



Solicitation Information

05 August 05

LOI # B05425

TITLE: Speech Recognition Automated Telephone Directory System for URI

Submission Deadline: September 15, 2005 at 1:40pm

Questions concerning this solicitation may also be e-mailed to the Division of Purchases at questions@purchasing.state.ri.us no later than **DATE** (Eastern Time). Please reference the RFP / LOI # on all correspondence. Questions received, if any, will be answered and posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

Pre-Bid Conference – Thursday, August 25, 2005 at 1:30 pm in the 2nd floor conference room of the Library at the URI Kingston Campus. Attendance is strongly suggested.

William J. Anderson, C.P.M. Administrator of Purchasing Systems

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov

NOTE TO VENDORS:

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

The attached document is to be used only for responding to the State of Rhode Island bid for Automated Directory Service - URI. Any other use or reproduction, in whole or in part, is prohibited without the written permission of the author.

Table of Contents:

1	Introduction.....	1
1.1	Background and Purpose	1
2	Instructions to Bidders and Vendor Qualifications.....	1
2.1	Instructions and notifications.....	1
2.2	Vendor Qualifications.....	10
3	System Requirements.....	11
3.1	Current Environment	11
3.2	Features and Functionality	12
3.3	Reports	17
3.4	System Interface.....	17
3.5	System Size	18
3.6	System Configuration	19
3.7	Backup and archiving	19
3.8	Project Management	20
4	Pricing.....	20
4.1	Basic system cost in recommended configuration.....	20
4.2	Unit Pricing for system additions	21
4.3	Payment options.....	21
4.4	Maintenance and Training	21
5	Warranty and Ongoing Service and Support	21
5.1	Initial Guarantee.....	21
5.2	After Guarantee Services	22
5.3	Other maintenance activities.....	22
5.4	Training.....	23
6	Appendix A: Weekly Call Arrivals.....	1

1 Introduction

1.1 Background and Purpose

The Rhode Island Department of Administration/Office of Purchases, on behalf of the University of Rhode Island, is soliciting proposals from qualified firms for the provision of an automated directory system as described in the terms of this Request.

The University of Rhode Island is a 4-year public institution of higher education. URI has four campuses: The main campus in Kingston, RI, the Narragansett Bay Campus which houses the Graduate School of Oceanography, the Providence Campus, which houses the Alan Shawn Feinstein College of Continuing Education and finally the W. Alton Jones campus, hotel and conference center in West Greenwich, RI.

URI has a need for a speech recognition Automated Directory System (ADS). This request is being driven by several factors:

- Increased demand for access to University resources, staff, and students outside of normal business hours;
- Coverage availability for console operators during peak periods or unplanned absences;
- Growing demand placed on operators due to an increasing number of calls to the University's various numbers.

This project has been named the "URI Automated Directory System".

2 Instructions to Bidders and Vendor Qualifications

2.1 Instructions and notifications

This document constitutes a Request for Proposal (RFP) for the acquisition, delivery, placement into position, installation, testing, documentation, technical assistance, and user training for a complete, working ADS.

2.1.1 General Conditions

This contract will be awarded under the State's general conditions of purchasing which are available on the Internet at:

<http://www.purchasing.ri.gov>

- Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP / LOI

- The Offeror should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator, at (401) 222-6253 or visit the website <http://www.rimbe.org>

2.1.2 Terms/Definitions

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal in addition to price. There will be no public opening and reading of responses received by the Office of Purchases pursuant to this Request, other than to name those bidders who have submitted proposals.

"Request", "Request for Proposal", or "RFP" refer to this document or the contents of this document. "Customer", "Owner", "University" and "URI" refer to the University of Rhode Island and/or associated State institutions or agencies covered under this RFP.

The terms vendor, bidder, contractor and offeror used herein all refer to the vendor submitting a response to this RFP. The terms bid and response are synonymous.

2.1.3 Alternative Approaches

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement may be acceptable. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request may be rejected as being non-responsive.

2.1.4 Proposal Costs

All costs associated with developing or submitting a response to this solicitation, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

2.1.5 Proposal Validity

Responses are considered to be irrevocable for a period of not less than 120 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

2.1.6 Proposal Submission

If there are any questions regarding this document that the offeror wishes to submit prior to the Pre-Bid Conference, please follow the instructions posted on the cover page of this solicitation.

