



## NOTICE OF SOLICITATION

**SERIAL 08081-RFP**

**REQUEST FOR PROPOSAL FOR: VOICE MAIL/MESSAGING SERVICE**

Notice is hereby given sealed proposals will be received by the Materials Management Department, Materials Management Center, 320 West Lincoln Street, Phoenix, Arizona 85003-2494, until **2:00 P.M** on **NOVEMBER 21, 2008** for the furnishing of the following for Maricopa County. Proposals will be opened by the Materials Management Director (or designated representative) at an open, public meeting at the above time and place.

All Proposals must be signed, sealed and addressed to the Materials Management Department, Materials Management Center, 320 West Lincoln Street, Phoenix, Arizona 85003-2494, and marked "**SERIAL 08081-RFP REQUEST FOR PROPOSAL FOR VOICE MAIL/MESSAGING SERVICE.**"

The Maricopa County Procurement Code ("The Code") governs this procurement and is incorporated by this reference. Any protest concerning this Request for Proposal must be filed with the Procurement Officer in accordance with Section MC1-905 of the Code.

**ALL ADMINISTRATIVE INFORMATION CONCERNING THIS REQUEST FOR PROPOSAL AND THE CONTRACTUAL TERMS AND CONDITIONS CAN BE LOCATED AT <http://www.maricopa.gov/materials>. ANY ADDENDA TO THIS REQUEST FOR PROPOSAL WILL BE POSTED ON THE MARICOPA COUNTY MATERIALS MANAGEMENT WEB SITE UNDER THE SOLICITATION SERIAL NUMBER.**

PROPOSAL ENVELOPES WITH INSUFFICIENT POSTAGE WILL NOT BE ACCEPTED BY THE MARICOPA COUNTY MATERIALS MANAGEMENT CENTER

DIRECT ALL INQUIRIES TO:

BRIAN WALSH  
PROCUREMENT OFFICER  
TELEPHONE: (602) 506-3243

**THERE WILL BE A MANDATORY PRE-PROPOSAL CONFERENCE AT 3:00 P.M., TUESDAY, OCTOBER 21, 2008, AT THE OFFICE OF ENTERPRISE TECHNOLOGY, TOMBSTONE CONFERENCE ROOM, 301 S. 4<sup>TH</sup> AVENUE (S.E. CORNER OF 4<sup>TH</sup> AVENUE AND JACKSON ST.), PHOENIX, AZ 85003. PARKING IS AVAILABLE AT THE PARKING STRUCTURE AT 5<sup>TH</sup> AVENUE AND JACKSON ST.**

**NOTE: MARICOPA COUNTY PUBLISHES ITS SOLICITATIONS ONLINE AND THEY ARE AVAILABLE FOR VIEWING AND/OR DOWNLOADING AT THE FOLLOWING INTERNET ADDRESS:**

<http://www.maricopa.gov/materials/advbd/advbd.asp>

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**REQUEST FOR PROPOSAL FOR: VOICE MAIL/MESSAGING SERVICE**

**1.0 INTENT:**

- 1.1 Maricopa County (County) is seeking Proposals from qualified firms to provide and implement a Voice Mail and Unified Messaging system at Maricopa County. All equipment and products used in the performance of this contract shall be the newest and most current model or version available.
- 1.2 The current system, VMX 300 Voice Mail system is outdated and is at the end of its life cycle. Maricopa County has an urgent need to replace the current VMX 300 Voice Mail system
- 1.3 **Current PBX and Voice Network Environment:** Maricopa County currently operates a Nortel SL100PBX telephone system supporting digital and analog voice services in 35 facilities distributed over 9200 square miles. The County has integrated hundreds of key systems, thousands of off-premises extensions, IVR systems, ACD systems, and a VMX 300 Voice Mail system into a comprehensive telephone network serving over 14,000 employees. The County depends on this system and the integrated voice systems to meet extremely high standards of availability, quality, delivery of functionality, and low administrative, provisioning and maintenance costs.
- 1.4 **The current Voice Mail system is equipped with approximately:**
  - 200 ports
  - 15,000 mail boxes
  - 14,000 end-user mail boxes

**2.0 SYSTEM REQUIREMENTS AND SCOPE OF WORK**

- 2.1 **Planning-** Proposer shall be able to provide professional services to work with the county staff in the planning and deployment phases of the Voice Mail and Unified Messaging System.
  - 2.1.1 The County expects the successful firm to implement the Voice Mail and Unified Messaging system and perform system configuration. During this time, County staff will work with the selected Proposer to install and configure the system. This period will be utilized for on-the-job training and tuning of the proposed system after which County staff will take over the day-to-day operation and management of the system.
- 2.2 **Configuration Design-** The selected Proposer shall deliver a system that includes all facets of a functional Voice Mail Unified Messaging system. This design should include all software and hardware functionality and specifications as outlined in the requirements for a reliable 24/7 operation to support 15,000 users. As part of the configuration design activity, the selected Proposer shall prepare all necessary project plans as described.
- 2.3 **Voice Mail and Unified Messaging System Requirements: Matrix D** details the requirements for the Voice Mail and Unified Messaging system. The Office of Enterprise Technology (OET) staff that will participate in the configuration design activities for the Voice Mail and Unified Messaging system developed these requirements. It is intended that the requirements illustrate the scope of the system functions that OET wants implemented. Proposers must recognize that the configuration requirements may not be complete and requirements may be added, enhanced or reduced during design.
- 2.4 **System Installation:** The selected Proposer shall assist the County in plan development and execution of a timely and complete installation of the Voice Mail and Unified Messaging system prior to final acceptance by the County. The selected Proposer, at a minimum, must as part of such plan:
  - 2.4.1 Provide an installation schedule with accurate dates.
  - 2.4.2 Provide a list of installation needs and pre-requisites.

- 2.4.3 Identify and communicate facility needs during installation to OET five (5) business days in advance to ensure that proper action is taken.
  - 2.4.4 Install the most recent and available versions of all software and/or hardware.
  - 2.4.5 Install test, staging and production environments.
  - 2.4.6 Ensure that all work sites are clean, safe and secured.
  - 2.4.7 Proposers shall submit examples of installation plans and important installation processes with their Proposals.
- 2.5 **Training** The selected Proposer shall provide technical training for County staff that addresses responsibilities related to system operation and management, problem identification, support contact management, and problem resolution. Prior to training, testing, system installation and implementation, the selected Proposer shall provide complete documentation on all aspects of the system. The selected Proposer shall provide training in a timely manner with respect to the project schedule and beginning of system operations. The County expects to train at least five (5) individuals from OET on the proposed Voice Mail and Unified Messaging system.
- 2.6 **The current Voice Mail system is equipped with:**
- 2.6.1 200 ports
  - 2.6.2 15,000 mail boxes
  - 2.6.3 14,000 end-user mail boxes
  - 2.6.4 Approximately 90% of the users have 3 minutes of voice message storage
  - 2.6.5 Approximately 10% of the users have 10 minutes of voice message storage
  - 2.6.6 The number of weekly voicemail calls:
    - 2.6.6.1 M1 = 120,000
    - 2.6.6.2 M2 = 49,800
    - 2.6.6.3 169,800 calls weekly
  - 2.6.7 Currently the SL100 PBX connectivity consists of a RS-232 SMDI connection to analog ports on the SL-100. IP connection may be supported in the future
- 2.7 **Auto Attendant**
- 2.7.1 Currently there are approximately 200 auto attendant applications on the current voice mail system. The largest being 7 wide and 60 deep.
  - 2.7.2 Approximately 300 hours per year of professional services (tier 2) is used to program and maintain these applications.
- 2.8 **Information for proposing Unified Messaging Options**
- 2.8.1 Currently 280 licensed users for the fax server.
  - 2.8.2 Email-MS Exchange 2007 with 15,000 e-mail users
- 2.9 **Current IT Environment for e-mail Communications-** the County uses Microsoft Exchange for e-mail and other productivity communications tools. Maricopa County currently has 15,000 email users on Microsoft Exchange 2003, soon (3-4 months) to be upgraded to Exchange 2007.
- 2.9.1 **Office of Enterprise Technology:** The County's Office of Enterprise Technology (OET) is responsible for providing countywide technology and telecommunications management and services. OET coordinates the use of information technology across County departments and agencies to ensure that accurate and timely information is provided to citizens, elected officials, County management and staff in the most cost effective manner possible. OET enables other County departments to use information technology to enhance their service delivery. OET procures, manages, and maintains The County's radio, telephone, cable, and computer network systems.
  - 2.9.2 The mission of OET is to provide world class information technology and telecommunications services to make County a better place to work and live.

