Cloud Unified Communications or On Premise Solution

Village of Frankfort

RFP Request

Responses Submitted to:
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Section 1 – Project Overview

1.1 Introduction to Village of Frankfort
The Village of Frankfort (Illinois) is strategically located 37 miles southwest of Chicago. Frankfort is a small town nestled in one of the most rapidly growing counties in the country. Frankfort is considered an upscale community with a population of 18,000. The main location, the Village Hall at 432 West Nebraska has about 35 employees working in at any given time. The second location at 20602 Lincoln Way Ln, the police department comprised of 28 full-time officers, 3 part-time officers, 4 Community Service Officers (CSO), clerical staff and maintenance personnel. The third main location is 524 center road (public works).

1.2 Project Description
Village of Frankfort is soliciting proposals for a multi-site telephone system. We are looking at either on premise or cloud-based systems.

Upon completion of the RFP process, Village of Frankfort intends to contract with the selected Vendor that best meets its needs. Vendor proposals must include application software; professional services, including implementation and training; and any required on-premises equipment. Vendor proposals must also include ongoing management, monitoring, and support, and must also meet the technical and functional requirements described on the following pages.

1.3 Minimum Requirements
Village of Frankfort requires, at the time of submission, that the proposing Vendor and the proposed products meet the minimum requirements listed in Section 1.4.1. Proposals may be rejected by Village of Frankfort if these requirements are not met.

1.3.1 Vendor Requirements
1. Vendor has been an authorized distributor of the proposed solution for a minimum of one year. The Vendor must have full authorization and support from the manufacturer of the core solution.

2. Vendor must employ (have on direct payroll or contract) a minimum of two software engineers certified on the proposed core products.

1.3.2 Vendor Requirements
Proposals must include all of the elements required for the solution, even if multiple entities are included in the product mix. The proposing Vendor (i.e., the prime contractor) must provide a coordinated project plan that includes the total solution, identifies all components that are provided by others, and act as the primary point of contact for the proposal while providing contact information for the others in Section 3.1. Ideally the proposing Vendor will be able to deliver all products that make up the entire solution and minimize the use of third-party elements in the solution.

1.4 Preliminary Calendar
Village of Frankfort has established the following anticipated sequence of events and tentative schedule dates for this procurement process. All dates set forth in the table below are subject to modification at the sole discretion of Village of Frankfort.

<table>
<thead>
<tr>
<th>Date</th>
<th>Day</th>
<th>Time</th>
<th>Project Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 May 20th</td>
<td></td>
<td>Request for Proposal distributed</td>
<td></td>
</tr>
<tr>
<td>2 June 1st</td>
<td></td>
<td>Vendor demos / walk through</td>
<td></td>
</tr>
<tr>
<td>3 June 3rd</td>
<td></td>
<td>Deadline for submission of questions</td>
<td></td>
</tr>
<tr>
<td>4 June 6th</td>
<td></td>
<td>Answers posted/released</td>
<td></td>
</tr>
<tr>
<td>5 June 10th</td>
<td></td>
<td>Vendor proposals due</td>
<td></td>
</tr>
<tr>
<td>6 July 13th</td>
<td></td>
<td>Committee Review</td>
<td></td>
</tr>
<tr>
<td>7 July 18th</td>
<td></td>
<td>Board Review</td>
<td></td>
</tr>
<tr>
<td>8 July 26th</td>
<td></td>
<td>Contract executed</td>
<td></td>
</tr>
<tr>
<td>9 August 1st</td>
<td></td>
<td>Project startup</td>
<td></td>
</tr>
<tr>
<td>10 August 15th</td>
<td></td>
<td>Anticipated project completion</td>
<td></td>
</tr>
</tbody>
</table>
Section 2 - Instructions and Procedures

2.1 Communication
Any questions about the solicitation shall be in writing and submitted through email to:

Sean Wybourn
Village of Frankfort
815-412-2498
swybourn@volil.com

Copy:
Village of Frankfort
815-469-2177

Questions must be submitted by email no later than 5 PM on June 3rd.

Village of Frankfort will respond to all written questions submitted by June 6th.

2.2 Addenda
Village of Frankfort may make changes to this solicitation. Oral or other interpretations, clarifications, or submittal instructions will be without legal effect. Any information modifying a solicitation will be furnished to all known proposers by a formal, written addendum.

2.3 Proposal Format
It is essential that Village of Frankfort be able to easily match a Proposer’s response with this RFP’s requirements. Therefore, all proposals must use this RFP to format the actual response. Failure to follow this format will be grounds for rejection. Where appropriate, indicate compliance and/or note any exceptions to the requirements and provide responses to all questions.

