthly (or other agreed upon interval) project status.
- Annual Report: The proposer must establish formal evaluation and quality control procedures to monitor each facet of the final contract. The evaluation and quality control procedures must provide sufficient information to allow the Company's Purchasing Agent to monitor the program's progress and effectiveness.

- o The proposer will submit the quality control report to the Purchasing Agent no later than June 1 each year.

Timeline

- This RFP is dated August 1, 2017. Respondents may request a copy be sent via email by contacting Joe Wilson at Jwilson@tmo.com
- Proposals are due by close of business on September 15, 2017.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews at our office with our evaluation team on or about October 1, 2017. You will be notified if this is requested.
- The selection of the winning respondent will be decided on or about November 1, 2017.
- Negotiations will begin immediately with the successful candidate and should conclude no later than December 31, 2017.
- The solution must be ready for implementation by January 15, 2018.