



Purchasing & Distribution Services

5050 Yonge Street, 3rd Floor, Toronto, Ontario M2N 5N8 • Tel: (416) 395-8117 • Fax: (416) 395-9906

REQUEST FOR PROPOSAL TELEPHONY COMMUNICATIONS SYSTEMS

LG09-109P

ISSUE DATE: 26 FEBRUARY 2009

CLOSING DATE: 31 MARCH 2009

CLOSING TIME: 10:00:00 A.M.

Sealed submissions must be received in the offices of Purchasing and Distribution Services on or before 10:00 A.M., local time, on 31 March 2009. (See Section 8 below).

**LATE, E-MAILED OR FACSIMILE SUBMISSIONS WILL
NOT BE ACCEPTED OR CONSIDERED**

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1. INSTRUCTIONS TO BIDDER

Instructions:

Bids are invited from suppliers of Telephony Communications Systems to enter into a Contract(s) on a non-exclusive basis with the Board to provide the Goods or Services as listed herein and more specifically in the Bid Form, if provided. All Bids must be in writing and delivered to the offices of Purchasing and Distribution Services in a sealed envelope, addressed to Purchasing and Distribution Services, as set out in Section 8.

The successful Bidder(s) will be required to enter into a Contract for the installation and maintenance of the Telephony Communications System. This contract is subject to approval by the Board.

1.1 DEFINITIONS

In this Request, each capitalized term shall have the following meaning:

"Addenda/Addendum" means those documents amending the Bid Documents, as set out in Section 1.2 and/or Section 3.

"Bid" means the bid provided by the Bidder in conformity herewith.

"Bidder" means a Person who is qualified to provide the Goods or Services, in accordance with the Bid Documents and the Specifications.

"Bid Documents" means those documents set out in Section 2 and the Agreement to Abide by the Established Process.

"Bid Form" means an attachment hereto, if provided, which may include specifications of the Goods and Services and requests the Contract Price(s) for the Goods and Services, which must be completed and returned as part of the Bid Documents.

"Board" or **"TDSB"** means the Toronto District School Board.

"Closing Date and Time" means the date and time by which the Bid must be received, failing which such Bid will not be accepted or considered.

"Contract Price(s)" means the unit prices or other costing required by the Bid Documents and set by the Contract.

"Contract(s)" means the Bid Documents and the Bid and any other agreement entered into between the Board and the Bidder in writing, signed by all parties and/or any purchase orders or other such documents issued by the Board, pursuant to such documents and the Terms and Conditions of transactions accessible at the website operated by or on behalf of the Board.

"Customer(s)" mean all Persons who purchase Goods or Services from, through or on behalf of the Board.

"Goods or Services" means those goods and/or services identified herein on page 1 and/or 2 of this Request and more specifically in the `Bid Form, if provided.

"Intellectual Property" means any trade-mark, copyright, moral right, patent, industrial design, trade name, domain name, trade secret, know how, integrated circuit topography or other intellectual property, industrial property or proprietary right owned by, licensed to, or used by any third Person.

"Period" means the ##### year set out above in section 1.

"Person" means any natural person, partnership, limited partnership, joint venture, syndicate, sole proprietorship, body corporate, company or corporation with or without share capital, unincorporated entity or association, trust, trustee, executor, administrator or other legal personal representative, regulatory authority or other entity recognized as such by applicable law, however designated or constituted.

"Privacy" means any law or regulation, of any nature, whether federal, provincial or territorial, dealing with privacy, personal information protection and electronic documents protection and enforcement.

"Request" means this Request for "Tender, Quotation, Proposal or Information" document.

"Specifications" means those stated requirements for the Goods or Services set out in the Bid Documents.

Please see additional definitions, specific to this project listed in Appendix B: Definitions and Abbreviations.

1.2 BID DOCUMENTS

The Bid Documents shall consist of the following:

1. Request to Bidders;
2. Bid Form, if provided; and
3. All addenda (including as set out in Section 2) issued prior to, and all changes to the Specifications after the execution of, the Request.

Bidders shall promptly examine all the Bid Documents after receipt. Any errors, omissions or ambiguities discovered therein prior to the Closing Date and Time should be reported to the person named in Section 4 of the Request. If necessary and time permits, Addenda may be issued to all Bidders before the Closing Date and Time. Unless confirmed by Addendum, Bidders shall not take into consideration any Request or answers modifying the Bid Documents.

1.3 BID AWARD

The Board intends to award the Contract to Bidder(s) who's Bid is most acceptable in terms of the evaluation criteria.

The award of a Contract may be made to as many Bidders as deemed necessary to fulfill the anticipated requirements of the Board.

Following the initial screening, the evaluating committee may request the short-listed Bidders to make presentations and conduct a Proof of Concept (POC) demonstration for components that may be integrated with the TDSB network to the committee in order to clarify or verify the Bids and to develop a comprehensive assessment of the Bid. The Board will schedule the time and location of these presentation and POC demonstrations. Presentations and POC demonstrations are at the option of the Board and may not be conducted. Bidders are, therefore, encouraged to present initially as complete a Bid as possible.

The Board shall not enter into any separate contract or agreement drafted by, presented by or otherwise proposed by the Bidder, including any "standard form" or other vendor contract.

THE RFP AND YOUR BID RESPONSE WILL BE THE BASIS FOR THE CONTRACT.

1.4 BIDDER

Bidder represents and warrants to the Board as follows:

- (i) Bidder is a corporation duly organized, validly existing and in good standing under the laws of Canada, one of the provinces of Canada or one of the states of the U.S. and, in particular, in _____.
(TO BE COMPLETED BY BIDDER)
- (ii) Bidder has full corporate power and authority to execute and deliver this Bid and to enter the Contract and to perform its obligations hereunder and carry out the transactions contemplated hereby. The execution, delivery and performance by it of the Bid has been duly and validly authorized and no additional corporate authorization or action on its part is required in connection with the execution, delivery and performance by it of the Contract or the consummation by it of the transactions contemplated hereby;
- (iii) This Bid is and the Contract shall be a valid and binding obligation of Bidder, enforceable against it in accordance with its terms, subject to the effect of bankruptcy, insolvency, re-organization, moratorium and similar laws relating to or affecting creditors' rights generally and subject, as to enforceability, to general principles of equity (regardless of whether enforcement is sought in a proceeding in equity or at law);
- (iv) The Goods or Services and the provision thereof under the Contract and/or the use, display, distribution, provision, performance, marketing, and/or sale of such Goods and Services by or on behalf of the Board, or by any person authorized by the Board, including students registered by or through the Board and/or purchasers from or through the Board, shall not infringe, violate or interfere with any Intellectual Property; and
- (v) In performance of the Contract, Bidder shall comply with all applicable laws and regulations and obtain and maintain all required licenses, permits and approvals which are required by any regulatory authority and shall furnish the Board with written evidence thereof.

2 Executive Summary

The Toronto District School Board is requesting proposals for a new telephony communications system to replace the existing Nortel Business Communications Manager (BCM) 1000 telephony platform, currently distributed across the elementary and secondary schools in Toronto. The current system is past end of life and the Board is looking for a more robust and productive system to satisfy its present and future requirements. The proposed solution must be capable of interworking with and integrating to standards based wireless telephone system.

The new system must also integrate with other TDSB deployed technologies such as Microsoft Active Directory, Microsoft Exchange, Office Communication Server and Mobile computing infrastructure.

The Board is looking to form a strong business relationship, with a service provider that can ensure superior customer services and provide TDSB the flexibility to evolve at their own pace. Also, the service provider must have clearly demonstrated the technological expertise and experience in executing large-scale communication migrations over 200 locations.

The Toronto District School Board intends to secure Contract(s) with qualified Bidders for the provision of Telephony Communications Systems and their maintenance for the period and in accordance with the terms and conditions outlined herein.

Vision

The primary purpose of this RFP is to address the current end of life BCM 1000 and replace it with a more robust and dynamic solution to satisfy present and future requirements. The new solution must be able to leverage available information technology resources, such as, Microsoft Active Directory, Microsoft Exchange, Office Communication Server and support an IP migration strategy.

The Board is making a strategic commitment to a newer technology platform and anticipates that it will meet its present and future business requirements.

The Board needs the assurance that it will have the flexibility to evolve with the new solution as our communications requirements evolve.

Scope of work based on RFP requirements includes:

- Replacement of telephony systems and telephones (see 2.1.9 and 3.0.3) at elementary and secondary schools (See Appendix C- TDSB Site Locations).
- Stand alone capability with local voice mail and auto attendant functionalities and integration of voice mail with exchange and single storage.
- Retention of a Centrex coordinated five (5) digit dial plan (x-xxxx) for internal and site to site calling.
- Identification of any voice infrastructure upgrades required for implementation of proposed telephony systems.

RFP Objectives:

The Toronto District School Board has the following objectives and expectations for its new enterprise communications system.

- Centralized Voice Mail System capable of accommodating elementary and secondary schools across TDSB locations
- Integration with MS Exchange and single storage
- Enhance school safety by providing simultaneous conversations (conferencing) in the event of an emergency
- Extension of current communications investment by integrating telephony system with the public address system
- Architecture capable of maintaining 5-nines availability
- Increase administrative office efficiency and reduce communications expenses for MAC activity
- Maintain local survivability and reliability of telephony communications
- Empower teachers and principals productivity by provisioning of new and more user friendly applications
- Seamless integration with current and future applications (VoIP and Unified Communications)
- Provide common and consistent platform and services across all sites
- Simple, centralized network management and administration for local phone and voice messaging systems
- Flexibility to relocate equipment and software licenses as required
- Scalable to accommodate growth and new applications
- Leverage existing technology investments and capabilities where feasible
- Extend core features and functionality to schools

3. ADDENDA

Bidders may, prior to the Closing Date and Time, be advised in writing by Addenda of required interpretation of, additions to, deletions from, corrections to, changes to, or alterations to requirements of the Bid Documents. All Addenda shall become an integral part of the Bid Documents and shall be allowed for and taken into account in arriving at the Contract Prices.

Before depositing its Bid, each Bidder shall be responsible for verifying with the Board, pursuant to Section 4, that it has received all Addenda that have been issued.

4. ENQUIRIES PRIOR TO THE CLOSING DATE AND TIME

Bidders shall direct all inquiries regarding the Bid Documents, in writing, by 4:00 P.M. Thursday March 12, 2009 to:

Lorraine Gilmour, Contract Specialist
FAX NO: (416) 204-1123
E-MAIL: lorraine.gilmour@tdsb.on.ca

Any interpretation, addition, deletion, correction, change or alteration in the Bid Documents will be made by Addendum (as provided in section 3 above). Interpretations, additions, deletions, corrections, changes or alterations in the Bid Documents made in any other manner will not be binding upon the Board, and Bidders shall not rely upon such.

The Board reserves the right to distribute any or all questions and answers to or from one Bidder to all other Bidders.

5. PRICING INSTRUCTIONS

Prices are requested firm for the entire contract. If Bidder cannot quote firm prices for the entire contract Bidder must state clearly in his submission the basis on which prices are submitted.

Prices are to be quoted CIP destination. All costs, carriage, and insurance are to be borne by Bidder.

Each Bidder shall complete the Bid Form (Appendix G, by providing the Contract Prices for which Bidder shall provide the Goods or Services. All required information and each and every space on the Bid Form, if provided, must be completed, and, where applicable, "NONE" or "unable to bid" must be inserted to fill any space intended to be left blank or unanswered.

