



RELEASE DATE: May 05, 2020

**REQUEST FOR PROPOSALS
No. P20001034,
(ERS PROJECT # ERSP-094).
SEALED OFFERS FOR**

**PHONE SYSTEM REPLACEMENT,
STATE-OF-THE-ART AND AUTOMATED
CALL MANAGEMENT (ACM) SYSTEM**

**FOR THE
EMPLOYEES' RETIREMENT SYSTEM
OF THE STATE OF HAWAII**

ALL OFFERS ARE TO BE ELECTRONICALLY SUBMITTED AND RECEIVED INTO THE HIEPRO SYSTEM, (<https://hiepro.ehawaii.gov/welcome.html>), IN PDF FORMAT WITH BOOKMARKS OF PROPOSAL SECTIONS BY 4:00 PM HST JUNE 04, 2020, NO HARD COPIES WILL BE ACCEPTED. OFFEROR. TO INPUT QUESTIONS TO THIS SOLICITATION IN HIEPRO BY 05/15/2020 AT 4:00 PM HST AND QUESTIONS SHALL BE ANSWERED BY 05/22/2020 AT 4 PM HST IN HIEPRO. A PRE-BID CONFERENCE IS SCHEDULED FOR 05/13/2020, 11:00 AM, AT ERS OFFICES AT 201 MERCHANT STREET, SUITE 1400, HONOLULU, HAWAII 96813, IN CONFERENCE ROOM 12-A. ATTENDEES WILL NEED TO SIGN ERS'S CONFIDENTIALITY AGREEMENT. A SITE VISIT WILL IMMEDIATELY FOLLOW THE CONFERENCE. THIS WILL BE THE ONLY OPPORTUNITY THAT VENDORS WILL HAVE FOR SITE REIVEW.

s/
**Procurement Officer
Thomas Williams, Executive Director**

RFP-20001034

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RFP P20001034 as Posted on State of Hawaii's HiePRO website (hiepro.ehawaii.gov/). The Employees' Retirement System of the State of Hawaii is sourcing Consultant VAR's (value added resellers) whom are expert in Telephony Systems and Automated Call Management (ACM) Control Center, or equivalent, technology to provide a scalable solution to replace ERS's current legacy telephone system. Vendor to sell, install, service, support, train and maintain same for the offices of the Employee's Retirement System of the State of Hawaii with HQ at 201 Merchant Street, Honolulu, Hawaii'i, Suite 1400 and at neighbor island offices on Maui, Kauai and Hawaii Island.

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SECTION ONE

INTRODUCTION, TERMS, DEFINITIONS AND KEY DATES

1. Administrative Overview:

1.1 Executive Summary:

The Employees' Retirement System of the State of Hawaii (ERS) administers a defined benefit retirement plan for the State and county government employees of the State of Hawaii. ERS provides retirement, disability and death benefits for its members. ERS is a qualified defined benefit public pension plan under Section 401(a) of the Internal Revenue Code. Administration of the ERS falls under the policy and executive direction of the Board of Trustees with certain areas of administrative control vested in the state Department of Budget and Finance.

The ERS's current phone system has been in place for over 30 years and uses analog technology with rotating call center. The existing phone cables/wiring has been installed at various times during this period.

The Employees' Retirement System is seeking proposals from qualified Consultant VAR's to review the "As is" Telephone Communications Environment within the Employees Retirement System and provide a "To Be" Design recommendation with total costing involved to create a Unified Communication System (UCS) Scalable Plan tailored for the ERS.

This includes State-of-the-Art Telephony communication system for approximate 200 phone lines (phone, fax, data) with 165 total desktop stations at the ERS offices in downtown Honolulu and includes the offices located the neighbor islands of Maui, Hawaii Island and Kauai and an integrated Automated Call Management (ACM) Center. The ACM support includes Caller ID, Business SMS/MMS, Voice Mail, Audio/Video Conferencing, Mobility, Auto-attendant, Call Forwarding & Greetings with Directory Services and are to be menu driven.

1.2 Cancellation

The Request for Proposals (RFP) may be cancelled and any or all proposals rejected in whole or in part, without liability to the State, when it is determined to be in the best interest of the State.

1.3 Issuing Office, Authority and Contact Persons:

The following are the cognizant authorities and points of contact concerning this solicitation for the ERS.

1.3.1. Issuing Office

Employees' Retirement System of the State of Hawaii
Procurement
201 Merchant Street Suite 1400
Honolulu, HI 96813

1.3.2. Procurement Officer.

Thomas Williams, Executive Director
Employees' Retirement System of the State of Hawaii
201 Merchant Street, Suite 1400
Honolulu, HI 96813

1.3.3. Contract Administrator.

Mr. L. Wolfe, Accounting Manager
Employees' Retirement System of the State of Hawaii
201 Merchant Street, Suite 1400
Honolulu, HI 96813

1.3.4 Procurement Singular Point of Contact / RFP

The following person is the single point of contact concerning this RFP. From the date of release, until the selection of the successful Offeror. Other contact without approval, may result in disqualification.

SJ Melendrez, PMO, Procurement Specialist
Employees' Retirement System of the State of Hawaii
201 Merchant Street, Suite 1400
Honolulu, HI 96813
Telephone: 808-586.1776
Email: dbf.ers.procure@hawaii.gov
(with a copy to Steven.Melendrez@hawaii.gov and
Larry.Wolfe@hawaii.gov)

NOTE: All questions are to be entered through HIEPRO.

Offerors and potential offerors (including agents of offerors or potential offerors) should, except as provided below, not contact any member of the ERS Board of Trustees or any member of the ERS staff. An exception to this rule applies to firms who currently do business with ERS; provided that any contact made by any such firm should be related to that business and should not relate to this RFP

1.3.5 Issuing Authority:

This RFP is issued under the provisions of Chapter 88 and 103D, Hawaii Revised Statutes and the implementing Administrative Rules.

All prospective offerors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective offeror shall constitute a representation of such knowledge on the part of such prospective offeror. In addition to this specification Document 103D-1, General Conditions and the attachments in HlePRO to this solicitation are hereby made part of the specifications.

1.4 RFP Organization

Section 1:

This RFP is organized into seven sections including attachments:

Section 1

Administrative Overview – provides offerors with general information on the objectives of this Request for Proposal (RFP), the procurement schedule and a procurement overview.

Section 2:

Background & Scope of Work provides offerors with a general description of the tasks to be performed.

Section 3:

Proposal Evaluation and Content which describes the prescribed format and content for the Offerors' Proposal.

Section 4:

Evaluation Criteria; provides the evaluation by which the Offeror's Proposals' shall be evaluated and judged.

Section 5:

Contractor Selection and Contract award provides the process by which the Offer’s proposals shall be select for award candidacy and contract award process.

Section 6:

Special Provisions provides the Offeror’s the State of Hawaii understood definitions and criteria for proposal and contract provisions of Vendors doing business with the State of Hawaii.

Section 7:

Attachment and Exhibits provides the Offeror’s attachments and exhibits which are specific for this solicitation for the Offeror to annotate and submit within their proposal for award candidacy selection.

1.5 Procurement Timetable: significant dates (subject to change):

The schedule represents the ERS’s best estimate of the schedule that will be followed. All times indicated are Hawaii Standard Time (HST). **Offerors are notified that these dates are estimated by the ERS and are subject to change at the discretion of ERS. The ERS reserves the right to change any date(s) as deemed necessary and in the best interest of the ERS.** Any change to the RFP Schedule and Significant Dates shall be reflected in and issued in an addendum. The approximate schedule is as follows:

Release of Request for Proposals	05/05/2020
Pre-proposal Conference	05/13/2020
Closing date to Submit Questions	05/19/2020
ERS’s Response to Questions	05/22/2020
Proposals Due date/time	06/04/2020
Proposal Evaluations	06/05 – 06/9/2020
Discussion with Priority Listed Offerors (if necessary)	06/10 - 06/12/2020
Best and Final Offer (if necessary)	06/15/2020
Notice of Award	06/22/2020
Contract Signing	06/29/2020
Contract Start Date	06/30/2020

1.6 Terms and Definitions Used in this Solicitation:

a. AGENCY RELATED:

ACMC	Automated Call Management Center
V/IP	Voice over Internet Protocol
VAR	Value Added Reseller (IT/S related) vendor
BAFO	Best and Final Offer
GET	General Excise Tax
CPO	Chief Procurement Officer
DAGS	Department of Accounting and General Services
HCE	Hawaii Compliance Express (automated vendor compliance system)
HlePRO	Hawaii State Government, Electronic Procurement System
GC	General Conditions, issued by the Department of the Attorney General
GP	General Provisions
SPO	State Procurement Officer

1.7 . Technology Related Definitions and Offerings for Vendor's Proposal:

A: UNIFIED COMMUNICATIONS (UC)

A set of products that provides a consistent unified user interface and user experience across multiple devices and modes of communications. Unified Communications that is able to provide services such as session management, voice, video, messaging, mobility, and meeting solutions (i.e., web, audio, IM&P, file sharing, white boarding, guest support, etc.). It provides scalable foundation for advanced unified communications capabilities of IM and presence-based services and extends telephony features and capabilities to packet telephony network devices such as IP phones, media processing devices, Voice over IP (VoIP) gateways, and multimedia applications.

Additional services, such as unified messaging, multimedia conferencing, collaborative contact centers, and interactive multimedia response systems, are made possible through open telephony APIs. General UC solution capabilities should include:

- High Availability for Call Processing
- Hardware Platform High Availability
- Network Connectivity High Availability
- PSTN Access resiliency
- Call Processing Redundancy

B. State-of-the-Art Telephone Solution. Utilized to provide the delivery of the telephony application (for example, call setup and teardown, and telephony features), instead of Capabilities should include:

- Support for analog, digital, and IP endpoints
- Centralized Management
- Enterprise Telephony Features (CFx, Transfer, CID, Shared line appearance, One Number Service, etc.)
- Provide basic hunt group and call queuing capabilities
- Flexibility to configure queue depth and hold time, play unique announcements and Music on Hold (MoH), log in and log out users from a queue and basic queue statistics
- E911 Support
 - o National E911 Routing Services (proper PSAP routing when PSTN access is centralized)
 - o 911 Device Tracking Services
 - o 911 On-Site Notification Services

C. Instant messaging/ Presence — Solutions that allow communication over the Internet Protocol, within the enterprise, and remotely, as well as with guest users that offers quick transmission of text- based messages from sender to receiver. In push mode between two or more people using personal computers, Desktop (Windows/Mac/VDI/Linux), Mobile/Smartphone, Tablet, along with shared clients, instant messaging basically offers real-time direct written language-based online chat. Instant messaging may also provide video calling, file sharing, PC to- PC voice calling and PC-to-regular-phone calling. • IM Persistency / Workstream Collaboration.

D. Unified messaging — Integration of different electronic messaging and communications media (e-mail, SMS, Fax, voicemail, video messaging, etc.) technologies into a single interface, accessible from a variety of different devices.

- Ability to access and manage voice messages in a variety of ways, using email inbox, Web browser, desktop client, VoIP phone, or mobile phone
- Visual Voicemail Support (Optional)
- ASR / Transcription Services for recorded messages

E. Automated Contact Center — A computer-based system that provides call and contact routing for high- volume telephony transactions, with specialist answering “agent” stations and a sophisticated real-time contact management system. The definition includes all contact center systems that provide inbound contact handling capabilities, outbound call/contact center and automatic contact distribution, combined with a high degree of sophistication in terms of dynamic contact traffic routing management.

1. Automated Call Distribution:

An automatic call distributor (ACD) in telephony is a system that distributes incoming calls to a specific group of terminals used by agents. It is a part of a computer telephony integration (CTI) system. ACDs recognize, answer and route incoming calls. They range from small systems maintaining a few lines up to systems maintaining a large number of lines for large applications.

