



REQUEST FOR PROPOSALS

Library Request for Proposals Development for a Replacement Phone System

DEADLINE: April 23 at 5 p.m. MST

SUBMITTAL

I. **PURPOSE**

Salt Lake County Library seeks to hire a qualified consultant or qualified consulting firm for the development of Request for Proposals (RFP) for a Voice Over IP phone system. The Library has determined to replace their existing phone system per the attached Executive Summary (Exhibit A).

II. **TERM OF AGREEMENT**

The deliverables must be completed, with the RFP ready to issue no later than June 30, 2010.

* NOTE – The consultant awarded a contract to provide this service will be excluded from proposing/bidding on the VOIP System RFP which is created by the awarded consultant of this RFP.

III. **SCOPE OF WORK**

For successful completion of the services required, the selected consultant will perform the following tasks:

- Analysis & Summation of the 'Telephone Equipment Analysis Report' that was completed January 11, 2010 by a third party.
- Development of the RFP Technical Specifications
- Coordination of the RFP with Salt Lake County Procurement.
- Coordination of the RFP with Salt Lake County Legal.
- Development of the Evaluation Criteria.

LIST OF DELIVERABLES

- 1) A preliminary Technical Specification for review & input by the Library.
- 2) A completed Technical Specification including a Scope of Work to be reviewed and added to by the Library, County Procurement and County Legal.
- 3) Evaluation forms to summarize the evaluation of the RFP responses.
- 4) A completed Phone System RFP.

IV. **COSTS & FEES**

A. The Proposal shall include a "Not To Exceed" price of \$15,000 or less for services rendered.

B. The "Not to Exceed" Fee shall include all reimbursable travel costs, phone, fax, project printing, etc.

C. Payment will be made upon acceptance of the VOIP System RFP and all other deliverables of this RFP. Payment terms are Net-30 days after receiving an invoice.

V. **PROPOSAL SUBMISSION REQUIREMENTS and EVALUATION WEIGHT**

All proposals submitted for evaluation must include the following information:

25% Firm's Qualifications. Provide a brief description of your firm, the scope and nature of services routinely provided by your firm on projects of this nature and its capabilities. Include resumes of those principals, partners and other key project staff members who will be directly involved in the overall consulting effort.

30% Relevant Experience. Provide detailed relevant experience of three similar projects which shall include the following: name of client, contact person and their current phone, brief description of service performed, date of services, and final contract amount and any other pertinent information regarding experience.

10% Proposed Approach. Describe how your firm will approach each task of the project. Give a description of the methodology to be employed in completing the tasks and deliverables of this RFP.

15% Project Schedule. Indicate time for key tasks of this RFP.

20% Proposed Fee. See section IV concerning fee. The County may consider a local preference (Attachment A) and a preference for providing health insurance (Attachment B).

VI. **SUBMISSION OF PROPOSALS**

DEADLINE: April 23 at 5 p.m. MST

Proposals will be accepted until **5:00 pm Mountain Standard Time on Friday, April 23, 2010.**

Please e-mail all proposals to scondie@slcolibrary.org. No responses will be accepted after that date and time.

Questions regarding this RFP may be directed to Skip Condie, the Library's Network Manager at 801-944-7554.

All costs associated with the preparation of the proposal, as well as any other related materials, will be borne by the Proposer. All proposals become the property of Salt Lake County. Salt Lake County reserves the right to stop the selection process at any time if it is considered to be in the best interest of the County. Salt Lake County also reserves the right to reject any or all proposals submitted.

VII. WRITTEN AGREEMENT REQUIRED

The selected consultant must be willing to enter into a written agreement with Salt Lake County (Attachment C).

Executive Summary for Salt Lake County IT-PRC

February 24, 2010

Business Need

Salt Lake County Library, like most successful businesses, depends on its technology infrastructure to provide efficient and effective services to its customers. The Library supports technologies in 22 separate library buildings throughout Salt Lake valley. In September 2008 the IT-PRC approved the Library's proposal to join the Utah Education Network (UEN) to take advantage of the opportunity to participate in the Utah Education Network's E-rate Consortium and have all E-rate eligible services delivered by UEN. By joining the UEN E-rate Consortium, the Library will increase its bandwidth tenfold (10X) and realizes five-year cost savings estimated at \$438,191. This project is underway with 11 total libraries now utilizing 100 Mb MOE fiber circuits. The remaining T-1 libraries will be implemented after the winter construction hiatus in April 2010 or as the four new libraries are opened in 2010 and 2011.

