ISABELLA COUNTY REQUEST FOR PROPOSALS



COMMISSION ON AGING PBX SYSTEM

ISSUED BY ISABELLA COUNTY BOARD OF COMMISSIONERS

ISSUE DATE: February 4, 2008



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ISABELLA COUNTY REQUEST FOR PROPOSALS COMMISSION ON AGING PBX SYSTEM

Isabella County is accepting proposals from experienced and knowledgeable agencies for acquisition of a new Private Branch Exchange (PBX) and Voice Mail System for the Isabella County Commission on Aging.

I. INTRODUCTION

1.1 Purpose

Isabella County, hereafter called "County," initiated this Request for Proposals (RFP) to solicit proposals from individuals and firms interested in providing Commission on Aging PBX system in a newly-constructed county-owned facility. The selected firm will be expected to provide such services in a manner responsive to the needs of the County.

1.2 Background

Isabella County is in the process of constructing a new building to house administrative offices and activity rooms for the Commission on Aging. This new facility, located at 2200 S. Lincoln Road, is scheduled to be occupied on June 1, 2008. Building plans will be provided by Isabella County upon request.

1.3 Objective

This document is the Request For Proposal (RFP) for the procurement of a PBX and Voice Mail system to support the new Isabella County Commission of Aging facility. The dial tone interface to the PBX will be via Primary Rate Interface (PRI) and will need to support a minimum of 41 Phone Sets. This document will outline the systems detail minimum and growth requirements for both systems to include installation and training requirements.

1.4 Minimum Qualifications

Proposals will only be considered from communications contractors who can prove they have the following qualifications.

- 1. Are licensed to do business in the State of Michigan.
- 2. At least five years of experience in the furnishing and installation of PBX systems devices comparable to that specified.
- 3. Contractor must have a programmer on staff. No out-sourcing will be allowed on this project. System must be programmed in office by said system programmer. Provide certificate along with submittals.
- 4. The PBX contractor shall employ competent electronic technicians who are trained and knowledgeable in the area of PBX Systems.

Firms that do not meet these minimum qualifications shall be deemed non-responsive and will not receive further consideration.

1.5 Funding

Any contract awarded as a result of this procurement is contingent upon the availability of funding, as determined by the Board of Commissioners.

1.6 Period of Performance

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about February 20, 2008 and conclude not later than May 1, 2008.

II. GENERAL INFORMATION FOR BIDDERS

2.1 Project Administrator

The Project Administrator is the sole point of contact for this procurement. All communication between prospective bidders and the County upon receipt of this RFP shall be with the Project Administrator, as follows:

Timothy J. Dolehanty, AICP Isabella County Administrator / Controller 200 N. Main Street Mount Pleasant, MI 48858

Telephone: (989) 772-0911, ext. 202

Facsimile: (989) 773-7431

E-mail: tdolehanty@isabellacounty.org

Prospective bidders are to rely on written statements issued by the Project Administrator. Any other communication will be considered unofficial and non-binding on the County. Communication directed to parties other than the Project Administrator may result in disqualification of the prospective bidder.

2.2 Estimated Schedule of Procurement Activities

Issue request for proposals	February 4, 2008
Last date for questions regarding the RFP	February 14, 2008
Response to questions issued	February 15, 2008
Proposals due	February 19, 2008 - 11:00 a.m.
Isabella County staff evaluates proposals	February 19 - 25, 2008
Building Committee approves contract	February 26, 2008
Begin contract work	February 27, 2008

2.3 Submission of Proposals

Proposals submitted in response to the RFP must include original signatures. The proposal, whether mailed or hand delivered, must arrive at the County Administration Office no later than 11:00 a.m., local time, on Tuesday, February 19, 2008.

Proposals are to be sent to the Project Administrator at the address shown in Section 2.1. The envelope should be clearly marked "COMMISSION ON AGING PBX SYSTEM" and addressed to the attention of the Project Administrator.

Bidders who mail proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the Project Administrator. <u>Bidders assume the risk for the method of delivery chosen</u>. The County assumes no responsibility for delays caused by any delivery service. Proposals may not be transmitted using electronic media such as facsimile transmission.

Late proposals will not be accepted and will be automatically disqualified from further consideration. All proposals and any accompanying documentation become the property of Isabella County and will not be returned.

