



# Peabody Municipal Light Plant

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## Peabody Municipal Light Plant - Request for Proposal

**PROPOSAL FOR THE DESIGN, INSTALLATION, CONFIGURATION, AND TRAINING FOR A VOICE OVER IP OR HYBRID VOIP/PBX ON PREMISES TELEPHONY SYSTEM (VoIP SYSTEM) FOR THE PURPOSE OF REPLACING EXISTING AVAYA DEFINITY TELEPHONY SYSTEM AND BECOMING THE PEABODY MUNICIPAL LIGHT PLANT'S SOLE INTERNAL TELEPHONY SYSTEM.**

RFP Issued: August 3, 2017

Proposals Due: September 5, 2017

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## 1.0 INTRODUCTION

### 1.1 BACKGROUND INFORMATION

The Peabody Municipal Light Plant (PMLP) is a consumer owned, not-for-profit electric utility owned by the citizens of Peabody and dedicated to providing safe, reliable electricity and high quality service at the lowest possible rates. We are committed to the protection of our environment and to the welfare and safeguard of our community. PMLP was founded in 1891 after a long and emotional political battle was fought by the citizens of the then Town of Peabody for the right to operate their own electric business. The efforts of our Peabody ancestors resulted in legislation being passed which allowed all cities and towns in the Commonwealth of Massachusetts the opportunity to establish their own electric business. With one of the most modern and reliable electric distribution facilities in New England, PMLP's electric rates are traditionally among the lowest in the region. Unlike most municipally owned utilities, Peabody has the ability to generate its own power when needed to help safeguard against widespread power outages. Service is provided to approximately 26,000 customers in Peabody and South Lynnfield. A five (5) member Municipal Lighting Commission, elected by the citizens of Peabody, governs the light plant.

### 1.2 RFP PURPOSE AND SCOPE

The Peabody Municipal Light Plant ("PMLP") is currently soliciting proposals to design, install, Configure, and Train on a new, state of the art, all-inclusive, turnkey VoIP or hybrid VoIP/PBX Telephony System for the purpose of replacing an existing AVAYA Definity System and becoming PMLP's sole internal telephony system. PMLP realizes that there are both "On-Premises" solutions and "Hosted" solutions. While PMLP is most interested in an On-Premises solution, we will review any vendor's solution, as long as BOTH options are available from any particular vendor. This RFP is designed to allow each Proposer the flexibility to design and implement what each believes is the best solution to match the included specifications and technology architecture.

The PMLP seeks a solution that includes Unified Messaging and can be scalable to integrate with newer communications technologies as they become available. All of PMLP's existing telephones will be replaced with devices that support basic telephony features, either via a softphone, traditional phone or mobile device. An employee will be able to log in anywhere on or off the company network (home phone, cell phone, work phone or computer) and automatically receive calls without administrative intervention.

The PMLP requires the new telephone system to have the capability to service remote locations with the same features and functionality as the main office seamlessly, as if the remote phone were geographically in the central location. Automatic fail-over/redundancy for any and all components is a critical need.

The selected vendor will be expected to work directly with PMLP to ensure design proof of concept, compatibility, call quality, and reliability. The PMLP also requires a backup mechanism that operates in tandem with the main system to process calls as needed, either due to emergency, power outage or capacity issues. This backup mechanism may initially consist of a group of legacy POTS lines currently in use at PMLP. However, each vendor proposal should contain the core infrastructure to facilitate future scaling to an off-site replication and disaster recovery model.

It is the intent of this Request for Proposal (RFP) that the responder shall provide a complete, end to end, solution for the proposed installation. The vendor shall provide all design, planning, system architecture, installation, network analysis, training and post-installation support for the project, with assistance from the PMLP IT Department.

The vendor is also expected to provide a comprehensive training plan for all employees. It is expected that the PMLP IT staff will require technical training at various levels and that other PMLP staff will require training on the new systems and all functionalities pertinent to the scope and use of the that employee's role/group. The PMLP IT staff will work with the vendor to develop a training plan that achieves these objectives.

The vendor is expected to plan and conduct the installation/configuration of the new VoIP system with minimal impact to daily operations and staff. It is critical that any interruption to PMLP's telephone communications be minimized to ensure public safety and reliable customer service. PMLP IT staff will work closely with the vendor to create a working project plan that will achieve these goals.