Where market conditions warrant and prior to or after the Contract has been entered into, the Board reserves the right to negotiate with the successful Bidder(s) for adjustments in Contract Prices. If the Board and Bidder(s) cannot agree on a new price, the Board may, in its sole discretion, terminate the Bidding process and any Contract without any obligation, costs, expenses, liability, losses and/or damages to it.

The prices shall not include goods and services tax, and provincial sales tax.

All prices shall be quoted in Canadian Funds.

6. SUBSTITUTIONS

The Goods or Services, including the materials and equipment described or named in the Bid Documents establish the standard for such Goods or Services and the material and equipment and for the workmanship required for the Goods or Services. The Bid and, in particular, the prices for the Goods or Services shall be based on the Goods or Services and the specified materials, equipment and workmanship.

The Board reserves the right to accept or reject proposed alternatives as the Board sees fit. Rejection by the Board is final. Also see Appendix A, Section 12.0: Alternate Solution.

Alternative Goods or Services may be included in the Bid and the Bidder may submit prices for such goods and/or services which the Bidder considers to be of equal or better quality than those listed in the Bid Document. In the event the Bidder submits an alternative good and/or service and it can be readily determined that the good and/or service is acceptable or not acceptable to the Board, it will be considered accordingly during the analysis of all the bids received prior to award. If the alternative good and/or service cannot be readily accepted or rejected, and the Bid price indicates that there could be an economical benefit to the Board, then the good and/or service will be put into testing pursuant to Section 9, to determine acceptability. However such goods and/or services shall not be considered for a Contract during this current bid process. If, during the testing process, it is determined that the good and/or service is acceptable, then it may be included as an approved good and/or service for future bids or quotation calls.

Unless qualified by the provision "NO SUBSTITUTE", the use or display of the name of a manufacturer, brand, make, catalogue designation or other good and/or service identifier in specifying a good and/or service does not restrict the Bidder to that manufacturer, brand, make, catalogue designation, or other identification. Such use or display indicates the character, quality and/or performance of the Goods or Services desired, but the good and/or service on which the Bid is submitted must be of such character, quality and/or performance that it will serve the purpose for which it is to be used as well as that specified in the Bid Document. In submitting a Bid on a good and/or service other than as specified, the Bidder must furnish complete data and identification with respect to the alternate good and/or service the Bidder proposes to furnish.

Consideration will be given to a Bid submitted on alternate goods and/or services to the extent that such action is deemed to serve the best interests of the Board. If the Bidder does not indicate the good and/or service to be provided under the Contract, it shall be deemed that the Bidder shall furnish the exact Goods or Services as described in the Bid Document.

7. RIGHT TO TERMINATE AND TERMINATION

The Board may, in its sole discretion, terminate this Bidding process for any reason or for no reason, without any obligation, costs, expenses, liability, losses and/or damages to it.

The Board reserves the right to cancel or terminate, with no obligation, costs, expenses or liability to the Board, any Contract upon giving 30 days written notice if its new Board of Trustees, elected during the term of the Contract, decides that the Contract should be cancelled for whatever reason.

The Board reserves the right, in its sole discretion, to cancel a Contract if required by Provincial Legislation, without any obligation, costs, expenses, liability, losses and/or damages to it.

The Board may terminate a Contract without notice and without any obligation, costs, expenses, liability, losses and/or damages to it, if:

- (i) The successful Bidder is, at any time, in breach of its Bid or any of the Bid Documents or the Contract;
- (ii) Bidder's business operations are curtailed by decisions or rulings under applicable law and/or Bidder ceases carrying on or is compelled to discontinue all or substantially all of its business;
- (iii) Bidder fails to meet quality control requirements;
- (iv) Bankruptcy or insolvency or any restructuring occasioned thereby occurs with respect to Bidder;
- (v) Bidder purports to assign, license, sublicense, subcontract, transfer or part with the Contract or purports to assign, license, sublicense, subcontract, transfer or part with any rights or obligations granted therein;
- (vi) If any provision of the Contract or the consummation of the transactions contemplated by the Contract in the manner contemplated therein, are or become illegal or unenforceable under applicable law in any material respect; and/or
- (vii) the Board decides, at its sole discretion and without cause, to terminate the Contract.

There shall be no cure period in respect of the above. Upon termination, Bidder shall take all steps required by the Board to facilitate such termination and the effects thereof and shall assume all obligations, costs, expenses, liabilities, losses and/or damages therefore.

Notwithstanding the foregoing, in the event that the Board determines that any non-compliance with any Specifications or quality requirements creates material threat of personal injury or material injury to property of any third Person, upon written notice thereof by the Board to Bidder, Bidder shall immediately rectify the non-compliance or immediately cease offering those Goods or Services until it can comply with the Specifications or quality requirements to the satisfaction of the Board.

Nothing herein is intended to replace or derogate from any other termination provisions or other remedies that the Board may have at law or in equity in consequence of any breach of, or failure to observe and perform, any covenant, representation or warranty in the Contract by Bidder.

8. SUBMISSION REQUIREMENTS

Documents Provided

The Bid Documents shall be provided directly to Bidders by the Board.

The Bid

The Bid shall consist of and Bidder shall return to the Board, enclosed and sealed in a Bid envelope, two hard copies and one soft copy of:

- (i) The completed Bid Form, if provided, included in the Bid Documents, completed exactly as required (failure to do so may result in disqualification in the Bid process). Bidders are to indicate manufacturers' name and product number, for each Good and provider, for each service, in the space provided on the Bid Form, if provided ; and
- (ii) All other documentation submitted by Bidder in response to the requirements as set out in the Bid Document, including in the Specifications.

Bidder's return address and company name shall be placed on the Bid envelope and the Bid envelope shall be delivered and received, by 10:00:00 a.m. on the Closing Date, to:

Toronto District School Board
Purchasing and Distribution Services
5050 Yonge St., 3rd Floor
Bid Response: RFP LG09-109P Telephony Communications Systems

** (RFP INFO MUST APPEAR ON ENVELOPE)

Closing Date and Time:

Bids are to be received on or before 10:00:00 A.M., local time, on March 31, 2009 at the following address:

Toronto District School Board
Purchasing and Distribution Services
5050 Yonge St., 3rd Floor
Toronto, Ontario M2N 5N8

The Board's Office Hours are from 8:00 am to 4:30 pm

Bids delivered after the Closing Date and Time will not be received or considered, and will be returned unopened. Bids delivered to any location other than as specified, will not be considered.

The Board does not provide receipts for Bids received, and assumes no liability for misplaced Bids without proof of receipt. It is the responsibility of the Bidder to provide any required Bid receipts and to obtain a dated signature of a staff member of the Board receiving its Bid(s).

Conflict of Interest

Each Bidder shall declare to the Board as part of its Bid any situation that may be a conflict of interest or a potential or perceived conflict of interest of Bidder, including with its obligations to the Board, the Contract, the Contract Price or the Customer.

No Influence

The Board prohibits its representatives from using their official position for personal financial gain, or from accepting any personal advantage from anyone under circumstances which might reasonably be interpreted as an attempt to influence the recipient in the conduct of their duties, extend any gratuity or special favour to the Bidder, or to influence the outcome of any Bid. The Board reserves the right to disqualify the proposal, tender or Bid of any Bidder who engages in any acts or practices which are either directly or indirectly, or may reasonably be perceived, either directly or indirectly to be made for the purposes of influencing the outcome of the Bidding process, the Bid or the Contract, including in their favour.

Agreement to Abide by the Established Process

It is vital to the Board that the process leading to the acceptance of a Bid and the conclusion of the Contract for the provision of Goods or Services be, and be seen to be, open and fair and that each of the Bidders be treated equally.

No Bidder can be seen to be deriving, intentionally or otherwise, an advantage, information or benefit which is not equally available to all other Bidders or from any special or personal relationships or contacts, or seeking or obtaining any advantage or information from any staff and representatives of the Board, whether authorized or not.

Bidders shall sign, and return with their submission, the enclosed "Agreement to Abide by the Established Process" form. The signed form will indicate concurrence with the process. Failure to indicate concurrence by returning the signed form will result in disqualification of the submission.

Signature Required

Bidder's full legal name and address shall be typed or legibly printed in the spaces provided on the Bid Form, if provided. The Bid Form shall be signed by an authorized representative of the Bid, in the spaces provided.

No Email or Fax

Bids submitted by e-mail or facsimile shall not be considered.

No Liability for Expenses

The Board shall not be liable for any expenses or costs incurred in the preparation and submission of the Bid, the Bidding Process or in the preparation and execution of the Contract.

Irrevocable Bid

The Bid, once submitted, may be accepted by the Board, in whole or in part, for a period of 180 days from the Closing Date and Time and is irrevocable during that period.

Rights to Disqualify

The Board reserves the right to disqualify Bids not submitted in strict accordance with the requirements of the Bid Documents.

Right to or not to Proceed

The Board reserves the right not to proceed with the Contract and to reject all, any of the Bids or any portion thereof. If the Board accepts any of the Bids (which it is not obligated to do) the lowest or any bid will not necessarily be accepted and the Board may, as its sole discretion, consider any other factors it deems appropriate in its sole discretion in awarding the Contract. The Board may request further clarification of a Bid from the Bidder. While the Board is not obligated to consider Bids which do not strictly comply with its requirements, it nevertheless reserves the right to do so, and specifically reserves the right to waive formalities as its interests may require.

9. BID EVALUATION

Bidders must respond to the Bid Documents by submitting all data required herein in order for the Bid to be evaluated and considered for award. Failure to submit such data shall be deemed sufficient cause for disqualification of a Bid from further consideration for award.

Testing

The Board reserves the right to have the Goods of any Bidder tested, by an accredited testing organization, to ensure compliance with the standards set in the Bid Documents or with accepted standards such as Health & Safety, WHMIS, CGSB, and CSA. A full report, by Goods will be available to each Bidder whose Goods are tested. All costs associated with this testing shall be borne by the relevant Bidder.

Samples of Goods are to be submitted only when requested, and at no cost to the Board. Samples, if required, are to be enclosed in a separate sealed package identifying the name of the Bidder, item numbered and the Tender number on it. Samples not picked up within 7 days of the Contract award shall become the property of the Board on the 8th day.

Evaluation Criteria

Evaluation of the Bids shall be based on the following criteria:

- (i) The conformity of the Bid with this Request;
- (ii) The extent to which the Bid meets all mandatory requirements of this solicitation, such as firm pricing, ability for direct delivery to all Board sites, etc.; appendices
- (iii) The extent to which the Bid meets other requirements of this solicitation, discounts, price protection, minimum order policy, delivery terms, and return goods policy program;
- (iv) Delivery. Reasonable quantities of Goods or Services must be available at any given period to ensure a minimum turn-around time. Bidders are to indicate normal delivery lead-time per Good/Service;
- (v) Deemed capabilities, understanding of the requirements, integrity, reliability, and financial stability of the Bidder to meet the requirements of the Board;
- (vi) Ability to provide detailed activity reports as they relate to purchases against the Contract. Bidders are asked to briefly explain their ability and willingness to provide such information;

- (vii) Environmental responsibility, including as set out in Section 15; and
- (viii) Absence of conflicts of interest and potential or perceived conflicts of interest.
- (viii) Reference checks

10. BILLING

The following note is applicable to all subsections of this Billing section:

Supplier shall submit invoices in writing directly to:

Accounts Payable, 5050 Yonge Street, 3rd Floor
Toronto, ON, M2N 5N8

For recurring monthly invoicing requirements, please see Appendix J.