2.4 Proprietary Information and Public Disclosure

Materials submitted in response to this competitive procurement shall become the property of Isabella County. All proposals received shall remain confidential until the deadline for submission of bids or proposals has expired, as defined by Michigan statute (MCL 15.243(i), the Freedom of Information Act).

2.5 Revisions to the RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be reduced to writing and submitted to all prospective bidders known to the County. For this purpose, the published questions and answers and any other pertinent information will be considered an addendum to the RFP and will be provided to prospective bidders.

The County reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

2.6 Acceptance Period

Proposals must provide 60 days for acceptance by County from the due date for receipt of proposals.

2.7 <u>Responsiveness</u>

All proposals will be reviewed by the Project Administrator to determine compliance with administrative requirements and instructions specified in this RFP. Failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive. The County also reserves the right, at its sole discretion, to waive minor administrative irregularities.

2.8 Most Favorable Terms

The County reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the bidder can propose. There will be no best and final offer

procedure. The County does reserve the right to contact a bidder for clarification of its proposal.

Bidders should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or the bidder's entire proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to the County.

2.9 Costs of Proposal

The County will not be liable for any costs incurred by the bidder in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

2.10 No Obligation Contract

This RFP does not obligate the Isabella County Board of Commissioners to contract for services specified herein.

2.11 Rejection of Proposals

The County reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

2.12 Failure to Comply

The bidder is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

2.13 Commitment of Funds

The Board of Commissioners or its delegate are the only individuals who may legally commit the County to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

2.14 Signatures

The Letter of Submittal and the Certifications and Assurances form must be signed and dated by a person authorized to legally bind the bidder to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship.

III. STATEMENT OF WORK AND EQUIPMENT SPECIFICATIONS

3.1 **Equipment Specifications**

Equipment described and furnished under these specifications shall be the standard product of one manufacturer. All equipment items identified by model number, type, or brand name establish the quality, function, and performance required of the specific equipment. The PBX system contractor shall furnish all the equipment, accessories and necessary material for a complete system as indicated on the drawings and described hereinafter. Definitions used in this section shall have meanings as follows:

Port/Mod: List the number of ports or devices supported by a module/blade or

card.

Equip: Number of ports accommodated with full operation at initial

configuration.

Wired: Number of ports to which the system can be expanded simply by

adding modules/blades or cards to the common equipment.

Max: Number of ports to which the system can be ultimately expanded

by adding common equipment.

1. PBX System Port/Mode Equipped

- a. Digital Stations Ports
- b. Analog Stations Ports
- c. Soft Station Ports
- d. Attendant DSS set
- e. CO Trunks (GS/LS)
- f. T1/DS1 Trunks
- g. PRI Trunks
- h. Station Requirements MIN & MAX
- i. E911 Service Capability
- i. Caller ID for supporting on digital trunks

2. Telephone Model, Quantity, and Narrative.

- a. The designed systems shall consist of 41 telephones at time of installation as follows:
 - i. Office style (32)
 - 1. 2 line office phones should have LCD read outs and have speakerphone capabilities
 - 2. Voicemail access and light indicator on phone
 - 3. Business Phone with 1 x 24 char display, min 15 flexible keys and min 5 fixed function keys
 - ii. Wall style (4)
 - 1. Basic style phone for either wall mount
 - 2. Outgoing calls with long distance codes

- 3. Voicemail access and light indicator on phone
- 4. Speakerphone (Bid as Alternate)
- iii. Operator Console Style (5)
 - 1. Desk style phone
 - 2. Outgoing calls with long distance codes
 - 3. Voicemail access and light indicator on phone
 - 4. Attendant DSS/BLF Console with min 50 flexible keys and fixed keys to address release.
- b. Each proposal must include a narrative that describes the following items. Proposals shall indicate compliance to the features required in this RFP through completion of the table provided in Exhibit C.
 - i. Provide an overview of the proposed PBX solution and reference how this converged voice solution will meet the Commission of Aging needs.
 - ii. Define specifically how the proposed solution complies and addresses each of the following requirements.
 - iii. Describe how the proposed system can be expanded without replacing or radically changing the initially purchased equipment.
 - iv. Describe how the system accommodates and supports the E911 application.
 - v. Describe how the system accommodates multiple hunt groups.
 - vi. Describe how the system supports optional redundant power.
 - vii. Describe how the solution allows for unified messaging by merging email and voice mail functions to be accessed from either a telephone set or a computer if applicable.
 - viii. Describe the PBX's ability to route calls and voice mail message alerts outside the system to home phones, cell phones and other devices.