An ACD system handles incoming calls based on the numbers called and an associated database of handling instructions. Companies that offer sales and service support use automatic call distributors to validate callers, make outgoing calls, forward calls to the right parties, permit callers to record messages, gather usage statistics, balance the use of phone lines and provide various other services.

ACDs provide caller identification such as that provided by dialed number identification service (DNIS), direct inward dialing, etc. They process high volume incoming calls and distribute them to single or group extensions. They also distribute calls equitably to extensions called as agent lines. They permit only a limited number of staff members to effectively handle large numbers of calls, while assuming that someone is always available at the receiver side to handle calls. An ACD system also maintains records of the peak calling hours, the number of incomplete calls and the incoming call volume.

ACD systems are extensively used in offices handling large volumes of incoming phone calls from callers who require assistance. The routing strategy is a rule-based set of instructions, which tells the ACD how calls are handled in the system. This is the algorithm determining the most appropriate employees available to respond to the incoming calls. Additional data is also reviewed to determine the reason for each call, ascertained by a simple interactive voice response (IVR) system. Initially, the ACD function was internal to the private branch exchange of companies.

The system is designed to enable common computing devices. Additional functions for external routing applications include computer-telephony integration, which can improve call center agent efficiency by matching incoming calls with important data on a PC. This is achieved through the Computer-Supported Telephony Applications (CSTA) protocol

2. Communications Telephony Systems and Applications

- Attendant Consoles (Telephone Station)
- IP Phones (desktop devices and accessories)
- Room Based Conferencing Endpoints (Conf Phones, Spark Board, JamBoard)

3. UC Network Monitoring — Provides end-to-end service management for Unified Communications. Capabilities include testing, performance monitoring, and configuration

management, accounting/billing, analytics (capacity planning), contact center specialized reports (utilization, queue KII's, call abandonment ratios, etc.), and business intelligence reporting.

4. Collaboration — Voice, video, workstream collaboration, and web conferencing; messaging; mobile applications; and enterprise social software. Doesn't include the audio visual software or hardware.

5. Collaborative Video — A set of immersive video technologies that enable people to feel or appear as if they were present in a location that they are not physically in. Immersive video consists of a multiple codec video system, where each meeting attendee uses an immersive video room to “dial in” and can see/talk to every other member on a screen (or screens) as if they were in the same room and provides call control that enables intelligent video bandwidth management.

6. Content Delivery Systems (CDS) — A large distributed system of servers deployed in multiple data centers connected by the Internet. The purpose of the content delivery system is to serve content to a very large number of end-users (i.e., quarterly all hands meetings/webinar) with high availability and high performance. CDSs serve content over the Internet, including web objects (text, graphics, URLs, and scripts), downloadable objects (media files, software, documents), applications (e-commerce, portals), live streaming media, on-demand streaming media, and social networks

1.8 VENDOR COMMUNICATIONS AND QUESTIONS:

Offerors shall input questions or comments concerning this solicitation only into the Q & A section of HiePRO for this RFP.

The answers to the questions shall be posted within the Answers section of the Q & A section of HiePRO and if there may be any revisions to the RFP specification, it will be provided via an addendum to this solicitation.

1.9 SUBMISSION OF PROPOSALS:

Offerors shall carefully examine the solicitation, and amendments (if any), required contract forms, and other documents, laws and rules, as necessary, before submitting a proposal. The submission of a proposal shall be considered to be a warrant and full representation that the offeror has made a careful examination, read, understood and warrants full understanding of the specifications thereof.

Each proposal is submitted within HiePRO in PDF format with bookmarks imbedded designating the critical sections of the Offeror's proposal and shall be clear, concise and complete in description, representation and in fact. Only (1) proposal will be acceptable, alternate proposals will not be considered and will be disregarded.

The HiePRO solicitation will close on 06/04/2020 and proposals must be received in HiePRO by 4:00 PM HST, late submittals will cannot be considered due to HiePRO will not receive any input after 4:00 PM HST concerning this solicitation.

1.10 OVERVIEW OF THE RFP PROCESS

a. The RFP is issued pursuant to Subchapter 6 of HAR Chapter 3-122, implementing HRS §103D-303.

b. The procurement process begins with the issuance of the RFP and the formal response to any written questions or inquiries regarding the RFP. Changes to the RFP will be made only by Addendum, verbal information given or received during the course of this solicitation does not have a bearing on the solicitation specifications thereof.

c. Proposals shall be received in HiePRO. The register of proposals is an automated process in HiePRO. Offerors' proposals shall be made available for public inspection, after notice of award in HiePRO and upon request written request to ERS RFP buyer and include the signed access for government document request.

All proposals and other material submitted by Offerors become the property of the State and may be returned only at the State's option.

d. The Procurement Officer, or an evaluation committee approved by the Procurement Officer, shall evaluate the proposals in accordance with the evaluation criteria Proposal Evaluation Section

e. Proposals may be accepted on evaluation without discussion. However, if deemed necessary, prior to entering into discussions, a "priority list" of responsible Offerors submitting acceptable and potentially acceptable proposals shall be generated. The priority list may be limited to a minimum of three responsible Offerors who submitted the highest-ranked proposals. The objective of these discussions is to clarify issues regarding the Offeror's proposal before the Best and Final Offer, (BAFO) is tendered.

f. If during discussions there is a need for any substantial clarification or change in the RFP, the RFP shall be amended by an addendum to incorporate such clarification or change. Addenda to the RFP shall be distributed only to priority listed Offerors who submit acceptable or potentially acceptable proposals.

g. Following any discussions, Priority Listed Offerors will be invited to submit their BAFO, if required. The Procurement Officer or an evaluation committee reserves the right to have additional rounds of discussions with the top three (3) Priority Listed Offerors prior to the submission of the BAFO.

h. The date and time for Offerors to submit their BAFO, if any, is indicated in BAFO Section. If Offeror does not submit a notice of withdrawal or a BAFO, the Offeror's immediate previous offer shall be construed as its BAFO. Offeror should submit their Offer as their BAFO

- i. After receipt and evaluation of the BAFOs in accordance with the evaluation criteria in Section Four, the Procurement Officer or an evaluation committee will make its recommendation. The Procurement Officer will award the contract to the Offeror whose proposal is determined to be the most advantageous to the State taking into consideration price and the evaluation factors set forth in Section Four.
- j. The contents of any proposal shall not be disclosed during the review, evaluation, or discussion. Once award notice is posted, all proposals, successful and unsuccessful, become available for public inspection upon request and ERS receipt of request for access form. Those sections that the Offeror and the State agree are confidential and/or proprietary should be clearly identified by the Offerors and shall be excluded from access.
- k. The Procurement Officer or an evaluation committee reserves the right to determine what is in the best interest of the State for purposes of reviewing and evaluating proposals submitted in response to the RFP. The Procurement Officer or an evaluation committee will conduct a comprehensive, fair and impartial evaluation of proposals received in response to the RFP.
- l. The RFP, any addenda issued, and the successful Offeror's proposal shall become a part of the contract. All proposals shall become the property of the State of Hawaii.

1.11 PRE-PROPOSAL CONFERENCE AND ONSITE REIVEW:

All vendors at the Site Visit will be required to sign the ERS Confidentiality Agreement in order to see the site.

The purpose of the pre-proposal conference is to provide Offerors an opportunity to be briefed on this procurement and to ask any questions about this procurement. The pre-proposal conference is not mandatory; however, Offerors are encouraged to attend to gain a better understanding of the requirements of this RFP. Offerors are advised that anything discussed at the pre-proposal conference does not change any part of this RFP. All changes and/or clarifications to this RFP shall be done in writing in the form of an addendum to this RFP.

The pre-proposal conference will be held as follows:

Date: 05/13/2020
Time: 11:00 am
Location: ERS Offices, City Financial Tower, 201 Merchant Street, Conf Room 12-A. (Vendors are to enter building at Ground level and proceed to 14th floor lobby and check in with the ERS's receptionist, then will be escorted to the Conference Room).

An escorted site review of the ERS offices shall be provided immediately following the Pre-Proposal Conference. This will be the only pre-proposal conference permitting vendors to review the site prior to RFP closure.

SECTION TWO

BACKGROUND AND SCOPE OF WORK

2.1 PROJECT OVERVIEW AND HISTORY

2.1 Background:

The ERS's current phone system has been in place for over 30 years and uses analog technology with rotating call center. The existing phone cables/wiring has been installed at various times during this period.

The ERS are sourcing proposals from qualified Consultant VAR's to provide within a Design/Build process with total system costing (including labor, materials, product and taxes and fees) a Unified Communication System (UCS) which is not limited to but includes State-of-the-Art Telephony communication system or alternative phone type for approximately 200 various phone, data and fax outlets. Approximately 180 are expected to be in the Honolulu Office, and 20 are expected to be in three (3) neighbor island offices. With an integrated Automated Call Management (ACM) Center for Caller ID, Business SMS/MMS, Voice Mail Audio/Video Conferencing, Mobility, Auto-attendant, Call Forwarding, Greetings etc., Directory for the ERS offices, hub located at the City Financial Center building, at 201 Merchant Street, Honolulu, Hawaii 96813.

2.2 SCOPE OF WORK (SOW):

a. Overview:

The Employees' Retirement System of the State of Hawaii is sourcing Consulting VARS who has expert level of competence in providing State-of-the-Art Phone system which may be Voice / Internet Protocol or alternative other and expert level of competence in Automated Call Center technology for the installation, integration and customization thereof of products and services they offer to provide to the ERS as noted in this RFP. If the offeror provides an internet-based phone solution in the proposed solution the phone will be required to have communication capability if the internet becomes not available.

1: Desk Telephony Systems:

The ERS headquarter offices are located at 201 Merchant Street, Honolulu, Hawaii 96813. The Systems the Offerors will propose to the ERS may be manufactured by Polycom or other national, name brand company's or equivalent systems in form, fit, functionality and performance of approximate 200 phone lines with 165 desk sets of V/IP desktop systems, or equivalent, to be acquired by the ERS is estimated Honolulu office and Neighbor Island offices at 101 Aupuni St # 208, Hilo, HI, 3060 Ewa St # 302, Lihue, HI, and 54 S. High Street # 218, Wailuku, HI. 180 phone lines and 155 desktop systems are estimated to be required for the Honolulu office, while 20 phone lines and 10 desktop sets for the neighbor island offices. The offeror's system proposed is required to be scalable to adapt with changes to ERS's operations.

a. Simplified login integration with preferred devices:

The following protocol outlines a connectivity for dial tone connectivity.

If the Offeror to provide a **simplified** the user login process, connection to the network and ensure system integrity, recommend in the Offerors system design to have the following:

- PSTN service to make and receive phone calls.
- Include ordering ACM services from appropriate dial tone vendor for calling services
- Simplify, to ensure that ERS users will just be required to login once, using their standard credentials to make or receive calls, no changes should be made to the state-of-the-art phones or equivalent products from the manufacturer.

2: Automated Call Management (ACM) Center

The phone system shall provide an integral Automated Call Center application. With priority routing, auto answering and call routing. Desktop systems shall have ability for Video Calling, conference and group calls and with user input the “find-me” auto forwarding to a user specified telephone number. The phone system will accommodate telephone number transfer from existing telephone number scheme to new system for phone and fax numbers, provide customary telephone hand-held sets and include headset usage, Management shall have multiple lines capability. The support the users will receive for the phone system and automated call center shall include live person support for ERS during Hawaii business days/hours, non-business hours shall receive web and email support 7 x 24 x 365.

3. Proposed Solution and Service Requirements

A. Proposal Criteria:

All Offerors to this solicitation are required to upload in their company’s proposal their company’s profile stating their company’s key competencies, business profile, length of time in business, authorizations, certifications and licenses in providing State-of-the Art Phone systems and Automated Call Center applications experience as noted on the Offeror forms

Offerors are required to have an office or an affiliate office in Hawaii to provide the product and systems specified herein, including the labor to install, service, support and provide training. Offeror to provide company key demographics, resumes of key personnel who will be servicing this contract. Offeror is required to be authorized by the hardware manufacturer for sales, service, support and training of the systems they propose to provide to the ERS and applications certification from the manufacture for the Systems they propose in their solution.

