

RI HIGHER EDUCATION ASSISTANCE AUTHORITY

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Hosted VoIP Telephone Service and Support

**PROPOSALS ARE DUE NO LATER THAN
8:00 AM ET ON MONDAY, JULY 22, 2013**

I. INTRODUCTION AND BACKGROUND

Established in 1977, RIHEAA provides students with financial assistance to meet the cost of higher education at schools throughout the nation.

Each year, RIHEAA awards grants and scholarships to more than 12,000 students and up until June 2010 guaranteed more than 52,000 loans. Since its inception, RIHEAA has played a critical role in the advancement of students and will continue to support students in their educational pursuits in the years ahead.

It is the desire of RIHEAA to utilize the latest telecommunication technologies at its primary office in Warwick, RI by replacing an existing Avaya telephone system, as it approaches the end of useful life, with a cost effective hosted VoIP solution.

II. SCOPE OF SERVICES

A. MINIMUM REQUIREMENTS

1. **QUALIFIED FIRMS:** Offeror should meet the following minimum qualifications:
 - a) Demonstrate an established customer base of satisfied clients;
 - b) Provide full range of telecommunications services and support as described in this RFP;
2. **DEFECTIVE PRODUCTS:** The successful offeror will, at times, furnish skilled workers, materials and equipment to perform all work. All materials and equipment will be new, free from defects, fit for the purposes for which they are intended and merchantable. Any and all defective products shall be replaced and exchanged by the offeror.
3. **EQUIPMENT/RECALL NOTICES:** In the event of any recall notice, technical service bulletin, or other important notification affecting products purchased from Offeror, a notice shall be sent by vendor to the property(s) at which the purchase was initiated.
4. **WEB PORTAL:** Offeror must have the ability to provide a portal that allows end users and administrator the ability to make moves, adds and changes within the system when required. Portal should also provide various reports on usage, call type, etc
5. **PRICING:** Offeror shall provide pricing in the form specified in Section IV, Paragraph D of this Request for Proposal. Offeror shall indicate the term for which initial prices will remain in effect. Prices shall include all charges incurred in fulfilling orders including any shipping and handling fees.

B. PRODUCT REQUIREMENTS

(please acknowledge that your solution will meet these minimum product requirements and describe any enhancements above and beyond these requirements that we should consider in our evaluation).

1. **CURRENT PRODUCTS:** All products being offered shall be in current and on-going production; shall be a model or type currently functioning in a user environment and capable of meeting or exceeding all specifications and requirements set forth in this RFP.
2. **BUSINESS CONTINUITY:** the proposed solution must provide equipment and design considerations for voice services in the event of business disruptions. **VOIP solution must have dual link redundancy and ability to accept 2 different internet connections. Solution must utilize RIHEAA recently installed 10m fiber internet bandwidth as the primary connection to the phone system.**

3. **911 IDENTIFICATION & LOCATION:** When a call is made out of the system to a standard 911 operator, the street address of the location from which the call is made must be displayed to the 911 operator.
4. **USAGE CHARGES:** the proposed solution must provide a flat-rate service for all site-to-site calls as well as outbound calls to the United States.
5. **CALL RESTRICTIONS:** the proposed system must allow the system administrator to restrict toll calls, directory information calls, and 900 number calls on any handset/extension.
6. **AUTOMATED ATTENDANTS (AA):** the proposed solution must provide an automated attendant to support internal call requirements, including business, non-business and holiday calls processing options.
7. **EXTERNAL TRANSFERS:** the system must allow callers the ability to transfer out of Auto Attendants and voice mail boxes to alternate locations which may be either another extension on the system or an external 10-digit number.
8. **HUNT GROUP(S):** the proposed solution must allow for the creation and management of hunt group(s)
9. **CUSTOMIZED AUTOMATED ATTENDANTS, On-Hold and Comfort Messages:** the proposed solution must allow for customizing Automated Attendants, On-Hold and Comfort Messages and can be uploaded in MP3/WAV formats and/or directly recorded.
10. **VOICE MAIL:** the proposed solution must provide voice mail service for all users, and scale up based on company growth.
11. **DIAL BY NAME:** the proposed solution must allow internal and external callers to dial staff by name.
12. **CALLER ID:** the proposed solution must provide caller ID with name information displayed on handsets.
13. **CALL FORWARDING:** the proposed solution must provide for call forwarding on all units and includes the option to forward to internal extensions, and/or external numbers, home or cell phone.
14. **CALL HOLD:** the proposed solution must allow any user to place a call on hold.
15. **CALL PICKUP:** the proposed solution must allow any user within the same group to pick-up a call.