3. Voice Mail System Basic Requirements.

- a. The designed systems shall consist of the following:
 - i. Voicemail for 12 port/100 hours
 - 1. Optional prices for 2 port or 4 port up to 24 port increments

- ii. Voicemail to email accessibility (Bid as Alternate)
- iii. Automated message system with menu options for auto call transfers
- iv. Installation and initial programming as a turn/key solution
- v. Training
- vi. System Administrator(s)
- vii. Primary Users
- viii. Training for new users each year
- ix. All necessary infrastructure components required for the above detail PBX system excluding station wiring provided by others. Tail out PBX and system to 110 blocks, cross connect to customer provided 110 blocks and terminated at remote end to be included as part of this bid.
- b. Each proposal must include a narrative that describes the following. Proposals shall indicate compliance to the features required in this RFP through completion of the table provided in Exhibit D.
 - i. Describe how internal staff can maintain and support system users.
 - ii. Is a simple GUI interface available for system administration?
 - iii. Identify what levels of training are necessary to perform these functions and what the costs of that training might be.
 - iv. Describe what controls and abilities users have that enable them to make changes to their stations without the need of a trained technician.
 - v. Describe how the system may be upgraded without having to change the hardware.
 - vi. Discuss what system or administrative changes can be made to the system without disrupting ongoing user functions.
 - vii. Describe how an audit trail is generated to track system management changes.
 - viii. Training for new users is an important issue for Isabella County.

- ix. Discuss how a new user will get functioning quickly and with a limited amount of Isabella County technical support.
- x. Describe self-help screens, initial voice mail setup functions, GUI user desktop option management, etc.

4. General Narrative.

Each proposal must include a narrative that describes the following.

- a. Discuss the manufacturer's history of system software revisions to installed systems.
- b. Since its first software version, how many revisions have been released?
- c. What is the policy for upgrading existing systems to the newest level of software?
- d. What are the charges from the manufacturer for these software upgrades?
- e. How many years of hardware warranty does the manufacturer offer?
- f. Discuss how the scalability of this solution will enable Isabella County to purchase only what it needs when it needs it, yet be able to grow and add functionality at a reasonable cost.

3.2 Tests and Adjustments

- 1. The PBX contractor shall perform all tests and adjustments required to obtain the specified performance.
- 2. The tests and adjustments shall be performed only after all equipment is installed and in its proper location.

3.3 Equipment Inventory and Drawings

A complete list of the major equipment to be used in this system shall be submitted to the owner's representative for approval. In addition, shop drawings of the following shall be submitted:

- 1. A block drawing that shows the functional relations of all portions of the system.
- 2. Rack layouts showing equipment locations.
- 3. Cable pulling diagrams for all cable specified.

Manufacturer's data sheets for each major component of the system shall be submitted.

3.4 <u>Warranties and Manuals</u>

Upon completion of PBX system installation and before final acceptance by the owner or owner's representative, the PBX contractor shall furnish two copies of the following:

- 1. Operating manuals, installation manuals, descriptive literature, and other information that is pertinent to the operation and performance of the system.
- 2. Wiring diagrams for equipment and the system that indicate the wire and cable connections, including any connections between amplifiers and associated loudspeakers.
- 3. Manufacturer's warranties and the PBX contractor's warranties.

3.5 Post-Installation Service

The PBX contractor shall have available to the purchaser the capability of servicing all installed equipment. Maintenance shall be provided on premises during normal working hours at no cost to the purchaser for a period of 12 months from the date of system acceptance unless the failure or damage is caused by misuse, neglect, accident, or manufacturers defects. Service on the premises during other than normal working hours must also be available and may be charged at current labor rates.

3.6 Training

The PBX contractor shall train the owner's maintenance personnel in the proper operation, maintenance, and service of the system.

IV. PROPOSAL CONTENT

Proposals must be submitted on eight and one-half by eleven $(8\frac{1}{2} \times 11)$ inch paper and in separated into four major sections. The four major sections shall include:

- 1. Letter of Submittal, including signed Certifications and Assurances (Exhibit A of this RFP).
- 2. Work Proposal.
- 3. Cost Proposal.

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist bidders in preparing a thorough response.