- 2.9.3 OET will be responsible for providing and installing any necessary additional general network equipment and/or software. The responsibility for installation of any necessary equipment and/or software on the workstations and/or servers within OET's network(s) or the County's enterprise network shall be determined during the design activities. Normally, installations on these networks are the responsibility of County staff, working closely with the selected Proposer's staff.
- 2.10 **Potential Future Functions:** The County may, at its discretion, augment the proposed system's functionality by using other optional modules and capabilities of the proposed system to support other functions such as, but not limited to, integration of system with other messaging systems and other IP based PBX systems, or expanding the concurrent user capability of the system. The proposed system shall be capable of full integration with all major industry suppliers of large telephone systems.
- 2.11 **Warranty:** The selected Proposer will be required to provide warranty service for the proposed system during the entire installation phase and for a minimum of one (1) year of operation after final acceptance by OET. This warranty service shall cover any and all hardware, software and services purchased from the Proposer to maintain reliable operations and will comply with Maintenance, Service and Support as described below.
- 2.12 **Maintenance, Service and Support:** The selected Proposer will be required to develop, obtain approval for and support a comprehensive maintenance, service and support plan to ensure the timeliness and completeness of the installation of the system **prior to final acceptance by The County**. This plan will cover both the initial warranty period and chargeable services after expiration of the warranty. The selected Proposer, at a minimum, must as part of such plan:
- 2.12.1 Provide help desk support of the proposed solution twenty-four (24) hours a day, seven (7) days a week.
  - 2.12.2 Provide 1<sup>st</sup> and 2<sup>nd</sup> level support for the life of the system.
  - 2.12.3 Provide software/hardware maintenance support for the proposed solution during the warranty period.
  - 2.12.4 Provide maintenance, service and support for the proposed system after warranty expiration.
  - 2.12.5 Provide upgrades to newer versions of the system.
  - 2.12.6 Provide written notification of major product release ninety (90) days prior to release.
  - 2.12.7 Provide updates through an annual maintenance agreement.
  - 2.12.8 Provide notification of system vulnerabilities via e-mail.
- 2.13 **SYSTEM INFORMATION**
- 2.13.1 **New System:** This solicitation is seeking proposals for a **new** Voice Mail and Unified Messaging system with the most current technologies available in the marketplace to service all current Voice Mail and Auto Attendant users and applications capable of interfacing to all major industry suppliers of PBX and IP telephony systems.
- 2.13.2 **Advanced Applications:** In addition to replacing the Voice Mail System and Auto Attendant, Maricopa County is assessing opportunities to improve communications and is seeking an advanced Voice Mail and Unified Messaging solution platform to leverage for later deployment of applications. While The County foresees a later deployment for additional features beyond the Voice Mail and Auto Attendant, optional cost proposals associated with the additional integrated applications such as Unified Communications should be submitted.
- 2.14 Following is a list of questions about the Voice Messaging system. **A response to all questions is required.**

Matrix C

No.	Question	Proposer Response
<b>General System Information</b>		
C1	What is the name of the product and the version for which your response is based?	
C2	Is this version of the product currently available for purchase?	
C3	Number of voice mail boxes proposed- Licenses	
C4	Number of voice mail ports proposed	
C5	Hours of voice storage capacity proposed	
C6	Is this product a standalone product or part of a required suite of products?	<input type="checkbox"/> Standalone <input type="checkbox"/> Part of a Required Suite <input type="checkbox"/> Optional Module within a Suite <input type="checkbox"/> Other:
C7	Describe and list the operating system	
C8	Describe the maximum capacity for the number of admin terminals and admin users.	
C9	If the proposed system requires additional software such as Oracle, SQL, or Web applications to reside on additional servers, please describe function and requirements.	
C10	Describe and list the versions of Microsoft Exchange Servers supported.	
C11	Describe and list the versions of IBM Lotus Domino Servers supported.	

No.	Question	Proposer Response
C12	Does the product have integrated fault tolerance capability?	<input type="checkbox"/> Cluster Active/Passive <input type="checkbox"/> Cluster Active/Active <input type="checkbox"/> Standalone Hot Spare <input type="checkbox"/> Other:
C13	If fault tolerance is not integrated, how is it provided?	
C14	Is the proposed system a separate Stand-Alone Cabinet; PC Based; or Shelved in the Telephone System? Please specify.	
C15	Describe and detail any additional options, modules, software applications, middleware, feature packs or any other software/hardware required to provide confederated identity from within Windows Active Directory. If such services are provided with your bid system, please state same. Describe the features of this integration, including adds, moves, changes and deletions, how performed, and any other relevant features.	
C16	State if this solution is for a single message store or a dual message store. A single message store integrates the e-mail server and the voicemail server and shares a common multimedia message store (universal mailboxes) and directory. A dual message store uses separate multimedia messaging stores and directories for the e-mail and voicemail systems. In a dual message store environment the e-mail and voicemail servers have to synchronize message and user status information to keep message status up to date and consistent between the two servers and between desktop and telephone modes of retrieval.	
C17	Options must exist to utilize a separate message store for voice and fax messages from email messages, as well as a single message store for voice, fax, and email messages. Provide descriptions of the available options within the proposed system.	
C18	Provide the major software releases for the product history.	
C19	Can customers provide their own servers? Will doing so change their warranty or support? Please describe options.	

No.	Question	Proposer Response
	<b>Redundancy</b>	
C20	Describe the redundancy options available. The system must provide a RAID Level 5 disk redundancy option. If not provided within your basic system bid, document the additional cost for same in your pricing information.	
C21	Describe your solution’s redundancy for the system critical components and message disk drives to back up a disk failure or inadvertent erasure of an important message by the user. System redundancy is desirable in case of a drive failure, and then after the drive has been replaced some sort of redundant array of disks (RAID) can rebuild the new drive thus preventing any loss of information.	
C22	The message deletion protection should at the very least be similar to the undo on a computer allowing a user to recover a message that has been accidentally deleted. Describe the features of your solution to provide same.	
C23	Describe the performance reduction, if any, of your solution during disk re-mirroring (e.g., degraded response time, certain features unavailable, etc.)	
C24	It is desirable that there is no single point of failure in the Messaging System architecture. Identify any single points of failure, if any. <i>In the pricing section identify all redundancy options, components and pricing associated with redundancy options</i>	
C25	<u>Hardware Swap or Install While Operating</u> : Describe the system capabilities to swap hardware while running, “hot pluggable”. This just means that in order to replace a card or add a card the system does not have to be turned off, it can be left up and running.	
C26	Describe how messaging capabilities still exist when the message storage server is offline.	
C27	Can the system administrator backup and restore all mailbox, usage and configuration data to storage?	
C28	When backing-up are there any interruptions to the system operations? (Is the voicemail down or inoperative to users?)	

No.	Question	Proposer Response
C29	Is the backup solution integral to, and provided with, your proposed solution? If so, what media types can be used for backup?	
C30	Alternatively, what third-party backup solutions are certified to work for backing up the message store? What options, if any, are required for third-party backup to back up the message store?	
C31	What media are used (CD, tape, floppy diskettes, USB Thumb Drive, Internet downloads) for system software updates?	
C32	Can updates be performed at any time without interrupting system operation? If not, describe the interruptions or degradations to system performance during same.	
C33	Can the system import the current VMX 300 Voice Mail/Auto Attendant database? Including single digit menus? If so, what format is required for the input?	
<b>System Support Maintenance</b>		
C34	Does the proposed system require any specialized tools to administer proper maintenance? If so describe.	
C35	<b>Scheduled changes</b> – allows the administrator(s) to schedule and implement programming changes across the network based on time of day, day of the week, and month or year.	
C36	<b>Computer-based administration</b> – does the system provide a GUI based utility for system administration and programming. Please describe available options. If Web-based, state the browsers supported (Internet Explorer, Firefox, Safari).	
C37	<b>Global changes</b> – allows the administrator(s) to implement global programming and configuration changes across the network.	
C38	<b>SNMP alarm notification</b> – the alarm notification functionality is SNMP enabled.	
C39	<b>Browser based system management</b> – allows the system administrator(s) to access the system administration tools from any Web-enabled browser.	
C40	<b>Browser based user administration</b> – allows any County user on the network to access programming information and change or modify predefined features.	
C41	<b>Diagnostic tools</b> – allow the system administrator to run a series of procedures and diagnostic tools to isolate and troubleshoot component and software level failures.	
C42	<b>Scheduled maintenance</b> – a set of procedures or tools run at regular intervals to maintain and optimize system performance.	
C43	<b>Internal diagnostics</b> – the ability for internal self-detection, diagnosis, reporting and resolution of component and software level failures on the equipment or its network connections.	