2.4 Proposal Pricing
The Proposer shall submit the proposed pricing on the forms in Section 6.3 or provide a formatted pricing response that includes the identical information.

2.5 Proposal Submission Requirements
The Proposer shall submit one (1 electronic copy of the proposal, provided in unlocked Microsoft Word format and spreadsheets provided in unlocked Microsoft Excel format.

Proposals shall be delivered on or before June 10th at 10:00 AM to the following: 432. W Nebraska Street Frankfort, IL 60423

2.6 RFP and Proposal Participation Requirements

2.6.1 Right of Selection/Rejection of Proposals
Village of Frankfort reserves the right to select a proposal for telecommunications services and equipment through negotiations. Village of Frankfort reserves the exclusive right to select or reject any or all proposals for any reason, to waive any informality in the proposals received, and to waive minor deviations from the specifications. Village of Frankfort’s waiver of any informality or immaterial deviation shall in no way modify the RFP documents or excuse the Vendor from full compliance with the RFP requirements. Selection of a Vendor as the apparently successful Vendor shall not be construed as an award of a contract but as the commencement of contract drafting, discussions, and negotiations. Village of Frankfort may select an apparently successful Vendor on the basis of information in addition to that received in a proposal. It is emphasized that all proposal responses should be complete and submitted with the most favorable financial terms.

Village of Frankfort specifically reserves the right to reject the proposal of any vendor who submits a false, incomplete, or noncompliance proposal response, or unresponsive statements in its proposal.
2.7 Standard Terms and Conditions
The following Village of Frankfort terms and conditions will be made a part of any subsequent contractual agreement with the awarded contractor.

2.8 Evaluation Criteria and Process
Village of Frankfort will evaluate proposals based on how well the proposal meets its needs, as determined by the Proposer’s response to the requirements defined in the rfp. Village of Frankfort reserves its right to make a final decision to procure the solution that provides the best value. This includes a combination of functional and technical features, risk avoidance, and price.

Section 3 – Vendor Qualifications, Service, and Support

3.1 Contact Information
Provide contact information for the proposing Vendor and any other components (describe) proposed as part of the solution.

<table>
<thead>
<tr>
<th>Proposing Vendor - core product/service</th>
<th>Email Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Account Representative</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract Executive</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales Engineer</td>
<td></td>
</tr>
</tbody>
</table>

3.2 Vendor Information
a. Parent company (if applicable):
b. State of incorporation:
c. Size of organization:
d. Total number of installed base customers:
e. Total number of installed base users licensed:
f. How long has your solution been based on the proposed platform?
g. Describe your certifications and credentials that indicate your expertise and commitment to a cloud solution practice or premise, also provide specific designations that identify specialty areas of focus and capability.

3.3 Proposed Product Manufacturer
List for each proposed solution component:
a. Manufacturer name 
b. Headquarters address 
c. Original release date of this family of systems 
d. Release date of this model of system 
e. Release date of the proposed level/version of software.

3.4 Customer References
The Proposer must submit a minimum of three (maximum of five) relevant customer references for which the Proposer has provided a similar solution within the last three years. The systems must be currently in full production use, and the customer contact center(s) must be of similar size and complexity to Village of Frankfort. The solution must be presently in full production use (sales pending implementation of key components do not qualify). References will be contacted only for final Vendors and only after prior notification is sent to the vendor.
### 3.5 System Support / Maintenance

#### 3.5.1 Maintenance

All equipment and services provided shall be included in the monthly rates quoted and shall include all maintenance, software support, and upgrade costs. Clearly identify if any items are optional, including elements that can be purchased instead of included in the monthly rate (such as phones, gateways, etc.).

### Section 4 – Technical and Functional Specifications

#### 4.1 Current Environment

The Village Hall has an Avaya IP Office version 6. Running Standard IP PBX using PRI and Pot lines. The system was installed in 2008 with a server utilizing Microsoft Windows XP. We have Avaya desktop phones version 5610, 5621, 5420. We have about 40 phones.

The Police Department current telephone system is an Avaya IP Office 500 System running on a standard IP PBX platform, using both PRI and POTS lines. The system was installed in 2008 with a server utilizing Microsoft Windows XP. Avaya 500 system supports 26 total phones, 4 of them having side cars. The phones include Avaya Models 5621SW, 5610SW and 5420. Currently, there are some employees that do not have a dedicated phone line. Mainly, patrol officers and CSO’s access voicemail messages via phones or computers located within the department’s common areas.