The Library's remaining voice network is managed and supported by Salt Lake County IS/Telecom. It is comprised of a NORTEL Option 61 at Whitmore and voice-over-IP (VOIP) phones at Alta, Draper, Kearns, Facilities, Sandy, Calvin Smith, South Jordan, Ruth Tyler, and West Jordan. There are NORTEL remote mini carriers providing communications to Bingham Creek, Columbus, Herriman, Holladay, Hunter, Magna, Taylorsville, West Valley, and Riverton. All of these systems support the Library's 228 phones and provide connectivity to the Public Switched Telephone Network (PSTN) as well as the Salt Lake County Communications Network. Voice Mail is supplied from new Cisco Unity voice mail system at the Government Center across a shared single T-1 from the Government Center to Environmental Health and on through another T-1 to Whitmore.

An update on the equipment in the current voice network was last performed 4-5 years ago. Although the equipment has performed well for the Library, it is behind current technology and in serious need of another update or replacement. The Emergency-911 service was revamped and corrected two years ago, but may still not be kept current enough by the County to protect the Library or SL County from this potential legal liability.

It is clear that the Library and Salt Lake County are at a crossroad in terms of the Library's voice network. With the Library engaged in constructing four new buildings, a decision is now more pressing than ever before. Each new library is designed with a fiber data circuit capable of supporting VOIP service as we have done in other libraries. Equipment for the first new library to open, the Herriman Library, needs to be purchased in summer 2010. At the recommendation of Darren Franchow of County Information Services, the Library embarked in October 2009 on an analysis of its current telecommunications infrastructure and the options for the voice network moving forward.

Business Objectives

Together with County IS/Telecom and based on total cost of ownership data, the Library needs to reach decisions as soon as possible about how to accomplish these business objectives:

1. Upgrade or replace the Library's existing voice network and voice mail service with the most cost-effective solution for Utah County taxpayers;
2. Upgrade to software that will be able to provide statistics for the Library's call center on call volume, duration, queue length, and wait time;
3. Continue to maintain the Library's increasing VOIP network with Library personnel, through County IS/Telecom, or through outsourcing;
4. If replacement of the voice network is recommended, develop a Request for Proposal and follow County procurement guidelines.



Business Solution

Due to the technical complexity of telecommunications, the Library contracted in November 2009 with the Tanner Group, a local telecommunications consulting group familiar with both the Library and the County's network configurations. The Tanner Group performed a complete inventory of the existing telecommunications equipment and provided its analysis of options. The report, which forms the basis for our business case, evaluated several options:

1. The Library can remain with its current NORTEL equipment supported by County IS/Telecom;
2. The Library can upgrade the NORTEL equipment as is or convert it to an IP-enabled system, such as the NORTEL CS1000E;
3. The Library can replace the entire system with new equipment, technology, and functionality procured through a competitive bid process.

Assumptions used in analyzing these options

1. County IS/Telecom maintenance charges of \$28.26 per month per phone will continue and future increases were not calculated in total cost of ownership.
2. Separating from the County's voice network will result in the loss of four-digit dialing to/from County agencies and the Library.
3. Separating from the County's voice network will require the Library to establish its own voice mail system.
4. Separating from the County's voice network will require the Library to provide its own long distance service.
5. Pricing information used in calculating total cost of ownership for these options was budgetary and does not represent best pricing as a result of a competitive bid process.
6. The Library will realize personnel expense to support its own voice network and would need to add this capacity in .5 FTE for years 1 and 2 and .25 FTE in years thereafter.
7. The evaluation of any Nortel Option should include the knowledge that Nortel recently filed Chapter 11 Bankruptcy and the Enterprise Division of NORTEL, which provides all Voice Switching including the Option 61 and CS1000E, was purchased by AVAYA, which raises questions about the ability to sustain NORTEL equipment for 10 years.

Option 1: Remain with the current NORTEL equipment supported by County IS/Telecom

The Library's basic NORTEL PBX is 20+ years old and while the software has been upgraded, it still is not at current software revision levels for NORTEL, being at least 3 revision levels behind. While still able to provide adequate communications, this VOIP-enabled PBX still lacks much of the functionality of current state-of-the-art communications systems and is in need of a major upgrade.

While this system may continue to function for years to come with an unknown life expectancy the features and functionality is limited in comparison to the current state-of-the-art systems available. It should be noted that SL County has already embarked on an upgrade/replacement process for all the NORTEL communications equipment in the SL County Voice Network, expressing concern over the continued functioning of the existing equipment. Most of the existing equipment is either "manufacture discontinued" or is in the process of becoming so. Remaining on this equipment puts the Library at great risk for interruption of operations and the sunk cost of piecemeal band-aids as equipment fails.

Option 2: Upgrade the NORTEL equipment as is or convert to an IP-enabled system, such as the NORTEL CS1000E;

The existing switch is several software releases behind and upgrading to the current software would most likely require replacement of the CPU and backplane upgrades running tens of

thousands of dollars. The projected ongoing costs of using the County IS/Telecom-provided switch at a cost of \$28.26 per phone per month potentially costs more than \$80,000 per year and will only increase with additional phones needed in the new libraries.