### 1.3 VENDOR RESPONSE TOPICS

Vendors shall respond, using summary language, covering the following general topics:

- Phone console quality and Softphone feature sets, as well as ease of use
- IP-based Voice capabilities and Intelligent Network Infrastructure Reliability
- Voice Quality
- Experience and References
- Voice Messaging/Unified Messaging
- System Administration Support/Service Capabilities
- Scalability
- System longevity
- Simplicity of Installation
- Training and Usage
- Failover/emergency backup options
- Performance expectations
- Product lifespan
- Product warranty
- Maintenance Contracts
- Any anticipated peripheral or miscellaneous costs

## 2.0 RFP INSTRUCTIONS AND INFORMATION

### 2.1 RFP TIMELINE

The dates provided below are approximate and are for the period up to the project start date. Vendors are advised that these dates are not absolute and may change due to unplanned events during the proposal and award process. PMLP reserves the right to change the calendar of events or issue amendments to the RFP at any time. PMLP also reserves the right to cancel or reissue the RFP. Vendors should check the PMLP Website for amendments.

RFP Issued	Thursday, August 3, 2017
Written Questions Due to PMLP	Friday, August 18, 2017
Answers Posted to PMLP Website	Tuesday, August 22, 2017
Proposals Due PMLP/Public Proposal Opening	Tuesday, September 5, 2017
Optional Product Demonstration (start)	Monday, September 11,
Optional Product Demonstration (end)	Thursday, September 21,
PMLP Evaluation Complete	Friday, September 22, 2017
PMLC presented with results	Thursday, September 28,
Contract Negotiations Begin	Monday, October 2, 2017
Contract Executed	Friday, October 27, 2017
Project Starts	Monday, November 27, 2017

### 2.2 RFP DESIGNATED CONTACT

All requests, questions, or other communications about this RFP shall be made in writing to:

Joe Anastasi, Information Technology Manager  
Peabody Municipal Light Plant  
201 Warren Street Extension, Peabody, MA, 01960  
janastasi@pmlp.com  
978-531-5975 x220

To ensure that written requests are received and answered in a timely manner, electronic mail (e-mail) correspondence is acceptable and preferred. But other forms of delivery, such as postal and courier services may also be used.

### 2.3 RFP QUESTIONS

Submit questions relating to this RFP via email to the RFP Designated Contact named in Section 2.2 by **Friday, August 18, 2017**. Submit all questions as a Word document. All written questions must include the name of the firm and the person submitting the questions.

PMLP will post a compilation of all questions and answers, to the PMLP website <http://www.pmlp.com> no later **Tuesday, August 22, 2017**.

## 2.4 CONTACT WITH PMLP EMPLOYEES

Direct contact with Peabody Municipal Light Plant employees other than the RFP Designated Contact regarding this RFP is expressly prohibited without prior consent. Vendors directly contacting Peabody Municipal Light Plant employees risk elimination of their proposal from further consideration.

## 2.5 PROPOSAL SUBMISSION AND OPENING

Peabody Municipal Light Plant (PMLP) will receive proposals for the VoIP System RFP until **11:00 a.m., Tuesday, September 5, 2017** at its General Offices at 201 Warren Street Extension Peabody, MA, 01960, at which time the proposals will be publicly opened and read. Please mail proposals to:

Peabody Municipal Light Plant  
201 Warren Street Extension, Peabody, MA, 01960  
ATTENTION: Glenn R. Trueira, Manager

The following must be clearly marked on the envelope: (1) "VoIP System Response" (2) Proposal Respondent's Name, (3) Proposal Respondent's Address. The proposal will remain valid for at least one hundred eighty (180) days from the proposal receipt deadline. All proposals and any exhibits, attachments, etc., received become the property of the PMLP and will not be returned to the proposal respondent. Proposals received after the proposal opening date and time will immediately be disqualified and returned unopened.

Proposal Respondents must provide the following when submitting their proposals:

- three (3) original signed copies (marked as original)
- two (2) CDs or thumb drives; Section 2.7 through Section 2.12 must be submitted in MS-Word or PDF. And Section 3.9 (same as 6.1) must be submitted on the EXCEL spreadsheets provided, using Excel "comments" for longer answers. A separate document may be provided for verbose answers if necessary, but must clearly label each verbose response with the numeric marker corresponding to the question, and must repeat the question in full before responding.

## 2.6 PROPOSAL FORMAT

Selected vendors may wish to demonstrate their solution on a selected time as noted in Section 2.1. PMLP requires the Project Manager and other key assigned project staff to be present at the product demonstration.