Itemization of Invoices/Billing Statements

Billings to the Board shall clearly set out and itemize the following information regarding purchases by the Board:

Date of Purchase
Quantity
Individual Line Item Description
Purchase Order Number
Contract number, where applicable
Requisitioner Identification
GST Number (if applicable)

such that each invoice or billing statement to the Board shall show, on its face, a complete segregation of purchases made by or on behalf of the Board for the Board and such that the amounts are properly allocable by the Board to each of the cost centres.

11. PAYMENTS

The Board will issue payments for all purchases in accordance with the invoice or billing statement issued by the Bidder, in accordance herewith. Bidder acknowledges that payments will be delayed in respect of invoices or billing statements which do not conform to all the itemized information required above in order to permit the Board to obtain all required data to properly allocate purchases among cost centres and to verify shipments.

The frequencies and quantities of orders or purchases used in the Bid evaluation on the Bid Form, if provided, are for Bid evaluation purposes only; and are not representations

of any guarantee of the frequency or quantities of orders or purchases by the Board for the Goods or Services under the Contract. Payments for the Goods or Services provided under the Contract shall be based on the actual quantity of Goods or Services ordered and received, pursuant to the Contract and at the Contract Price. The Board does not assume any liability for any inventory carried by the Bidder to satisfy the requirements of the Contract.

The Board reserves the right to negotiate with the Bidder, the date on which the invoice or billing statement will be submitted to the Board.

Electronic Fund Transfer (EFT)

The Toronto District School Board (Board) requires all suppliers to participate in a direct deposit system (electronic funds transfer) as the only acceptable method of payment to the Board's suppliers. The benefits to our vendors include increased security and improved efficiencies by eliminating delays in handling and processing of cheques. This also means that you will receive payment sooner.

The successful Bidder shall be required to provide the Board with the necessary banking information to enable electronic fund transfers for the payments of Goods or Services. Under no circumstances shall the Board be responsible for the payment of any transaction fees or other related charges that may be imposed by the supplier.

The necessary information is a void cheque (if at all possible) with an e-mail address for the deposit notification to be sent to, or, the following information in writing:

1. Bank number
2. Bank Transit number
3. Bank account number
4. E-mail address for deposit notification purposes

If Bidder has previously provided this information and there are no changes, please signify where indicated below and disregard this request for information.

The above information was previously submitted by Bidder on (insert date) _____

12. DISPUTES

In the event of any dispute or claim arising between the Board and the Bidder as to their respective rights and obligations under the Contract, either party may give the other written notice of such dispute or claim. If the dispute or claim cannot be resolved through negotiation to the satisfaction of both parties, then the Board shall have the right at any time to submit the particular matter to arbitration in accordance with Arbitrations Act (Ontario). If the Board does not exercise its right to submit the matter to arbitration, then either party may submit the dispute to such judicial tribunal in Ontario, Canada, as the circumstances may require.

13. RIGHT TO CONTRACT FOR IDENTICAL OR SIMILAR GOODS OR SERVICES

By entering into the Contract, the Board does not and shall not limit its right to contract for identical or similar Goods or Services from any other Person should the Bidder be unable to furnish the required Good/Service within the required time frame.

Any Goods or Services requested by the Board during the term of the Contract, but not yet completed by the end of the term, shall nonetheless be provided by the Bidder under the terms of the Contract.

14. INDEMNIFICATION AND LIABILITY INSURANCE

No Liability

Bidder agrees that the Board shall not be liable for and is under no obligation to indemnify, hold harmless or defend any entity or person including the Bidder (or any officer, employee, agent, assign, successor, director, shareholder, authorized representative or independent contractor, including sub-contractors of the Bidder), for any injury (including death) or damage, of any nature, or for the loss or damage to the property or business of the Bidder (or its officers, employees, agents, assigns, successors, directors, shareholders, authorized representatives or independent contractors, including the Bidder's sub-contractors), in any manner based upon, occasioned by or in any way attributable to the Contract and/or the provision of the Goods or Services under the Contract and/or any actions of the Board and the Bidder hereby releases and forever discharges the Board therefore.

Indemnity

Bidder shall at all times and from time to time indemnify, hold harmless and defend the Board (and its trustees, members, employees, officers, agents, authorized representatives, independent contractors or any person authorized by the Board, including students registered by or through the Board and/or purchasers from or through the Board):

- (i) from any and all claims, demands, actions, suits or other proceedings ("action") by whosoever made, sustained, brought or prosecuted in any manner,
- (a) including, in connection with, due to or arising in any way from the Goods or Services, with respect to the provision of the Goods or Services under the Contract and/or with respect to the use, display, distribution, performance and/or marketing of the Goods or Services,
- (b) based upon, incurred, claimed, paid, suffered or sustained by, occasioned by or attributable to or for personal injury, property damage or business damage or any

infringement of, violation of or interference with or otherwise, due to or arising in any way from any Intellectual Property of any third party, and/or

- (c) anything done or omitted to be done by the Bidder, Bidder's sub-contractors, officers, employees agents, assigns, successors, shareholders, or its or their directors, or authorized representatives; and/or
- (ii) for any and all costs, damages, expenses, liabilities, losses including, without limitation, any and all amounts paid to settle any action or satisfy any judgment, fine, assessment, penalty, loss, expense, cost or liability of any kind whatsoever (including court costs and counsel fees on a solicitor and its own client basis), (herein collectively called an "Indemnifiable Loss" and any indemnified Person herein collectively called an "Indemnified Party").

Claims

- (i) Notwithstanding anything to the contrary, Bidder shall not pay, compromise or settle any action or seek or agree to any equitable relief without the consent of the Indemnified Party, such consent not to be unreasonably withheld. Bidder shall provide reasonable information to the Indemnified Party on an ongoing basis regarding any action and any proposed payment, compromise or settlement of any action and the basis for any equitable relief sought.
- (ii) Notwithstanding anything herein to the contrary, if Bidder acknowledges to the Board in writing Bidder's obligation to fully indemnify the Indemnified Party with respect to an Indemnifiable Loss and provides the Board with reasonable proof of its ability to indemnify, Bidder may compromise or settle in accordance with the provisions of this section, at Bidder's own expense and by Bidder's own counsel (provided such counsel is acceptable to the Board, in its sole discretion), any such matter involving any action relating to an Indemnified Party.(iii) In the event that Bidder does not acknowledge as aforesaid and/or provide such reasonable proof, as required in this Section 14., the Indemnified Party shall be entitled (but not obligated) to carriage of any and all matters giving rise to an actual or potential Indemnifiable Loss. In connection therewith, Bidder agrees to consent to any compromise or settlement proposed by the Indemnified Party where either (i) the compromise or settlement results in no Indemnifiable Losses that are required to be indemnified by Bidder or (ii) the Indemnified Party agrees to bear any and all Indemnifiable Losses.
- (iii) In any event, Bidder shall cooperate in the compromises of, the contest of and the defence against, any such asserted action, and shall upon the request of the Indemnified Party assist and participate in the contest and defence of such asserted liability or action.

- (iv) Bidder may not settle or compromise any action over the objection of the Indemnified Party if such settlement or compromise would impose any legal judgment or holding, declaration, liability or obligation (including, but not limited to, the requirement to take or refrain from taking any action) on such Indemnified Party.

Insurance Policy

(i) During:

- (a) The term of the Contract; and
- (b) The period of at least three (3) years following the last shipment of Goods or the provision of Services under the Contract, whichever date is later.

Bidder shall ensure, at its own expense that it maintains, in full force and effect at all such times, with responsible insurance carrier(s) acceptable to the Board,

- (1) at least Two Million Canadian Dollars (C\$2,000,000.00) of comprehensive commercial general liability insurance for bodily injury, property damage, operations liability, contractual liability and tenant's legal liability, including umbrella liability insurance covering liability arising from premises, operations, independent contractors, products-completed operations, personal injury and liability assumed under the Contract;
- (2) at least Two Million Canadian Dollars (C\$2,000,000.00) of business automobile liability insurance and, if necessary, umbrella liability insurance for owned, hired and non-owned vehicles covering bodily injury and property damage; and
- (3) at least Two Million Canadian Dollars (C\$2,000,000.00) of errors and omissions insurance and of product liability insurance applicable to the Goods or Services under the Contract.

This insurance shall cover the Board as a named additional insured and shall name its members, trustees, officers, employees and agents as additional insureds under such insurance coverage and shall be for the benefit of all said parties.

- (ii) All such insurance shall be primary and respond before any other applicable insurance of the Board. If there is other valid and collectable insurance effected by the Board or any other insurers available to the Board or its members, trustees, officers, employees or agents, the insurance afforded by such other available, valid and collectable insurance shall be in excess of and shall not contribute with the said coverage identified in this Section 14.

- (iii) Bidder shall furnish to the Board, prior to the commencement of the Contract and, thereafter, prior to the expiration of any insurance policy required herein, evidence of Bidder's compliance with the foregoing, suitable certificates from its insurers to the effect that such insurance coverage designates the Board and the said persons as named additional insureds and proof of premium payments. Further evidence of such insurance is to be provided from time to time upon the Board's request.
- (iv) All such insurance policies shall provide that they are non-cancellable and not subject to amendment except on 30 days prior written notice to the Board, and all such amendments shall be subject to the Board's approval. Bidder shall provide the Board with at least thirty (30) days prior written notice of any substantial modification of the policies, other than for cancellation due to non-payment of premium(s), for which such notice shall be ten (10) days.
- (v) Bidder shall seek the approval of the Board of any deductibles and retentions associated with the insurance required herein and shall indemnify and hold harmless the Board and its members, trustees, officers, employees and agents against all deductibles or retention amounts for which Bidder is liable under any insurance policies contemplated by this Section 14.

Undertaking from Insurers

In the event Bidder fails to pay the premium(s) for any of the insurance policies required herein, the Board reserves the right to pay such premiums to keep such insurance coverage in full force and effect and, in the event of so doing, reserves the right to claim from Bidder all such premium payments and interest thereon at the prime rate from time to time plus three percent (3%) annually, payable monthly and calculated from (and including) the date payment is due to the date of payment and both before and after judgment. Failure by Bidder to pay premiums as required hereunder shall constitute material breach of this Agreement.

Failure to Furnish Proof

If Bidder fails to furnish proof of such insurance as required above, then the Board, in addition to all other remedies available to it hereunder, may at its option obtain such insurance coverage and bill Bidder for the premium cost therefore. Bidder shall remit such premium cost to the Board within ten (10) days of receipt of notice from the Board of the amount of such premium cost. The Board reserves the right to claim from Bidder, such premium costs and interest thereon at the prime rate from time to time, plus three percent (3%) annually, payable monthly and calculated from (and including) the date payment is due to the date of payment and before and after judgment. Failure by Bidder to pay premiums as required hereunder shall constitute material breach of this Agreement..