No.	Question	Proposer Response
C44	<b>Backup across the network</b> – allows the administrator(s) to backup any PBX or other Telephony Platform on the network from a centralized management position.	
C45	<b>LDAP directory synchronization</b> – allows the administrator to utilize Lightweight Directory Access Protocol (LDAP) to synchronize the PBX or other Telephony Platform database with a directory server.	
C46	<b>Active Directory synchronization</b> – If a separate facility or installation option is provided for integration directly with Windows Active Directory, please describe and specify.	
C47	<b>Password aging</b> – force users to automatically change passwords at pre-determined intervals.	
C48	<b>Invalid login threshold</b> – creates a record of all invalid attempts to log into the system administration package and locks out the user after five (5) invalid attempts for specified period of time.	
C49	<b>Change report history</b> – provides a report of all programming changes and the source for documentation and authorization purposes.	
C50	Please provide any 3 <sup>rd</sup> party licensing, or add-on features that are available.	
C51	Vendor warranty service – provide a description of your warranty service, including guaranteed response times, preventive maintenance schedules, and any added service offerings.	
C52	Please describe the support options available to The County for the proposed product.	
C53	Maintenance support programs - provide a description and pricing of all available maintenance plans for service after the warranty period. Please provide pricing for any extended warranties available.	
C54	Response time: provide a description of your response time to post-warranty support; please include the time for each category of response (e.g. emergency, standard, add, move & change, etc.).	
C55	Describe your company’s relationship with the product(s) manufacturer(s), including how long the sales distribution and maintenance agreements have been established and provide a letter from the manufacturer certifying your business relationship.	
C56	Please provide any additional information that would assist The County in making the choice for the proposed product.	

No.	Question	Proposer Response
<b>Unified Communications</b>		
C57	<b>Mandatory.</b> The proposed Voice Mail system must be able to support Unified Communications functionality as specified in this section. Is this capability integrated? Describe.	
C58	<b>Optional</b> – (Optional Pricing to add e-mail and fax Unified Communications to the Voice Mail system). For Unified Messaging, indicate if a portion of pricing includes integration with email system(s), number of users also Faxing, number of users. If not included, indicate optional costs to add.	
C59	Can the Voice Mail system platform be upgraded to provide integration with <b>fax delivery</b> ? <i>Describe system capabilities and proposed options</i>	
C60	Can the Voice Mail system platform be upgraded to provide integration with <b>electronic mail</b> systems to unify message delivery? <i>Describe system capabilities and proposed options.</i>	
C61	Describe the capability for interfacing with Exchange. Maricopa County currently has 15,000+ email users.	
C62	Describe the capability for interfacing with Microsoft Exchange 2007. There are 3,500 users on Microsoft Exchange.	
C63	Ability for user to manage voicemail messages on their computer. Please answer the following questions regarding unified messaging features:	
C64	Are voice and email messages displayed in the same application?	
C65	List the email systems and versions that are compatible with this product.	
C66	Does the system store the incoming caller's number in the message header information?	
C67	Does the system correlate caller's number with contact information provided in the messaging application or other contact database?	
C68	Can the system use voice commands to dial from the contact database? Describe	
C69	Can user set up message management folders?	
C70	When voicemail messages are deleted on the computer, are they also deleted from the voicemail box, and vice versa?	
C71	Can the system accommodate fax delivery to a non-DID extension?	

No.	Question	Proposer Response
C72	Indicate the approximate frequency of updates to the major release level (e.g. the time between release n and release n+1). Provide the release history.	
C73	Indicate the methods and procedures used to update the software due to bugs or errors that are discovered in operation and servicing. What is the committed time to fix a service effecting bug or error?	
C74	Indicate the methods and procedures used to update the software, due to variations from specifications that are discovered in operation and servicing.	
C75	Can the system provide visitor or guest mailboxes?	
C77	Describe the graphical user interface (GUI) clients available to the user to access voice, fax, and optionally email messages from a PC.	
C78	Describe your support policy for using third-party IMAP4-compliant email clients.	
C79	Describe the graphical user interface (GUI) clients available to the user to access voice, fax, and <u>Microsoft Exchange</u> email messages from a PC.	
C80	Describe the graphical user interface (GUI) clients available to the user to access voice, fax, and <u>IBM Lotus Domino</u> email messages from a PC.	
C81	Describe how voice, text, and fax messages can be integrated so as to be viewed and acted upon from within the Microsoft Exchange client.	
C82	Describe the integrated approach whereby voice and fax messages are stored separately from email but able to be viewed from the Microsoft Exchange client.	
C83	Describe how voice, text, fax, and email messages can be viewed and acted upon within the Microsoft Exchange client from a single unified Inbox.	
C84	Describe how voice, text, and fax messages can be integrated so as to be viewed and acted upon from within the Lotus Notes client. We desire an integrated approach whereby voice and fax messages must be stored separately from email but able to be viewed from the IBM Lotus Notes client.	
C85	Describe how voice, text, fax, and email messages can be viewed and acted upon within the IBM Lotus Notes client from a single unified Inbox.	
C86	Describe how users access their voice, text, and fax messages, as well as their email messages, via a Web browser.	
C87	Users must be able to be prevented from storing voice messages on a PC if desired.	
C88	The system must support Secure Sockets Layer (SSL) Web connections.	

No.	Question	Proposer Response
C89	Describe how desktop PC client software can be deployed. SMS (Microsoft Systems Management Server) must be supported for deployment.	
C90	Can users receive confirmation of message delivery?	
C91	Subscribers can choose to have the system locate messages received from a specific caller or group of callers.	
C92	Does the system support return receipt (message delivery confirmation)?	
C93	If enabled, subscribers must be able to screen their telephone calls and choose to intercept the call to speak live with the caller. Describe presence capabilities such as; Busy, away, online, on the phone, not available and all the available presence features available in the proposed solution.	
C94	Variable length subscriber passwords must be supported. State the minimum and maximum lengths.	
C95	How are initial passwords defined?	
C96	State password reuse restrictions.	
C97	Subscribers must be required to periodically change their passwords. Describe how the system prompts users to do so.	
C98	The system must prevent the Administrator from obtaining a subscriber's passwords; however, if the password is forgotten, a new password can be issued that must be reset by the subscriber.	
C99	The system must lock a mailbox after multiple incorrect attempts to log in. Describe.	
C100	The system must prevent unauthorized system access in order to transfer from the system. Detail how this is accomplished.	
C101	The system must support segmenting groups of subscribers in order to restrict messaging capabilities between groups.	
C102	The Administrator <b>must</b> be able to broadcast a message that is indicated as such when the subscriber logs on to the mailbox.	
C103	Can the System Administrator create an announcement that will automatically play to users when they log on to their mailboxes?	
C104	Describe how your system defines class of service and which capabilities are controlled by class of service.	