16. **CALL FIND ME/FOLLOW ME:** the proposed solution must provide a user the feature to route a call to two or more different phone numbers in succession; calls may be first routed to an office phone, and if unanswered, re-routed to a mobile phone. If the recipient doesn't answer either number, then the call is routed to VOIP system voicemail.
17. **RECEPTIONIST CAPABILITIES:** the proposed system must have robust web-based capabilities for receptionist to answer inbound calls, monitor the status of users on the system and transfer calls to both internal and external numbers.
18. **VOICEMAIL TO EMAIL:** the proposed solution must provide for routing user or general voicemails to email.

C. SERVICE REQUIREMENTS

(please acknowledge that your solution will meet these minimum service requirements and describe any enhancements above and beyond these requirements that we should consider in our evaluation).

1. **HARDWARE SUPPORT:** the proposed solution should include the costs for supporting any hardware components provided in this RFP such as handsets, POE Switches, and any proprietary hardware.
2. **SOFTWARE SUPPORT:** the proposed solution should include the costs of supporting any software add-ins, integrations, and any customized tools and/or features.
3. **TRAINING & EDUCATION:** the proposed solution must include the cost of adequate on-site, pre and post installation training for all end users.
4. **TRANSITION:** transition plan for the proposed solution shall be fully documented and include required resources and responsibilities of each party, specific milestone and completion dates.

III. INSTRUCTIONS TO OFFERORS

- A. **FAMILIARIZATION OF SCOPE OF WORK:** Before submitting a proposal, Offeror shall familiarize itself with the Scope of Services, laws, regulations and other factors affecting its ability to perform under the requirements of the RFP. The Offeror shall be responsible for fully understanding the requirements of the subsequent agreement and otherwise satisfy itself as to the expense and difficulties accompanying the fulfillment of the requirements. The submission of a proposal will constitute a representation of the Offeror's ability to comply with its proposal. There will be no financial adjustment for lack of such familiarization.
- B. **INQUIRIES:** Any question related to RFP requirements shall be directed to the Company point of contact whose name appears on the first page of this document. Offerors are encouraged to submit written questions via email at least five days prior to the proposal due date. Any correspondence related to the RFP should reference the appropriate page numbers and paragraph numbers.
- C. **EXCEPTIONS TO RFP REQUIREMENTS:** If Offeror wishes to propose modifications to the RFP requirements, the proposed deviations and any proposed substitute provisions must clearly identified.
- D. **PROPOSAL FORMAT:** An original printed proposal and two (2) copies (3 total) of the proposal should be delivered to the Company point of contact on the first page of this RFP. Offeror shall also submit one electronic copy of the proposal by email, CD or memory drive in .doc or .pdf format.
- E. **PREPARATION OF PROPOSAL:** The Offer and acceptance form contained in this RFP must be signed and returned with the proposal. The Offer and acceptance page shall be signed by a person authorized to submit an offer. An authorized signature on the Offer and Acceptance page, Proposal Amendment(s), or a cover letter accompanying the proposal documents shall constitute an irrevocable offer to sell the goods and/or services specified in the proposal on the terms and conditions set forth in this RFP as modified by the proposal offered by the Offeror and as subsequently amended in writing, if at all, by the Offeror and the Company. The Company shall not reimburse the cost of developing, presenting submitting or providing any response to this RFP.
- F. **WHERE TO SUBMIT PROPOSAL:** In order to be considered, the Offeror must complete and submit its proposal to the Company point of contact on the first page of this RFP before the due date indicated.
- G. **WITHDRAWAL OF PROPOSAL:** At any time prior to the specified due date and time, an Offeror may formally withdraw the proposal by a written letter or email to the Company point of contact on the first page of this RFP. Telephonic or oral withdrawals will not be considered.

- H. DISCUSSIONS:** The Company, at its sole discretion, may conduct discussions with Offeror and/or one or more other Offerors for any purpose whatsoever, including, without limitation, discussing the terms of a proposal, eliminating minor irregularities, informalities, or apparent clerical mistakes in the proposal in order to clarify an offer and assure full understanding of, and responsiveness to, RFP requirements.

IV. PROPOSAL EVALUATION

- A. PROPOSAL EVALUATION CRITERIA:** The following will be used to evaluate the Offeror's proposal, however, the Company reserves the right to select a primary vendor that it deems appropriate at its sole discretion without regard to these criteria.

1. Qualifications and Experience;
2. Service Delivery Approach;
3. Price Proposal.

- B. QUALIFICATIONS AND EXPERIENCE:**

1. Please provide a brief history and description of your company.
2. Please provide a statement of your annual sales for the past three (3) years.
3. Please provide the total number and location of individuals employed by your firm.
4. Please provide the total number and location of customer support centers.
5. Summarize your experience in providing products and services similar to those outlined in this RFP. Provide a minimum of three (3) references for which you have provided similar products and services.
6. Please provide Hosted PBX references similar in nature to those proposed for the RI Higher Education Assistance Authority.
7. Please submit any other information that you feel is applicable to your qualifications and experience.
8. Please provide the name of the individual will act as your primary point of contact.