## 2.7 COVER LETTER

Introduction and general comments

## 2.8 EXECUTIVE SUMMARY

The Executive Summary should be suitable for review by PMLP Executives and the PMLP Board of Commissioners. The following highlights are suggested for inclusion: company strength and markets served; product functions and capabilities, including perceived advantages; future product plans and commitment to product investment; support services; value differentiation and ability to demonstrate proven knowledge and experience supplying solutions to utilities of a size comparable to PMLP.

## **2.9 FIRM QUALIFICATIONS**

Vendors must demonstrate proven knowledge and experience supplying solutions to utilities of a size comparable to PMLP. Please provide a list of three software implementation projects of similar scope to that requested by PMLP, including a client reference/contact (with name, phone, and email). Include a brief description of the project, the date of the installation, who served as your project manager for each project, and who had key lead technical roles in those projects. Projects in New England should be emphasized.

In addition to the project information, please provide the following information: (1) the name and the location of your corporate headquarters, (2) the names, titles and length of tenure of the top five officers of the company, (3) the average number of employees over the past five years, (4) a brief description of the company size and organization, (5) the number of years the company has been in business, (6) the most recent audited financial statements, (7) the number of installs of the proposed solution, and (8) a brief description of the company, products, and services and (9) a list of regular and overtime hourly rates for vendor team members.

## **2.10 PROJECT TEAM**

Vendors are required to identify all of the individuals who will be a part of the project team, as well as the Project Manager. An organizational chart should be provided listing the intended role of each member of the project team. Each team member's total involvement in the project should be detailed, expressed as total work hours per member of the project. Describe each team members' experience for this project. Clearly identify which proposed personnel would be responsible for the following tasks: implementation planning (network assessment review and gap analysis), documentation development, custom programming, hardware and software installation, configuration, system integration, implementation, testing, and final system acceptance and on-site go-live support.

## **2.11 MANAGEMENT APPROACH**

Vendors are required to describe how the project will be organized and managed. Describe the resources necessary to accomplish the project's requirements presented in Section 3.4, including your anticipated commitment from PMLP personnel. Indicate the total work hours estimated for the project. Include an explanation of your project approach that describes each step for the project, the milestones and associated deliverables.

In addition, the vendor is required to develop and maintain a work plan and schedule of activities for initial set-up and on-going delivery of products and services that address all tasks and proposed deliverables identified in this RFP. A detailed graphical schedule shall be provided that depicts the critical activities, deadlines, PMLP involvement, and dates of deliverables/milestones.

## **2.12 TECHNICAL APPPROACH**

Clearly describe your proposed approach for this project. Your proposal shall provide a step-by-step description of the phased approach for completion of the project and the

specific goals and deliverables for each phase in the process. Include a description of how your firm would organize, mobilize, and implement a typical project, including discussion on its quality control procedures, and tools. The approach should include a detailed implementation methodology, describing how you would approach a project of this size.

### 3.0 SCOPE OF SERVICES

#### 3.1 OVERVIEW

In seeking to solicit proposals, the PMLP’s goals are the following, in no particular order:

- Replace existing AVAYA Definity and Prologix phone and voicemail system
- At base, continue to provide all existing phone and voicemail services and features
- Provide a reliable, robust, IP-based on-premises telephony system
- Enhance functionality to include softphones, conferencing, and mobile connectivity
- Enhanced administrative features such as Call Centers, Trunking, and Hunt Groups
- Enhanced logging and reporting on any/all phone activity
- Offer redundancy, failover, and disaster recovery options
- Interconnect phones, voicemail, email/sms messages for unified communications
- Integrate with Microsoft Active Directory and Exchange
- Utilize existing PRI circuit in addition to new SIP trunk simultaneously
- Receive affordable and robust support and maintenance over the next 10+ years
- Integrate Legacy services (FAX, Credit Card machines, Paging, 2-way audio doorbell)
- Receive professional services to design, install, configure, and rollout (training).
- Implement a package with robust scalability and growth options
- Interconnect main building system/network with small satellite sites seamlessly
- Implement new enhanced backend features such as Caller-ID and E911

This Chart below shows a brief synopsis of the current end user spectrum:

<b>PSTN Connection</b>	1 PRI – 5 POTS Lines
<b>Telephone Handsets</b>	70 Standard Business Phones 20 Enhanced Business Phones
<b>Softphones</b>	0
<b>Analog Ports</b>	75
<b>Voice Mail Users</b>	50
<b>Console Call Management – Operator</b>	1

PMLP has between 5-10 remote locations which we would consider for scalability. Currently these locations have individual land lines with full phone numbers. Moving forward, we would like to scale our services to reach these locations either via PMLP owned fiber connections our internet services.