Termination

In the event that any dispute and/or claim arises between the parties in connection with any matter at issue or dealt with in this Section 14, the Board reserves the right to terminate unconditionally the Contract or any part hereof at the Board's sole discretion and Bidder shall be responsible for all obligations, costs, expenses, liabilities, losses and/or damage caused or resulting thereby or resulting there from, including interest thereon at the prime rate from time to time plus three percent (3%) annually including before and after judgment.

15. ENVIRONMENTAL PROTECTION

Committed to liaising with school and community environmental groups and suppliers, the Board strives to source, promote and support products and services that are environmentally sound.

The Board supports environmentally sensitive products and services. All criteria being equal, the Board will give preference to environmentally sensitive products and services. Consideration will be given to Goods or Services that:

- (i) are durable, reusable and contain maximum recycled content;
- (ii) eliminate waste;
- (iii) are purchased from local sources;
- (iv) are independently recognized for meeting high environmental standards;
- (v) are purchased from manufacturers and suppliers that have a registered environmental management system; and
- (vi) meet health and safety standards.

16. WORKPLACE HAZARDOUS MATERIAL INFORMATION SYSTEM (WHMIS) REQUIREMENTS

In accordance with WHMIS, Material Safety Data Sheets (MSDS) and supplier labels must be provided for Goods classified as controlled products under the Hazardous Products Act and the controlled products regulations. Please indicate the WHMIS class assigned to each product on the MSDS.

Current copies of MSDS (no older than three years) and supplier's labels must accompany and be part of each Bid and/or shipment.

17. SPECIFICATIONS FOR ELECTRICAL CONNECTIONS

All electrical equipment must conform to the standard of the Electrical Safety Authority (E.S.A.) as same may be amended from time to time, and electrical equipment must be Canadian Standard Association (CSA), E.S.A, or Underwriters Laboratories of Canada (ULC) approved and is in accordance with all other related local, provincial and federal ordinances.

Energy Star Rated Products

The Board may give preference to products meeting ENERGY STAR guidelines. Bidders are requested to clearly identify those products that are Energy Star compliant. All quoted electrical devices must include rated energy consumption levels including standby mode wattages.

18. MUNICIPAL FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

The Bid and any accompanying documentation submitted by Bidder prior to the Closing Date and Time specified in this Information shall become the property of the Board and shall not be returned. The Bid shall be subject to the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56. Bidder's proposal shall be received and held in confidence by the Board unless and to the extent that it is or must be disclosed pursuant to any Freedom of Information and Privacy legislation or instructed by the Courts of the Province of Ontario or the evaluation and award process adopted by the Board for this solicitation.

19. OPERATION OF VEHICLES

All vehicles, including delivery or service vehicles must not enter or leave school grounds when students are in the area unless directed by or with permission of the school and/or administrative staff.

Drivers of motor vehicles shall not operate their vehicles beyond the designated parking areas unless permission is obtained from the school principal or an authorized official to locate and operate the vehicle elsewhere. Such vehicles shall be operated with due caution at all times while on school property. TDSB reserves the right for its staff to request to see company identification badges when vendor's staff or contracted staff is on TDSB premises.

On or near school grounds, the driver or operator must comply with the following:

- (i) Speed limit must not exceed 8 km (5 miles) per hour at any time;
- (ii) Vehicles or equipment must not be operated in the school yard during recess, lunch hour or other times of outdoor activity;

- (iii) When a co-driver/helper is assigned to the vehicle, he/she must direct the movement of the vehicle or equipment while on foot from a position away from the vehicle and in clear view of the driver or operator;
- (iv) When a co-driver/helper is not assigned to the vehicle, vehicles with limited rear vision must not be backed up without the aid of a ground guide who must direct the movement of the vehicle or equipment while on foot from a position away from the vehicle or equipment and in clear view of the driver or operator;
- (v) When a vehicle is parked in a school yard, the following conditions must be met:
 - (a) The ignition turned off;
 - (b) The key removed;
 - (c) The transmission placed in park (neutral if not parked);
 - (d) The parking brake engaged; and
 - (e) The doors locked.
- (vi) When returning to a parked vehicle or equipment, the driver/operator must circle the vehicle or equipment and ensure that there are no children playing under or near the vehicle or equipment;
- (vii) Vehicles or equipment must never be left unattended with the engine running. Engine idling must not exceed the City of Toronto's three minute limit;
- (viii) All tools, supplies, equipment, etc. are to be securely stored in the vehicle; and
- (ix) Reversing or backing up must be avoided as much as possible. The vehicle should be positioned so that the driver can drive it away rather than back it up.
REVERSE ONLY WHEN IT IS SAFE TO DO SO!

It is the responsibility of the driver or operator to exercise extreme caution when reversing vehicle. Whenever possible, another employee should be requested to assist the driver or operator. Vehicles with limited rear vision shall not be backed-up without the aid of a ground guide at the rear of the vehicle and in clear view of the driver or operator. This, however, does not relieve the operator's responsibility to exercise extreme caution when reversing the vehicle.

Rules for Backing-up:

1. The driver or operator must understand the hand signals to be used prior to moving the vehicle.
2. The driver or operator must get the whole picture (get out and walk around the vehicle).
3. If the driver or operator loses eye contact with the guide, he/she must stop immediately and re-establish eye contact. The driver/operator must be sure it is safe to resume reversing.
4. The driver or operator must reverse slowly, no faster than normal walking speed.
5. The driver or operator must check on both sides (mirrors) as he/she reverses.

All vehicles, including delivery or service vehicles, which are used to enter school grounds should, wherever possible, be equipped with back-up alarms.

Delivery

For identification purposes, the employees delivering for Bidder or providing Services must wear a Uniform which clearly identifies the company, including the name and logo (if applicable) and, if the Bidder issues any identification badges to its employees, such employees must wear such badges at all times when in or around school property. TDSB reserves the right for its staff to request to see company identification badges when vendor's staff or contracted staff is on TDSB premises.

All deliveries of Goods must be made during normal school operation hours subject to safety concerns on an individual school basis. Services are to be provided in accordance with prior arrangements with the Board.

All Goods must be delivered and unloaded by Bidder's employees. Delivery must be made to inside the building to the designated receiving area for that school or building.

20. WAIVING NON-COMPLIANCE

The Board reserves the right, at its sole discretion, to accept all or part of any Bid which is non-compliant with the requirements of the Bid Documents.

21. GOVERNING LAW

The construction, performance and interpretation of this Contract shall be governed by the substantive laws of the Province of Ontario, Canada (without regard to its principles of conflicts of law) provided that if the foregoing laws are modified during the term hereof in such a way as to adversely affect the original intent of the Bidder, the Board

and Bidder shall negotiate in good faith to amend the Contract to effect their original intent as closely as possible. The Board and Bidder hereby waive any right to a trial by jury. Each of the Board and Bidder irrevocably attorns and submits to the non-exclusive jurisdiction of the Courts of the Province of Ontario.

22. CONFIDENTIALITY

Bidder shall hold in confidence, during, and after the termination or expiration of, the Bidding process and/or the Contract and not disclose, provide or otherwise make available, in whole or in part, to any third Person without the prior consent of the Board, the fact that the Bidding process or Contract is or was occurring or exists or existed, the Contract Price, any information that is disclosed by the Board to Bidder with respect to the operations of, the purchasing by, the Goods or Services, or the activities of the Board and any and all information relating thereto or designated proprietary by the Board (Proprietary Information). Bidder shall ensure that only its employees with a need to know the Proprietary Information shall have access to it and then only if those employees have entered into a confidentiality and use restriction agreement, obligating them at least to the same extent as Bidder is obligated hereunder. Bidder shall exercise a standard of care with respect to the Proprietary Information that is not less than the standard care Bidder exercises under its corporate policy for confidentiality and use restrictions.

23. PRIVACY

Bidder shall comply with all laws of Canada and any of its provinces and territories with respect to Privacy.

24. NO ASSIGNMENT/SUB-CONTRACT

The Contract shall be personal to Bidder. Bidder shall not, without the prior written consent, in writing, of the Board, assign, license, sublicense, sub-contract, transfer or part with the Contract or any of its rights or obligations thereunder.

25. CO-OPERATIVE PURCHASING PROVISIONS

The Board may agree to permit other public organizations within the Greater Toronto Area (GTA) to access any contract(s) that may result from this solicitation. The successful bidder(s) shall allow such access with the understanding that the participating organizations be responsible for their own contract management. The Board reserves the right to negotiate any resulting additional volumes towards any volume discounts that may be established as part of the contract.

26. PERSONAL INFORMATION PROTECTION AND ELECTRONIC DOCUMENTS ACT

The Bidder represents and warrants that if the bidder is or becomes subject to any private sector privacy legislation in responding hereto, or in carrying out its obligations under any subsequent agreement, the Bidder will be solely responsible for compliance with such legislation. Without limitation, the Bidder represents and warrants that if the Bidder is subject to the Personal Information protection and Electronics Act, S.C. 2000, c. 5, including any amendments thereto ("PIPEDA"), the Bidder shall ensure PIPEDA compliance of:

- (a) all PIPEDA Protected Information the Bidder collects directly from the individuals or indirectly from the Board or others;
- (b) all PIPEDA Protected Information the Bidder uses or discloses in the course of responding hereto or in performing its obligations under any subsequent agreement; and,
- (c) all PIPEDA Protected Information the Bidder transfers or discloses to the Board.

For the purposes hereof, "PIPEDA Protected Information" means any "Personal Information" or "Personal Health Information" as such terms are defined in PIPEDA.

27. ACKNOWLEDGEMENT

I/we have read, understand and agree to comply with the terms and conditions as stated in this document.

(Please type or print)

COMPANY NAME: _____

ADDRESS: _____

TELEPHONE: _____

CELL PHONE: _____

PAGER NUMBER: _____

FACSIMILE: _____

E-MAIL ADDRESS: _____

WEB SITE: _____

SIGNATURE OF RESPONSIBLE OFFICER

(Please type or print name)

DATE: _____

END OF "REQUEST TO BIDDERS"

AGREEMENT TO ABIDE BY ESTABLISHED PROCESS

The Board has advised the Board's trustees, members, staff and agents that the integrity of the Bidding process requires observance of the following ground rules:

1. All communications, including requests for information, between Bidders and the Board must be between only the representatives of the Board and of each Bidder who have been authorized and designated for that particular purpose.
2. Apart from the communications between and among the designated representatives, there must be no communication between the Board and any representative of Bidder, and no giving of information with respect to the Bid processes and the final Contract.
3. Any attempt on the part of any Bidder, or any of its employees, agents, contractors or representatives to contact any persons other than the designated representatives with respect to the Bid or the Bidding process or any action or violation of the above requirements shall be grounds for disqualification, and the Board may, in its discretion, in addition to any other rights or remedies available at law, reject any potential or actual submission, proposal or Bid submitted by Bidder.

Bidders must accept and agree to observe the contents of this "Agreement to Abide by the Established Process", inform their staff and agents thereof, and ensure their compliance therewith.

This agreement must be signed by a person who has the authority to bind Bidder and be submitted with the Bid.

Certification :

Accepts, and undertakes to ensure compliance with the terms of the Agreement to Abide by the Established Process.

Company Name

Signature of responsible officer

Date

APPENDIX A - REQUIREMENTS DOCUMENTATION

The following document contains all information specific to the Telephony Communications System requirements of the Toronto District School Board.

These sections contain all the pertinent infrastructure (hardware, software, and network) and high level requirement information about the existing environment.