No.	Question	Proposer Response
C105	Describe how your system accommodates subscribers in different time zones receiving messages correctly time-stamped for the receiving subscriber's location. All time zones worldwide must be accommodated.	
C106	Describe the available standard reports, as well as viewing and printing options.	
C107	The capability to have the system backed up both automatically (unattended) and on demand (attended).	
C108	Describe the messaging system's inherent networking capabilities. The system must support SMTP/MIME.	
C109	Describe the solution's ability to network with dissimilar systems via TCP/IP, AMIS and VPIM v2.	
C110	The system should use industry standards to store messages. What is the encoding (digitization) rate?	
C111	How much space does a one minute message occupy?	
C112	If permitted, all messages should be accessible in .wav file format.	
C113	Describe in detail how the system provides integrated fax messaging capabilities.	
C114	Describe in detail how the system supports third-party fax servers.	
C115	What impact does your solution have on the network?	
C116	Provide the supported software versions for the graphical user interfaces to unified messages.	
C117	Provide the supported software versions for the graphical user interface to voice messages.	
C118	Can extension numbers be changed without deleting messages or affecting the mailbox?	
C119	It is required that regardless of the telephone user interface of the recipient's mailbox; callers are given a uniform interface and set of prompts.	
C120	Describe the maximum number of networked subscribers supported.	

No.	Question	Proposer Response
<b>Optional Systems and Applications</b>		
C121	Does your system have the capability to handle Speech Recognition to provide callers a directory assistance self-service function? If so, what are the database requirements?	
C122	Please specify what software is used and if any what additional cost and hardware is required to use this technology.	
C123	Describe system capabilities and submit optional pricing in the pricing section:	

2.15 SYSTEM REQUIREMENTS

2.15.1 **Proposers must respond to The County’s requirements using the table provided. The requirements included in the table were developed by the OET staff that will participate in the configuration design activities for the system. It is intended that the requirements illustrate the scope of a fully implemented system. Proposers must recognize that the requirements may not be complete and requirements may be added, enhanced or reduced during design.**

2.15.2 **Table Column Definitions:**

2.15.2.1 **No.:**

This column indicates a unique number/letter for each requirement. A separate response is expected for each requirement.

2.15.2.2 **Description:**

This column identifies capabilities or functions expected in the proposed solution.

2.15.2.3 **Proposer Response:**

Proposers shall provide one of four possible responses to each functional requirement in this column, using the capability coding scheme described below:

2.15.2.3.1 **Base Package** is to be indicated if the base system configuration satisfies The County’s need.

2.15.2.3.2 **Optional Module** is to be indicated if the acquisition of software products offered by Proposer, other than the base system configuration, will satisfy the requirements without the need to modify the package. In addition, the module must be currently available in general release.

2.15.2.3.3 **In a Future Release** is to be indicated if The County’s requirement will be satisfied in a scheduled new release of the product. The scheduled release date must be noted.

2.15.2.3.4 **Not supported is** to be indicated if the requirement is beyond the scope of the application software’s capabilities.

2.15.2.3.5 **Note:** *Any of the numbered or lettered line items without a Proposer response or with an invalid response will be assumed to not be supported (response of 0) by the proposed application.*

2.15.2.3.6 **Include sufficient information in the Comments column (or an attachment) to clarify that all requirements are met (failure to do so may result in a lower score).**

2.16 User Functional Requirements - Matrix D

No.	Description	Proposer Response	Comments
D1.	Provides the administrator the ability to assign individual limits to each voice message box by number of minutes and number of messages.		
D2.	Provides the administrator the ability to assign Maximum number of days a message may be stored before being purged.		
D3.	After leaving a message, a caller can reach the operator or another configurable extension.		
D4.	Caller identification is available on internal calls processed by the Auto Attendant and Voice Mail.		
D5.	Caller identification is available on external calls using PRI trunks.		
D6.	<p>System is accessible only to users with a valid user id and password. Users can change their passwords at any time.</p> <p>While listening to new or saved messages, the subscriber can invoke any of the following functions by pressing a key entry, or voice command.</p>		
D7.	Pause		
D8.	Erase / Delete		
D9.	Retrieve erased / deleted message		
D10.	Save		
D11.	Back up		
D12.	Fast Forward		
D13.	Replay / Review		
D14.	Skip		
D15.	Before sending a recorded message, a subscriber can choose any of the following:		
D16.	Mark message urgent		
D17.	Mark message private		

No.	Description	Proposer Response	Comments
D18.	Prohibit forwarding of message		
D19.	Specify date and delivery time stamp		
D20.	A subscriber can forward a message to an offsite telephone number such as a cell phone.		
D21.	A digital phone subscriber will be notified immediately through a message-waiting lamp when a new message is received.		
D22.	The system invokes stuttered dial tone to analog extensions as a message waiting indication, including remote networked telephone systems)		
D23.	The system is capable of sending SMS messages to cell phones as a message waiting indication		
D24.	The system is capable of sending Email messages for message waiting indication		
D25.	The system allows a minimum of two personal mailbox greetings for subscribers to record for outside callers.		
D26.	The system allows the subscriber to record a minimum of two personal greeting for internal callers.		
D27.	During a call transfer, the system will monitor the call to see if it was answered or if it was busy.		
D28.	A Caller is informed that the party they were being transferred to was busy and will not place the caller into a perpetual loop.		
D29.	The system provides special message boxes that play announcements to callers and then hangs up.		
D30.	More than one announcement can be played from a single message only box.		
D31.	The system can be configured be configured to accept replies from callers after they've heard the announcements. AKA Voice Forms.		
D32.	The caller can reply to each announcement individually.		
D33.	External callers are able to access operator assistance, including automatic transfer for those who do not respond to prompts in a timely manner, or who make too many errors, or who call from a rotary phone.		

No.	Description	Proposer Response	Comments
D34.	Each mailbox must be able to have a unique destination if the external caller presses "0." Describe other transfer options available to the caller.		
D35.	While leaving a voice mail message, external callers are able to pause, replay, erase and re-record, add to a message already recorded, mark a message urgent, and choose to cancel the message.		
D36.	Multilingual prompts are available from which the system can offer subscribers and external callers a choice of languages. Is this a standard or optional feature? Describe this feature, including listing the available languages.		
D37.	TDD/TTY for hearing/speech impaired mailbox holders is supported. The system is in compliance with Section 255 of the Telecommunications Act and Section 508 of the Rehabilitation Act.		
D38.	Subscribers are notified that their mailboxes are almost full.		
D39.	Messages are automatically deleted after a set number of days, by class of service.		
D40.	Maximum message length for callers is customizable up to _____. Subscriber's maximum greeting duration is _____.		
D41.	Message, Greeting and Announcement maximum duration values can be different for external callers and other subscribers creating and sending messages.		
D42.	Callers and subscribers are warned that they are nearing the maximum recording time.		
D43.	Subscribers have the need to share a single telephone extension yet have individual private mailboxes. Callers can choose to be routed to a specific subscriber's mailbox when calling this shared extension.		
D44.	Subscribers are able to have more than one extension number associated with a mailbox.		
D45.	Subscribers with more than one extension number associated with a mailbox can customize the Call Answer behavior for each extension.		
D46.	The system provides a tutorial for first-time subscribers to help set up their mailboxes.		

No.	Description	Proposer Response	Comments
D47.	The system enables Subscribers to record and activate multiple personal mailbox greetings. If supported by the switch, the system must recognize and play different personal greetings for all conditions, for a busy condition, for a no answer condition, and for an extended absence. If a personal greeting is not recorded, the system will play a standard greeting with the subscriber's recorded name and give callers the option to leave a message.		
D48.	The system supports different greetings for internal and external callers.		
D49.	Subscribers are able to address messages to a mailbox number, numeric address or network address; a name; a distribution list; and all of the above.		
D50.	Subscribers are able to cancel an incorrect address without affecting the message, as well as cancel the message so it is not sent.		
D51.	Subscribers are able to address messages by name.		
D52.	Subscribers are able to access large system global distribution lists.		
D53.	Subscribers are able to create private personal distribution lists.		
D54.	The system is able to provide message waiting notification when broadcasting messages for all subscribers or groups of subscribers.		
D55.	Inherent text-to-speech capabilities include reading message headers (envelope information), message subjects, and text names (if provided) via computer-generated voice over the telephone user interface.		
D56.	System and user Interfaces are retained including a common login interface and mailbox model. The result is a system that is able to closely emulate the legacy VMX 300 ARIA.		
D57.	New, Saved, and Deleted message categories are configurable and presented to subscribers when checking messages.		
D58.	Subscribers are notified when a subscriber-requested operation is delayed.		
D59.	The system supports an SMDI interface with the PBX for integration and for invoking Message Waiting with the PBX.		