Bidders are requested to offer proof of their specification compliance by inserting proof responses within the body of this solicitation. Bidders are encouraged to insert images, pictures and other support materials that will enhance their written responses. Since the evaluation team will be looking to see how well Isabella County requirements are met, a clear and concise description is encouraged. Proposals must include requisite training and pertinent warranty periods for each item bid. All bids must clearly identify how items bid meet solicitation requirements. They must also clearly show how those items may be configured and priced to meet requirements. If bidders do not bid on every item, those omitted items must be clearly identified.

4.1 Letter of Submittal

The Letter of Submittal, the attached Certifications and Assurances form (Exhibit A to this RFP), and all RFP amendments must be signed and dated by a person authorized to legally bind the bidder to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the bidder and any proposed subcontractors:

- 1. Name, address, principal place of business, telephone number, and fax number/email address of legal entity or individual with whom contract would be written.
- 2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, if any).
- 3. Legal status of the bidder (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
- 4. Federal Employer Tax Identification number or Social Security number.
- 5. Location of the facility from which the bidder would operate.

6. Identify any Isabella County employees or former County employees employed or on the firm's governing board as of the date of the proposal. Include their position and responsibilities within the bidder's organization. If following a review of this information, it is determined by the County that a conflict of interest exists, the bidder may be disqualified from further consideration for the award of a contract.

4.2 Work Proposal

The Work Proposal must contain a comprehensive description of equipment to be provided and services to be performed in order to meet the work specifications described in Section III.

4.3 Experience of the Bidder

Indicate relevant experience that indicates the qualifications of the bidder. Relevant experience will include working with public agencies in performing services substantially similar to those listed in the Statement of Work (Section III) of this RFP.

4.4 References

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three similar project references and briefly describe the type of service provided. The bidder must grant permission to the County to contact the references. Do not include current Isabella County staff as references. References will be contacted for the top-scoring proposal(s) only.

4.5 Related Information

- 1. If the bidder contracted with Isabella County during the past 24 months, provide a project description and/or other information available to identify the contract.
- 2. If the bidder's staff was an employee of Isabella County during the past 24 months, or is currently an Isabella County employee, identify the individual by name, the department previously or currently employed by, job title or position held and separation date.
- 3. If the bidder has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the bidder's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
- 4. Submit full details of the terms for default including the other party's name, address, and phone number. Present the bidder's position on the matter. The County will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the bidder in the past five years, so indicate.

4.6 Cost Proposal

The evaluation process is designed to award this procurement not necessarily to the bidder of least cost, but rather to the bidder whose proposal best meets the requirements of this RFP. However, bidders are encouraged to submit proposals which are consistent with ongoing efforts to conserve County resources.

Bidders are to provide a pricing quotation as follows:

- 1. Quotation #1 shall be for a PBX configured as defined in this solicitation which must include the appropriate software for voice mail and all appropriate software licensing and hardware for a turn-key solution.
 - a. All parts are to be listed as separate line items.
 - b. Include warranty information on all components including installation.
- 2. Quotation #2 shall be for installation, setup and training of the system.
- 3. Quotation #3 shall be cost of ongoing system support including an SLA (Service Level Agreement) providing onsite assistance and replacement of hardware based on the following response requirements 1 Hour (Emergency), 4 Hour and Next Business Day.
- 4. Proposals must include requisite user and administrative training and must also include pertinent warranty periods for each item bid.
- 5. All bids must clearly identify those items that meet requirements set forth in this solicitation and must clearly show how those items may be configured and priced to meet bid requirements.
- 6. If bidders do not bid on every item, those omitted items must be identified.

EXHIBIT A CERTIFICATIONS AND ASSURANCES

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSAL FAILURE TO SUBMIT THIS COMPLETED FORM MAY RESULT IN DISQUALIFICATION

I/we make the following statement of assurances as a required element of the proposal to which it is