## 3.2 SUMMARY OF REQUIREMENTS

This section attempts to verbally qualify and quantify many of PMLP's requirements. This is not a complete list, but should be viewed as a fair synopsis of expectations.

### **Broad Overview:**

PMLP's new Telephone, Voicemail and Unified Messaging system design shall provide a uniform communication system for all PMLP facilities and shall be scalable for future growth. Proposed systems must provide the appearance and functionality of a single, centrally managed system. The PMLP intends to administer this new system locally, with current IT staff, at our main building. Though we will entertain all options, we are leaning strongly toward an on-premises solution. All proposing vendors must include an on-premises offering (at least). Optional hosted offerings will be reviewed only if they accompany an on-premises counterpart. Reliability, redundancy and seamless continuity of service in the event of failure of any component in the primary system is of high importance to PMLP. Compatibility with existing network infrastructure, Back-Office applications, and existing Cat-6e cabling is also important.

### **Network Review:**

The PMLP is aware and expects that each respondent will need to conduct a full network review to determine the best integration approach. The needs and expectations of a converged network do place different requirements on the network in terms of Quality of Service (QoS), packet prioritization, cable quality, termination specifications, etc. Although the PMLP believes that the network is VoIP ready, we desire each vendor to perform any necessary network reviews and determine if any updates or changes must be performed to support the proposed VoIP system. Vendors shall provide all results of the network review, including network maps, specification thresholds, specific problem areas and the recommended solution and cost for each.

### **Communications Cabling:**

The network review shall include the in-building existing Cat-6e cabling, and will recommend any changes or upgrades necessary. The chosen vendor will provide cable from the wall jack to the phone. Some installations will have 2 network drops and can serve with one to the PC and another to the phone. But some installations will be "in-line" with the handset/endpoint existing between the wall jack and the PC. The chosen vendor will be responsible for wiring connections from the VoIP system to any communications equipment utilizing the VoIP system (not including endpoint phones). All current endpoints are already wired back directly to the Data Center, where the VoIP installation will reside. The chosen vendor will be responsible for re-termination (or converter boxes) of legacy services from existing system to the new VoIP system. Any additional cabling/wiring needed by the respondents to complete the installation should be included as part of the RFP response.

### **Required Services:**

Unified Messaging - The PMLP wishes to implement Unified Messaging and integrate the VoIP system with Active Directory and our Exchange E-Mail system. The PMLP is currently on Exchange 2013, but have plans to upgrade in 1-2 years to the then-latest version of

Exchange. The vendor shall propose the best way to achieve this with full functionality and with minimal impact on services.

Enterprise Mobility - The PMLP plans to incorporate over time, the ability to move to an active mobile workforce. At present, plans would at least need to consider iPhone and Android technologies, as well as laptops and tablets. The goal is constant connectivity and mobile unified communications regardless of geographic location of staff.

Call Accounting System - A Call Accounting System (CAS) is required and must be part of the base proposal for this system. The CAS must include Call Dialing Report (CDR) for inbound, outbound and internal calls and usage reports for all types of inbound, outbound and internal calls. Specifically, but not limited to, the PMLP is interested in metrics for Caller-ID info, call length, number of unanswered calls going to voicemail, and dropped calls. Please describe your solution to the Call Accounting System and attach sample reports. The chosen vendor shall also provide training for up to 4 employees on the administration, maintenance, programming and daily operation of the Call Accounting System.

Automatic Call Distributor (ACD) - Employees should be able to log in to any phone or PC softphone and have calls routed to them along with their user profile and functionality set.

### **Single Point of Responsibility:**

The PMLP expects to have a single point of contact for all aspects of this project. The PMLP will not enter into any agreement that does not provide a single point of accountability for the installation and performance of the system. Any delineation between a business partner and manufacturer responsibilities with respect to these requirements should be enumerated and clearly distinguished.

### **Technical Requirements:**

The chosen vendor must provide a complete system design detailing the integration of the voice network into the data network. Further, the vendor must provide methodology for assuring voice quality and accessibility throughout the system. Core system servers, switches, call managers and other equipment will be installed on the PMLP VMware servers.