No.	Description	Proposer Response	Comments
D60.	The system supports an Ethernet interface with the PBX for integration and for invoking Message Waiting with the PBX.		
D61.	The system makes outcall notifications to a pager, a telephone number, or a telephone list based upon a subscriber-defined schedule and parameters based on the type of message received and the urgency of the message.		
D62.	If enabled, the subscribers can choose to receive text notification when new <u>call messages</u> and <u>new fax</u> messages are left. The subscriber notification can be to a pager, SMS-enabled digital phone, SIP device or other device that accepts an SMTP/MIME address.		
D63.	If enabled, subscribers can offer callers the option of initiating a text notification with callback number at a minimum. This notification can be sent as a page, an SMS message, or to an email address.		
D64.	If enabled, unanswered calls to the subscriber's mailbox can be redirected to a list of subscriber-specified phone numbers in an attempt to find the subscriber. The subscriber should be able to specify the list of phone numbers, as well as multiple schedules. State how many ports are used for this feature.		
D65.	The system provides Find-Me/Follow-Me services to connect subscribers. This functionality can be activated via the telephone user interface.		
D66.	<p>After listening to a message, reply features to other subscribers should be available without re-addressing the message. If supported by the PBX, the subscriber is able to directly call the sending subscriber.</p> <p>Programmable class of service options must at minimum provide the same capabilities as currently available in the voice mail system.</p> <p>Describe the number of programmable Class of Service options.</p>		

2.17 Acceptance: For Customer’s Initial purchase of each Equipment and Software product. Licensor shall provide an acceptance test period (the “Test Period”) that commences upon Installation. Installation shall be defined as: a.) the Equipment, if any, is mounted; b.) the Software is installed on the data base server(s) and/or personal computer(s); and c.) implementation team training, if any, is complete. During the Test Period, Customer shall determine whether the Equipment and Software meet the Licensor published electronic documentation, (“Specifications”). The Test Period shall be for 90 days. If Customer has not given Licensor a written deficiency statement specifying how the Equipment or Software fails to meet the Specification (“Deficiency Statement”) within the Test Period, the Equipment and Software shall be deemed accepted. If Customer provides a Deficiency Statement within the Test Period, Licensor shall have 30 days to correct the deficiency, and the Customer shall have an additional 60 days to evaluate the Equipment and Software. If the Equipment or Software does not meet the Specifications at the end of the second 30 day period, either Customer or Licensor may terminate this Contract. Upon any such termination, Customer shall return all Equipment and Software to Licensor, and Licensor shall refund any monies paid by Customer to Licensor therefore. Neither party shall then have any further liability to the other for the products that were the subject of the Acceptance Test.

2.18 FACILITIES:

During the course of this Contract, the County shall provide the Contractor’s personnel with adequate workspace for consultants and such other related facilities as may be required by Contractor to carry out its obligation enumerated herein.

2.19 INVOICES AND PAYMENTS:

2.19.1 **The Contractor shall submit two (2) legible copies of their detailed invoice before payment(s) can be made. At a minimum, the invoice must provide the following information:**

- 2.19.1.1 Company name, address and contact
- 2.19.1.2 County bill-to name and contact information
- 2.19.1.3 Contract Serial Number
- 2.19.1.4 County purchase order number
- 2.19.1.5 Invoice number and date
- 2.19.1.6 Payment terms
- 2.19.1.7 Date of service or delivery
- 2.19.1.8 Contract Item number(s)
- 2.19.1.9 Description of Purchase (product or services)
- 2.19.1.10 Pricing per unit of purchase
- 2.19.1.11 Extended price
- 2.19.1.12 Total Amount Due

**Problems regarding billing or invoicing shall be directed to the using agency as listed on the Purchase Order.**

2.19.2 Payment may be made to the Contractor by Accounts Payable through the Maricopa County Vendor Express Payment Program. This is an Electronic Funds Transfer (EFT) process. After Award the Contractor shall fill out an EFT Enrollment form (to be provided by the Procurement Officer) or as located on the County Department of Finance Website as a fillable PDF document ([www.maricopa.gov/finance/](http://www.maricopa.gov/finance/)).

2.19.3 EFT payments to the routing and account numbers designated by the Contractor will include the details on the specific invoices that the payment covers. The Contractor is required to discuss remittance delivery capabilities with their designated financial institution for access to those details.

2.20 TAX: (COMMODITIES)

Tax shall not be levied against labor. Sales/use tax will be determined by County. Tax will not be used in determine low price.

2.21 DELIVERY:

It shall be the Contractor's responsibility to meet the proposed delivery requirements. Maricopa County reserves the right to obtain services on the open market in the event the Contractor fails to make delivery and any price differential will be charged against the Contractor.

3.0 **SPECIAL TERMS & CONDITIONS:**

3.1 CONTRACT TERM:

This Request for Proposal is for awarding a firm, fixed price purchasing contract to cover a five (5) year period.

3.2 OPTION TO EXTEND:

The County may, at their option and with the approval of the Contractor, extend the period of this Contract up to a maximum of five (5), one (1) year options, (or at the County's sole discretion, extend the contract on a month to month basis for a maximum of six (6) months after expiration). The Contractor shall be notified in writing by the Materials Management Department of the County's intention to extend the contract period at least thirty (30) calendar days prior to the expiration of the original contract period.

3.3 PRICE ADJUSTMENTS:

Any requests for reasonable price adjustments must be submitted sixty (60) days prior to the Contract expiration date. Requests for adjustment in cost of labor and/or materials must be supported by appropriate documentation. If County agrees to the adjusted price terms, County shall issue written approval of the change. The reasonableness of the request will be determined by comparing the request with the (Consumer Price Index) or by performing a market survey.

3.4 INDEMNIFICATION

To the fullest extent permitted by law, Contractor shall defend, indemnify, and hold harmless County, its agents, representatives, officers, directors, officials, and employees from and against all claims, damages, losses and expenses, including, but not limited to, attorney fees, court costs, expert witness fees, and the cost of appellate proceedings, relating to, arising out of, or alleged to have resulted from the negligent acts, errors, omissions or mistakes relating to the performance of this Contract. Contractor's duty to defend, indemnify and hold harmless County, its agents, representatives, officers, directors, officials, and employees shall arise in connection with any claim, damage, loss or expense that is attributable to bodily injury, sickness, disease, death, or injury to, impairment, or destruction of property, including loss of use resulting there from, caused by any negligent acts, errors, omissions or mistakes in the performance of this Contract including any person for whose acts, errors, omissions or mistakes Contractor may be legally liable.

The amount and type of insurance coverage requirements set forth herein will in no way be construed as limiting the scope of the indemnity in this paragraph.

The scope of this indemnification does not extend to the sole negligence of County.

3.5 INSURANCE REQUIREMENTS

Contractor, at Contractor's own expense, shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of B++6. In lieu of State of Arizona licensing, the

stipulated insurance may be purchased from a company or companies, which are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County. The form of any insurance policies and forms must be acceptable to County.

All insurance required herein shall be maintained in full force and effect until all work or service required to be performed under the terms of the Contract is satisfactorily completed and formally accepted. Failure to do so may, at the sole discretion of County, constitute a material breach of this Contract.

Contractor's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it.

Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect the County's right to coverage afforded under the insurance policies.

The insurance policies may provide coverage that contains deductibles or self-insured retentions. Such deductible and/or self-insured retentions shall not be applicable with respect to the coverage provided to County under such policies. Contractor shall be solely responsible for the deductible and/or self-insured retention and County, at its option, may require Contractor to secure payment of such deductibles or self-insured retentions by a surety bond or an irrevocable and unconditional letter of credit.

County reserves the right to request and to receive, within 10 working days, certified copies of any or all of the herein required insurance policies and/or endorsements. County shall not be obligated, however, to review such policies and/or endorsements or to advise Contractor of any deficiencies in such policies and endorsements, and such receipt shall not relieve Contractor from, or be deemed a waiver of County's right to insist on strict fulfillment of Contractor's obligations under this Contract.

The insurance policies required by this Contract, except Workers' Compensation, and Errors and Omissions, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insureds.

The policies required hereunder, except Workers' Compensation, and Errors and Omissions, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Contractor's work or service.