NOTE: The expectation is that the vendor will take into account all the attached information when responding to the questions in the system and station features, telephony equipment costs, ICE IVR requirements for Integration and bidder(s) compliance table regardless of whether the items from these sections are explicitly stated in those questions.

Request: Wherever possible or appropriate for items in these sections, please provide sample screen shots and or reports.

Bidders Supporting Documentation (M) - Mandatory

The bidder will provide in this part of the Proposal, all information that relates to the Proposal but is not included in the other parts. References should be made as appropriate. This includes any sales material and brochures and supporting documentation for items identified in the other parts of the Proposal.

References:

The bidder must provide at least three references whose environment and requirements are most similar to those being proposed to TDSB.

a) The references may be in the form of case studies but should include quantifications of the project's magnitude (number of users, number of telephony servers, number of regions/sites covered, length of contract if managed service, etc).

b) Please note that by submitting a response to the RFP, your company authorizes TDSB to contact any of the references as part of the RFP evaluation process. Your company also authorizes your references to release the information to TDSB.

Contact details:

- Name, Title and responsibility, Address, Telephone number, Facsimile Number, Email address

Bidder Company Information:

The bidder must provide information that will enable TDSB to evaluate the bidder's track record, financial stability, and operation capabilities. TDSB requires that bidder include the following specific details in this section:

- Ownership of bidder's company
- Number of years in business
- Legal name
- Name, title and responsibility
- Address
- Telephone number
- Facsimile number
- Email address
- Website address
- Within the above, provide total employee counts in Ontario, Canada and Globally and a percentage breakdown of R&D vs. professional services employees
- Estimated number of full-time and part-time resources available in your company for each type of resource you are offering in this Proposal (ie. engineering, deployment, project management, etc)

The bidder is encouraged to attach further details such as independent market share information, analyst reports, and partnerships in the Appendix of their Proposal.

Bidders Financial Information

A copy of the most recent annual report must be included in the RFP.

Any recent developments that have taken place since the publication of the annual reports and financial statements must be discussed if they might have a significant impact on the financial condition of the involved firm(s).

SECTION 1 – CURRENT ENVIRONMENT

1.0 Current Environment

Each elementary and secondary school is supported by a Nortel Business Communications Manager (BCM) 1000 telephony system that provides telephony services, voice mail and auto-attendant functionality and is connected by Centrex lines to the Public Switched Telephone Network (PSTN). Currently the Board is serviced by three Central Offices and uses a Centrex coordinated five (5) digit dial plan (X-XXXX) for internal and site to site calling between TDSB sites. Line extensions for principals, vice principals, and caretaking, have been standardized throughout all schools.

Local Access Services:

Centre III services provide the majority of local access telephone services for the Board within the local dialling area. Communications to these sites vary from two (2) Centrex lines to eighteen (18) Centrex lines with thirty one (31) percent having two (2) Centrex lines, nineteen (19) percent having three (3) Centrex lines and fourteen (14) percent having four (4) Centrex lines.

The service provider hosts the Centrex service for TDSB at three (3) Central Offices, located at Burnhamthorpe, servicing the west and supporting twenty one (21) percent of the lines; Adelaide servicing the Central Region and supporting fifty three (53) percent of the lines and Shepherd servicing the east region and supporting twenty six (26) percent of the lines at TDSB. (See Appendix E- Summary of Central Offices & Line Count by Region).

Currently, the Board has approximately 1,000 telephone numbers published for community access. These numbers must be maintained in any proposed system in order to minimize disruption with communications to the schools, administration offices and outdoor educational sites.

Regular Business lines (1FL's) provisioned by the service provider, supports local access to Board facilities located outside the local dialling area and complements various local access needs within the local area. TDSB utilizes Centrex and 1 FL services for local access. It is necessary to keep this service for local access and DRP. The Board currently is using a Centrex coordinated five (5) digit dial plan (X-XXXX) for internal and site to site calling. Any recommendation must allow for continuation of this dialling pattern to ensure there is no disruption of communication at the sites.

Voice Mail System (VMS)

The voice mail platform at the schools is Call Pilot and each BCM is provisioned with a voice messaging key code for a minimum of 16 seats. The BCM 1000 equipment is currently managed and maintained by the service provider.

The Board's Administration sites are provisioned with voice mail services through its own Avaya Octel 350 messaging server. This VMS is housed at the Head Office located at 5050 Yonge Street. It currently supports over 2600 active voice mail users.

Network Infrastructure

The current wide area network infrastructure does not have the capability and associated Quality of Service (QoS) mechanism implemented to satisfy the requirements of VoIP. However, with the implementation of the future MPLS network the wide area network will be enabled to support VoIP. The migration of the wide area network to MPLS is expected to take approximately two and a half years. Currently Local Area Networks within schools and Education Offices are based on 100Mbps Fast Ethernet technology. After the migration they will be based on 1Gbps Ethernet technology.

Email Infrastructure

TDSB's current electronic messaging platform is Microsoft Exchange 2003. Office Communications Server (OCS) was recently integrated into TDSB's ICT (Information and Communications Technology) infrastructure providing managed Instant Messaging (IM) services, real-time presence, and TDSB hosted conferencing. The overall strategy is to move towards a Unified Messaging solution.

SECTION 2 – BIDDERS RESPONSE

2.0 Solutions Offerings

The requirements are classified as follows:

M - Mandatory Requirement - Mandatory requirements must be substantially met in order for the proposal to be qualified for further consideration.

O – Optional Requirements - Bidders may provide an alternative solution to meet the RFP requirements.

2.1.0 System Architecture (M) - Mandatory

- 2.1.1 Provide an architectural description and diagram of the hardware and software required for the complete proposed solution. Describe how the proposed solution will work with Microsoft Active Directory and Microsoft Exchange.
- 2.1.2 TDSB does not want to be locked into a propriety solution. Describe the proposed systems support for open architecture.
- 2.1.3 Does the solution support centralized management for administration and maintenance operations? Explain.
- 2.1.4 Describe the scalability and limits of your solution to provide for modular cost-effective growth in both phones and applications over the next seven years.
- 2.1.5 Does the proposed system support E911 compatibility? (Also see 2.10.0 E 911 support)
- 2.1.6 What are some of the key differentiators that make your proposed system unique and suitable for TDSB's requirements today and in the future?
- 2.1.7 Describe the complete set of Application Programming Interface (API) that is available with the system.
- 2.1.8 Does the proposed solution provide a choice of analog, digital, IP desktop and IP soft phones and software interfaces for endpoints, including users, modems, fax machines, conference phones, etc? Please provide a detailed description and cost of each choice posed.
- 2.1.9 Can the system leverage existing BCM investments and offer a future proof IP migration strategy (see Appendix C – TDSB site locations)? If so, explain.
- 2.1.10 Does your solution support VoIP? Is your VoIP solution reliant on any specific manufacturer's switch or router? Please provide details.
- 2.1.11 Can the proposed system support and allow for a smooth transition towards future requirements for Wireless Fidelity (WiFi) and Unified Messaging? Please provide details.
- 2.1.12 Is the operating system robust and relatively immune from internal and external attacks emanating from the IP network? Describe the security features inherent in the system.
- 2.1.13 Provide details of the operating system in the proposed solution. Is it an industry standard operating system? Explain how you proposed to upgrade and maintain the built-in security of the system.
- 2.1.14 Provide a complete list of all Common and Peripheral equipment in the proposed system, indicating version, projected version, and warranty.

2.2.0 Hardware Configuration (M) - Mandatory

- 2.2.1 Provide a brief description of the system hardware.
- 2.2.2 Is the system engineered for non-blocking for voice calls? Explain.
- 2.2.3 What is the maximum number of simultaneous conversations supported by the proposed system? Please provide details.
- 2.2.4 What is the maximum number of analog sets supported by the system?
- 2.2.5 What is the maximum number of IP sets supported by the system?
- 2.2.6 Describe your strategic approach to IP migration and indicate whether it is a phased approach or a forklift upgrade. If it is a phased approach, what will be the impact to the end users (i.e. dial plan, feature transparency etc)?
- 2.2.7 Provide a matrix for each set type proposed, indicating the availability, cost and any limitations of headsets, line cords, wall mount brackets, terminal adapters etc.

2.3.0 PSTN and Legacy Integration Interfaces (M) - Mandatory

- 2.3.1 Identify all supported interfaces for integration with existing or legacy TDM equipment, such as PBX, Key Systems, Octel Voice mail etc.
- 2.3.2 Identify and describe how various analog trunk circuits (GS/LS, DID, E&M Tie Trunk, AUX) are supported by the proposed solution.
- 2.3.3 Identify and describe how various digital trunk circuits (T1, E1, and ISDN PRI) are supported by the proposed solution.
- 2.3.4 Identify supported protocols and PRI services, such as ANI, DNIS, Caller ID Name and Number.

2.4.0 System/Station/User features (M) - Mandatory

- 2.4.1 Complete the table listing the **system features** in Appendix F, indicating their availability and whether they are standard or optional. If optional and additional software licenses are necessary to support the features listed, please provide a separate cost in your pricing. (See Appendix G)
- 2.4.2 Complete the table listing the **station features** in Appendix F, indicating their availability and whether they are standard or optional. If optional and additional software licenses are necessary to support the features listed, please provide a separate cost in your pricing. (See Appendix G)

2.5.0 Systems Capabilities (M) - Mandatory

- 2.5.1 What is the maximum number of lines and trunks that can be supported by the system?
- 2.5.2 What is the total system capacity for analog devices?
- 2.5.3 What is the total system capacity for IP terminal devices?
- 2.5.4 What is the maximum number of trunk groups supported?
- 2.5.5 What is the Busy Hour Call Completion (BHCC) ratings of the proposed solution?

2.6.0 Redundancy (M) - Mandatory

- 2.6.1 What type of power redundancy is included in the base price of the proposed system? Please provide separate and detailed costs (based on 30 minutes, 1 hour, 2 hours and 4 hours) for any redundancy, UPS or battery back-up that is not part of the proposed solution.
- 2.6.2 Will your company provide replacement equipment for lightning damage or power surges?
- 2.6.3 Describe the redundancy, backup capabilities and options available with the proposed system? Provide separate pricing for any optional redundancy and backup capabilities.
- 2.6.4 Identify any critical equipment that could result in a single point of failure on the recommended system? Describe what provisions are in place to provide alternative services in case of power failure.
- 2.6.5 Provide details for system proposed capabilities of power fail transfer, including number of power fail sets supported, any requirements for external bypass equipment, how bypass is enabled and why, and if system can support ground start trunk.

2.7.0 Reliability (M) - Mandatory

- 2.7.1 Voice communications is critical to TDSB's business. Describe how 99.999% availability measurements and performance details are determined? Explain how the proposed system is designed to avoid any single point of failure.
- 2.7.2 What is the Mean Time Between Failure (MTBF) ratings for the proposed hardware? Please provide performance detail for major components or card types but not limited to CPU, memory, line card, station card, disk drives, power supply etc.
- 2.7.3 Explain the reliability features of the operating system for the VoIP platform?
- 2.7.4 What functions or features are lost due to a power outage? How is local survivability achieved? Provide any associated costs.

2.8.0 Scalability (M) - Mandatory

- 2.8.1 TDSB wants to expand any proposed system with minimum disruption and cost. Describe the scalability and limits of your proposed solution in terms of adding users, trunks, analog and IP sets and applications.