### **Redundancy/Failover**

Proposed systems should have seamless failover capabilities in case of system component failure. The VoIP system should also include an acceptable way to continue telephone uptime during a building power outage. The use of existing POTS lines for this uptime is acceptable as long as customers and public safety officials can continue to use the same phone numbers during normal operations and power failure emergencies.

### **System Administration:**

The PMLP IT staff will administer the system. Installation, configuration and training will be performed as a joint effort by the chosen vendor and PMLP IT staff. Role-based user training will be performed by the chosen vendor for no more than 5 distinct user roles. Remote administration of the system must be available to PMLP IT staff after deployment. Respondents shall supply all additional equipment and software needed for the system programming and operation.

**System Design Requirements:**

The PMLP uses 3-digit internal dialing extensions currently. It is preferred to maintain the existing 3-digit extension matrix. Any proposed VoIP system should have the ability to identify when users are available or busy.

**Security:**

The proposed VoIP system shall have a full security suite of features inherent to protect the system and network from intrusion and unauthorized access. It should allow the PMLP IT administrators to control classes of service, classes of restriction, and call groupings. The winning proposal respondent will also supply all system level passwords to the PMLP.

**Vendor Requirements:**

Respondents will provide documentation showing call handling and device addressing schemes, an initial inventory of equipment (including model and serial numbers of phones, switches and routers), as well as any other relevant equipment. Such documentation may either be in hard copy form or electronic submission.

**Project Management:**

Vendor/business partner is expected to provide a project manager for this installation that will interface and become the main contact with the PMLP for the duration of the project. The PMLP reserves the right to request a change in project management based on performance, including availability and responsiveness. Vendor shall provide a project timeline consistent with accepted project management principles that identify milestones and benchmarks for install, configuration, and staff training.

**Maintenance and Support:**

Vendors shall provide the PMLP with a complete listing of available service and support plans. These shall include the range of offered services including all levels of support plus escalation plans. At a minimum, support agreements should cover:

- An itemized list of services
- Ongoing Maintenance costs
- Recurring licensing fees
- Forecast of any increase for 2-3 years for hardware, software maintenance, or licensing needs
- Detail of local support, on-site arrival window, limits of coverage for service and repairs
- Maintenance plan options with four hour or less response times including non-business hours, holidays and weekends.
- Software upgrade plans inclusive in Maintenance

**Transition Plan:**

The PMLP expects the installation and configuration of the new system to have little or no impact to ongoing operations. Vendor is expected to have experience in this area and to provide the PMLP with a plan to accomplish this. If this work requires extended downtime, the cutover should occur during off-hours. Submitted plans should include, at a minimum:

- Design plan and detailed timing schedule to move units off the old system to the new

system with minimized disruption to staff.

- Validated procedures to illustrate the parallel migration process.

- Documentation, installation, reports and materials must be provided to the PMLP prior to commencement of installation, followed by submission of Moves, Adds, or Changes (MAC).

- The PMLP currently works with WindStream Communications (formerly EarthLink) for our PSTN phone line service and internet needs. Respondent will be expected to interface as needed with both companies and/or offer equivalent replacements.

- Detailed labor costs for installation and cut-over work, including off hours rates. These rates shall be included in the Pricing Section description and on Bid Forms (section 6.1)

### **3.3 PRODUCT DEMONSTRATION**

Selected vendors may opt to demonstrate their VoIP system on a selected time as noted in Section 2.1. PMLP requires the Project Manager and other key assigned project staff to be present at the product demonstration. PMLP's objective is to discern the vendor's proposed project staff's familiarity with the proposed VoIP solution and their ability to explain, communicate, converse, and interact with PMLP staff. Vendor costs associated with optional Product Demonstrations are the vendor's responsibility.

### **3.4 PROJECT MANAGEMENT**

PMLP expects the selected vendor to name an overall project manager for the project, provide onsite project management when needed, and produce and maintain the overall project implementation plan and schedule. The Project Manager will be the primary point of contact for communications from the vendor. All correspondence to PMLP should flow through the Project Manager. PMLP will also provide a project management team to coordinate internal resources, facilitate communication at all levels, facilitate decision-making, and provide oversight and auditing. Other elements required by the vendor's Project Manager include: (1) Delivery and preparation of status reports, (2) Meeting facilitation, (3) Issue tracking and resolution, (4) Documentation of changes, required actions, decisions, etc. (5) Management briefings and (6) Management of deployment and post go-live resources.