Option 3: Replace the entire voice network with new equipment and software with current functionality procured through a competitive bid process.

After reviewing the analysis and recommendations prepared by the Tanner Group, the Library recommends that it replace the voice network and assume responsibility for its maintenance as they already have for their data network. Taking into account the assumptions mentioned above, the options analyzed where the Library replaces the voice network have very short paybacks and could significantly reduce total cost of ownership for communications while improving and enhancing its capabilities.

The Tanner Group's study recommends Option 3 as the most cost-effective in terms of total cost of ownership over 3, 5, and 10 years.

The anticipated cost of replacing current telecommunications equipment has been earmarked in the Library's Capital Projects Revolving Fund as a priority in 2010-2011. Under County guidelines, the proposed solution requires the Library to conduct a competitive procurement and a formal selection process using a Request for Proposals.

The timeline for a replacement project would call for an RFP to be issued and a vendor selected in Q2 2010. Given the complexity of telecommunications networks, the Library has requested to be assisted in developing the VOIP System RFP and evaluating proposal responses by a Consultant and representatives from County IS/Telecom.

Thank you for your consideration.
Submitted April 6, 2010

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Attachment A

Preference Given for Local Business

The County Council passed a policy that County purchases shall be awarded through a local preference system.

A local preference may accrue to a vendor who submits the low, responsive price for a goods and/or services contract if other factors are met. To be considered for a preference, offerors must agree to provide a complete and signed Local Certification Form, which includes a street address within the County that is not a post office box, a copy of a current business license issued by the County or any of the cities within the boundaries of the County and proof of registration with the State of Utah of an authorized agent to accept service of process. In addition, offeror must maintain local business status and current business license as required for the period of the contract. Completion of required information under the Alternative A portion of this document shall serve as compliance of submittal of a Local Certification Form.

For the preference to apply, the preferred offeror's price cannot be higher than 104% of the lowest offeror who does not claim a preference for award of this contract if the total amount of the contract is under \$250,000. If the amount of the contract is between \$250,001 and \$1,000,000 the offeror's price cannot be higher than 101% of the low offeror who does not claim a preference for this award of contract. For contracts of \$1,000,001 and greater, the preferred offeror's bid cannot be higher than \$50,000 of the low offeror who does not claim a preference for award of this contract.

- ☐ **Alternative A** shall be to complete a signed Local Certification Form, which includes a street address within the County that is not a post office box, a copy of a current business license issued by the County or any of the cities within the boundaries of the County and proof of registration with the State of Utah of an authorized agent to accept service of process. If marking this box as requesting Alternative A, please complete the Local Certification Form on page 2 of this Attachment A and submit required documentation with bid response.
- ☐ **Alternative B** Marking this box as Alternative B the vendor is choosing not to submit under a local preference.

If no Alternative A bids are submitted or the Alternative A bid does not fall within the limits shown above, the bid will be awarded to the lowest responsive responsible bidder without preference.

Vendors may qualify for either the health care preference or the local business preference, but not both.

If required documents are not submitted with the solicitation requesting Alternative A preference, documentation must be provided within (5) five days after being notified that their bid is under consideration for award based upon this preference. If the documentation is not received within the five-day limit, the County will disqualify the preference status.

The County will have the right to monitor the contractor's compliance with requirements for local preference status. Violation of this contract condition shall be the basis for immediate termination of the contract for default by the contractor.

Local Preference Certification Form

(Offeror to provide documentation qualifying them for local preference as stated)

Company Name: _____

Street Address: _____

Signature of Authorized Agent: _____

Proof of Registration with the State of Utah: _____

Copy of Business License within Salt Lake County Attached:

☐ Yes ☐ No

Business License Number: _____

Business License Issue Date: _____

Attachment B

Preference Given for Health Benefit to Employees

The County Council passed a resolution that service contracts shall be awarded through a preference system. Service contracts may include services combined with goods.

A preference may accrue to a vendor who submits the lowest price to a solicitation for a service contract if other factors are met. To be considered for a preference, offerors must agree to provide at least catastrophic health benefits* to their employees for the period of time covered under a contract awarded from this RFP. The contract period will include all option years and extension periods.

For the preference to apply, the preferred offeror's price cannot be higher than 104% of the lowest offeror who does not claim a preference for award of this contract if the total amount of the contract is under \$250,000. If the amount of the contract is between \$250,001 and \$1,000,000 the offeror's price cannot be higher than 101% of the low offeror who does not claim a preference for this award of contract. For contracts of \$1,000,001 and greater, the preferred offeror's bid cannot be higher than \$50,000 of the low offeror who does not claim a preference for award of this contract.