2.9.0 Network and Connectivity (M) - Mandatory

- 2.9.1 Describe the ability of your solution to support any type of port circuit interface, both IP and non-IP (PSTN, ISDN etc)
- 2.9.2 What type of analog devices are supported by the system?
- 2.9.3 Describe how analog station equipment is supported by the proposed communications system.
- 2.9.4 Describe how the proposed system will respond to congestion on the network?
- 2.9.5 How is QoS monitored by the proposed system? Can it be programmed to “Fall Back to the PSTN” if congestion is detected? How does this affect a call that is in session?
- 2.9.6 Describe how your system defines class of service and which capabilities are controlled by class of service?

2.10.0 E911 Support (M) - Mandatory

- 2.10.1 TDSB is very safety conscious. Describe how the proposed system will provide onsite notification when a 911 call is placed.
- 2.10.2 How are calls from IP phones and non-DID numbers identified to the Emergency Service Access (ESA)?
- 2.10.3 How is 911 impacted with a digit access code, such as 8 or 9, to dial outside of the system?
- 2.10.4 Briefly describe the system standard capabilities and optional hardware or software requirements necessary to address E911 support.

2.11.0 Employee(s) with Disability (EWD) Support (O) - Optional

- 2.11.1 List all EWD devices that are supported by the proposed system.
- 2.11.2 Describe any third party agreement provided by your company for EWD support.

3.0 Network Evolution (M) - Mandatory

- 3.0.1 TDSB has a large investment in BCM telephony equipment. How does your system inter-work with legacy systems, sets and applications?
- 3.0.2 Would your VoIP strategy allow TDSB to evolve to a VoIP platform at their own pace?
- 3.0.3 Explain how you can protect TDSB's investment.

4.0 System Management (M) - Mandatory

- 4.0.1 Describe in detail the hardware and software tools used to access and perform administrative operations and can they integrate with HP Openview and Orion. What method(s) are available to access the system for administrative functions?
- 4.0.2 Can the system administrator remotely access system configuration from multiple workstations (individually or simultaneously)? How many simultaneous administrative logins are supported by the system? Is there any additional cost to accommodate additional administrative logins?
- 4.0.3 How secure is the system to prevent unauthorized access to the administration application?
- 4.0.4 Describe the required or recommended training for system administrators for the proposed system, including time and costs.
- 4.0.5 TDSB is seeking the control and cost saving advantages of a unified management system. Explain how the administrative tool can provide integrated administration of the systems across all locations.
- 4.0.6 Does the proposed solution provide a single point of management from any point on the network for all components including the PBX, voice mail, auto attendant, ACD and unified messaging system? Please provide details.

5.0 System Maintenance and Upgrades (M) - Mandatory

- 5.0.1 Explain the back-up procedures for the system configuration and how the administrator would reload the data if needed to restore a previous configuration.
- 5.0.2 Does backup include operating system and all configuration information?
- 5.0.3 Is backup capability and application included with proposed system, or is external hardware or software required? Is back-up automatic or manual? Describe how it is accomplished.

- 5.0.4 When system or station software updates are performed, must the system be shut down, or can these types of activities take place in an on-line environment? Indicate how often updates are issued.
- 5.0.5 What components or modules are hot swappable in the proposed system?
- 5.0.6 What is the Mean Time To Repair (MTTR) ratings for the proposed system? MTTR must include from time the technician arrived at the system until the time problem is determined.
- 5.0.7 Describe your company's policy regarding system upgrades, new releases, and enhancements. Please state what is covered under your maintenance and support agreements.
- 5.0.8 Describe your software version release notification process? How many are included free of charge in your proposed solution?

6.0 Voice Mail Specifications (M) - Mandatory

- 6.0.1 Provide an overview of the hardware, software, architecture, and components of the proposed system to meet TDSB's requirements.
- 6.0.2 Can the proposed system interface with other vendors' voice mail system? If so, how can this be accomplished?
- 6.0.3 How many users are supported by the proposed voice mail system?
- 6.0.4 What is the length of the longest message that can be recorded by a user?
- 6.0.5 How many messages can be stored in a subscriber's mailbox?
- 6.0.6 How many classes of service can be defined for voice mail permission levels?
- 6.0.7 Describe how subscribers are notified that they are nearing the maximum recorded time?
- 6.0.8 Is the "Find Me Follow Me" functionality available on the proposed system?
- 6.0.9 Can the system support Enterprise Wide licensing and maintain a single system file for all system rights to use software licenses?
- 6.0.10 Describe and provide a flow chart of the tutorial available for first time subscribers.
- 6.0.11 How many ports would be required to support a TDSB centralized voice mail system? If additional ports are required in the future, how are these added? Explain how the system scales beyond the number of proposed ports. (Refer to Section 2 – Current Environment). Provide any associated costs.
- 6.0.12 Provide details of the system and/or applications proposed, including disk space, expansion capabilities of system and actual capacity of the system ports and storage for proposed system.
- 6.0.13 Define your licensing policy including incremental increases and cost of additional licenses.

- 6.0.14 Describe the upgrades, migration tools and process required for integration between the proposed Voice Mail Systems to a Unified Messaging platform.
- 6.0.15 Does the voice mail system provide an interface to deliver desktop email applications to provide unified messaging? Describe the process.
- 6.0.16 Provide a detailed description of the Unified Messaging solution including product specifications and features. Provide detail costs in Appendix G.
- 6.0.17 Does the proposed system include unified messaging with email solutions such as Microsoft 2007 and multi-system voice mail networking using AMIS or SMDI? Provide detailed costs for all the components required.

6.1. Voice Mail System – System Features (M) - Mandatory

- 6.1.1 Describe the architecture of the voice mail solution, including how voice mail is accessed from the user extension, remotely and from their desktop computer.
- 6.1.2 Does the system support sending and receiving messages from existing or legacy voice mail systems? Explain the integration process.
- 6.1.3 If a caller does not know a particular subscriber's extension number, can they "look up" the subscriber by "spelling" the name via touchtone input? Explain how the system would resolve the situation where one name has multiple entries (e.g., "Jones")
- 6.1.4 Does the voice mail system support a "zero out" to the attendant feature? Can the "zero out" destination be a station rather than the attendant? If the "zero out" destination is busy, or rings unanswered, will the call be re-directed?
- 6.1.5 Can the user send a "reply to all" message to the recipients of the original message?
- 6.1.6 Does the voice mail system support multiple greetings? If so, describe available greetings.
- 6.1.7 Does the system support automatic remote notification and delivery of voice mail messages to users?

6.2 Voice Mail System – User/Station Features (M) – Mandatory

- 6.2.1 Complete the table, in Appendix F, listing the Voice Mail features indicating their availability and whether they are standard or optional. If optional and additional software licenses are necessary to support the features listed, please provide a separate cost in your pricing. (see Appendix G)

6.3 Voice Mail System – System Administration (M) - Mandatory

- 6.3.1 Describe the system administration tool(s) available to provide integrated administration of the system across all locations.
- 6.3.2 Describe how the system administrator is able to perform the following actions:
 - 1) Add, change or delete a class of service. State what user permissions or characteristics within a class of service can be created or modified.
 - 2) Add, change or delete a user's voice mailbox.
 - 3) Set the maximum length of voice messages.
 - 4) Explain how the system administrator would perform a backup and restore on the voice mail system.
- 6.3.3 How is security provided to prevent unauthorized access to the administration application? Describe the different security access levels.
- 6.3.4 Does the system log all of the administrator's actions? Please provide a sample log.

6.4 Auto-Attendant Services (M) - Mandatory

- 6.4.1 Describe the standard Automated Attendant offering proposed, as part of the integrated platform. Provide details on capabilities of the automated attendant to support the following functionalities?
 - 1) Dial by name and number
 - 2) Call Distribution to attendants
 - 3) Night Service
 - 4) Message Waiting
 - 5) Through Dialling
 - 6) Multi-lingual support
 - 7) Multiple-greetings support based on ANI/DNIS and Time-of-Day/Schedule
 - 8) Directory Assistance for locating users by name or listing all extensions
 - 9) Nesting: Sub-level menus to direct callers to a specific department or information
 - 10) Function as an information desk and can offer answers to commonly asked questions through information only or message only mailboxes
- 6.4.2 Does the proposed system support a desktop console instrument or PC client soft console or both?
- 6.4.3 Can the system import professional recordings of announcements? Where would these files be stored?
- 6.4.4 Can the console operator work remotely, using a PC soft console application?

- 6.4.5 What is the maximum number of unique announcements allowed by the system?
- 6.4.6 Can announcements or menu updates be uploaded from a central site?

6.5 IVR Requirements, Features and Capabilities (M) - Mandatory

- 6.5.1 Is the IVR functionality available with the proposed system? If so, provide a detailed description of the IVR solution and the hardware and software required.
- 6.5.2 Describe your support for integration with ICE (See Appendix I – ICE IVR Requirements for Integration with PBX) and open source database.

6.6 Public Address System (M) - Mandatory

- 6.6.1 Does the telephone system have an interface that is capable of connecting to a standard paging system, using an analogue trunk or analogue extension interface?
- 6.6.2 Describe how the telephone system can be connected to the paging system?
- 6.6.3 Can zone paging in the PA system be accessed through the phone system? Please describe the process.
- 6.6.4 Can group paging in the PA system be accessed through the phone system? Please describe the process.

6.7 CDR System (M) – Mandatory

- 6.7.1 Describe the basic CDR offering proposed, as part of the base price. Provide detailed and separate costs for a centralized CDR system, hardware and software, in your pricing.
- 6.7.2 Does the CDR system have the ability to retrieve files on demand?
- 6.7.3 Can the system report on the following:
 - a) Incoming and outgoing calls
 - b) Outgoing calls only
 - c) Customer defined prefix calls only (long distance calls)
 - d) Calls based on account codes
- 6.7.4 What type of standard reports does the system offer?
- 6.7.5 How are these reports displayed and in what format? Please provide samples.
- 6.7.6 Does the proposed system have the ability to extract data for use with other database and spreadsheet applications? How easy is this accomplished? Please describe the process.
- 6.7.7 Does the CDR system have the ability to send CDR data files to a central server on a pre-defined schedule?

6.8 ACD - Automatic Call Distribution (M) - Mandatory

- 6.8.1 Describe the standard ACD offerings proposed for basic call centre requirements. Can the communication system support fully integrated generic software ACD features and functions? Identify and list all feature and function capabilities that are not included in the standard offering.
- 6.8.2 How many ACD agents does the system support?
- 6.8.3 How many ACD groups does the system support?
- 6.8.4 Does the system hunt in a circular, top down or in a most idle agent manner?
- 6.8.5 Identify any feature or specified parameter requirements not currently supported.