### **3.5 SOFTWARE & HARDWARE**

Proposed solutions will supply PMLP with approximately 100 user licenses for the proposed, integrated solution. Licensing quantities and types should be designed using the chart from section 3.1.

The vendor will provide costs for additional software products that are necessary to support the solution, including licenses for the back-end database software and any additional Third-party software.

In addition, the vendor will provide the hardware, network, and computing specifications required to support the proposed solution. Costs should reflect the installation of this equipment; however, PMLP reserves the right to procure the specified hardware directly if available to do so independently.

### 3.6 IMPLEMENTATION SERVICES

PMLP is requesting full support in its implementation of the chosen solution. The following activities, as applicable to your proposed solution, should be included.

- 1.) Business Process Review – Perform an on-site assessment of the existing business processes, and normal daily usage of the current phone system. The purpose of this task is to provide the successful vendor with the opportunity to become familiar with PMLP's business needs and expectations.
- 2.) Gap Analysis – Prepare a document itemizing the gaps between PMLP's business processes/needs and any enhanced offerings of the proposed VoIP system. The Gap Analysis document should include recommendations for mitigating gaps, as well as benefits gained by adopting newer, currently unused technologies.
- 3.) System and software set-up and configuration – Provide frontline configuration and setup resources who will work with PMLP staff to implement the system.
- 4.) Security design/setup–Design & employ system & role-based security/encryption.
- 5.) System Testing – Develop a test plant to assist and itemize the testing of the configured system. Testing will be performed by both the vendor and key PMLP staff. The system will be considered implemented until the testing is completed and PMLP IT staff is satisfied that any identified issues have been resolved.
- 6.) Configuration of interfaces with other PMLP applications – The successful vendor will be required to develop data integration routines to integrate between the proposed solution and the following systems: (1) Microsoft Active Directory (2) Microsoft Exchange Email Server (3) PMLP core switch and network infrastructure (4) Existing PRI circuit, as well as new SIP trunk (5) Any/all planned endpoints and integrated legacy equipment.

### 3.7 DATA CONFIGURATION/MIGRATION

PMLP intends to utilize its existing extensions and phone numbers with the new VoIP system. PMLP will work with the selected vendor to determine the appropriate scope for line conversion needs and alternatives. In addition, all current Call Centers, Hunt Groups, and other special pathing routes shall be migrated to the new VoIP system. Finally, any Classes of Service, Time of Day usage, and other current PBX configuration elements shall survive the conversion to the new VoIP system.

### 3.8 NETWORK SPECIFICATIONS

The PMLP currently utilizes a Cisco 4506 core switch with Category 6e, plenum rated cabling throughout the main building. A section of the ports on the core switch are PoE rated. Any proposed solution should have endpoints with the ability to support both PoE and local power supplies. In addition, any phone console should be Gigabit capable out of the box. At least some phones should contain switches to allow a single Ethernet cable to provide data to both the PC and the phone simultaneously. PMLP employs VMWare and a mix of Microsoft Windows and Red Hat Linux servers. Any proposed solution should have a fully supported option to run within a VMWare environment. All proposed solutions should be flexible enough to utilize a combination of SIP and PRI circuits to load-balance and act as failover for all daily connections into and out of the network and to interface with the PSTN. Any additional routers, switches, or other hardware components needed to support the daily and redundant operation of the proposed VoIP system must be included with all proposals.

Built-in security and encryption is necessary. A full description of security features and an overall security plan are expected from all proposed solutions.

For further clarification and information, consult sections 3.1 and 6.1

### 3.9 FUNCTIONAL SPECIFICATIONS

Proposal Form - Functional Specifications (Addendum – Section 6.1) lists the detailed functional specifications questions that the proposed VoIP system must provide. Proposal Respondents are required to enter the designated code in the “Response” column for each functional specifications question listed to indicate their response. Every item listed in the Proposal Form -Functional Specifications must be populated with one of the following code definitions:

F	Functionality is fully provided in the base product with no customization/add-on required
NA	Functionality is not currently included in the base product and cannot be provided
C	Functionality not included in the base product but could be provided by a customization or add-on to the base product
TP	Functionality could be provided via a Third Party Software solution
S	“Special” wording is required to answer this question. Provide numbered response list.

\*Responses to Functional Requirements must be provided in hardcopy AND electronically (EXCEL).