Please refer to the "Evaluation Criteria" section of the RFP for weighting of the proposed fee. An offer that falls within the preference guidelines will be given a higher rating on the proposed fee criteria.

Proposers may submit offers as described below. Proposers are not required to submit both alternates and may submit under either format. Proposers may also submit under both alternatives. The formats are:

Alternate A shall be the offer to provide services under a contract while providing their employees with at least catastrophic health care benefits as defined below.

Alternate B shall be the offer to provide services under the contract but not providing their employees with health benefits as defined below.

Your proposal must state if you are requesting Alternate A preference.

If there are no Alternate A offers submitted or the Alternate A offer does not fall within the limits shown above, the preference will not be part of the evaluation process.

A signed letter from the offeror's health insurance carrier or agent must accompany the Alternate A preference request. The letter from the carrier or agent must state the policy period or dates of coverage and that the policy provides health insurance coverage for all employees at least equivalent to Catastrophic Health Benefits as defined below.

Proposals should not contain any documents that provide personally identifying information (i.e. protected health information) including but not limited to the Social Security numbers of, or any private health information about the employees covered under the health insurance program.

If not submitted with the proposal requesting Alternate A preference, evidence of catastrophic health benefits must be provided within (5) five days after being notified that the Mayor has approved award of the contract to your firm. If the proof of this insurance coverage is not received within the five-day limit, the County will disqualify the preference status. The health benefit must be in effect prior to submission of the bid package.

The County will have the right to monitor the contractor's compliance when providing the health benefit. Violation of this contract condition shall be the basis for immediate termination of the contract for default by the contractor.

* "Catastrophic Health Benefits" are defined in County policy as a policy of insurance for health care coverage of all medical-related expenses arising from catastrophic events, and which shall provide for coverage of affected employees and their families after payment by said employees of initial charges of \$3,000 for a single covered individual for medical costs arising out of any one catastrophic event, and initial charges of \$5,000 of two or more covered individuals for medical costs arising out of any one catastrophic event.

Alternate A – Pricing Schedule

(Offeror to provide services while providing employees catastrophic health benefits)

Alternate B – Pricing Schedule

(Offeror to provide services while NOT providing employee catastrophic health benefits)

Attachment C

Environmentally Responsible Procurement Practices

1. In compliance with Executive Order #2006-1, Salt Lake County has implemented environmentally responsible procurement practices. The County requires all persons, businesses, corporations and other entities doing business or entering into a contract with the County to comply with all federal, state and local environmental laws, rules and regulations. Compliance with environmental laws, rules and regulations is a relevant factor in evaluating the integrity and responsibility of a business. The County, in its sole discretion, may not solicit proposals from, award contracts to, procure, or otherwise enter into business arrangements with any person, business, corporation or other organization that is non-compliant. If a bidder, vendor or contractor is: suspended, proposed for debarment, debarred, ineligible or excluded from contracting with another government entity due to environmental non-compliance, the County in its sole discretion, may deem the bidder, vendor or contractor non-responsible and decline to award a contract.

2. Based on the foregoing, the bidder/vendor/contractor certifies, to the best of its knowledge, that neither the bidder/vendor/contractor nor any owner, officer or agent of the bidder/vendor/contractor:

- 2.1 is presently debarred, suspended, proposed for debarment, declared ineligible, or excluded from the award of a contract or purchase by any federal, state or local agency based on a finding, determination, notice of violation or order of environmental non-compliance;
- 2.2 is presently indicted or charged by a government entity in a criminal, civil or administrative proceeding with the commission of any offense, violation, or failure to comply with any federal, state, or local environmental law, rule or regulation, indicating a lack of business integrity or business honesty affecting its responsibility as a county contractor;
- 2.3 has, within the last 3 (three) years, been convicted, or had a civil judgment or administrative order rendered against it for any offense or violation, including but not limited to environmental non-compliance, indicating a lack of business integrity or business honesty affecting its responsibility as a county contractor;
- 2.4 has, within the last 3 (three) years, had a contract/purchase terminated due to an act or omission, including but not limited to environmental non-compliance, demonstrating a lack of business integrity or business honesty affecting its responsibility as a county contractor.

3. Bidder/vendor/contractor shall require any subcontractor/supplier to disclose in writing, whether at the time of the award of the subcontract, the subcontractor complies with the certification requirements in subparagraphs 2.1, 2.2, 2.3 and 2.4 above.

4. Bidder/vendor/contractor shall immediately notify the county in writing if, at any time before the award, the bidder/vendor/contractor learns that its certification was erroneous when submitted or has since become erroneous because of changed circumstances.

5. If it is later determined that bidder/vendor/contractor knowingly rendered an erroneous certification under this provision, in addition to other available remedies, the county in its sole discretion, may terminate the contract/purchase for default.