**3.5.1 Commercial General Liability:**

Commercial General Liability insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than \$1,000,000 for each occurrence, \$2,000,000 Products/Completed Operations Aggregate, and \$2,000,000 General Aggregate Limit. The policy shall include coverage for bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provision which would serve to limit third party action over claims. There shall be no endorsement or modification of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.

**3.5.2 Automobile Liability:**

Commercial/Business Automobile Liability insurance and, if necessary, Commercial Umbrella insurance with a combined single limit for bodily injury and property damage of not less than \$1,000,000 each occurrence with respect to any of the Contractor's owned, hired, and non-owned vehicles assigned to or used in performance of the Contractor's work or services under this Contract.

3.5.3 Workers' Compensation:

Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Contractor's employees engaged in the performance of the work or services under this Contract; and Employer's Liability insurance of not less than \$100,000 for each accident, \$100,000 disease for each employee, and \$500,000 disease policy limit. (N.B. - \$1,000,000 limits on larger contracts)

Contractor waives all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Contractor pursuant to this Contract.

3.5.4 Errors and Omissions Insurance:

Errors and Omissions insurance and, if necessary, Commercial Umbrella insurance, which will insure and provide coverage for errors or omissions of the Contractor, with limits of no less than \$1,000,000 for each claim.

3.5.5 Certificates of Insurance.

3.5.5.1 Prior to commencing work or services under this Contract, Contractor shall furnish the County with certificates of insurance, or formal endorsements as required by the Contract in the form provided by the County, issued by Contractor's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Contract are in full force and effect. Such certificates shall identify this contract number and title.

In the event any insurance policy (ies) required by this contract is (are) written on a "claims made" basis, coverage shall extend for two years past completion and acceptance of **Contractor's** work or services and as evidenced by annual Certificates of Insurance.

If a policy does expire during the life of the Contract, a renewal certificate must be sent to **County** fifteen (15) days prior to the expiration date.

3.5.5.2 Cancellation and Expiration Notice.

Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to the County.

3.6 PROCUREMENT CARD ORDERING CAPABILITY:

It is the intent of Maricopa County to utilize a procurement card that may be used by the County from time to time, to place and make payment for orders under the Contract. Respondents without this capability may be considered non-responsive and not eligible for award consideration.

3.7 SCHEDULE OF EVENTS

Request for Proposals Issued:

09/25/2008

Deadline for written questions (48) hours after Pre-Proposal meeting). No questions will be responded to prior to the Pre-Proposal Conference. All questions must be submitted to ([walshb@mail.maricopa.gov](mailto:walshb@mail.maricopa.gov)) and be received by 4:00 P.M. Arizona time. All questions and answers will be posted to [www.maricopa.gov](http://www.maricopa.gov) with the original solicitation.

Deadline for submission of proposals is **2:00 P.M.**, on **NOVEMBER 21, 2008**. All proposals must be received before 2:00 P.M. on the above date at Maricopa County Materials Management Department, 320 West Lincoln Street, Phoenix, AZ 85003.

Proposed review of Proposals and short list decision:	<u>12/10/08</u>
Proposed Respondent presentations: (if required)	<u>12/20/08</u>
Proposed selection and negotiation:	<u>01/09</u>
Proposed Best & Final (if required)	<u>01/09</u>
Proposed award of Contract:	<u>02/15/09</u>

All responses to this Request for Proposal become the property of Maricopa County and (other than pricing) will be held confidential, to the extent permissible by law. The County will not be held accountable if material from proposal responses is obtained without the written consent of the Respondent by parties other than the County.

**3.8 INQUIRIES AND NOTICES:**

All inquiries concerning information herein shall be addressed to:

MARICOPA COUNTY  
DEPARTMENT OF MATERIALS MANAGEMENT  
ATTN: CONTRACT ADMINISTRATION  
320 W. LINCOLN ST.  
PHOENIX, AZ 85003

Administrative telephone inquiries shall be addressed to:

BRIAN WALSH, PROCUREMENT OFFICER, 602-506-3243  
([walshb@mail.maricopa.gov](mailto:walshb@mail.maricopa.gov))

Inquiries may be submitted by telephone but must be followed up in writing. No oral communication is binding on Maricopa County.

**3.9 INSTRUCTIONS FOR PREPARING AND SUBMITTING PROPOSALS:**

**Respondents shall provide their proposals in accordance with Section 3.12 as follows:**

- 3.9.1 **One (1) original hardcopy of all proposal documents.**
- 3.9.2 **One (1) CD providing all proposal documents in Word, Excel (Attachment A) and then the entire proposal document in PDF format.**
- 3.9.3 **Six (6) CD's providing the entire proposal in PDF format only.**
- 3.9.4 **Respondents shall address proposals identified with return address, serial number and title in the following manner:**

**Maricopa County  
Materials Management Department  
320 West Lincoln Street  
Phoenix, Arizona 85003-2494**

**SERIAL 08081 – RFP, VOICE MAIL MESSAGING SYSTEM**

- 3.9.5 **Proposals shall be signed by an owner, partner or corporate official who has been authorized to make such commitments. All prices shall be held firm for a period of one hundred fifty (150) days after the RFP closing date.**

3.10 EXCEPTIONS TO THE SOLICITATION:

The Respondent shall identify and list all exceptions taken to all sections of 08081 – RFP and list these exceptions referencing the section (paragraph) where the exception exists and identify the exceptions and the proposed wording for the Respondent’s exception under the heading, “Exception to the PROPOSAL Solicitation, SERIAL 08081 - RFP.” **Exceptions that surface elsewhere and that do not also appear under the heading, “Exceptions to the PROPOSAL Solicitation, SERIAL 08081 - RFP,” shall be considered invalid and void and of no contractual significance.**

The County reserves the right to reject, determine the proposal non-responsive, enter into negotiation on any of the Respondent exceptions, or accept them outright.

3.11 GENERAL CONTENT:

The Proposal should be specific and complete in every detail. It should be practical and provide a straightforward, concise delineation of capabilities to satisfactorily perform the Contract being sought.

The Respondent should not necessarily limit the proposal to the performance of the services in accordance with this Request for Proposal but should outline any additional services and their costs if the Respondent deems them necessary to accomplish the program.

3.12 FORMAT AND CONTENT:

To assure that each Proposer receives full recognition for its capability and experience, the County requires that Proposals be organized into the following major sections described below. The RFP response should be prepared in a simple and straight forward manner, using tables, charts or forms where provided. To aid in the evaluation, it is desired that all proposals follow the same general format. **The proposals are to be submitted in binders and have sections tabbed as below: (Responses are limited to 200 pages, single sided, 10 point font type).**

3.12.1 Table of Contents

3.12.2 Letter of Transmittal (Exhibit 2)

3.12.3 Executive Summary – This section shall contain an outline of the general approach utilized in the proposal.

3.12.4 Proposal – This section should contain a statement of all of the programs and services proposed, including conclusions and generalized recommendations. Proposals should be all-inclusive, detailing respondent’s best offer. Proposer shall provide a system design document that outlines the hardware and software required to support The County’s vision of a Voice Mail and Unified Messaging system. The design document shall include network infrastructure diagrams and related information. The design must meet the requirements for a 24-hour operation

3.12.5 Qualifications – The Proposer shall provide The County with sufficient documentation to demonstrate that it is experienced and qualified to fulfill this agreement, including:

3.12.5.1 Brief overview of the company

3.12.5.2 Professional certifications or licenses, if applicable

3.12.5.3 Proposers must have a minimum of ten (10) existing Voice Mail and Unified Messaging systems designed, installed, tested and operational for a minimum of one (1) year.