### 3.10 TRAINING

Provide end-user training to approximately 50 PMLP staff, consisting of no more than 5 distinct types of user groups. Training shall be in accordance with the pre-approved plan submitted to and accepted by the PMLP. All training will occur at the PMLP main building. On-site training should provide end-users with an overview of the system, as well as detailed hands-on training tailored to the respective role-based groups, led by a qualified trainer. If other training methods such as web-based or computer-based training are available, these should be indicated in the response to this RFP as ADDITIONAL training.

### 3.11 DOCUMENTATION

PMLP expects the selected vendor to provide (at a minimum) the following user-oriented documentation for the new solution.

1. User Manuals: User Manuals should be given for each component of the system, and should clearly define the operational steps required for users to effectively perform the tasks they will need on a day-to-day basis.
  2. System Administration Manuals: System Administration Manuals should provide information such as (1) Backup and recovery procedures, (2) Error code descriptions and troubleshooting methods.
  3. System Configuration and Maintenance Manuals: System Configuration and Maintenance Manuals should provide information such as, but not limited to: (1) Documentation on aspects of the system that are configurable and system-specific and (2) Documentation for the PMLP IT staff to maintain and operate the system following the turn-over of the responsibility of those operations from the selected vendor to PMLP.
- The selected vendor is required to provide ten (10) hard copies of the User Manual, two (2) hard copies of the System Administration Manual, two (2) hard copies of the System Configuration & Maintenance Manual and two (2) electronic copies of all manuals above.

### **3.12 SUPPORT & MAINTENANCE**

At a minimum, the selected vendor will provide technical assistance during PMLP's regular operational hours of 7:00 a.m. to 5 p.m. Eastern Standard Time, through a toll free phone number and through the Internet, although 24-hour support service is preferable. Vendors should provide information about expected response times to technical inquiries, and should describe the process by which clients log and track the resolution of issues. Vendors also need to describe how frequently software patches and upgrades are distributed and the recommended approach for applying these patches/upgrades.

## **4.0 PRICING SCHEDULE**

The proposal respondent assumes sole responsibility for the complete effort required in submitting a proposal in response to this RFP. No special consideration will be given after proposals are opened because of a proposal respondent's failure to be aware of all the requirements of this RFP.

Each respondent shall provide at least 2 distinct packages for review. This includes at least 2 distinct bid forms (see sections 4.5 and 6.1) at a minimum. This minimum response must include package "A" as the package that best fits our current minimum specs, plus some room for growth. Package "B" should be the next best platform available from the respondent. Meaning, it is the next level up in the product line. Package "B" should always include more capacity and scalability. It will be PMLP's choice to weigh value between Packages "A" and "B" to determine which will best suit our current and future needs. If a respondent wishes to bid on an on-Premises solution and a hosted solution, then that respondent would need to bid a minimum of 4 packages (2 for on-prem, and 2 for hosted). There is no maximum for how many packages a respondent wishes to bid on. PMLP will always compare similar packages between respondents, and will ensure that all "A" packages, get compared to other "A" packages, et. al.

### **4.1 EQUIPMENT AND LABOR**

Vendors shall include all hardware, software, databases, middleware, firmware, connectors, terminations, wiring between proposed components (not including endpoints-to-Data Center), peripherals, accessories, and any labor needed to install, configure, and test the proposed VoIP system. Every component must be itemized. PMLP requires the ability to pick-and-choose quantities and configurations to best fit business and financial needs.

### **4.2 TRAINING**

Vendors shall ensure adequate training for both IT Staff and not more than 5 role-based user groups. Follow up training shall continue until all PMLP staff is comfortable with operating the system from both administrative and end-user standpoints. Training must be on PMLP premises and provided by a live, qualified member of the vendor's team. Training solutions may include several tiers of training, as well as several packages for training types or durations. However, each package or tier must be itemized and separate. PMLP requires the ability to choose the training package that best fits our needs.

### 4.3 SUPPORT, LICENSING AND MAINTENANCE

Vendors shall ensure that each component's support and maintenance costs, licensing costs, and quantities shall be itemized and categorized into the smallest possible units. Support must cover every aspect of the system from hardware to software, in the back office as well as the endpoints and all points in between. All support and maintenance quotes should come with annual, 2-year, and 3-year renewal costs, itemized. In addition, SLA turnaround times shall be listed separately for each itemized support option. PMLP requires the ability to pick and choose with support agreements we will want for each and every distinct support component. Example: PMLP may wish to purchase 8x5xNBD on endpoints, but 24x7x4 on critical components (if the distinction exists).