Public works, 524 Center Road has 5 Pot lines that are currently set up as regular phones with just mainly call out capability.

#### 4.2 General System Design

### Table

<table>
<thead>
<tr>
<th>Reference</th>
<th>Client Name</th>
<th>State</th>
<th>Type of Business</th>
<th>Contact Name</th>
<th>Job Title</th>
<th>Phone Number</th>
<th>System Replaced</th>
<th>Email Address</th>
<th>Number of Users</th>
<th>When Implemented</th>
<th>Description / Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Reference 2</td>
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<tr>
<td>Reference 3</td>
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<td>Reference 4</td>
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<td>Reference 5</td>
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</tr>
</tbody>
</table>
4.2.1 Architecture/Business Continuity

4.2.1.1 Core hardware such as processors, power supplies, hard drive systems, network interface cards, etc. must be redundant and fault tolerant to avoid single points of failure.

4.2.1.2 The proposed solution must be capable of surviving the loss of any single critical component. Thus, the system must be designed to avoid a “single point of failure” with redundant core components in an “active/active” configuration that includes duplicated power supplies and other required elements to eliminate system outage. If available, the proposed solution shall show as an option the costs to link Village of Frankfort to a minimum of two separate Vendor data centers with redundant network connections.

4.2.1.3 The carrier network connections from the hosted provider to the contact center and Village of Frankfort must be over a deterministic network that can ensure call quality.

Provide answers to the following questions:
1. What is the manufacturer of the core solution? Identify any other manufacturers’ products used to create the total solution.
2. What are the documented service uptime statistics? Provide details on the root cause of any service interruptions over the past two years.

4.2.2 System Maintenance, Upgrades, and Diagnostics

4.2.2.1 The service must be provided so that routine maintenance procedures, troubleshooting, loading hardware and software revisions, patches, etc., may be performed without disrupting the client’s service.

4.2.3 Systems Management/Administration

4.2.3.1 Village of Frankfort system administrator(s) must be able to “build” and modify station programming, routing rules, user groups, and other system features, and to print reports concerning such database information.

4.2.4 Dial Tone and Network Services

4.2.4.1 The hosted provider must extend inbound Automatic Number Identification (ANI) or Caller ID digits to the users.

Provide answers to the following questions:
1. Are you a carrier that can deliver both the CaaS services and telephony and network services?
2. What is the geographic coverage available for free calls (local to Village of Frankfort) and toll calls?
3. For calls charged as long distance and inbound toll-free calls, what are the rates per minute, the billing increment, and the minimum charges? Are these costs part of your billing, or is a separate agreement and invoice from the long-distance carrier needed?

4.2.5 Telephony Features

The core telephony solution must provide, at a minimum, the full range of features resident in current state of the art PBX systems. This would include common telephony capabilities such as, but not limited to, the basic features of hold, transfer, redial, park, pickup, call forwarding outside system with return (sometimes called single number reach with one mailbox), distinctive ringing, etc.

The following features are called out separately as they may be differentiators and are intended to guide the Vendor’s proposed solution:

4.2.5.1 The new system must support a call history log with the ability to launch a callback from the history log, as well as export the log, including Caller ID.

4.2.5.2 It is desired to have the call history log on the phone as well as the PC client.

4.2.6 IP Desktop Requirements

The new system architecture must support a blended desktop environment.

4.2.6.1 An “Operator” software tool should be provided for the receptionist with the ability to see user extension
4.3 Telephony Functional Requirements

This section identifies requirements outside of the common telephony feature set for which you must propose a solution.

4.3.1 Instant Messaging, Presence and unified messaging

4.3.1.1 The Vendor should propose an Instant Messaging solution that will work with a Microsoft exchange server.

4.3.2 Desktop Interfaces

4.3.2.1 Village of Frankfort requires the ability to use a PC-based call control (desktop application) that works in conjunctions with the fixed telephones. Also provide specific designations that identify specialty areas of focus and capability.

4.3.3 Mobility

Many users carry a cell in specific areas of Village of Frankfort.

4.3.3.1 The system must extend office telephone system features to mobile employees “if needed”, both onsite and offsite.

4.3.3.2 At a minimum, the proposal should include the integration of desk phones with cell phones (single number) and the ability to bridge calls (simultaneous ring) while maintaining only one (system) mailbox.

4.3.4 Conferencing and Collaboration

Village of Frankfort wishes to incorporate a full conferencing suite into the complete solution.

4.3.4.1 The proposed system must provide ad-hoc conferencing for up to six parties per call. Simultaneous conference calls. This capacity is in addition to the conference bridge requirement described.