B. Vendor Responsibilities

1. Review and administer a Project Change Control Procedure with ERS Point of Contact, (POC to be disclosed at contract award.)
2. Review the Scope of Work and any associated documents, with ERS Point of Contact
3. Coordinate and manage the technical activities of vendor's personnel
4. Prepare and maintain the project plan which lists the activities, tasks, assignments, timeline, milestones and estimates for performance of this Scope of Work
5. Help resolve deviations from the project plan with ERS Point of Contact
6. Manage and support services stated under this Scope of Work

C. Vendors Solution:

Offerors' shall provide the following:

1. Vendor should provide failover capability so that ERS does not have a single point of failure.
2. New phone system should not be reliant on third party software.
3. ERS must be able to retain existing phone number and it is highly desirable to keep the 5-digit HATS dialing.
4. Any servers being proposed must be running a currently supported Microsoft Windows operating system
5. Vendor must perform an assessment of ERS's existing cabling and confirm that the proposed solution will successfully work and identify which cabled areas may require re-cabling.
6. Vendor must provide a complete list of requirements (both minimum and recommended) for the proposed solution.
7. Vendor needs to clearly specify what is covered under maintenance and it should cover, hardware / equipment, software / applications, support, troubleshooting, diagnostics, etc. Furthermore, vendor maintenance should also include upgrades, updates to both hardware, software, operating systems and other parts of the vendor's solution and must be coordinated with ERS to minimize disruption and downtime to staff and business processes.
8. Vendor must clearly delineate what the vendor responsibilities are and what ERS's responsibilities are.
9. Training and documentation should be included for users, power users, administrators, technical staff, etc. In addition, training must include hands-on training and a proposed schedule that will minimize disruption and downtime to staff and business processes. Should there be significant changes to the hardware, software or vendor's solution, vendor is required to provide re-training and revised documentation.
10. Offeror shall include any equipment to be purchased by the ERS for this procurement. For equipment other than handsets and headsets, redundant power supply is required.

The Offeror shall be responsible for providing the sales of the State-of-the Art telephone systems, Integration, customization, custom configuration of the systems with associated hardware and software into the ERS environment as a turnkey system with seamless performance at the into the office environment and providing porting transfer of the existing telephone numbers at each of the office locations into the new telephones with uninterrupted service. Integration shall be seamless into the existing ERS network and environment. Offeror shall Configure the Call Center Software integral with name brand mainstream application system with full functionality and business configuration to the satisfaction of the ERS.

The offeror shall evaluate the existing cabling which supports the computer systems located at the desks of the ERS staff to verify compatibility for providing communication for the State-of-the-Art systems and vendor to provide a report and floor map of cable locations which are compatible and ready to install those cabling locations at which the cabling is legacy and may require upgrading installations prior to installing the desktop systems.

If new cabling is to be required to the office desks, cabling will be done by others, this solicitation does not request new cabling installation, this RFP only addresses the acquisition of the phone systems proper with ancillary hardware if/as required and software to support the phone systems properly and integrated Call Center.

The awardee to this RFP shall be responsible for training the ERS staff on the State-of-the-Art systems provided, identify a Super-User, Administrator of the ERS staff and instruct the ERS staff is systems utilization, configuration and customization. Training to include technical, operational, configuration, updating/upgrading and custom configured to the satisfaction of the ERS. The phone systems which shall be sold and installed shall integrate seamlessly with the ERS network, computer systems and communications environment.

2.3 EMPLOYEES' RETIREMENT SYSTEM RESPONSIBILITIES:

- (1) To Provide RFP requirements definition to support the project.
- (2) To Provide (1) point of contact for Contract Control.
- (3) To Provide (1) Technical Point of contact from IT for systems technical support.
- (4) To Provide (1) Procurement Point of contact for RFP Processing and to answer Questions to the vendor community in behalf of Procurement for ERS
- (5) To facilitate office and technical space at ERS for the vendor support.

2.4 TERM OF CONTRACT

The contract is expected to begin on June 30, 2020. Installation is required to be complete by June 30, 2021 and the cost of installation includes one (1) year of maintenance from the cutover or “Go Live Date” of the telephone system, not to exceed June 30, 2022. The proposer is required to provide an additional five (5) years of maintenance, not to exceed June 30, 2027, that will be invoiced and paid annually.

Unless terminated, the Contractor and the State have the option to extend the term of the contract for two (2) additional one-year periods without the necessity of re-soliciting, upon mutual agreement in writing at least sixty (60) days prior to the expiration of the contract.

SECTION THREE

PROPOSAL FORMAT AND CONTENT

3.1 OFFEROR'S AUTHORITY TO SUBMIT AN OFFER

The State will not participate in determinations regarding an Offeror's authority to sell a product or service. If there is a question or doubt regarding an Offeror's right or ability to obtain and sell a product or service, the Offeror shall resolve that question prior to submitting an offer.

3.2 REQUIRED REVIEW:

3.2.1 Before submitting a proposal, each Offeror must thoroughly and carefully examine this RFP, any attachment, addendum and other relevant document, to ensure Offeror has a full understanding the requirements of this RFP. Offeror must also become familiar with State, local, and Federal laws, statutes, ordinances, rules, and regulations that may in any manner affect cost, progress, or performance of the work required.

3.2.2 Should Offeror find defects and questionable or objectionable items in the RFP, Offeror shall notify the ERS in writing prior to the deadline for written questions as stated in the RFP *Schedule and Significant Dates*, as amended. This will allow the issuance of any necessary corrections and/or amendments to the RFP by addendum, and mitigate reliance of a defective solicitation and exposure of proposal(s) upon which award could not be made.

3.3 PROPOSAL PREPARATION COSTS

Any and all costs incurred by the Offeror in preparing or submitting a proposal shall be the Offeror's sole responsibility whether or not any award results from this RFP. The State shall not reimburse such costs.

3.4 TAX LIABILITY

3.4.1 Work to be performed under this solicitation is a business activity taxable under HRS Chapter 237, and if applicable, taxable under HRS Chapter 238. Contractor is advised that they are liable for the Hawaii GET at the current 4.5% for sales made on Oahu, and at the 4% rate for the islands of Hawaii, Maui, Molokai, and Kauai. If, however, an Offeror is a person exempt by the HRS from paying the GET and therefore not liable for the taxes on this solicitation, Offeror shall state its tax-exempt status and cite the HRS chapter or section allowing the exemption.

3.4.2 Federal I.D. Number and Hawaii General Excise Tax License I.D. Offeror shall submit its current Federal I.D. No. and Hawaii General Excise Tax License I.D. number in the space provided on Offer Form, page OF-1, thereby attesting that the Offeror is doing business in the State and that Offeror will pay such taxes on all sales made to the State.

3.5 PROPERTY OF STATE

All proposals become the property of the State of Hawaii.

3.6 CONFIDENTIAL INFORMATION

3.6.1 If an Offeror believes that any portion of a proposal, offer, specification, protest, or correspondence contains information that should be withheld from disclosure to the public as confidential, then the Offeror shall clearly mark and identify on those specific documents the writing narrative are confidential and the vendor shall inform the Procurement Officer in writing and provided with justification to support the Offeror's confidentiality claim. Price is not considered confidential and will not be withheld.

3.6.2 An Offeror shall request in writing nondisclosure of information such as designated trade secrets or other proprietary data that Offeror considers to be confidential. Such requests for nondisclosure shall accompany and be noted in the proposal. Any confidential materials be clearly marked as confidential and shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal.

3.7 EXCEPTIONS

Should Offeror take any exception to the terms, conditions, specifications, or other requirements listed in the RFP, Offeror shall list such exceptions in this section of the Offeror's proposal. Offeror shall reference the RFP document section where exception is taken, a description of the exception taken, and the proposed alternative, if any. The State reserves the right to accept or not accept any exceptions.

No exceptions to statutory requirements of the AG General Conditions shall be considered.

3.8 PROPOSAL OBJECTIVES

3.8.1 One of the objectives of this RFP is to make proposal preparation easy and efficient, while giving Offerors ample opportunity to highlight their proposals. The evaluation process must also be manageable and effective.

- 3.8.2 Proposals shall be prepared in a straightforward and concise manner, in a format that is reasonably consistent and appropriate for the purpose. Emphasis will be on completeness and clarity and content.
- 3.8.3 When an Offeror submits a proposal, it shall be considered a complete plan for accomplishing the tasks described in this RFP and any supplemental tasks the Offeror has identified as necessary to successfully complete the obligations outlined in this RFP.
- 3.8.4 The proposal shall describe in detail the Offeror's ability and availability of services to meet the goals and objectives of this RFP
- 3.8.5 Offeror shall submit a proposal that includes an overall strategy, Gantt timeline and plan for the work proposed as well as expected results and possible shortfalls.

3.9 PROPOSAL FORMS

- 3.9.1 To be considered responsive, the Offeror's proposal shall respond to and include all items specified in this RFP and any subsequent addendum. Any proposal offering any other set of terms and conditions that conflict with the terms and conditions providing in the RFP or in any subsequent addendum may be rejected without further consideration.
- 3.9.2 Offer Form, Page OF-1. Offer Form, OF-1 is required to be completed using Offeror's exact legal name as registered with the Department of Commerce and Consumer Affairs, if applicable, in the appropriate space on Offer Form, OF-1 (SECTION SEVEN, Attachment 1). Failure to do so may delay proper execution of the Contract.

The Offeror's authorized signature on the Offer Form, OF-1 shall be an original signature in ink, which shall be required before an award, if any, can be made. The submission of the proposal shall indicate Offeror's intent to be bound.

- 3.9.3 Offer Form, Page OF-2. Pricing shall be submitted on Offer Form OF-2 (SECTION SEVEN, Attachment 2). The price shall be the all-inclusive cost, including the GET, to the State. No other costs will be honored. Any unit prices shall be inclusive.

3.10 PROPOSAL CONTENTS

Proposals are to include the following but not limited to the below:

- 3.10.1 Include a transmittal letter to confirm that the Offeror shall comply with the requirements, provisions, terms, and conditions specified in this RFP.

- 3.10.2 Include a signed Offer Form OF-1 with the complete name and address of Offeror's firm and the name, mailing address, telephone number, and fax number of the person the State should contact regarding the Offeror's proposal.
- 3.10.3 If subcontractor(s) will be used, append a statement to the transmittal letter from each subcontractor, signed by an individual authorized to legally bind the subcontractor and stating:
- a. The general scope of the work to be performed by the subcontractor.
 - b. The subcontractor's willingness to perform for the indicated.
- 3.10.4 Offeror to provide all of the information requested in this RFP in the order specified, in a clear, concise and complete format.
- 3.10.5 Proposal shall be organized into sections, following the exact format using all titles, subtitles, and numbering and shall be submitted in acrobat PDF format, each section separated by acrobat bookmarks and each bookmarked section described below.

Each section must be addressed individually, and pages must be numbered sequentially from the start of the proposal to the last page of the proposal. The sections identified shall be:

- a. **Transmittal Letter**
See SECTION SEVEN, Attachment 1, Offer Form OF-1.
- b. **Experience and Capabilities:**
 - 1) A complete, relevant, and current client listing of telephony systems sold, serviced and supported over the last 5 years.
 - 2) The number of years Offeror has been in business and the number of years Offeror has performed services specified by this RFP.
 - 3) A list of key personnel and associated resumes for those who will be involved in this project and their responsibilities for this project, provide name, title and responsibilities for this project.
 - 4) Provide a list of minimums of three (3) Project references from the Offeror's client listing that the State may contact concerning the Offeror's past and current performance in supporting V/IP systems.

