

Sample Request for Telephone System Bids

NOTE: Telephone technology is very complex. It is highly recommended that a program use a consultant who is well versed in these systems to develop the bid specifications. This sample was developed for the HRH by S.R. Green and Associates, based in Los Angeles, CA.

1. INTRODUCTION AND OVERVIEW:

The <Name of Program> seeks a telecommunications network and call switching and processing system to be utilized for delivery of calls to a newly created Hotline program. Callers (the general public) are to queue to full-time advocates and/or volunteers specializing in advice regarding managed health care issues, concerns or problems.

We forecast inbound call volume to approach 5000 per month, ramping up to still greater volume later. Outbound calls would likely be half that amount. Present needs are indicated in the following details and specifications. Should the program gain sufficient momentum, expansion will be required, allowed for in the following.

You are invited to bid for this project. The equipment needed **installed** by <Date>.

2. BID / RESPONSE REQUIREMENTS:

- 2.1. This specification is in two parts. The short "Compliance Table" pertains quite strictly to this special application and the equipment function desired. The "Equipment" portion outlines generally the station and trunk capacities required of the PBX, as well as some PBX features, and lastly, the capacities of the voice processing system. Although the program prefers a single vendor solution, a multiple vendor solution will be considered as budgetary and overall system operation issues may arise.
- 2.2 We are requesting pricing for the platform of a system that accommodates analog trunking only and *would never have to accommodate any T1 services.*
- 2.3 Given the short time framework of this project, strict adherence to the format and response requirements detailed in this specification are required as there is sufficient time to send responses back to bidders for corrections. Failure to comply with or complete any part of this request may result in the rejection of a proposal.**
- 2.4 Also very important, itemized, unit cost pricing is requested for hardware scheduled below (telephones, line cards, etc.) and must be indicated in bids.**
- 2.5 Any question of interpretation by the Bidder shall be resolved before the Bidder submits the final response. Interpretation of each requirement resides with the bidder. In order to maintain the project schedule, request for interpretation are required for submission as soon as possible, but in no case later than <date>. Questions concerning this RFP should be directed to <name and phone number of contact person>.

2.6 Please prepare four copies of the proposal. Completed proposals must be submitted no later than *<date and time>*. Please send to:

<organization name and address>.

2.7 NOTIFICATION OF WITHDRAWALS OF PROPOSAL: Proposals may be modified or withdrawn prior to the date and time specified for proposal submission by an authorized representative of the bidder or by formal written notice. Proposals submitted will become the property of the Program after the proposal submission deadline.

2.8 RIGHTS TO PERTINENT MATERIAL: All responses, inquiries, and correspondence relating to the RFP and all reports, charts, displays, schedules; exhibits, and other documentation produced by the Bidder that is submitted as part of the proposal will become the property of the Program.

2.9 RIGHT OF PROGRAM TO REJECT PROPOSALS: The Program reserves the right to reject any and all proposals or any part of any proposals, to waive minor defects or technicalities, or to solicit new proposals on the same project or on a modified project which may include portions of the originally proposed project as may be deemed necessary in its interest. The Program is not required to have reasons for rejecting a proposal.

2.10. DEMONSTRATIONS: The Program may require demonstrations of similar systems that are installed and operational. All costs of the demonstrations are the Bidder's responsibility.

2.11. EVALUATION: Some of the criteria upon which the evaluation of your proposal will be based are:

1. Completeness of the proposal.
2. Adherence of the proposal to the format requested herein.
3. Level of service and responsiveness that the Bidder can provide to the Program.
4. Financial stability and reputation of the Bidder.
5. Experience and technical expertise of staff.
6. Design, capability, and completeness of system.
7. Capability, reliability, and expandability of proposed hardware.
8. Economic feasibility and justification of all costs.
9. Bidder willingness to negotiate a contract acceptable to the Program.
10. Feasibility, timeliness and quality of the implementation schedule and cut plans.
11. Project Management abilities.

2.12. EXCEPTIONS TO THE RFP: Some degree of latitude is allowed in the preparation of your proposal. Specifically, we are receptive to your suggestions pertaining to:

1. Phasing and scheduling of the implementation.
2. Additional system capabilities not mentioned in this RFP that the Bidder believes would be useful to the Program.

3. Alternate methods of obtaining any portion of the requirements specified in this RFP.

2.13. PRODUCT LITERATURE: The Bidder shall present any general information and all marketing material (i.e., brochures, references, specification sheets and the like) as it deems necessary.