7.0 Migration and Project Management (M) - Mandatory

- 7.0.1 Provide a detailed plan for installation, starting from date ordered and include everything from signing of documents to final cut over.
- 7.0.2 It is essential that the installation of the new system be as transparent as possible to the end users. Work must be coordinated with the affected sites to ensure minimum disturbance to the working environment, no interim changes in dialling procedures and no perceived degradation in the quality of service.
- 7.0.3 Provide a project schedule with a work responsibility matrix, identifying the tasks the vendor will perform and the tasks TDSB is expected to perform to successfully implement the new system. Please provide anticipated timelines for the completion of each task.
- 7.0.4 Acceptance testing must be structured and well documented to meet TDSB's requirements. Provide a test plan based on the criteria outlined in the RFP.
- 7.0.5 Provide details of (2) two large scale implementations (minimum 200 locations), encompassing all facets of the project, that your company has performed from design phase through to successful delivery to the client.
- 7.0.6 Provide references to support the (2) two large scale implementations
- 7.0.7 All equipment must conform to industry standards outlined in the Canadian Department of Communications document CS-03 and CSA.
- 7.0.8 The selected bidder is responsible for the engineering of the new telecommunications system and all interconnecting facilities based on the RFP.

- 7.0.9 The selected bidder will perform station reviews, preparation, and original program initializations.

8.0 Vendor Experience and Management (M) - Mandatory

- 8.0.1 TDSB wants a partnership with an established vendor. What is your PBX and VoIP market share of the proposed solution?
- 8.0.2 Provide examples of your company's experience in building and supporting Telephony and VoIP solutions over 200 sites.
- 8.0.3 State the level of Value Added Reseller (VAR) relationship your company has attained with the manufacturer of the proposed solution.
- 8.0.4 Provide documentation to support your status and level of relationship as an authorized reseller?
- 8.0.5 Confirm your support infrastructure to provide 7/24/365 maintenance and support to TDSB sites as per Appendix C – TDSB Site Locations.
- 8.0.6 Describe how you would notify TDSB of promotions that can reduce costs and improve efficiency?
- 8.0.7 Provide examples and describe any such promotions available to your company that can be passed directly to TDSB.
- 8.0.8 Describe any factory services or programs available to your organization that can be passed on directly from manufacturer to TDSB.
- 8.0.9 Does your company provide any end of life product information that would be made available to TDSB? If so, provide examples.
- 8.0.10 How many full time permanent staff are local and available to TDSB (refer to Appendix C – TDSB Site Locations)? List their names, credentials, duties, responsibilities and number of years in the industry.

9.0 Service Level Agreement - Vendor Services - Maintenance and Warranty (M) - Mandatory

- 9.0.1 Describe any preventive maintenance alarm software that your company may employ to minimize the threat of system failure at TDSB.
- 9.0.2 The telephone system and all associated equipment in your proposal must be warranted by your company and by the manufacturer to be free of defects in equipment, software, and workmanship for at least one year following system cutover.
- 9.0.3 During the warranty period and any subsequent maintenance agreement, any defective components shall be repaired with new product at no cost to TDSB.

- 9.0.4 All system maintenance during the warranty period and under any maintenance agreements shall be performed by your company and at no additional cost to TDSB other than charges stipulated to maintain the warranty.
- 9.0.5 Bidders must include with their proposal in Appendix G of the RFP document, the cost of one (1), two (2) and three (3) year warranty after the initial warranty period, to support the business between 8am and 5pm, Monday through Friday.
- 9.0.6 Describe your direct service organization and escalation procedures. The escalation procedure must identify who should be contacted, the order the contact should occur and additional resource(s) at each escalation stage.
- 9.0.7 Discuss your proactive capabilities for remote monitoring, diagnostics, and repair and your ability to quickly and accurately identify and resolve reported troubles remotely.
- 9.0.8 Describe your company's ability to provide a single point of accountability including trouble reporting and technical support.
- 9.0.9 TDSB requires a two (2) business hour on-site response time for a major outage. Can you meet this commitment?
- 9.0.10 Can your company guarantee TDSB a response time of no more than two (2) hours for all major system problems and a maximum of four (4) hours response to other system problems?
- 9.0.11 Provide an outline of your company management account structure that would be in place to support TDSB, include resumes of the proposed account and technical teams.
- 9.0.12 Describe how your services would add value to the proposed solutions.
- 9.0.13 Provide a copy of your site log. Copy of site log must be available at all times for TDSB representative at each location.
- 9.0.14 Describe in detail your Centralized Ticketing System. Would TDSB have access to view on line, the status of outstanding tickets and MAC orders?

9.1 Logistical Support (M) – Mandatory

- 9.1.1 Briefly describe local technical, maintenance and repair support facilities, including dispatch and technician support tools.
- 9.1.2 Provide a list of any other support levels in the local area available to TDSB for the maintenance of the proposed system(s).
- 9.1.3 Does your organization have a dedicated helpdesk to field technical questions? Is this service available 7/24/365 and is it answered by a live agent?
- 9.1.4 Does the manufacturer support a users group? Describe the relationship of your company with the users' group?
- 9.1.5 Describe your access to the manufacturer's support and technical resources available to your company.

- 9.1.6 Would TDSB's be allowed access to the manufacturer's support and technical resources, if any?
- 9.1.7 Describe your organization's professional service capabilities for systems design, integration, and applications implementation that will be available to TDSB.
- 9.1.8 State the service technician coverage relating to Appendix C – TDSB site locations.
- 9.1.9 On an ongoing basis, do you employ a third party independent research group to monitor categories such as technology, customer service, product features, ease of installation and performance? If so, provide a service level verification report.
- 9.1.10 Can your helpdesk ticketing software integrate with Remedy? Describe what is required for the integration?

9.2 Repair Response and MAC (M) - Mandatory

- 9.2.1 Describe your company's repair commitment from time of trouble discovery through to time the trouble is cleared.
- 9.2.2 Describe your company's definitions of major and minor failures, response and service restoration time and emergency services.
- 9.2.3 How long will it take your company for full replacement of the central operating hardware or software of the system, if a major disaster destroys the call processing components of the system? Provide a replacement schedule.
- 9.2.4 Describe your penalty system for not meeting the Service Level Agreement (SLA).
- 9.2.5 List the system devices that constitute a Major move, add or change (MAC) such as cards, circuit packs etc.
- 9.2.6 Describe all operation, maintenance, change and reporting that constitute a Minor move, add or change (MAC) such as COS, system and set feature etc.

9.3 Training (M) – Mandatory

- 9.3.1 Provide a detailed outline and description of the training process for end users and system administrators.
- 9.3.2 The successful bidder must provide at no cost to TDSB a training course for **up to five (5)** designated persons on how to effect software moves and changes to the proposed system. Identify and specify the levels of access to the systems for the system administrators.
- 9.3.3 If additional training is required, does your company offer it and what would be the associated cost?
- 9.3.4 Are there any additional assistance options available, such as consulting services, customized report design, or any other customization that might be required by our specifications?
- 9.3.5 List any additional options available, such as consulting services, customized reports design, or any other application that would enhance TDSB's requirements?
- 9.3.6 Explain the administration security authentication features of your system administration solution.
- 9.3.7 Provide details of how voice communications are encrypted to prevent access, and include recommendations to protect the security of the system on an ongoing basis.
- 9.3.8 Identify and specify the levels of access available to the systems for the system administrators.
- 9.3.9 Identify what, if any, levels of access are not available to the system administrators.
- 9.3.10 System administrators must be able to participate in hands on configuration, design, implementation and roll out activities.

10.0 Billing

- 10.0.1 How flexible is your billing model?
 - a) Do you have the resources to customize reports to meet TDSB's billing requirements?
 - b) Can your billing system integrate with SAP?
 - c) TDSB designed a billing format to integrate with the SAP billing module. Would your billing system be able to provide a billing format identical to the information provided in Appendix J – TDSB Billing Format?
 - d) What detailed information is provided in your billing report? Provide sample copy.

11.0 Pricing (M) - Mandatory

- 11.0.1 Pricing must be based on all products and services that are required to meet TDSB's objectives as outlined in the RFP.
- 11.0.2 All available discounts, buy back allowances and other price affecting factors must be detailed.
- 11.0.3 Complete all sections of the RFP template labelled "RFP Appendix G"
- 11.0.4 Provide your proposal discount rate percentage on all future equipment purchases for 1, 2 and 3 years. Does your discount pricing change if delivery time frames are changed?
- 11.0.5 Provide a labour rate schedule showing service, maintenance, time and material rates.

12.0 Alternate Solution (O) - Optional

- 12.0.1 Vendors are encouraged to be creative and provide an alternate solution that is cost effective and meets TDSB's present and future needs. Also see Section 6 – Substitutions.
- 12.0.2 The board is very conscious of energy consumption of their business tools, including Communications systems. Bidders are requested to factor in the "green" footprint as well as the features and functionality of a unified communications system.
- 12.0.3 TDSB welcomes any and all suggestions in terms of creative financing encompassing any part of or the entire project in scope.

APPENDIX B: DEFINITIONS AND ABBREVIATIONS

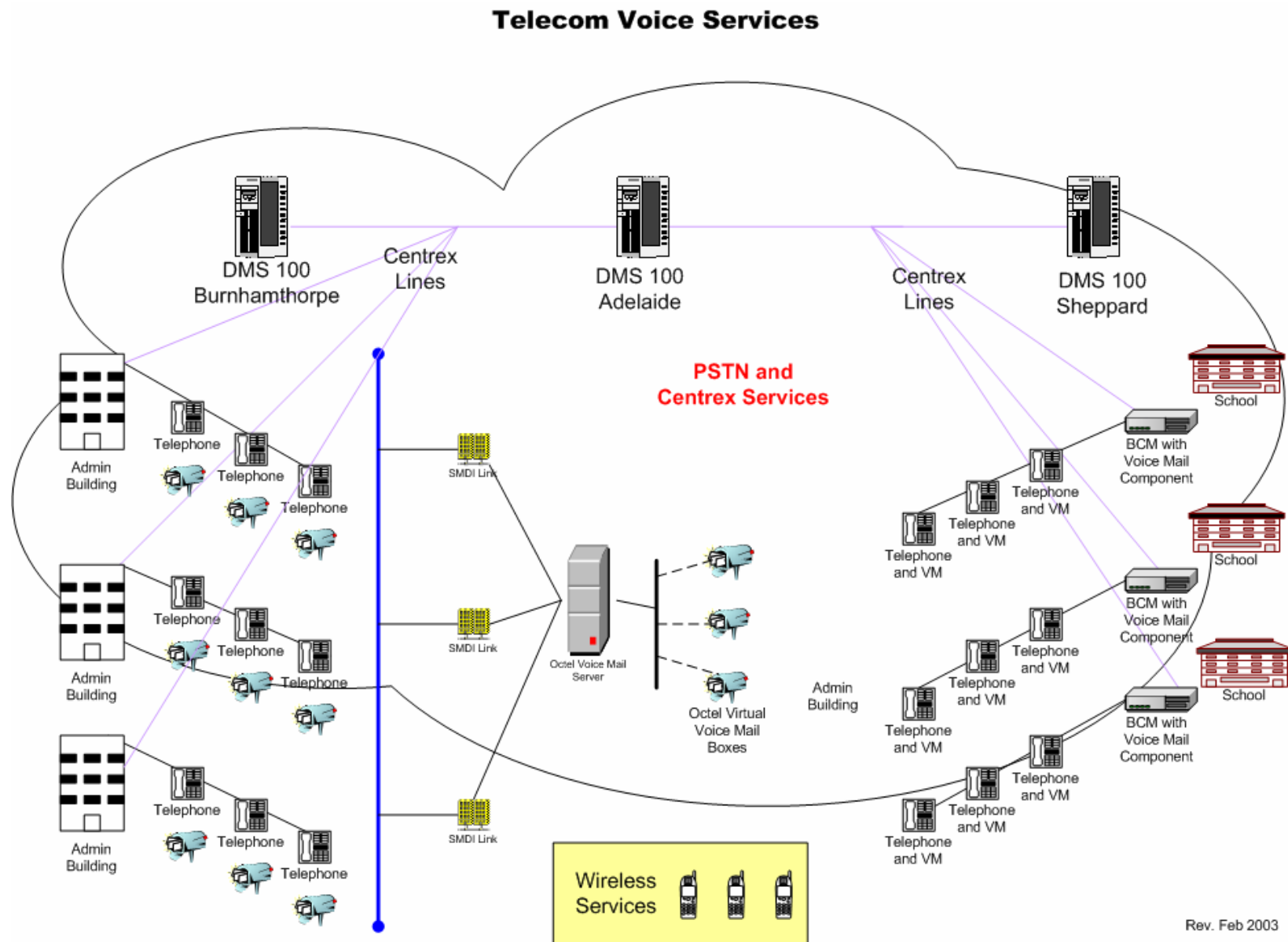
Following is a list of Definitions, Abbreviations and Terms. Not all apply to this RFP