In the Project references, please provide the title of the project, location, names, titles, organizations, telephone numbers, email and postal addresses. Please provide a brief description of the projects, project goals, approximate costing, users effected and project schedule length.

- 5) Provide a summary listing of judgments or pending lawsuits or actions against; adverse contract actions, including termination(s), suspension, imposition of penalties, or other actions relating to failure to perform or deficiencies in fulfilling contractual obligations against your firm. If none, Offeror to state none.

c. Strategy

Provide Offeror's technical design and overall strategy for accomplishing the objectives in the RFP in a bulleted line item SOW format. The line item to be followed by narrative of the how the Offer will accomplish the what, which is bulleted in the SOW line items.

Offeror shall include a Gantt type waterfall schedule chart and include in the chart the Offer's task definition from the RFP, (vertical fields,) the length of time in quantity of weeks (left to right format) from NTP (notice to proceed) which shall be required to accomplish the SOW task noted in the Gantt schedule.

d. Certifications:

In the proposal the Offeror shall provide Offeror's company and Staff's certifications and authorizations from the product manufacturer, developer with statements of authorization to perform those items as noted in this RFP.

e. Pricing.

See Attachment 2, Offer Form OF-2 and sign form and submit integral to the proposal, uploaded into HiePRO with other Proposal and ancillary documents.

f. ERS Confidentiality

Offeror and proposed subcontractor shall submit a signed ERS Confidentiality Agreement, that must be uploaded into HiePRO with other Proposal and ancillary documents.

3.11 RECEIPT AND REGISTER OF PROPOALS

Proposals will be received, and receipt is electronically verifiable and is open to the public in Offers Tab in the proposal after bid closing. Public inspection of vendors proposals is per section 103D-701, HRS after bid award and receipt by ERS of the requester, request to view government document form.

3.12 BEST AND FINAL OFFER (BAFO)

If the State determines a BAFO is necessary, it shall request one from the Offeror. The Offeror shall submit its BAFO and any BAFO received after the deadline or not received shall not be considered. It is noted the Offeror should submit their initial offer as their Best and Final Offer.

3.13 MODIFICATION PRIOR TO SUBMITTAL DEADLINE OR WITHDRAWAL OF OFFERS

3.13.1 The Offeror may modify or withdraw a proposal before the proposal due date and time.

3.13.2 Any change, addition, deletion of attachment(s) or data entry of an Offer may be made prior to the deadline for submittal of offers.

3.14 MISTAKES IN PROPOSALS

3.14.1 Mistakes shall not be corrected after award of contract.

3.14.2 When the Procurement Officer knows or has reason to conclude before award that a mistake has been made, the Procurement Officer should request the offeror to confirm the proposal. If the Offeror alleges mistake, the proposal may be corrected or withdrawn pursuant to this section.

3.14.3 Once discussions are commenced or after best and final offers are requested, any priority-listed Offeror may freely correct any mistake by modifying or withdrawing the proposal until the time and date set for receipt of best and final offers.

3.14.4 If discussions are not held, or if the best and final offers upon which award will be made have been received, mistakes shall be corrected to the intended correct offer whenever the mistake and the intended correct offer are clearly evident on the face of the proposal, in which event the proposal may not be withdrawn.

3.14.5 If discussions are not held, or if the best and final offers upon which award will be made have been received, an Offeror alleging a material mistake of fact which makes a proposal non-responsive may be permitted to withdraw the proposal if: the mistake is clearly evident on the face of the proposal but the intended correct offer is not; or the Offeror submits evidence which clearly and convincingly demonstrates that a mistake was made.

3.14.6 Irregularities:

Technical irregularities are matters of form rather than substance evident from the proposal document, or insignificant mistakes that can be waived or corrected without prejudice to other Offerors; that is, when there is no effect on price, quality, or quantity. If discussions are not held or if best and final offers upon which award will be made have been received, the Procurement Officer may waive such irregularities or allow an Offeror to correct them if either is in the best interest of the State. Examples include the failure of an Offeror to: return the number of signed proposals required by the request for proposals; sign the proposal, but only if the unsigned proposal is accompanied by other material indicating the Offeror's intent to be bound; or to acknowledge receipt of an amendment to the request for proposal, but only if it is clear from the proposal that the Offeror received the amendment and intended to be bound by its terms; or the amendment involved had no effect on price, quality or quantity.

SECTION FOUR
PROPOSAL EVALUATION CRITERIA

4.1 Introduction:

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly and impartially. Structural, quantitative scoring techniques will be utilized to maximize the objectivity of the evaluation

Evaluation criteria and the associated points are listed below. The award will be made to the most responsive and responsible Offeror whose proposal is determined to be the most advantageous to the State based on the evaluation criteria listed in this RFP.

4.2 Evaluation Process:

The procurement officer or an evaluation committee of designated reviewers selected by the procurement officer shall review and evaluate proposals. When an evaluation committee is utilized, the committee will be comprised of individuals with experience in, knowledge of, procurement and project responsibility for technical and business requirements of the project. The evaluation will be conducted in three phases as follows:

- Phase 1 - Evaluation of Proposal Requirements
- Phase 2 – Best and Final Offer (BAFO), (if and as required only)
- Phase 3 - Recommendation for Award

4.3 Evaluation Criteria, (proposals shall be judged by the items requested in this RFP to include):

	Evaluation Criteria	Maximum Points
1	Total cost of product, equipment and services	30
2	Corporate Background, Experience, capability	30
3	Previous projects of similar magnitude and scope, Reference and client listings	20
4	Project Proposal	20
	Total	100

1. Total cost of product, equipment and services (30 points)
 - a. For purposes of the evaluation; base the pricing on
 200 phone lines for phone, fax, and data
 (180 in Honolulu and 20 at Neighbor Island Offices)
 165 phone instruments
 (60 Management Phones, 105 Office Worker Phones)
 - b. *Formula for determining allocation of points for fee:

$$\text{allocated points} = (\$ \text{ amount of the lowest fee proposal} \times 30) \div \$ \text{ amount of the fee proposal being evaluated}$$

2. Corporate Background, Experience, capability and proficiency in State-of-the-art Phone systems, Automated Call Management Systems (30 points)
 - a. Number of years in the business and number of years performing services specified in this RFP
 - b. Financial Strength of Offerors
3. State previous projects of similar magnitude and scope of this RFP and provide examples of written plans, cost of projects, challenges and resolution (20 points). Reference and client listings required with project examples.
4. Project Proposal (20), (see attached proposal documents and questions for offeror to answer in their proposal. Technical Requirements are to be answered via line item or Narrative.
 - c. Methodology
 - b. Timeline, offeror to provide a Gantt type schedule noting type, schedule and hours thereof. Expected results and possible shortfalls.

SECTION FIVE

CONTRACTOR SELECTION AND CONTRACT AWARD

5.1 EVALUATION OF PROPOSALS

The Procurement Officer, or an evaluation committee of at least three (3) qualified State employees selected by the Procurement Officer, shall evaluate proposals. The evaluation will be based solely on the evaluation criteria set out in Section Four of this RFP.

a. PRELIMINARY EVALUATION:

A preliminary evaluation shall determine whether each Proposal is considered responsible, thus justifying further evaluation. In its preliminary evaluation, the Procurement Officer or Committee will examine the completeness of each Proposal, and its compliance with the instructions, terms and conditions in this RFP. Subsequent review and evaluation will be based on the evaluation criteria stated in RFP. Any Proposals that are incomplete or that do not comply with the instructions or terms and conditions shall be rejected and excluded from further consideration. Responsible Offeror's Proposals must meet all submittal requirements and the minimum eligibility requirements described in the RFP.

b. PRIORITY LIST OF OFFERORS

Before conducting discussions, a priority list shall be generated by the Responsible Procurement Official or Evaluation Committee. In accordance with HAR § 3-122-53, in order to generate a priority list.

Proposals shall be initially classified as acceptable, potentially acceptable or unacceptable based on the Evaluation Criteria. The priority list may be limited to 3 highest ranked proposals. All responsible Offerors who submit acceptable Proposals or potentially acceptable Proposals are eligible for the prioritized listing. If numerous acceptable and potentially acceptable Proposals are submitted, the Evaluation Committee or the Procurement Officer may limit the priority list to at least three (3) responsible Offerors who submitted the highest-ranked Proposals.

c. DISCUSSIONS WITH PRIORITY-LISTED OFFERORS

Discussions may be conducted with Priority-Listed Offerors, if deemed advantageous by the ERS in its sole discretion. Discussions will be limited to only "priority-listed" Offerors and are held 1) to help the ERS better understand a Proposal if questions arise. 2) to facilitate arriving at a contract that will provide the best value to the ERS, taking into consideration the evaluation criteria set forth in the RFP; and 3) to discuss any other issues the agency deems in its sole discretion to be in the best interests of the State. Discussions may include, but are not limited to, presentation of Offeror's Proposal, interviews with Offeror's key personnel, demonstrations, site visits, or teleconferences. Any discussions shall be conducted in an organized and consistent manner established by the agency, and in accordance with the following:

A. Priority-listed Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussions and revisions of Proposals.

B. Any substantial oral clarification of a Proposal shall be reduced to writing by the priority-listed Offeror.

C. If during discussions there is a need for any substantial clarification or change in the RFP, the RFP may be amended by an addendum to incorporate the clarification or change. Addenda to the RFP shall be distributed only to the priority listed Offerors.

D. Priority-listed Offerors may be permitted to amend Proposals already submitted, provided such amendments are related and limited to the discussions conducted.

E. If in the opinion of the Evaluation Committee a contemplated amendment will significantly change the nature of the procurement, the RFP may be canceled and a new RFP may be issued.

F. The contents of any Proposal shall not be disclosed so as to be available to competing Offerors during the discussion process.

5.2 BEST AND FINAL OFFERS:

At the option of the ERS and following discussions between the Evaluation Committee or Procurement Officer and Priority-listed Offerors, each Priority-listed Offeror may be asked to provide their best and final offer. In that event, the procedure as listed below will be used.

A. The Evaluation Committee or Procurement Officer will establish a date and time for submission of best and final offers.

B. Offerors may be afforded the opportunity to revise their Proposals, including price, during the best and final offer phase.

C. If an Offeror does not submit a notice of withdrawal or another best and final offer, the Offeror's immediate previous Proposal will be construed as their best and final offer.

D. After best and final Proposals are received, final evaluations will be conducted by the Evaluation Committee or the Procurement Officer for an award.

E. Best and final offers shall be submitted only once, unless the head of the purchasing agency or designee determines that it is in the ERS best interest to conduct additional discussions or change the requirements by addendum distributed only to priority-listed Offerors and require another submission of best and final offers. Otherwise, no discussion of or change in the best and final offers shall be allowed prior to award.

5.3 AWARD OF CONTRACT

Method of Award. Award will be made to the most responsible and responsive Offeror whose proposal is determined to be the most advantageous to the State based on the evaluation criteria set forth in the RFP.

5.4 RESPONSIBILITY OF OFFERORS

Offeror is advised that in order to be awarded a contract under this solicitation, Offeror will be required, to be compliant with all laws governing entities doing business in the State including the following chapters and pursuant to HRS §103D-310(c):

1. Chapter 237, General Excise Tax Law;
2. Chapter 383, Hawaii Employment Security Law;
3. Chapter 386, Worker's Compensation Law;
4. Chapter 392, Temporary Disability Insurance;
5. Chapter 393, Prepaid Health Care Act; and
6. §103D-310(c), Certificate of Good Standing (COGS) for entities doing business in the State.

The State will verify compliance on Hawaii Compliance Express (HCE).

Hawaii Compliance Express. The HCE is an electronic system that allows vendors/contractors/service providers doing business with the State to quickly and easily demonstrate compliance with applicable laws. It is an online system that replaces the necessity of obtaining paper compliance certificates from the Department of Taxation, Federal Internal Revenue Service; Department of Labor and Industrial Relations, and Department of Commerce and Consumer Affairs.