2.14. REFERENCES: The Bidder must include at least three references for existing telephone systems installed by bidder employing the same equipment as proposed. Please provide the customer name, address, and telephone number, the number of lines installed, the date placed in service and the customer's selected method of maintenance. The Program intends to check these references and verify customer satisfaction with hardware, software, installation and training.

2.15. MILESTONE SCHEDULE: Milestone Dates

- Inquiries ----- <date>
- Bids Due ----- <date>
- Contract Award ----- <date>
- System Installed ----- <date>

3. COMPLIANCE TABLE: Does the system proposed meet these criteria?¹

(IMPORTANT NOTE: Non-compliance does not necessarily disqualify a vendor for consideration. If a "YES" answer is indicated, client assumes such functionality is included in system proposed.)

3.1. [NEC vendors only] Are the systems proposed compatible with existing NEC DTerm telephones: ETE-6D-2 TEL: _____(Y or N)

3.2. [NEC vendors only] Are the systems proposed compatible with existing NEC DTerm key telephones: ETW-8-1: _____(Y or N)

3.3. E911' compatibility: Do the systems proposed have the ability to forward the correct address / data to the 'E911' Call Center in the event such a call originates from one of the two *other* addresses that LSNC or HRH / LSNC occupies?: _____(Y or N)

3.4. Future Feature Group D requirement, **Option # 1 / digital trunk configuration only:** HRH / LSNC may wish to utilize this wholesale service for eventual delivery of '800' calls via these trunks at wholesale usage rates. The system proposed requires T1 termination of Feature Group D services delivered by Pacific Bell in standard ESF T1 format with Type II E&M signaling and in band MF (Multi Frequency) addressing.

COMPLY: _____(Y or N)

¹ These criteria were specific to the needs of the Health Rights Hotline and may not be applicable to other programs.

The MF addressing is as follows for an **inbound** call: (see acronym glossary)

(LEC)	
Local Exchange Company tandem switch	Client, LSNC, HRH / LSNC
Seize	Wink
KP + IANI + ST KP + DNIS + ST	Wink

Important note: In both cases the second wink must be received in under 4 seconds after "ST" or the LEC will abandon the call and route to 120 (fast busy). Any means of providing that supervision are acceptable including immediately routing the call to silence, ring back cadence or system greeting.

4. **EQUIPMENT TO BE SCHEDULED:**

The PBX proposed should be equipped with all common equipment required to support the following station and trunk port capacities indicated in the following. **Itemized pricing of these components is required** as the final network design has not yet been determined as well as the office and call center layout.

1. (1) Common services with ACD complete including announcers as may be required
2. Minimum (10) analog 2500 type station ports, instrument reuse, cabinet wired for 24
3. Minimum (17) digital station ports, cabinet wired for 32
4. (14) digital telephones with display, speaker, 15 to 25 buttons, for ACD application, including two supervisors
5. (3) digital telephones no display 6 to 15 buttons, handsfree
6. (4) analog DID/wink start CO trunk ports, cabinet wired for 8
7. (12) analog LS/GS CO trunk ports, cabinet wired for 24
8. (4) station ports for voice processing system interface
9. (1) call accounting system interface (interface only)
10. (1) RMATS modem interface for PBX
11. (1) RMATS modem interface for voice processing system
12. (1) DSS/BLF indicator for receptionist
13. Cable reuse
14. (1) year warranty minimum
15. (1) additional year of maintenance - indicate cost per year

5. **EQUIPMENT TO BE SCHEDULED: Voice Mail...**

The voice processing system proposed should be equipped with all common equipment required to support the following traffic and storage capacities. The installed price for this system is requested **but is to be shown separate from the PBX pricing.**

LSNC prefers that the voice processing system utilize out of band or data link type signaling and provide Personal Greeting upon Busy / No Answer Conditions and as well illuminate Message Waiting lamps upon both electronic and analog telephone instruments.

1. (4) ports equipped but with a minimum 12 port wired
2. 10 to 15 hours storage capacity
3. Faxback / Fax on Demand is requested, but not necessarily at extra cost. Please indicate additional cost for this feature: \$ _____
4. Directory
5. Urgent message notification capabilities
6. One year warranty
7. Annual cost for maintenance after warranty expiration

6. EQUIPMENT REQUIREMENTS: Compliance table of PBX features...

6.1. ACD: An 8 to 10 person call center is initially planned, with expansion capabilities up to 20 to 25. Only basic ACD and reporting capabilities are required here. Both English and Spanish messaging is required, therefore 2 ACD groups will be in service. Calls will be answered live and transferred to the respective ACD group unless agents are busy, in which case the automated attendant must answer, allowing the caller to select the ACD group desired.