C. SERVICE DELIVERY APPROACH

1. Describe the hosted platform your company uses. (Broadsoft, Asterisk, etc.)
2. Describe the overall architecture of the system. Provide diagrams that illustrate all of the major network components, their roles and interactions with each other.
3. Describe the handset equipment products you are offering and define the various features and functionality of each along with a price list that includes each model number you are offering for this proposal.
4. Describe the features and functionality of your client portal interface. Define the significant benefits to your portal and distinguish those from your competitors.
5. Detail the contract terms associated with your Hosted PBX service, including any term liability exposure that exists upon cancellation of services.
6. Describe the process of changing and adding independent features when needed by either the users or locations.
7. Define the bandwidth necessary at each location, type of bandwidth as well as bandwidth options your company offers.

D. PRICE PROPOSAL

1. Pricing Model:
 - a) The pricing model shall not include a rebate component. All discounts must be applied to the net product/service cost at the time of purchase.
 - b) The offeror will describe, in detail, its pricing model. The preferred pricing model is an all-inclusive price per seat/user cost.
 - c) Pricing for seats/users should be presented with a 36 month term. All installation and training fees associated with implementing service at each location must be included in the proposal. Any ongoing costs associated with your Hosted PBX service must also be included with the proposal.
 - **System should be priced based on 30 seats with voicemail**
 - **System should include Auto Attendant**
 - **System should include Reception Phone**
 - **Solution should include all necessary hardware including POE switch and router**
 - **System should Include 200 DID numbers**
 - **IP System must utilize existing RIHEAA internet bandwidth**

• **System should allow for dual internet connections for disaster recovery**

- d) Describe how local, regional and long distance usage is bundled within monthly seat pricing.

2. Price Proposal:

- a) Offeror shall submit their price proposal as a separate and clearly identified document. The Offeror should also provide an electronic file containing its price proposal in .xls format.

- A. **ADVERTISING:** Offeror shall not advertise or publish information regarding this RFP, or any subsequent communication or agreement without prior written consent of the Company.
- B. **AGREEMENT:** Any agreement resulting from this RFP shall be based upon the RFP issued by the Company and the Offer submitted by the Offeror. However, the agreement shall contain the entire agreement between the parties and shall prevail over the RFP, the Offer submitted by the Offeror and any agreements, writings, proposals or negotiations in any form.
- C. **AMENDMENTS:** The Company, at its sole discretion, reserves the right to:
 - 1. Cancel the RFP process at any time for any reason;
 - 2. Amend the RFP and/or enter into supplemental written or verbal agreements;
 - 3. Grant time extensions to any one or more Offeror which may or may not include Offeror;
 - 4. Otherwise modify the scope of the terms or other provisions of the RFP.
- D. **LICENSES:** Offeror shall maintain in good standing all Federal, State and local licenses, permits required for the operation of the business conducted by the Offeror contemplated by this RFP and any proposal submitted by Offeror.
- E. **LIENS:** All goods, services and other deliverables supplied to the Company under any agreement resulting from this RFP shall be free of liens other than the security interest, if any created on a specific item subject to automatic release upon payment for such item. All such security interests shall be automatically extinguished upon full payment for the item made by the property.
- F. **RIGHTS AND REMEDIES:** No provision in this RFP, in the Offeror's proposal or in any other document shall be construed, expressly or by implication, as a waiver by either party of any existing or future right and/or remedy available to it in law and equity. Neither the failure of either party to insist upon the strict performance of any term or condition of any agreement, nor the acceptance of any available right or remedy shall be deemed a waiver of any right of either party to insist upon the strict performance of any agreement.

V. OFFER AND ACCEPTANCE

TO RI Higher Education Assistance Authority

The undersigned hereby offers to furnish the products and services contained in its proposal, which is incorporated by reference as if fully set forth herein on the terms and conditions set forth in the RFP, as modified by the proposal offered by Offeror as subsequently amended, if at all, in writing by Offeror and the Company.

For clarification of this offer, contact:

Offeror Company Name

Name: _____

Address

Title: _____

City State Zip

Phone: _____

E-mail: _____

Signature of Person Authorized to Sign

Printed Name

Title

ACCEPTANCE OF OFFER

The Offer is hereby accepted. The Offeror is now bound to sell the products and services specified in its proposal on the terms and conditions set forth in the RFP, as modified by the proposal offered by Offeror as subsequently amended, if at all, in writing by Offeror and the Company.

RI Higher Education Assistance Authority

Awarded this ____ day of _____, 2013

Charles Miller, Chief Information Offices
RI Higher Education Assistance Authority