Vendors/contractors/service providers should register with (HCE) prior to submitting an offer at <https://vendors.ehawaii.gov>. The annual registration fee is \$12.00 and the 'Certificate of Vendor Compliance' is accepted for the execution of contract and final payment.

Timely Registration on HCE. Vendors/contractors/service providers are advised to register on HCE soon as possible. Each Offeror is to be compliant on HCE by the time of solicitation closing.

5.5 PROPOSAL AS PART OF THE CONTRACT

This RFP and all or part of the successful proposal may be incorporated into the ERS contract.

5.6 PUBLIC EXAMINATION OF PROPOSALS

Except for confidential portions, the proposals may be made available for public inspection after posting of award and requester providing a Request for Government document form, filled out and signed appropriately pursuant to HRS §103D-701.

If a person is denied access to a State procurement record, the person may appeal the denial to the office of information practices in accordance with HRS §92F-42(12).

5.7 DEBRIEFING

Pursuant to HAR §3-122-60, a non-selected Offeror may request a debriefing to understand the basis for award.

A written request for debriefing shall be made within three (3) working days after the posting of the award of the contract. The Procurement Officer or designee shall hold the debriefing within seven (7) working days to the extent practicable from the receipt date of written request. Award shall be posted in same location as solicitation posting, HiePRO

Any protest by the requestor following a debriefing, shall be filed within five (5) working days, as specified in HAR §103D-303(h).

5.8 PROTEST PROCEDURES

Pursuant to HRS §103D-701 and HAR §3-126-3, an Offeror who is aggrieved in connection with the award of a contract may submit a protest. Any protest shall be submitted in writing to the Procurement Specialists at:

SJ Melendrez, ERS, 201 Merchant Street, Suite 1400, Email:
Steven.melendrez@hawaii.gov

A protest shall be submitted in writing within five (5) working days after the aggrieved person knows or should have known of the facts giving rise thereto; provided that a protest based upon the content of the solicitation shall be submitted in writing prior to the date set for receipt of offers. Further provided that a protest of an award or proposed award shall be submitted within five (5) working days after the posting of award or if requested, within five (5) working days after the debriefing was completed.

The notice of award, if any, resulting from this solicitation shall be posted on the HIePRO website (<https://hiepro.ehawaii.gov/welcome.html>) and shall also be made available on the State of Hawaii HANDS website, (<https://hands.ehawaii.gov/hands/>)

5.9 APPROVALS

Any agreement arising out of this offer may be subject to the approval of the Department of the Attorney General, and to all further approvals, including the approval of the Governor, as required by statute, regulation, rule, order, or other directive.

5.10 CONTRACT EXECUTION

Successful Offeror receiving award shall enter into a formal written contract by the State. No performance or payment bond is required for this contract.

No work is to be undertaken by the Contractor prior to the effective date of contract. The State of Hawaii is not liable for any work, contract, costs, expenses, loss of profits, or any damages whatsoever incurred by the Contractor prior to the official starting date.

If an option to extend is mutually agreed upon, the Contractor shall be required to execute a supplement to the contract for the additional extension period.

5.11 INSURANCE

5.11.1 Prior to the contract start date, the Contractor shall procure at its sole expense and maintain insurance coverage acceptable to the State in full force and effect throughout the term of the Contract. The Offeror shall provide proof of insurance for the following minimum insurance coverage(s) and limit(s) in order to be awarded a contract. The type of insurance coverage is listed as follows:

1. Commercial General Liability Insurance

Commercial general liability insurance coverage against claims for bodily injury and property damage arising out of all operations, activities or contractual liability by the Contractor, its employees and subcontractors during the term of the Contract. This insurance shall include the following coverage and limits specified or required by any applicable law: bodily injury and property damage coverage with a minimum of \$1,000,000 per occurrence; personal and advertising injury of \$1,000,000 per occurrence; broadcasters' liability insurance of \$1,000,000 per occurrence; and with an aggregated limit of \$2,000,000. The commercial general liability policy shall be written on an occurrence basis and the policy shall provide legal defense costs and expenses in addition to the limits of liability stated above. The Contractor shall be responsible for payment of any deductible applicable to this policy.

2. Automobile Liability Insurance

Automobile liability insurance covering owned, non-owned, leased, and hired vehicles with a minimum of \$1,000,000 for bodily injury for each person, \$1,000,000 for bodily injury for each accident, and \$1,000,000 for property damage for each accident.

3. Appropriate levels of per occurrence insurance coverage for workers' compensation and any other insurance coverage required by Federal or State law.

5.11.2 The Contractor shall deposit with the ERS, on or before the effective date of the Contract, certificate(s) of insurance necessary to satisfy the ERS that the provisions of the Contract have been complied with, and to keep such insurance in effect and provide the certificate(s) of insurance to the ERS during the entire term of the Contract. Upon request by the ERS, the Contractor shall furnish a copy of the policy or policies.

5.11.3 The Contractor will immediately provide written notice to the ERS and contracting department or agency should any of the insurance policies evidenced on its Certificate of Insurance form be cancelled, limited in scope, or not renewed up expiration.

5.11.4 The certificates of insurance shall contain the following clauses:

1. “The State of Hawaii is added as an additional insured as respects to operations performed for the State of Hawaii.”
2. “It is agreed that any insurance maintained by the State of Hawaii will apply in excess of, and not contribute with, insurance provided by this policy.”

5.11.5. Failure of the Contractor to provide and keep in force such insurance shall constitute a material default under the Contract, entitling the State to exercise any or all of the remedies provided in the Contract (including without limitation terminating the Contract). The procuring of any required policy or policies of insurance shall not be construed to limit the Contractor’s liability hereunder, or to fulfill the indemnification provisions of the Contract. Notwithstanding said policy or policies of insurance, the Contractor shall be responsible for the full and total amount of any damage, injury, or loss caused by the Contractor’s negligence or neglect in the provision of services under the Contract.

5.12 REQUIREMENTS FOR BID and PERFORMANCE BONDS

Bid and performance bonds are not being required for this solicitation.

5.13 PAYMENT

Incremental payments shall be made to the awarded Contractor on a monthly basis after the close of business of the last day of the month, upon receipt of invoice and completion reports that meet the expectations of the ERS. The receipt of monthly reports shall be due based on the timeline submitted by the Contractor in the proposal, or as amended.

5.14 CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract, remaining portion thereof remains in effect.

SECTION SIX

SPECIAL PROVISIONS

6.1 OFFER GUARANTY

A proposal security deposit or performance bonds are NOT required for this RFP.

6.2 ACCEPTANCE AND TESTING

The ERS will accept the work from the vendor upon completion of the work assignments and testing thereof outlined in the RFP Statement of Work and identified by the vendor in their project plan. Acceptance of the work is at the discretion of the ERS

6.3 INTELLECTUAL PROPERTY RIGHTS

The State reserves the right to unlimited, irrevocable, worldwide, perpetual, royalty-free, non-exclusive licenses to use, modify, reproduce, perform, release, display, create derivative works from, and disclose the work product, and to transfer the intellectual property to third parties for State purposes.

The work contracted by the State to the awarded vendor is work for hire, therefore the work, which is contracted, performed and the vendor is paid for becomes the unlimited right of the State and Employees' Retirement System.

6.4 WARRANTIES AND DISCLAIMER OF IMPLIED WARRANTIES

All Hardware provided in the fulfillment of the requirements of this RFP shall provide a minimum of 1-year warranty from the manufacturer and the Offeror shall offer an extended warranty of 5 years. Any hardware provided which may have a defect shall be replaced or repaired at no additional cost to the ERS. Software used for the Automated Call Center upgrades and updates shall be provided at no additional cost to the ERS.

6.5 PREFERENCES

a. HAWAII PRODUCTS PREFERENCE

In accordance with HRS §103D-1002, the Hawaii products preference is applicable to this solicitation. Hawaii Products [are / may be] available for those items noted on the offer form. The Hawaii products list is available on the SPO webpage at <http://hawaii.gov/spo> Offeror submitting a Hawaii Product (HP) shall identify the HP on the solicitation offer page(s). Any person desiring a Hawaii product preference shall have the product(s) certified and qualified if not currently on the Hawaii products list, prior to the deadline for receipt of offer(s) specified in the procurement notice and solicitation. The responsibility for certification and qualification shall rest upon the person requesting the preference.

b. SOFTWARE DEVELOPMENT BUSINESSES PREFERENCE

Subchapter 5, Chapter 3-124, HAR, provides that:

The preference shall apply to all bids or offers issued by a purchasing agency when so stated in the solicitation.

Bids issued by a governmental agency pursuant to Section 103D-301, HRS, shall contain a notice stating that a price preference will be given to Hawaii software development businesses. This price preference will be ten per cent of the bid price, and will be used for bid evaluation.

Bidders requesting a preference shall submit a completed certification form, as required by Section 3-124-33, with each bid. Previous certifications shall not apply unless allowed by the bid.

Any bidder who fails to indicate that it is a Hawaii software development business will be presumed to be a non-Hawaii software development business and the bidder's proposal will be increased by ten per cent for purposes of evaluation.

Where a bid or purchase contains both Hawaii software development businesses and non-Hawaii software development businesses, then for the purpose of determining the lowest evaluated bid, the original bid price for the non-Hawaii software development businesses shall be increased by ten per cent.

The responsible bidder submitting the lowest evaluated bid(s), taking into consideration all applicable preferences shall be awarded the contract, provided the product being offered meets the minimum bid specifications.

The contract amount of any contract awarded shall be the original bid price offered, exclusive of any preferences.

6.6 CERTIFICATION OF OFFEROR CONCERNING WAGES, HOURS AND WORKING CONDITIONS OF EMPLOYEES SUPPLYING SERVICES

All Offerors for service contracts shall comply with section 103-55, Hawaii Revised Statutes, which provides as follows:

Wages, hours, and working conditions of employees of CONTRACTOR supplying services: Before any prospective Offeror is entitled to submit any offer for the performance of any contract to supply services in excess of \$25,000 to any governmental agency, Offeror shall certify that the services to be performed will be performed under the following conditions:

Wages: The services to be rendered shall be performed by employees paid at wages or salaries not less than the wages paid to public officers and employees for similar work.

Compliance with labor laws: All applicable laws of the Federal and State governments relating to workers compensation, unemployment compensation, payment of wages, and safety will be fully complied with.

No contract to perform services for any governmental contracting agency in excess of \$25,000 shall be granted unless all the conditions of this section are met. Failure to comply with the conditions of this section during the period of the contract to perform services shall result in cancellation of the contract.

It shall be the duty of the governmental contracting agency awarding the contract to perform services in excess of \$25,000 to enforce this section.

This section shall apply to all contracts to perform services in excess of \$25,000, including contracts to supply ambulance service and janitorial service.

This section shall not apply to:

- (1) Managerial, supervisory, or clerical personnel.
- (2) Contracts for supplies, materials, or printing.
- (3) Contracts for utility services.
- (4) Contracts to perform personal services reference Hawaii Revised Statutes, (HRS).
- (5) Contracts for professional services.
- (6) Contracts to operate refreshment concessions in public parks, or to provide food services to educational institutions.
- (6) Contracts with nonprofit institutions.