3.12.5.4 Names and résumés of proposed key staff and the project manager proposed for this project

3.12.5.5 Specific experience with projects of similar size and scope

- 3.12.5.6 Proposers shall provide information related to three (3) installed systems of similar size and scope for evaluation
- 3.12.5.7 Proposer and manufacturer relationship
- 3.12.6 **Initial Implementation Plan**: Proposer shall submit a detailed project plan for initial implementation with its Proposal. The plan shall include project mission and objectives. Proposer shall submit descriptions of Proposer's work process or approach to achieving each objective and descriptions of deliverables.
  - 3.12.6.1 The initial implementation plan shall include specific details for installation, testing, training and recommendations for system operations to:
  - 3.12.6.2 Implement and configure the core system, with at least one (1) distributed management/deployment node, if applicable
  - 3.12.6.3 Interface the system with PBX and network Nortel systems, TDM and IP, Message Waiting Capability is mandatory for all network systems.
  - 3.12.6.4 Auto Attendant current configuration deployment
  - 3.12.6.5 Unified Messaging deployment plan and Interface the system with, with applicable email Exchange.
  - 3.12.6.6 Perform discovery to establish a baseline and then complete a County-defined deployment and implementation phase(s).
- 3.12.7 **Training**: (Refer to §2.5) Proposer shall submit with its Proposal training information specific to the topics covered, length of class, etc. Proposer shall also specify if training is provided by the manufacturer or other training professional, and whether training is available on-site or off-site. Pricing must be included on **ATTACHMENT A**.
- 3.12.8 All costs associated with the Proposal must be identified in **ATTACHMENT A**
  - 3.12.8.1 Proposer shall submit a separate Financial Proposal based on **Unit Pricing**. Unit pricing is required and may be cause for rejection if not supplied.
  - 3.12.8.2 **ATTACHMENT A** provides a cost sheet that includes items for a typical system. Quantities of software licenses for all types of operating systems used by The County are provided. Quantities are anticipated and may increase or decrease at The County's discretion.
  - 3.12.8.3 Items for professional services, training, software maintenance, travel, and miscellaneous expenses are provided. **ATTACHMENT A** also includes areas for additional cost items.
- 3.12.9 Warranty

Proposer shall submit with its Proposal the terms and conditions of its warranty, which will cover any and all hardware, software, and services provided by the Proposer to maintain reliable operations.
- 3.12.10 Maintenance, Service and Support
  - 3.12.10.1 Proposer shall submit with its Proposal its maintenance plan, including cost estimates covering a comprehensive maintenance plan, and its proposed annual maintenance cap during the life of the system. Proposer shall also submit with its Proposal a sample maintenance agreement and sample license agreement.

3.12.10.2 All costs associated with maintenance, service and support shall be identified in **ATTACHMENT A**.

3.12.11 Subcontractors

The Proposer shall provide a list of any and all subcontractors to be used, including any Disadvantaged, Minority, Small, and/or Woman-Owned Business Enterprise firms, if applicable.

3.12.12 Proposal exceptions

3.12.13 Other data

3.12.14 Attachment A (Pricing)

3.12.15 Attachment B (Agreement Page)

3.12.16 Attachment C (References)

3.13 EVALUATION OF PROPOSAL – SELECTION FACTORS:

A Proposal Evaluation Committee shall be appointed, chaired by the Procurement Officer to evaluate each Proposal. At the County's option, Respondents may be invited to make presentations to the Evaluation Committee. Best and Final Offers and/or Negotiations may be conducted, as needed, with the highest rated Respondent(s). Proposals will be evaluated on the following criteria which are listed descending order of importance;

3.13.1 Respondent's response and system capabilities

3.13.2 Firm's Qualifications.

3.13.3 Implementation Plan.

3.13.4 Price of goods and services.

3.14 CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

3.14.1 The undersigned (authorized official signing for the Contractor) certifies to the best of his or her knowledge and belief, that the Contractor, defined as the primary participant in accordance with 45 CFR Part 76, and its principals:

3.14.1.1 are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal Department or agency;

3.14.1.2 have not within 3-year period preceding this Contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

3.14.1.3 are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and

3.14.1.4 have not within a 3-year period preceding this Contract had one or more public transaction (Federal, State or local) terminated for cause of default.

3.14.2 Should the Contractor not be able to provide this certification, an explanation as to why should be attached to the Contract.

3.14.3 The Contractor agrees to include, without modification, this clause in all lower tier covered transactions (i.e. transactions with subcontractors) and in all solicitations for lower tier covered transactions related to this Contract.

3.15 **POST AWARD MEETING:**

The successful Respondent shall be required to attend a post-award meeting with the Using Agency to discuss the terms and conditions of the Contract. This meeting will be coordinated by the Procurement Officer of the Contract.

**NOTE: RESPONDENTS ARE REQUIRED TO USE ATTACHED FORMS TO SUBMIT THEIR PROPOSALS.**

**ATTACHMENT A  
PRICING**

**Fee Schedule**

Modify sheet as necessary to accommodate your needs.

You must provide unit pricing and follow a similar format in your proposal

Quantity	Item Description	Per Unit Cost	Extended Total
<b>VOICE MAIL AND AUTO ATTENDING (CORE PRODUCT)</b>			
<b>Equipment</b>			
1	Voice Mail and Auto Attendant (core product system)		
<b>Taxes if applicable</b>			
<b>Equipment Maintenance</b>			
	Pricing for a full service maintenance agreement that supports both hardware and software 8 a.m. to 5 p.m., Monday – Friday with two (2) hour on site response.		
	If discounts are available for multi-year support agreements, please provide information regarding the length of term and the net discount percentage.		
	Pricing for a maintenance agreement that supports both hardware and software seven days per week, twenty-four hours per day, with two (2) hour on site response.		
	Time and materials coverage, rate for standard business hours and after hours.		
<b>Agent/Client Licenses</b>			
<b>Annual Software Maintenance/Support License</b>			
1 year	Core product system, 1 <sup>st</sup> year	Included in core product cost	
1 year	User licenses, 1 <sup>st</sup> year	Included in core product cost	
1 year	Core product system, 2 <sup>nd</sup> year		
1 year	User licenses, 2 <sup>nd</sup> year		
1 year	Core product system, 3 <sup>rd</sup> year		
1 year	User licenses, 3 <sup>rd</sup> year		
1 year	Core product system, 4 <sup>th</sup> year		
1 year	User licenses, 4 <sup>th</sup> year		
1 year	Core product system, 5 <sup>th</sup> year		
1 year	User licenses, 5 <sup>th</sup> year		

**ATTACHMENT A  
PRICING**

Quantity	Item Description VOICE MAIL AND AUTO ATTENDING (CORE PRODUCT)	Per Unit Cost	Extended Total
<b>Professional Services for Implementation and Installation (provide detail)</b>			
List separately minimum charges, travel charges, and minimum billing increment.			
	Implementation of Core System		
	Installation of Core System		
	Remote diagnostics - list fees and minimum billing increment.		
	Help Desk -Hourly rates - itemize standard and overtime hourly rate for post-warranty support.		
<b>Training in administration and technical support of the system (use the most effective training option and provide detail)</b>			
	User training - extensive phone and voicemail user training, all users at each location.		
	Administrator training for one supervisor and four administrators in at least two separate sessions.		
<b>Total Cost of Core System (Total Turn-Key Solution):</b>			

**ATTACHMENT A  
PRICING**

**Fee Schedule**

**OPTIONAL UNIFIED MESSAGE APPLICATION**

Modify sheet as necessary to accommodate your needs.

You must provide unit pricing and follow a similar format in your proposal.

Quantity	Item Description OPTIONAL UNIFIED MESSAGE APPLICATION	Per Unit Cost	Extended Total
<b>Equipment</b>			
1	Unified Message Application for use with Microsoft Exchange and Lotus Notes separate application, pricing		
<b>Taxes if applicable</b>			
<b>Equipment Maintenance</b>			
	Pricing for a full service maintenance agreement that supports both hardware and software 8 a.m. to 5 p.m., Monday – Friday with two (2) hour on site response.		
	If discounts are available for multi-year support agreements, please provide information regarding the length of term and the net discount percentage.		
	Pricing for a maintenance agreement that supports both hardware and software seven days per week, twenty-four hours per day, with two (2) hour on site response.		
	Time and materials coverage, rate for standard business hours and after hours.		
<b>Agent/Client Licenses</b>			
<b>Annual Software Maintenance/Support License</b>			
1 year	Unified Messaging product system, 1 <sup>st</sup> year		Included in core product cost
1 year	User licenses, 1 <sup>st</sup> year		Included in core product cost
1 year	Unified Messaging product system, 2 <sup>nd</sup> year		
1 year	User licenses, 2 <sup>nd</sup> year		
1 year	Unified Messaging product system, 3 <sup>rd</sup> year		
1 year	User licenses, 3 <sup>rd</sup> year		
1 year	Unified Messaging product system, 4 <sup>th</sup> year		
1 year	User licenses, 4 <sup>th</sup> year		
1 year	Unified Messaging product system, 5 <sup>th</sup> year		
1 year	User licenses, 5 <sup>th</sup> year		

**ATTACHMENT A  
PRICING**

Quantity	Item Description OPTIONAL UNIFIED MESSAGE APPLICATION	Per Unit Cost	Extended Total
<b>Professional Services for Implementation and Installation (provide detail)</b>			
List separately minimum charges, travel charges, and minimum billing increment.			
	Implementation of Core System		
	Installation of Core System		
	Remote diagnostics - list fees and minimum billing increment.		
	Help Desk -Hourly rates - itemize standard and overtime hourly rate for post-warranty support.		
<b>Training in administration and technical support of the system (use the most effective training option and provide detail)</b>			
	User training - extensive phone and voicemail user training, all users at each location.		
	Administrator training for one supervisor and four administrators in at least two separate sessions.		
<b>Total Cost of Optional Unified Message Application:</b>			

**OPTIONAL PRICE**

Modify sheet as necessary to accommodate your needs.  
You must provide unit pricing and follow a similar format in your proposal.