Please indicate if these features are available and whether they are provided as part of the basic ACD package or at additional cost. Likewise please indicate the additional cost. Again, noncompliance will not necessarily disqualify a vendor from consideration.

- a. Caller notification of position in queue: average wait time and / or their numerical order: _____(Y or N)
- b. Caller ability to leave queue after time-out either to retrieve information OR leave a voice mail message, but then return to the original queue position if they left the queue only to obtain additional information: _____(Y or N)
- c. ACD real time reporting system need indicate on the supervisor's telephone **or** elsewhere:
 1. the number of calls in queue : _____(Y or N)
 2. the age of the oldest call: _____(Y or N)
 3. please indicate where the above information would be obtained: _____;
 4. the average hold time. (if not available real time, then from reports; please indicate what source of this information would be)

7.2. **Caller ID** upon telephone displays; _____(Y or N)

7.3. **Hookflash:** System must have ability to send 'Hookflash' signal either to CO Centrex trunk whether analog loop or ground start, OR, upon Centrex trunk built upon ISDN PRI T1 Pacific Bell Super Trunk services; _____(Y or N)

7.4. **Least-cost-routing** with capacity for screening minimum of 4 NPAs. _____(Y or N)

7.5. **Call announce** capabilities on ALL digital instruments, Two-way; _____(Y or N)

7.6. Interface for possible later **CTI** application; _____(Y or N)

7.7. Please list types of ACD reports available in the Basic ACD package and include samples; _____(Enclosed? Y or N)

7.8. How many different pacifier messages are provided with the Basic ACD proposed?_____

7.9. Is a remote music-on-hold interface included?_____

8. TRAINING

8.1. ACD Supervisor and Voice Mail Administration Training: At least two individuals shall be trained on ACD and Voice Mail system administration operation prior to cutover.

8.2. User Training:

All users shall be given pre-cut and post-cut on-site training by Bidder personnel to enable them to understand and operate the hardware and to understand the application available to them. Sessions shall be arranged with a maximum of 8 users per class. Customized instruction cards and station user booklets shall be provided for all users (+10% spares) two weeks before cutover.

9. PAYMENT SCHEDULE - acceptance testing specification

Bidder shall submit price for purchase (one time payment) or lease purchase. Price quotes shall include all equipment, materials, labor and transportation required for complete installation of the system as specified herein. If sales taxes are applicable, Bidder shall include an amount sufficient to cover the taxes in all bid prices; otherwise, sales taxes shall be presumed to be included in all bids.

Pre-cut pricing for a period of 6 months following cutover is required for minor adds and changes (outside of expansion to include LSNC) to cover both PBX and voice mail hardware and software. HRH / LSNC will bear the cost for labor for such moves, adds and changes.

If a payment schedule is required please conform to the following:

30% on contract signing

30% on delivery of the system to vendor shop facilities

20% on system cutover

20% on systems acceptance - Acceptance testing 30 days following "in service / cutover" date.

Glossary of Acronyms

ACNA= Access Customer Name Abbreviation
ACTL= Access Customer Terminal Location
ANI= Automatic Number Identification (number calling from)
ASR= Access Service Request
BAN= Billing Account Number
CABS= Carrier Access Billing System
CAC= Carrier Access Code
CFA= Connecting Facility Arrangement
CIC= Carrier Identification Code
CPN= Calling Party Number
DNIS= Dialed Number Identification Service (number to be called)
HRH / LSNC or IXC= Interexchange Carrier
II= Two digit class code: class of service of inbound ANI (e.g. 27 = coin telephone)
KP= Key Pulse MF tone
LATA= Local Access Transport Area, LEC toll Service Area
LEC= Local Exchange Carrier
LOA= Letter of Agency
MF= Multiple Frequency Signaling
NRC= Non Recurring Charges (installation charges)
'P'= referring to grade of service: percentage of blocked calls in 100
PIU= Percent of Interstate Usage applied to minutes of switched access usage
RBOC= Regional Bell Operating Company; example, Pacific Bell
RESPORG= Telecommunications providers having responsibility for building and maintaining customer records concerning the '800' SMS
SECLOC= Secondary Location, dial tone location
SMS= Service Management System for '800' number CIC inquiry
ST= Start MF tone
STP= Signal Transfer Point
SS7 / CCS= Signaling System 7 / Common Channel Signaling protocol
SWC= Serving Wire Center