SECTION SEVEN

ATTACHMENTS AND EXHIBITS

Attachment 1: OFFER FORM, OF-1

Attachment 2: OFFER FORM, OF-2

Attachment 3: TECHNICAL REQUIREMENTS,
TELEPHONY SYSTEM

Attachment 4: TECHNICAL REQUIREMENTS
AUTOMATED CALL CENTER

Attachment 5: WARRANTY & SERVICE LEVEL AGREEMENTS

Attachment 6: Q & A QUESTIONS FOR OFFEROR TO ANSWER
AND PROVIDE IN PROPOSAL SUBMITTAL

Exhibit A: COMPLIANCE VENDOR QUESTIONS (EXCEL FILE)

Exhibit B: ERS CONFIDENTIALITY AGREEMENT

Exhibit C: CONTRACT EXAMPLE

**ATTACHMENT 1,
OFFER FORM, OF-1
RFP-P20001034**

**STATE-THE-ART TELEPHONY SYSTEM
FOR THE
EMPLOYEES' RETIREMENT SYSTEM OF THE STATE OF HAWAII**

**Procurement Officer
Employees' Retirement System
201 Merchant Street, 14th Floor
State of Hawaii, Honolulu, Hawaii 96813**

Dear Procurement Officer:

The undersigned has carefully read and understands the terms and conditions specified in the Specifications and Special Provisions attached hereto, and the General Conditions are hereby made a part hereof. Offeror hereby submits the following offer to perform the work specified herein, all in accordance with the true intent and meaning thereof. The undersigned further understands and agrees that by submitting this offer. Offeror declares the offer submitted is not in violation of Chapter 84, Hawaii Revised Statutes, concerning prohibited State contracts, and offeror certifies the price(s) submitted are independently arrived at without collusion.

Offeror is:

Sole Proprietor Partnership *Corporation Joint Venture
 Other _____
*State of incorporation: _____

Hawaii General Excise Tax License I.D. No. _____

Federal I.D. No. _____

Payment address (other than street address below): _____
City, State, Zip Code: _____

Business address (street address): _____
City, State, Zip Code: _____

Respectfully submitted:

Date: _____ (x) _____
Authorized (Original) Signature

Telephone No.: _____

Name and Title (Please Type or Print)

Fax No.: _____
E-mail Address: _____
** _____
Exact Legal Name of Company (Offeror)

**If Offeror is a "dba" or a "division" of a corporation, furnish the exact legal name of the corporation under which the awarded contract will be issued.

**ATTACHMENT 2
OFFEROR'S PROPOSAL FORM OF-2
RFP-P20001034**

Project total costing to be included below:

1. State-of-the-Art Phone System

Product (ERS will pay for actual products purchased and installed)

Office Worker Phone: 105 Type: _____ Cost ea.: _____ Ext: _____

Management Phone: 60 Type: _____ Cost ea: _____ Ext: _____

Licenses: _____ Cost ea: _____ Ext: _____

Installation Services:

Materials; Cost ea: _____ Ext: _____

Installation Labor Services: Est Hrs.: _____ Cost per: _____ Ext: _____:

Onsite Training:

Labor Services: Est Hrs.: _____ Cost per: _____ Ext: _____

Warranty: Hardware for 5 years: Cost per: _____ Ext: _____

Support; 5 years Cost per: _____ Ext: _____

Product Shipping: \$ _____

State GET @ 4.712% \$ _____

Subtotal State-of-the-Art Phone System \$ _____

(continued)

ATTACHMENT 2
 OFFEROR'S PROPOSAL
 OFFER FORM
 OF-2 (continued)

2. Automated Call Management System Software

Product Software

Cloud hosting: Type: _____ Cost year: _____ Ext: _____

Software: Type: _____ Cost ea: _____ Ext: _____

Licenses: Cost ea: _____ Ext: _____

Contract Costing for providing the following for Automated Call Management Center
Installation & Configuration Services:

Materials; Cost ea: _____ Ext: _____

Installation Labor Services: Est Hrs.: _____ Cost per: _____ Ext: _____:

Onsite Training:

Labor Services: Est Hrs.: _____ Cost per: _____ Ext: _____

Support; 5 years Cost per: _____ Ext: _____

Product Shipping: \$ _____

State GET @ 4.712% \$ _____

Subtotal Automated Call Management System Software \$ _____

(continued)

ATTACHMENT 2
OFFEROR'S PROPOSAL
OFFER FORM
OF-2 (continued)

3. TOTAL PRICE FOR RFP

TOTAL OF LINE 1 PLUS LINE 2 \$ _____

NOTE: REFER TO SECTION 4.3 Evaluation Criteria

(Quote is held valid for (90) calendar days).

Offeror _____
Name of Company

Authorized (Original) Signature

Name and Title (Please Type or Print)

ATTACHMENT 3

TECHNICAL REQUIREMENTS TELEPHONY SYSTEM

State-of-the-Art Telephony System Features and Specifications

1. PHONE FORM FEATURES

- 1.1 Multitouch color LCD touchscreen.
- 1.2 Voicemail support.
- 1.3 Adjustable base height.
- 1.4 USB Type A & Type C ports.
- 1.5 A adjustable font size, and viewing in any lighting required.

2. AUDIO FEATURES

- 2.1 HD Voice lifelike for all audio path. hands-free and headset.
- 2.2 Acoustic Clarity, full duplex and echo cancel and background suppression
- 2.3 Individual volume settings with visual feedback for each audio path
- 2.4 Voice activity detection and Comfort noise generation
- 2.5 Dial tone generation, Low delay, adaptive jitter and Packet loss conceal.

3. HANDSET COMPATIBILITY

- 3.1 Dedicated RJ-9 headset jack. port
- 3.2 Hearing aid compatible handset for magnetic coupling compliance
Includes ADA ITU-T P.370 and TIA 504A and ADA sec 508 standards
- 3.3 USB headset support and compatible with TTY adapter equipment

4. NETWORK AND PROVISIONING

- 4.1 Two ports gigabit ethernet, 10/100/1000Base-TX ports SIP and SDP protocol supported
- 4.2 Manual or dynamic (DHCP) network and Time and date NTP sync.

5. CALL TRACKING.

- 5.1 Provisioning and call server redundancy support.
- 5.2 SIP and RTCP, RTP support
- 5.3 Event logging, syslog and hardware diag., status and statistics reporting

6. SECURITY

- 6.1 802.1X authentication, EAPOL media encryption via SRTP & Transport layer security (TLS), Encrypted configuration files
- 6.2 Digest authentication, Password login and URL syntax with password for boot server address, HTTPS secure provisioning

7. DESKTOP UNIT ATTRIBUTES

- 7.1 Console, Handset with handset cord, CAT-5E cable & Desk Stand

ATTACHMENT 4
CALL CENTER MINIMUM TECHNICAL USER REQUIREMENTS.

1. Inbound Call Rotation

A Call rotation for 2-3 staff. Allow calls to route to 3-4 of staff (ACC) at their desks. Option to increase the staff for the calls and/or route to the other internal organizations. Include automatic IVR (interactive Voice Response).

2. Menu Tabs: for users to direct calls via menu tabs:

- A. For general information (e.g. website, office hours)
- B. Direct to specific inter-organizations.
- C. Call forwarding to inter-organizations.
- D. Users navigate menus to ensure call is routed properly.

3. Auto Routing:

A. Inbound calls to automatically go to the next available agent.

4. Call-Back Features:

- A. Ability to leave callback phone number which can be automatically dialed and enable. “double ring” to identify incoming call to agent as a “callback” caller.
- B. Ability to notify members of wait times and has call back feature without losing place in, Integral to system while on operation in wait que.

5. Voicemail tracking:

- A. The ACC line will enable caller to speak to a live person.
 - 1. If agent is unable to understand message, name, and phone number and caller does not have voice mail, invoke the auto call back to the line at a prescribed time by the agent.

6. Training:

A. Vendor to provide to the ERS on system setup, configuring, modify of settings for the calling environment, and modification of tab instructions.

7. Call Tracking.:

- A. Ability to track incoming and outgoing calls, dynamically and back end report.
 - Number of calls (e.g. daily, monthly)
 - Recording of conversation (Staff, time of call, minutes spent on calls)
 - Ability to track calls by time of day or caller to identify staff that spoke to caller.
- (1) Abandoned or dropped calls
- (2) Ability to classify type of call

ATTACHMENT 4 (Continued)
CALL CENTER MINIMUM TECHNICAL USER REQUIREMENT

8. Reporting features:

A. Based on the tracking requirements, the ability to print reports, export reports to excel and view online, such as:

1. Number of calls received
2. Number of calls dropped
3. Length of call
4. Number of calls transferred
5. Wait time
6. Number of voicemails
7. Number of calls per agent
8. Historical and dynamic, real time reporting

9. Customer Relations Manager:

A. Able to interface with V3 CRM (Customer Relation Management) with caller ID.

1. Ability to work with caller-id capability to track calls.

10. Auto Attendant Features

A. Flexible Greeting, user programmable:

1. Users are able to maintain the main greeting.
2. Set-up anytime at user's discretion, after hours, holidays, special events

B. Provide outbound alerts

11. Call Routing:

A. Take phones out of rotation for breaks, lunch and other reasons. Includes ability to track these events.

B Route calls by priority, ring sequence, ring on all phones designated ring groups. etc.

12. Supervisor Features

A Listen in on call and to enter call if necessary.

B. To dynamically view agents status.

C. Real-time monitoring of queues, calls, emails, chats, etc.

ATTACHMENT 4 (Continued)
CALL CENTER MINIMUM TECHNICAL USER REQUIREMENT

13. Technical Features

- A. Auto Transcribe recorded call and voice messages for storage and to email transcribed Messages
- B. Storage capacity to retain recorded calls for one (1) year,
- C. Optional expansion/growth for storage
- D. Configurable to purge recorded calls on specified interval

14. Porting Telephone numbers

- A. Retain existing telephone numbers and port to new system.

15. Enhanced Capabilities

- A. Able for integrated video conferences, (external and internal) and for SMS or text messages and for online private and web chats.

ATTACHMENT 5:
SERVICE LEVEL AGREEMENT & WARRANTY REQUIREMENTS

1. Contractor shall maintain equipment in good working order to meet the needs of the ERS.
The ERS is requesting from the Offeror a maintenance and warranty agreement for all products and services provided by Offeror to cover all hardware, software, firmware and ancillary equipment provided by the awardee to perform on this contract.
2. Contractor to provide all technical support and services required to repair and restore system operation in event of system failure. Repairs shall include labor, hardware and software recoding required restoring system, as well as replacement parts which may become defective due to normal wear and usage.
3. Contractor shall perform hardware and software upgrades and patches for the current version of software used by the system to maintain the system on supported versions. Contractor is responsible for fixing any problems or overwriting system changes created by the installation of upgrades and patches necessary to maintain the system in good working order. If any hardware or software reaches end of support, Contractor shall replace with hardware or software of similar functionality.
4. Contractor shall perform inspections at regular intervals and provide services and repairs as necessary to keep equipment in good working order.
5. Contractor shall coordinate with the ERS staff and external vendors to interface, connect and troubleshoot system anomalies as required.
6. Contractor shall coordinate with the ERS staff and dial tone provider / vendor to interface, connect to the ACC system, and/or troubleshoot system anomalies.
7. Contractor shall make any software changes as necessary during the maintenance period as requested by the ERS
8. Contractor shall provide end user training for all ERS staff to enable usage of all equipment and software and any upgrades to phone/voicemail system and phone equipment.
9. Contractor shall provide system administrator training to the ERS and/or other State of Hawaii agencies staff to enable the ERS to set up or make changes to the following: the equipment as required, as example, administration of the upgraded hardware and software, and/or the ACC system's software.

10. During the term of the maintenance period Contractor shall provide

1. A dedicated customer support representative.
2. Provide phone support for assistance and advice to ERS and the State of Hawaii agencies as required, including, but not limited to, answering questions, assist in troubleshooting problems related to the new system; and assisting the ERS in making changes to the ACC system (e.g., assistance in designing changes, analyzing proposed changes, and instructions and walk-through on how to make changes).
3. Perform remote installation of upgrades and patches for the current version of software used by the new system. Contractor is also responsible for fixing any problems or overwriting system changes created by the installation of these upgrades and patches.
4. Provide emergency service (24 x 365 days a year including holidays) in order to keep the new system functioning properly and maintain system uptime.
5. Phone system hardware to be repaired within 24 hours or replaced at no additional cost to ERS

11. Service period will be for one (5) years, commencing upon full execution of the contract and with contract options to renew for two (2), additional one (1)-year periods after the first (5) year term.