4.3.5 Voice Mail / Unified Messaging

4.3.5.1 The system must be able to allow users to easily transfer active calls directly to another user’s voicemail box, bypassing the user’s telephone, when appropriate.

4.3.5.2 Voicemail must have Microsoft exchange email integration.

4.4 Contact Center System Capabilities

4.4.1 Call Recording / Quality Monitoring

The proposed system should be capable of recording calls if needed.

Provide answers to the following questions:

1. Describe the proposed system. Is it part of the core contact center platform or a separate system?

Section 5 - Statement Of Work (SOW)

5.1 Approach

The following sample SOW is supplied as a template for responding Vendors to create a proposed SOW for this project. It is intended to demonstrate the minimum requirements and the desired level of project detail to be included in the submission.

Use this template to write a SOW appropriate for this project and provide applicable pricing. The Vendor should customize this template as necessary to ensure it is a suitable SOW for the delivery of their services. The Vendor’s SOW response, including any modifications agreed to by the parties, will become the core element of any subsequent contract.

5.2 Implementation Template

The Vendor is responsible for comprehensive project management services that include the ability to define what are
considered industry best practices for the implementation of a hosted solution or on premise of this scope, and that address the
Expectations of both the Vendor and Village of Frankfort. The Vendor SOW shall include project controls and processes that
will ensure a smooth implementation.
After completion the vendor will be responsible for the removable and electronic disposal of our current system.

5.3 Project Plan/Schedule

- Vendor Project Manager shall provide a detailed Project Plan/Schedule, subject to approval by Village of
Frankfort, which documents all activities and timelines associated with the project including, but not limited to:
  - Services ordered, including any required onsite equipment
  - Solution design and configuration
  - On-site training – timelines for system administration and end user training
  - On-site installation of any required equipment
  - Testing and acceptance
  - On-site and remote post implementation support.

5.4 Vendor Responsibilities - Pre-Installation

5.4.1 Carrier Services

- Vendor will work with Village of Frankfort Project Manager to ensure all provider services are in place and tested
  prior to implementation.

5.4.2 End User Requirements

- Vendor will work with Village of Frankfort resource to collect, compile, and validate information for contact center
  agents and supervisor.

5.5 Training

5.5.1 Vendor shall provide the following training

- The Vendor shall perform knowledge transfer on all elements of the proposed solution for Village of Frankfort's
  implementation team.
- Vendor shall provide manufacturer certified end use, supervisor, and administrative training at each Village of
  Frankfort site, or at agreed-upon centralized locations for remote sites.
- Vendor will work with Village of Frankfort Project Manager to determine training curriculum and schedules.
- Classes will be conducted on live system equipment at each Village of Frankfort site or designated remote sites.
- Vendor shall provide users with Quick Reference Guides and access to online resources.

Section 6 – System Configuration Sizing and Pricing

6.1 Configuration Size

Use the following charts to provide pricing for the initial quote If chart needs to be changed, please change as needed.

<table>
<thead>
<tr>
<th>Site One - Village Hall</th>
<th>Quantity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local ISDN-PRI Spans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local SIP sessions (simultaneous capacity)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Analog Lines (carrier circuit)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analog Extensions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic IP Phone – single endpoint per user</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced IP User (UC features) – one endpoint</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced IP User – multiple devices / endpoints</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Softphone (no set) users not in above</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 6.2 Pricing

Pricing Table 1: List all one-time charges. Mark “N/A” or “Waived” where appropriate.

<table>
<thead>
<tr>
<th>One-time Charges</th>
<th>Qty.</th>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Service Offering</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Center Provisioning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carrier Circuit Installation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On-site Equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sets (if purchased)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miscellaneous Hardware</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Software (such as SDK)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integration Components</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Third-party Installation Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Services for Third-party Vendors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (define)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Pricing Table 2: List all recurring monthly charges. Mark “N/A” where appropriate.

<table>
<thead>
<tr>
<th>Recurring Charges: Monthly service fees</th>
<th>Qty.</th>
<th>Item</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Service Offering</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual maintenance on Purchased Equipment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per user fees - basic user</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per user fees - advanced user</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per call center agent fee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per call center supervisor fee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Per videoconferencing Virtual Meeting Room fee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usage Based Charges</td>
<td>Unit</td>
<td>Rate</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>Moves, Adds, Changes, Deletes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long Distance Costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (specify):</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Pricing Table 3:** List all usage based charges, along with rates and units.

**6.3 Additional Pricing Options**

Provide below any pricing options, special offers, financing, promotions, or discounts for trading-in any legacy equipment not otherwise described within the RFP response.