Quantity	Item Description OPTIONAL PRICING	Per Unit Cost	Extended Total
<b>Equipment – Optional Pricing – Other Applications</b>			
<b>Taxes if applicable</b>			
<b>Agent/Client Licenses</b>			
<b>Annual Software Maintenance/Support License (warranty through 5<sup>th</sup> year)</b>			

**ATTACHMENT A  
PRICING**

<b>Professional Services for Implementation and Installation (provide detail)</b>			
<b>Training in administration and technical support of the system (use the most effective training option and provide detail)</b>			
<b>Total Cost of Options:</b>			

ATTACHMENT B

**AGREEMENT**

Respondent hereby certifies that Respondent has read, understands and agrees that acceptance by Maricopa County of the Respondent's Offer will create a binding Contract. Respondent agrees to fully comply with all terms and conditions as set forth in the Maricopa County Procurement Code, and amendments thereto, together with the specifications and other documentary forms herewith made a part of this specific procurement

**BY SIGNING THIS PAGE THE SUBMITTING RESPONDENT CERTIFIES THAT RESPONDENT HAS REVIEWED THE ADMINISTRATIVE INFORMATION AND DRAFT RFP CONTRACT'S TERMS AND CONDITIONS LOCATED AT <http://www.maricopa.gov/materials>. AND AGREE TO BE CONTRACTUALLY BOUND TO THEM.**

---

\_\_\_\_\_ Small Business Enterprise (SBE)

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\_\_\_\_\_  
RESPONDENT SUBMITTING PROPOSAL

\_\_\_\_\_  
FEDERAL TAX ID NUMBER

\_\_\_\_\_  
PRINTED NAME AND TITLE

\_\_\_\_\_  
AUTHORIZED SIGNATURE

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
TELEPHONE FAX #

\_\_\_\_\_  
CITY STATE ZIP

\_\_\_\_\_  
DATE

WEB SITE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

MARICOPA COUNTY, ARIZONA

BY: \_\_\_\_\_  
DIRECTOR, MATERIALS MANAGEMENT

\_\_\_\_\_  
DATE

BY: \_\_\_\_\_  
CHAIRMAN, BOARD OF SUPERVISORS

\_\_\_\_\_  
DATE

ATTESTED:

\_\_\_\_\_  
CLERK OF THE BOARD

\_\_\_\_\_  
DATE

APPROVED AS TO FORM:

\_\_\_\_\_  
DEPUTY MARICOPA COUNTY ATTORNEY

\_\_\_\_\_  
DATE

ATTACHMENT C

**RESPONDENT REFERENCES**

**RESPONDENT SUBMITTING PROPOSAL:** \_\_\_\_\_

1. COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

2. COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

3. COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

4. COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

5. COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

**EXHIBIT 1  
VENDOR REGISTRATION PROCEDURES  
AND  
SMALL BUSINESS PROGRAM**

**On-line Vendor Registration at Maricopa County is available NOW!**

On November 22, 2004, Maricopa County changed its vendor registration process.

**On-Line Registration is FREE and REQUIRED for all vendors.**

**Register On-line at [www.maricopa.gov/materials](http://www.maricopa.gov/materials)**

**It is required that you select an appropriate commodity code(s) associated with your line of business.**

**Upon completion of your on-line registration, you are responsible for updating any changes to your information. Please retain your Login ID and Password for future use.**

**If you have any questions, email us at [VendorReg@mail.maricopa.gov](mailto:VendorReg@mail.maricopa.gov).**

**SMALL BUSINESS PROGRAM**

**(MCBIZ)**

**"It is Maricopa County's policy to provide small businesses the opportunity to participate in the County's solicitation process for consideration to fulfill the requirements for various commodities and services.**

**Maricopa County's small business program specifically targets procurements of \$50,000 and less. However, Maricopa County encourages small business enterprises to submit responses to available solicitations for consideration.**

**Maricopa County's small business policy can be found on the Materials Management website at <http://www.maricopa.gov/materials/help/sbe.asp>."**

**EXHIBIT 2**

**LETTER OF TRANSMITTAL**  
(To be typed on the letterhead of Offeror)

Maricopa County Department of Materials Management  
320 West Lincoln,  
Phoenix, Arizona 85003

Re: RFP Number – 08081-RFP

To Whom It May Concern:

(NAME OF COMPANY) (Herein referred to as the "RESPONDENT"), hereby submits its response to your Request for Proposal dated \_\_\_\_\_, and agrees to perform as proposed in their proposal, if awarded the contract. The Respondent shall thereupon be contractually obligated to carry out its responsibilities respecting the services proposed.

Kindly advise this in writing on or before \_\_\_\_\_ if you should desire to accept this proposal.

Very truly yours,

\_\_\_\_\_  
NAME (please print)

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TITLE (please print)

**EXHIBIT 3**

## MARICOPA COUNTY TRAVEL MANUAL

**Purpose**

This policy is established in order to maintain a uniform definition of allowable and allocable costs acceptable to Maricopa County / Special Districts (hereinafter "the County"). It is recognized that there will be times when it is necessary for contractors to travel to the County in order to perform services under a contract. Use of this policy should insure the County does not become liable for unwarranted or excessive travel expense invoices from contractors.

**Policy**

- A. All contract-related travel shall be prior-approved by the County.
- B. Travel, lodging, and per diem expenses incurred in performance of County contracts shall be reimbursed based on current U.S. General Services Administration (GSA) domestic per diem rates for Phoenix, Arizona. Contractors must access the following internet site to determine rates:  
  
[http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA\\_BASIC](http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA_BASIC)
- C. Commercial air travel shall be scheduled at the lowest available and/or most direct flight airfare rate at the time of any approved contract-related travel. A fare other than the lowest rate may be used only when seats are not available at the lowest fare or air travel at a higher rate will result in an overall cost savings to the County. Business class airfare is allowed only when there is no lower fare available to meet County needs.
- D. Rental vehicles may only be used if such use would result in an overall reduction in the total cost of the trip, not for the personal convenience of the traveler.
  - 1. Purchase of comprehensive and collision liability insurance shall be at the expense of the contractor. The County will not reimburse the contractor if the contractor chooses to purchase these coverages.
  - 2. Rental vehicles are restricted to sub-compact, compact, or mid-size sedans unless a larger vehicle is necessary for cost efficiency due to the number of travelers. (NOTE: contractors shall obtain written approval from the County prior to rental of a larger vehicle.)
  - 3. The County will reimburse the contractor for parking expenses if free, public parking is not available within a reasonable distance of the place of County business.
  - 4. The County will reimburse for the lowest rate, long-term uncovered (e.g. covered or enclosed parking will not be reimbursed) airport parking only if it is less expensive than shuttle service to and from the airport.
- E. The contractor is responsible for any other miscellaneous personal expenses, as they are included in the contractor's lodging and per diem expenses.
- F. The County will reimburse any allowable and allocable business expense, excluding health club fees and business class air fares, except as indicated in paragraph "C" above.
- G. Travel and per diem expenses shall be capped at (TO BE PROPOSED) % of project price unless otherwise specified in individual contracts.