12. Offeror's shall be firm, fixed, inclusive of all fees, costs, and taxes.

13. Offeror shall include any equipment to be purchased by the ERS for this procurement. For equipment other than handsets and headsets, redundant power supply is required.

ATTACHMENT 6:
Q & A QUESTIONS FOR OFFER TO ANSWER AND
PROVIDE IN PROPOSAL SUBMITTAL.

A. SOLUTION ARCHITECTURE AND TECHNOLOGY

1. Provide a description of your proposed solution architecture, including network and component diagrams and quantities. This includes Call Center as a service offering.
2. Describe the telecommunications requirements for bandwidth, line, and port sizing.
3. Describe the physical, environmental and power requirements of your proposed solution.
4. Describe how your solution supports future growth.
5. What is the system availability percentage of your proposed solution (e.g. 99.999% availability)?
6. Describe any specific capabilities of your proposed solution to support high levels of reliability and availability (e.g. virtualization methods used, hot/warm/cold standby servers and/or application redundancy, distributed processing, support for failover across a WAN environment, stateful failover vs next call failover, etc.).
7. Provide resolution if internet goes down how the phone system stays up and provide a disaster recovery plan for your solution.
8. Describe how system and data integrity is maintained in the event of a failure in any of your proposed system's components. Include call preservation capabilities in your description.
9. Indicate any features that are not available if using a third-party hard phone (e.g. whisper tones, zip tones, ability to remotely listen in, etc.).
10. Describe the scalability of system in terms of the number of concurrent agents, calls and calls per second.
11. In a multisite deployment, how long does the system take to react to an outage of:
 - A main routing process?
 - An automatic call distributor (ACC)
 - An interactive voice response (IVR) system?
12. Validate that all upgrades and enhancements shall be provided at no additional cost.

B. TECHNOLOGY COMPONENTS

- 1 Describe the workstation requirements. For Web-based applications, what browsers are supported, and at what version levels?
2. How will the solution interface to the telephony environment? Can a common dial plan be supported between third-party and system stations?
- 3 What other telephony environments/interfaces are supported?

- 4 Provide server and workstation specifications, including minimum workstation requirements for administrators, supervisors, and agents. Describe type of virtual machine (VM) environments supported and versions required for both application servers and servers that handle media.
5. Describe how your solution will utilize our existing enterprise telephony systems
6. How are transfers from the ACC to the phone SYSTEM handled internally.
7. Describe the process for both cold and warm transfers.
8. Describe the information available in your system logs.
9. Describe how the solution integrates with third-party databases (for example, support for compliant databases, access via Web services, etc.).
- 10 How many database connections can be open at one time?
11. What is the solution database based on?
12. What security is used to control access the database?
13. How does the solution integrate with messaging systems? What stands are supported?
14. Describe how the solution supports integration with other gateways.
15. Describe how the solution supports non-native endpoints.
16. What has been your solution availability over the past three years?
- 17 Describe your company's policy for managing system maintenance. Is there a window when the system will be down for maintenance and unavailable to the users? Is this a static time weekly or monthly? How are other periods of unavailability?
- 18 Describe your solution's system backup and recovery features and the components to consider for disaster recovery.
- 19 In which U.S. cities does your company have data center locations? Describe any planned changes over the next three years.
- 20 Describe how the solution performs within industry standard norms for sound fidelity, jitter, packet loss, latency and other routinely used performance metrics.
- 21 Describe how the global user/call ID is defined and passed to other systems/applications. Can your solution accept a global unique identifier (GUID) from another system?
- 22 Describe your solution's ability to do session routing (route to the right network/device, not just to the right user).
- 23 Describe your solution's ability to integrate with internal presence/chat solutions, and its ability to route and transfer calls to users on non-native platforms?

24 Describe the level of call and/or contact logging available and how logs can be aggregated together for end-to-end call flows.

25 Describe your solution's support of Web services for integration into other systems. List all services supported.

C. SECURITY:

1. Describe the security integration with multiple firewalls.

2 Describe what types of password authentication is supported and how users log into the system

3 Describe login executions required to utilize full functionality in your product.

4 Describe the software security embedded in the proposed solution.

5 Describe how your system supports different access security levels.

6 Describe the solution's data encryption capabilities.

7 Describe the solution's communications transmission encryption capabilities.

8 Describe how the solution provides secure connections to external users.

9 Describe how the solution's security policies are compliant with industry standards.

10 Can all media packets (voice, video, IM, etc.) in transport be encrypted? How does the encryption keys execute?

11 How does the solution protect from standard IP vulnerabilities, including denial-of-service attacks?

D. SYSTEM MANAGEMENT TOOLS:

1 Describe your solution's management tools, including but not limited to:

- System performance monitoring tools
- Administrative tools for enabling moves, adds and changes
- Administrative tools for designing call/contact flows
- Call restriction assignment tools
- Class-of-service definitions and assignment tools
- Dial plan and routing parameter tools
- Media and voice conferencing servers
- Debugging tools
- System performance diagnostics and troubleshooting tools.
- Tools for monitoring and filtering of alarms, faults and associated logs.
- Tools for providing real-time statistics regarding system performance, including checking server and process status
- Tools for supporting Simple Network Management Protocol (SNMP) traps to external

2 Describe the solution's ability to support, build and/or modify a call flow, end to end, in a single tool that is GUI-based.

3 Describe the solution's ability to calculate, track and alarm on call/media quality.

4 Describe the solution's ability to support secure remote access for troubleshooting.

5 Describe the solution's management tools' key performance indicators (KPIs), including any threshold alarming that is prebuilt into the solution and configured with defaults that can be changed. List everything that can be monitored and alarmed on.

E. CALL CENTER APPLICATION FUNCTIONALITY

1. ACC/In-Bound Call Routing:

- a. Describe the capacities of the solution in terms of the number of:
 - b. Configured agents
 - c. Agent groups
 - d. Total number of skills supported by the system
 - e. Number of skills that can be assigned to an agent
 - f. Queues
 - g. Routing schemes — how many routing variables can be used, @ time variables.
 - h. Steps per routing scheme
 - i. Music on-hold choices.
 - j. Number of messages that can be played to callers while they are on hold

2 Describe how the solution supports routing callers based on information sources such as automatic number identification (ANI), dialed number identification service (DNIS) and databases

3 Describe how the solution supports skills-based routing, including any ability to allow skills to be prioritized or weighted. Can skills be assigned to other queue objects, requests and voice

4 Describe options for how calls can be prioritized, and whether prioritization can be dynamic (for example, reprioritizing calls based on age).

5 Describe how calls or other media contacts can be routed to the last agent the caller spoke with on a prior call.

6 Describe the escalation process for inbound calls if not answered immediately. For example, can the caller be rerouted to another queue or agent group after a certain threshold?

7 Describe the logic used to minimize wait times and reduce idle time.

8 Describe how service levels are defined for inbound queues.

9 Describe the solution's ability to force an agent's state.

10 Describe the solution's ability to automatically set an agent state to "not ready" if a call is not answered by the agent.

11 Describe the solution's ability to determine the best place to route a call based on real-time system information.

12 How does the solution route callers across multiple systems/sites if the queue time favors a shorter wait time in the other system/site?

- 13 Can a caller be queued to a multiple system at once so that the caller gets to the first available.
- 14 Does any collected data from the caller route with the call when routed across systems? If so, what data?
- 15 Can the caller be rerouted to another queue or agent group after a certain threshold?
- 16 Describe how the solution can play different messages to callers in queue based on the queue stats and how long the caller has been in queue.
- 17 Describe how the solution informs callers of their place in queue.
- 18 Describe how the solution informs callers of their estimated wait time in queue.
- 19 Describe how callers can be given the option to leave a message. Explain what impact, if any, there is on callers' ability to retain their place in queue if they choose to engage the messaging capability (for example, if an agent becomes available while the customer is leaving a message).
- 20 Describe how a voice message left by a caller can be attached to a customer database or call record. Specify whether all options selected by the caller and attributes about the caller can be attached to the voice message for agent processing information.
- 21 Describe how the solution captures information about abandoned calls and how that information is used to manage abandoned call callbacks.
- 22 Describe the solution's ability to track customer interaction and leverage this information on next contact routing.
- 23 Describe the solution's ability to import or export and call routing flows into databases.
- 24 Describe any callback features supported by the solution. For example, if queue times hit a certain threshold, what is the ability to build an application to see if the customer would like a call back instead of waiting on hold? Describe the options available for the timing of the callback, such as scheduled callback or in-queue placeholder.

F. Outbound Calling:

1 Describe the methods used by the dialer to manage outbound calling. Describe how it supports:

- Preview dialing (agent can review the customer record prior to initiating a click-to-call.
- Progressive dialing (next call is automatically placed when the agent becomes available) and Predictive dialing (calls are placed in anticipation of an agent being available when a live connection is made).

2 Describe the performance of the dialer in terms of efficiency and accuracy in connecting agents with called parties. Include discussion of answering machine and call progress detection.

3 Describe how the solution supports campaign creation, list management and scheduling.

4 Describe the call pacing options and controls.

5 Describe how the solution supports capabilities such as "best time to call" and time zone management.

6 Describe how the dialer supports call routing based on agent skill sets.

7 Describe how the solution announces the arrival of a call to an agent. What options are available (music, zip tone, whisper tone, etc.).

8 Describe how the dialer supports legal requirement compliance and capabilities, such as do not-call lists and opt-out lists.

9 Describe how the solution supports blending of inbound and outbound calls. Do agents have to log in and out of inbound and outbound calling queues? How does the dialer know when agents are on inbound calls or are otherwise "not available"?

10 Describe how calls can be directed to an automated message or to a script.

11 Describe what is done to minimize the time it takes from the time a caller answers the phone to the time the agent gets the call and greets the caller.

12 Describe the solution's ability to modify calling line identification based on campaign or type of call.

13. Describe how the solution supports two-way SMS messaging.

14. Describe how the solution supports SMS messaging with mobile phones.

15. Describe how the solution routes Short Message Service (SMS) messages. Can SMS be routed in a mixed fashion with other media types, such as voice calls and emails? Describe how this is done, including agent skill management, system administration, and real-time and historical reporting tools.

15 Describe how the solution integrates with CRM applications. How are SMS messages appended to the CRM customer records?

16 Describe how SMS messages are assigned to agents or queues.

- 17 Can agents select specific SMS messages from the queue? How is this managed?
- 18 Describe the method for managing service levels for reply messages.
- 19 Describe how SMS session priority is assigned (for example, by time since received, customer value and so forth). How can the priority of an SMS be escalated?
20. Describe how SMS messages are archived and how supervisors and/or agents can access archived responses.
- 21 Describe the solution's ability to support auto-acknowledge messages and agent response templates.
22. Does the solution use a standard versus a proprietary SMS messages client?
23. Describe how the SMS solution supports integration to common enterprise SMS messaging solutions, including compliance with integration standards. Does the solution require its own SMS server, or can it leverage existing SMS resources?
24. Describe how SMSs are kept secure.

G. Social Media Routing:

1. Describe how the solution routes social media interactions. Can social media interactions be routed in a mixed fashion with other media types, such as voice calls and emails?
- 2 Describe how this is done, including agent skill management, system administration, and real-time and historical reporting tools.
- 3 Describe how the solution integrates with CRM applications. How are social media interactions appended to the CRM customer records?
4. Describe how social media interactions are assigned to agents or queues.
5. Can agents select specific social media interactions from the queue? How is this managed?
6. Describe the method for managing service levels for reply messages.
7. Describe how social media interaction priority is assigned (for example, by time since received, customer value and so forth). How can the priority of a social media interaction be escalated?
8. Describe how social media interactions are archived.
9. Describe how supervisors and/or agents can access and send archived responses.
- 10 Describe the solution's ability to support agent response templates.
- 11 Does the solution use a standard or a proprietary social media interaction client?