### 4.4 OTHER COSTS

Vendors shall not leave out any costs. Other than unforeseen future upgrades, or chosen add-ons at a later date, any costs not included in the proposal, but that "crop up" during discovery or implementation will be entirely the responsibility of the winning vendor.

### 4.5 COST PROPOSAL FORMAT

PMLP reserves the right to either request additional cost-based information if the submitted costs are not formatted with enough information to allow PMLP to make a valid choice, or to reject the proposal for non-compliance. PMLP also reserves the right to reject any proposals that do not follow the guidelines set forth in this section (section 4).

At the beginning of all proposed responses, vendors must include the two below questions and a valid check in one of the two boxes.

1. The above proposal is in complete compliance with PMLP's Technical Specifications:

YES  NO

2. The above proposal is in complete compliance with PMLP's Terms and Conditions:

YES  NO

## 5.0 EVALUATION CRITERIA

### 5.1 PROPOSAL EVALUATION

The PMLP Selection Committee will evaluate all proposals received and accepted. The PMLP Selection Committee will consist of members of PMLP's staff, and will be directed by the PMLP Selection Committee Chairperson. The evaluation process will be based on best value, as determined by PMLP, not simply based on lowest cost. The evaluation committee may request written clarifications of any offer received. However, PMLP may refuse to accept in full or partially the response to a clarification request given by any vendor. Vendors are cautioned that the evaluators are not required to request clarifications; therefore, all offers should be complete and reflect the most favorable possible terms. Proposals will be evaluated on the following criteria, in no particular order of importance:



(1) Vendor Qualifications, (2) Solution Features, (3) Cost Proposal (4) Completeness of Proposal, (5) Product Reliability, (6) Failover Capabilities, (7) Support Options, (8) Security, (9) Scalability. While each of these 9 categories will be a significant part of the evaluation process, not all of these categories will be given equal weight when reaching a final decision.

## **5.2 NEGOTIATION AND BEST/FINAL OFFER**

PMLP may elect to conduct negotiations with one or more vendors and make requests for best and final offers. The PMLP Selection Committee may solicit best and final offers (BAFOs) from vendors. If a best and final offer is not submitted, the previous submittal will be construed as the best and final offer. After best and final offers are received, final evaluations and negotiations will be conducted for an award. If negotiations with the highest ranked vendor cannot be concluded to PMLP's satisfaction, PMLP reserves the right to initiate negotiations with the next highest ranked vendor. This process will continue until negotiations are successfully concluded to PMLP's satisfaction. Upon the successful conclusion of negotiations, the winning vendor will be presented to the PMLP Board of Commissioners for final approval.

## **5.3 CONTRACT AWARD**

Respondents are responsible for any costs involved in submitting proposals. PMLP reserves the right to reject any or all proposals and to award a contract if deemed in the best interests of PMLP. Any award made as a result of this Request for Proposal will result in the successful vendor and PMLP entering into a signed written contract. Contract award will be made to the proposal respondent whose proposal provides the highest overall value to PMLP as determined by PMLP, as described in section 5.1, and not based simply on lowest cost. Upon completion of the project, and all contract requirements have been met, and PMLP's satisfactory testing/acceptance, payment will be made in full.

## **6.0 ADDENDUM**

### **6.1 ATTACHED SPECIFICATION QUESTIONS LIST AND BID FORM**

Vendors should refer to section 3.9 for specific instructions on how to fill out the attached Specifications form(s), and section 4.0 for specific instructions on how to fill out the bid form(s).

To assist in being clear on submission of multiple "Bid Forms" (minimum submission is two). Each respondent shall provide at least 2 Bid Forms. If offering an On-Premises solution and an option for a Hosted solution, then responders should provide at least 4 Bid Forms (2 for On-Premises, 2 for Hosted). In each category (On-Premises and Hosted), respondents will provide one Bid Form for the product package that best fits PMLP's current setup plus a little room for growth. And then another Bid Form for the next level up product, that would provide PMLP with more capacity and more room for growth, in addition to potentially other more robust benefits (speed, failover, etc.)

Respondents do not have to provide a Hosted solution, but may choose to do so at their discretion. However, no Hosted proposals will be considered if they are not also accompanied by an On-Premises counterpart proposal as well.