Firm Name:

	ached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with se requirements are conditions precedent to the award or continuation of the related contract(s):
1.	The prices and/or data have been determined independently, without consultation, communication, or agreement with other proposers for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal or bid.
2.	The attached proposal or bid is a firm offer for a period of 60 days following receipt, and it may be accepted by the Isabella County without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
3.	In preparing this proposal or bid, I/we have not been assisted by any current or former employee of Isabella County whose duties relate (or did relate) to this proposal, bid, or prospective contract, and who was assisting in other than his or her official, public capacity. Neither does such a person nor any member of his or her immediate family have any financial interest in the outcome of proposal bid. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
4.	I/we understand that Isabella County will not reimburse me/us for any costs incurred in the preparation of this proposal or bid. All proposals or bids become the property of Isabella County, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
5.	Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the proposer and will not knowingly be disclosed by him/her prior to opening, in the case of a proposal directly or indirectly to any other proposer or to any competitor.
5.	No attempt has been made or will be made by the proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
7.	I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
3.	I/we acknowledge communication of any kind regarding my/our proposal directed to parties other than the Project Administrator may result in my/our disqualification.
€.	I/we warrant that no conflict of interest knowingly exists for any member of the project team that contributed to this proposal or prospective contract.
Sig	nature Date
[it]	le

EXHIBIT B CHECKLIST FOR RESPONSIVENESS

 Proposal was submitted on or before 11:00 a.m. on February 19, 2008
 Proposal was signed by the authorized individual.
 Proposal was formatted into three major sections: letter of submittal, work proposal and cost proposal.
 Proposer meets minimum qualifications:
1. Licensed to do business in the State of Michigan.
2. At least five years of experience in the furnishing and installation of sound, and A/V systems devices comparable to that specified.
3. Contractor must have a programmer on staff. No out-sourcing will be allowed on this project. System must be programmed in office by said system programmer. Provide certificate along with submittals.
4. The sound contractor shall employ competent electronic technicians who are trained and knowledgeable in the area of Sound Systems.
 Letter of Submittal and Certifications and Assurances were signed by an individual authorized to bind the Proposer to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the sole proprietor if a sole proprietorship.
 Exhibit C is completed and attached to the proposal.
 Exhibit D is completed and attached to the proposal.
 Three business references were provided.

NOTE: "Yes" answers must be given to each element above for the proposal to be considered responsive.

EXHIBIT C CHECKLIST FOR COMPLIANCE WITH TELEPHONE SPECIFICATIONS

Indicate in the following table whether a feature is standard (std) or optional (opt) (mark with "X"). Indicate any exceptions or enhancements in the comment column, along with an indication of any additional costs if the component optional.

Element	Std	Opt	Comment
Add on Conference Account Codes			
Attendant Alternate Answer			
Attendant Barge In			
Attendant Night Transfer			
Attendant Overflow			
Attendant Transfer – Announced			
Attendant Transfer – Unannounced			
Automated Attendant			
ANI Busy Lamp Field			
Call Forward – By time of day			
Call Forward – remote			
Call Forward – Busy			
Call Park			
Call Pickup			
Call Queuing			
Call Transfer			
CENTREX Compatibility			
Digit Manipulation			
Called Number Display			
Name Display – External			
Name Display - Internal			
Distinctive Ringing			
Volume Control - Handset			
Volume Control – Ringing			
Volume Control – Intercom/HF			
Flexible Key Assignment			

Last Number Redial	
Least Cost Routing	
External Paging Access	
Message Waiting Indication	
Automatic Set Relocation	
Multiple Console Operation	
Music on Hold	
Multiple Tenant Service	
Internal Paging	
Power Failure Transfer	
Prime Line Pickup	
SMDR output	
Toll Restriction	
Flexible Numbering of Stations (3,4,5 digits)	
Consistent Station Numbering	
among multiple tied sites	
System Speed Dialing	
Station Speed Dialing	
Voice Mail Integration	
Automatic Alternate Routing	
Inter-switch Feature Transparency	
PRI support	
Subnet Trunking	
Traffic Reports	
Non-Volatile System Program	
Headset compatible telephone sets	
Support for analog station	
connections:	
Fax	
Cordless phones	
Multiple lines	
Appearances per station	

EXHIBIT D CHECKLIST FOR COMPLIANCE WITH VOICE MAIL SPECIFICATIONS

Indicate in the following table whether a feature is standard (std) or optional (opt) (mark with "X"). Indicate any exceptions or enhancements in the comment column, along with an indication of any additional costs if the component optional.

Element	Std	Opt	Comment
Automatic station identification			
Broadcast messages			
Distribution lists			
Outcall notification			
Message waiting indication control			
Delivery priority			
Return to operator or other user			
Retrieve messages from computer			
unified mailbox			
Retrieve email messages from			
telephone – unified mailbox			