12. Describe how the social media solution supports integration to common enterprise social media systems, including compliance with integration standards. Does the system require its own social media applications and servers, or can it leverage existing Board social media resources?

13. Indicate which social media channels you support.

-Can multiple types of objects, such as phone calls, emails and Web chats, be placed in the same queue? Please describe.

14 Describe how the solution provides a visual indication to the user of the type of object

15. Describe how different types of objects can be assigned different priority levels que

16. Describe how queue objects can be routed differently based on their type; for example, can phone calls be routed to one skill set as opposed to emails?

17. Describe how queue objects can be escalated to a supervisor if they have not been processed in a sufficient time frame.

18. Describe the tool(s) used to administer the different media types, including business rule management.

19 Describe the real-time and historical reporting tools for multimedia routing.

H. Interactive Voice Response (IVR):

1. Describe the solution's IVR capabilities, including integration with the ACC.

2 Describe the IVR's default database.

3 Describe how the IVR connects to external data sources, such as enterprise application databases and Web pages. How many can be supported at one time?

4 Describe how the IVR can collect both alpha and numeric input.

5 Describe how the IVR can support multiple languages.

6 Describe the IVR's text-to-speech capabilities.

7 Describe the IVR's speech-to-text capabilities.

8 Describe the solution's speech recognition capabilities (for example, directed dialogue, natural language and so forth) and how they are supported. If you use a third-party speech recognition system, indicate the vendor and how the system integrates with your IVR.

9. Describe the solution's ability to import or export IVR and call routing flows into other applications.

11 List which standards and versions that the solution is compliant with

12. Describe what differentiates your IVR from the competition in ways that improve self-service/automation rates and caller needs and identification for call routing.

13 Describe the solution's ability to support post call surveys, including the options available to trigger the survey, how/where the data collected is stored, and the reporting and analytics available for this data.

14 If solution includes IVR, describe how the IVR gathers data for reporting purposes.

I. Mobile Applications:

1 Describe the solution's ability to integrate with mobile applications and mobile Web tools. Include capabilities such as visual IVR, estimated wait time, callback scheduling.

2. Describe how customer interaction data is passed from the mobile environment to the call center system to enhance routing and prioritization decisions and how that data can be made available to agents.

3 Describe how the solution supports identification as to whether or not a call is coming from a mobile phone.

J. CALL CENTER ADMINISTRATION TOOLS

1. Supervisor Desktop Tools:

1 Describe the supervisor's desktop application, including how it provides for the monitoring of agents and inbound call/contact volumes and the status of associated agents in real time.

2 Describe how the supervisor can change an agent's status (for example, from "after-call work" to "ready").

3 Describe how the supervisor can have visibility of agents across multiple sites to monitor performance and make changes to agents' skills assignments.

4 Describe how your supervisor desktop application enables supervisor-to-team scrolling messages.

5 Describe the environment used for developing supervisors' desktops.

6 Describe how can the application be accessed by a tablet or other mobile device? How can the application be accessed from anywhere on the network?

7 Describe how the supervisor desktop tool can be used to alert the supervisor to agents experiencing problem callers in real time.

8 Describe how the supervisor can use the desktop tool to quickly listen in on agent phone interactions and provide coaching or escalation assistance when necessary.

9 Describe how the supervisor can implement changes, additions and deletions to things such as contact routing flows, agent skills, IVR menu trees, dialing campaigns, announcements and so forth.

10 Describe the process of moving agents from one team to another on your system. When agents are moved, can the agents' preferences and skills stay with those agents?

11 Describe how your solution provides a common/centralized management interface that allows for day-to-day administration of the contact center, workforce management and/or quality management applications, allowing for common repetitive entries to be reduced

12 Describe any limitations as to simultaneously logged-in administrators, number of logged-in

2. Agent Desktop Tools:

- 1 Describe your solution's agent desktop environment, including capabilities such as softphone, CRM and other enterprise application integration; the ability to inform agents of relevant queue status; and the ability to inform agents of their own performance relative to performance targets and the team performance.
- 2 Describe how agents can alert supervisors of problem calls.
- 3 Describe the environment used for developing agent desktops.
- 4 Describe how thin- and/or thick-client interfaces are supported.
- 5 Describe how the solution's capabilities can be exposed in a third party's agent desktop environment.
- 6 Describe how agents can code records with specific call outcome data either via an agent desktop GUI or specialized keys on their hard phones.
- 7 Describe how agents can transfer/conference a call to another agent, subject matter expert, or external number, and indicate whether this process can be automated.
- 8 Describe how agents can make manual calls.
- 9 Describe how agents can view scripts.
- 10 Describe how agents can switch between skill groups or activities (for example, between media types, or from inbound to outbound call support).
- 11 Describe how agents can switch between different CRM and other enterprise databases, and open new applications or Web browser sessions from within the agent desktop application.

K. Real-Time Monitoring and Reporting:

- 1 Describe the solution's ability to provide real-time monitoring and reporting of agent activity and overall contact center performance. Include a description of the information available to supervisors regarding workgroup and team performance, as well as the ability to drill down on individual agent activity and listen to specific calls
- 2 Describe how access to specific real-time reporting data can be limited to specific users.
- 3 Describe how supervisors can create real-time alerts based on contact center statistics.
- 4 Describe how the solution supports real-time schedule adherence via the supervisory tool.
- 5 Describe the information available to supervisors and/or agents regarding calls/contacts in queue (for example, caller name, caller ID or ANI, duration of call, etc.).
- 6 Describe the summary information regarding the queue in real time (for example, number of calls in queue, longest call waiting, service level, etc.).
- 7 Describe all summary statistics and standard real-time reports available.
- 8 Describe how real-time statistics can be displayed in dashboard or graphic form.

9 Describe how supervisors can move contacts in real time from one queue to another queue on their screen or move a contact to an available agent to get it answered responded to.

L. Historical Reporting:

1 Describe the solution's ability to provide historical reporting of agent activity and overall contact center performance. Include a description of the information available to supervisors regarding workgroup and team performance, as well as the ability to drill down on individual agent activity.

2 Describe the solution's reporting architecture, including database formats supported.

3 Describe how access to specific historical reporting data can be limited to specific users.

4 Describe how reports can be scheduled and distributed to a common set of recipients.

5 Describe all summary statistics and standard historical reports available.

6 Describe the available media (such as Excel, Word, and PDF) that reports can be extracted from your system.

7 Describe how reports can be customized.

8 Describe the database structure supporting real-time and historical reports. Indicate how the running of detailed historical reports will not impact real-time reporting.

9 Describe the solution's storage retention capabilities and recall procedures.

10 Describe solution's limitations as to simultaneous users accessing reporting tool. Describe how to add, modify users.

M. Call Recording:

1 Describe how the solution can support 100% call recording 24/365. Describe how every call is recorded so that not a single call will be unrecorded.

2 Describe the recording architecture supported by the solution. For example, does it support recording for both the recording of the caller and the agent experience?

3 Can the solution record a call between agent and supervisor when the agent puts the caller on hold?

4 Describe the solution's ability to record agent desktop screens, including multiple screens and in a virtual environment, including any ability to record screens in after-call-work mode.

5 Describe the solution's ability to store call recordings.

6 Describe the format the call and screen recordings are stored in (for example, MP3, WAV).

7 Describe how the solution enables supervisors to service-observe an agent.

8 Describe how the solution leverages CTI and GUID information to index calls for retrieval.

9 Describe the solution's ability to record a call end to end, even if it is transferred.

10 Describe options for not recording sensitive data, along with options for encryption.

N. Workforce Management/Optimization:

1 Describe the solution's Workforce Management (WFM) software capabilities to include:

- Forecasts that include annual, quarterly, monthly, daily and ad-hoc intervals
- Customer defined underlying factors such as historical data, seasonal trends, etc.,
- Ability to create shift-based schedules,
- Ability to create demand-based schedules
- Real time adherence viewing tool
- Ability to adjust schedules based on real time changes
- Ability to track adherence to schedules (actual vs scheduled)
- Provide alerts when agents do not adhere to schedules
- Agent scorecards to measure performance against metrics

2 How does the system determine peak staffing requirements? For startup, can historical data be imported? If so, how?

3 What interfaces is used to extract data required to build forecasts?

4 Provide best practices and recommendations to utilize the proposed WFM tools most effectively.

O. IMPLEMENTATION

1. Implementation Plan:

- Offeror to provide a detailed implementation plan with a Gantt Type timeline from contract signature through user training with clearly defined roles and responsibilities and provide schedule on Gantt type display

2 Describe your implementation strategy, including:

- Average time frame of implementation
- Milestones with estimated dates
- Resources required from Proposer
- Resources required from the ERS
- Roles and responsibilities of the Proposer during implementation
- Roles and responsibilities of the ERS during implementation.
- Key deliverables

- 3 Describe the experience of your company in deploying solutions similar to this RFP.
4. Describe how your company handles change management.
- 5 Describe your company's ability to provide pre-installation and post-installation support.
- 6 Describe any services that your company offers to complement the proposed solution.
- 7 Describe your company's project management methodology.
- 8 Identify and describe the role of any third parties that your company plans to employ to implement all or specific parts of the proposed solution.
- 9 Provide details on the experience and background of the staff who will be potentially assigned to implement the solution.
- 10 Describe your company's process for documenting the system deployment, including relevant system configuration and customization.
- 11 Describe the best practices that your company employs to realize maximum benefits during initial implementation.
- 12 Describe any abilities to provide load testing to validate that the solution works under peak load.

P. TRAINING.

1. Offeror to provide training onsite @ ERS offices and on-line for administrators, supervisors and agents.
2. Describe (A) initial training options, (B) ongoing training options and (C) on-demand self-training options.
- 3 Any costs related to initial administrator and end user training on system as well as re-training and future new user training must be included in cost proposal.
- 4 Proposer to provide class syllabus of the training materials to be presented with best practices as part of the training process. Training materials must be available via web portal.

Q. SYSTEM MAINTENANCE AND SUPPORT:

- 1 Offeror to provide unlimited 24x7x365 end user, administrator and technical support through a toll-free phone number and web interface.
- 2 Describe how your company's customer service is organized and how it operates. Include options for support desk availability and response times
 - How the support desk is reached (phone, web, etc.)
 - Escalation process with names and contact information
 - Availability and requirements for remote support

- 3 Describe the level of experience of your company's support personnel.
- 4 Describe how technical or end user support will be provided and coordinated for any aspects of your solution that are to be supported by a third party.
- 5 Provide the processes and schedules for routine maintenance, troubleshooting, hardware and software revisions, patches, etc. for the solution. Any maintenance activity must be coordinated through the ERS IT/S change management process.
- 6 Provide an example of a root cause analysis and corrective action template for cases.
- 7 Describe the types of upgrades as well as how often upgrades are conducted.
8. Describe the responsibilities your company takes to implement software patches or updates. Are they tested and certified in a lab environment before release?
9. Describe your company's test environment resources available for pre-testing any proposed changes to the system.
- 10 Offeror to maintain all service-related documentation such as training materials, manuals, call flows/scripts, policies and procedures.

R. SERVICE LEVEL AGREEMENT

- 1 Describe the Service Level Agreement(s) (SLAs) proposed for your solution
- 2 Describe the penalty structure for missed SLAs (if any).
- 3 Describe the reports that are provided so that the ERS has quantifiable information as to whether the SLAs were met or missed.

S. PRICING

- 1 Describe your pricing methodology
- 2 Specify whether license pricing is based on individual or concurrent agents, and include volume and term discount tiers.
- 3 Indicate whether your solution is premise-based, hosted or a combination of any of these types. Specify how the individual solution components are priced.
- 4 Describe any front-end costs that may be associated with the planning and implementation of the solution. How are professional services fees for design and installation charged for? Is there a front-end fee, or are the costs inclusive?