ACD	Automatic Call Distribution
ANI	Automatic Numbering Identification
BCM	Business Communication Manager
BOARD	Toronto District School Board
BRI	Basic Rate Interface
CALLER ID	Caller ID feature displays calling party information
CDR	Call Detail Recording - feature to record information on incoming, outgoing, and tandem calls for each trunk group that you administer for CDR, including auxiliary trunks.
CO	Central Office - A central office is a telephone company building in which network equipment such as switches are installed.
COR	Class of restriction - Define different levels of call origination and termination privileges
COS	Class of Service - COS feature to allow or deny user access to some system features
CENTREX	Switching service for business customers that permits station-to-station dialling, listed directory number service.
DMS	Nortel Digital Communication Switch used at the Central Office
DNIS	Dialled Number Identification Service
DRP	Disaster Recovery Plan
E911	Enhanced 911 – Emergency assistance
FAC	Feature Access Code - provide users with quick access to certain features of the Telephone system
ISDN	Integrated Services Digital Network (ISDN) Service feature to provide a Message-oriented signalling method that allows information to be sent along with a call
IVR	Interactive Voice Response
MPLS	Multi Protocol Labelling System
OCTEL	Avaya Voice Messaging Server
ORION	Ontario Research and Innovation Optical Network
PA	Public Address System
PRI	Primary Rate Interface
PSTN	Public Switched Telephone Network
QoS	Quality of Services
TDSB	Toronto District School Board
VoIP	Voice Over IP

APPENDIX C: TDSB SITE LOCATIONS

Please see attached excel file

APPENDIX D: OVERVIEW OF CURRENT TDSB VOICE SERVICES



APPENDIX E: Summary of Central Office Switches and Line Count by Region

APPENDIX E: SUMMARY OF CENTRAL OFFICE SWITCHES AND LINE COUNT BY REGION

DMS	NXX	AREA	ADMIN	SCHOOLS	TOTAL	%
Burnhamthorpe	394	West	745	893	1638	21
Adelaide	393	South	261	1182	1443	53
	395	North	701	1091	1792	
	397	North	342	72	414	
	338	Agents - Steeles to Lakeshore	388	0	388	
Sheppard	396	East	672	1355	2027	26
Total			3109	4593	7702	100

APPENDIX F: Features

Complete the "Compliant" Column of the table above, indicating whether the feature offer (Y) or not offer (N). Indicate if the system feature is Standard (S) or Optional (O)

SYSTEM FEATURES

System Features	Compliant (Y/N)	Standard (S) or Optional (O)
Abbreviated Rings		
Authorization Codes		
Autodials Buttons		
Automated Attendant		
Automatic Call Distribution		
Automatic Line Selection		
Automatic Route Selection		
Blocked Calls based on NNX (976)		
Blocked Calls based on NPA(900)		
Busy /Direct Station Select		
Busy Indicator Lamp		
Call Back Ring Again		
Call Coverage		
Call Detail Recording		
Call Detail Recording Output		
Call Forward No Answer		
Call Hold		
Call Park		
Call Pick up Group		
Call Privacy		
Call Queuing		
Call Restrictions/COS		
Call Routing		
Caller ID		
Camp On		
Centralized Attendant Service		
Class of Service Restriction		
Conference Calling (# parties)		
Coordinated Dialling Plan		
Console Queuing		
Date and Time Display		

System Features	Compliant (Y/N)	Standard (S) or Optional (O)
Direct Inward Dialling		
Direct Inward System Access		
Display Telephones		
Do Not Disturb		
DTMF		
E-911 Service Support		
Facility Restriction Levels		
Feature Access Codes		
Hunt Groups		
Idle Line Preference		
Intercom Capabilities		
Last number Dialed		
Least Class Routing		
Meet Me Conferencing		
Microphone Disabled		
Music On Hold		
Night Service		
Off-Premises Station		
Paging Interface		
Phantom Extension		
Power Fail Transfer Station		
Restriction Features (trunk)		
Ringing Options by Line		
Ringing Options by Stations		
Security Violation notification		
Silent Suppression		
Simultaneous Ringing		
Speed Dial List		
System Features		
System Status Features		
Three Way Calling		
Time of Day Routing		
Toll Restrictions		
Transfer Calls		
Uniform Call Distribution		
Uniform Call Distribution		
Uniform Dial Plan		
Visual Message Waiting Notification		
Voice Message System Interface		
Volume Control		

Station Features	Compliant (Y/N)	Standard (S) or Optional (O)
Abbreviated Dial		
ANI/DNIS/CLID Call Programming		
Automatic Callback		
Bridged Shared Line Appearance		
Call Coverage (Programmed)		
Call Display		
Call Forwarding (All Calls)		
Call Forwarding (Follow Me)		
Call Hold		
Call Park		
Call Pickup		
Call Transfer		
Call Waiting		
Callback Last Internal Caller		
Camp-on		
Conference		
Consultation Hold		
Dial By Name		
Discrete Call Observing		
Display		
Distinctive Ringing		
Do Not Disturb		
Handset Volume Adjustment		
Hands-Free Answer Intercom		
Hands-Free Dialling		
Headset Button		
Hunt Groups		
Incoming Call Display		
Internal Caller ID Programming		
Last Number Redialled		
Loudspeaker Paging Access		
Malicious Call Trace		
Meet-Me Conferencing		
Message Waiting Activation		

Station Features	Compliant (Y/N)	Standard (S) or Optional (O)
Paging/Code Call Access		
Personal CO Line (Private Line)		
Personal Ringing		
Personal Speed Dialling		
Pickup Groups		
Priority Calling		
Speed Dialling		
Supervisor/Assistant Calling		
Voice Messaging Retrieval Button		

Voice Mail Features	Compliant (Y/N)	Standard (S) or Optional (O)
Capture and retrieve CLID and Call name display		
Create, edit and modify their own distribution lists		
Forward messages to other users with comments		
Future delivery of messages		
Guest boxes		
Identify message as urgent		
Listen/edit message prior to sending		
Manage voice mail from inside their email boxes		
Manage voice mail from their personal computers		
Message indication lamp		
Modify their own passwords		
Outcalling		
Personal greetings options		
Play, pause and replay messages		
Recall messages marked for deletion prior to sign off		
Record messages, send/mark urgent		
Record more than five (5) personal greetings		
Record responses/reply to voice mail		
Remote access		
Set business days and hours for alternate greeting		
System distribution lists		
Users instructions through system prompt		
Standard voice mail functionality available		

APPENDIX G: Pricing
TELEPHONY EQUIPMENT COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEM	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	TOTAL COST

NB: List all Telephony Equipment costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

STATION EQUIPMENT COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEM	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	TOTAL COST

NB: List all Station Equipment costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

APPLICATIONS COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEMS	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	PROFESSIONAL SERVICES	TOTAL COST

NB: List all Application Equipment costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

TRAINING COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEMS	TRAINING MATERIALS	TRAINING SESSIONS	OTHER COSTS	TOTAL COSTS

NB: List all Training costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

SYSTEM MANAGEMENT COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEMS	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	TOTAL COST

NB: List all System Management costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

OTHER COSTS

Prices Firm for Contract Period? (Y/N) <i>(See Section 5 Pricing Instructions)</i>	
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ITEMS	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	TOTAL COST

NB: List all System Management costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

SUMMARY OF COSTS

ITEMS	HARDWARE COST	SOFTWARE COST	INSTALLATION COST	PROFESSIONAL SERVICES	TOTAL COSTS	PRICES FIRM (Y/N)
Telephony Equipment						
Station Equipment						
Applications						
Training						
System Management						
Other Costs						
Total Costs						

NB: List all Summary costs required to deliver a working telecommunications system in accordance with this specification. If this table does not provide enough flexibility you may copy the column headers exactly as shown here and attach a cost spreadsheet or include notes providing further explanation on portions of the costs.

APPENDIX H: Bidder's Compliance Table

SECTION	TITLE	TYPE	COMPLY Y/N	PAGE #
2.1.0	System Architecture	M		
2.2.0	Hardware Configuration	M		
2.3.0	PSTN Legacy & Integration Interfaces	M		
2.4.0	System/Station Features	M		
2.5.0	System Capacities	M		
2.6.0	Redundancy	M		
2.7.0	Reliability	M		
2.8.0	Scalability	M		
2.9.0	Network Connectivity	M		
2.10.0	E-911 Support	M		
2.11.0	EWD	O		
3.0.	Network Evolution	M		
4.0.	System Management	M		
5.0.	System Maintenance & Upgrade	M		
6.0.	Voice Mail (VM) Specifications	M		
6.1.1	VM System Features	M		
6.2.1	VM System Users	M		
6.3.1	VM System Administration	M		
SECTION	TITLE	TYPE	COMPLY	PAGE

			Y/N	#
6.4.0	Auto-Attendant	M		
6.5.0	IVR Requirements	M		
6.6.0	PA System	M		
6.7.0	CDR System	M		
6.8.0	ACD System	M		
7.0.	Implementation	M		
8.0.	Installation Requirements	M		
9.0.	Vendors Experience & Management	M		
10.0.	Maintenance & Warranty	M		
10.1	Logistic Support	M		
10.2	Repair Response	M		
10.3	Training	M		
11.0.	Pricing	M		
12.0.	Alternate Solution	O		

APPENDIX I: ICE IVR REQUIREMENTS FOR INTEGRATION WITH PBX

Trunk Side PRI

- i. Every span configured between the ice³ server and the PBX will consist of 23 B channels and 1 D channel.
- ii. Determine a unique access code on the PBX for dialling from the PBX to ice³.
- iii. The ice³ server will need to receive a 4 digit DNIS from the PBX.
- iv. When using the PBX for redundancy ESN can route all calls meant for the ice³ trunk group to a second choice on failure. Suggested routing is to a back-up ACD queue number on the PBX.
- v. For installation, one straight through cat-5 cable that terminate in RJ-45 at both ends will need to be run from where the PBX trunk cables are installed (terminated in DB15 male) to the ice³ server.
- vi. The ice³ server will be shipped with a DB15 female to RJ-45 jack adapters for each span.

APPENDIX J: TDSB BILLING FORMAT

Please see attached excel file