2.1.7 Response Format

- 1) All responses to this RFP are to have as a first section , a signed and completed three-page bidder certification cover form, and a completed and signed W-9 taxpayer number and identification form. Both documents may be downloaded from the Department of Purchases web site at: <http://www.purchasing.ri.gov>
- 2) A summary section should follow, and include
 - a summary of costs, broken down by major system/service components
 - an exceptions listing (by paragraph number) of any specifications that have NOT been met.
- 3) Vendors shall submit the itemized response following the paragraph numbering plan in this RFP. It is preferable for the Response to contain the actual text of the RFP followed by the Vendor's response to that paragraph. For each paragraph, the vendor shall respond with detailed information, indicating the vendor's ability or lack of ability to comply, and with any associated costs related to the specification. (At minimum, vendor shall reply with an acknowledgment that the requirement has been read, understood, and the vendor will comply.)
- 4) Vendor may include further sections or appendices containing drawings, planning documents, or any other supplementary information the vendor would like to include in their response.

NOTE: One copy of the offeror's complete response to this solicitation is requested in an electronic format on CDROM or disk, in Microsoft Office or PDF file formats.

2.1.8 Pre-Proposal Conference

There will be a pre-proposal conference on August 25, 2005, at 1:30 PM, at the URI Library, 2nd floor conference room, Kingstown, RI. This will provide vendors with the opportunity to talk to the staff responsible for administering the Campus telecommunications system. Vendors may also be taken on a campus tour in order to familiarize themselves with the work environment.

2.1.9 Response Due Date

Five RFP responses (**1 clearly marked original, 4 copies**) shall be delivered on or before **1:40 P.M. on September 15, 2005** in a sealed package marked with the proper Bid Number (B05425) and the words:

"Automated Directory Services - URI"

By Courier or Mail:

RI Dept. of Administration

Division of Purchases, 2nd floor

One Capitol Hill

Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time may not be considered.

Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed or emailed to the Division of Purchases may not be considered. The official time clock is located in the reception area of the Division of Purchases.

2.1.10 Applicable Codes and Regulations

All work on this project must conform to all applicable Federal, State of Rhode Island and Providence Plantations, Town of Kingston and all local laws, ordinances and to the regulations of the local utility companies. The work must be in accordance with the requirements of the National Bureau of Fire Underwriters, the National Electrical Code, the Occupational Safety and Health Administration (OSHA), the Americans with Disabilities Act (ADA) and the Codes and the recommendation of Bell System Practice, EIA/TIA 568, 569 Commercial Building Wiring Standards and any subordinate clauses contained in the Building Industry Consulting Service International, Inc. (BICSI) Telecommunications Distribution Methods Manual and not addressed by the EIA/TIA 568 and 569

Standards Documents. In the event that a conflict or interpretive difference occurs between the EIA/TIA documents and the BICSI Telecommunications Distribution Methods Manual, the EIA/TIA 568 and 569 documents shall prevail. The bidder must possess a valid Rhode Island Telecommunications Systems Contractor license where required, and all employees working on this job must possess the appropriate Rhode Island Telecommunications license for the level of work they are performing. The bidder must be certified to install the selected products and components used on this project.

The above requirement includes, but is not limited to, the current edition of the National Electrical Code, the National Board of Fire Underwriters Standards, Life Safety Code, Standards, rules and regulations of the State of Rhode Island.

2.1.11 Foreign Corporations

In accordance with Title 7, Chapter 1.1, of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in this state until it shall have procured a *Certificate of Authority* to do so from the Secretary of State. The apparent low offeror, if an out of state corporation with no business address within the state must either: 1) provide a copy of their *Certificate of Authority*, or, 2) Show proof that an application is in process prior to the bid award. Awards to foreign corporations on a “one time basis” DO NOT require a Certificate of Authority. This is a requirement only of the selected vendor.

2.1.12 Prevailing Wage

Where appropriate, owner’s representative(s) will verify vendor trade license and audit certified payrolls for prevailing wage conformance.

The vendor must be certified by the manufacturer to install the products and components used on this project.

2.1.13 Professional Manner

Work under this contract may be performed while classes are in session. It is critical that the work not disrupt normal operations at the University. Vendor personnel are to conduct themselves in a professional manner, so as not to compromise the safety or self-respect of any student or staff member. The University reserves the right of approval of any on-site employees, and the right to dismiss from this, and any project, any individual without a statement of cause. The vendor will comply without compromising schedules and/or any other contract term.

2.1.14 Exemptions to Specifications

A vendor may request an exemption to one or more of the terms and conditions set forth in this RFP prior to the date of bid opening. If an exemption is granted to one vendor, it will be offered to all vendors as a written modification to this

RFP. It is important that the request for an exemption be communicated to no later than 10 calendar days prior to the RFP response due date as stated herein. Requests should be in writing to:

William J. Anderson, C.P.M.
Office of Purchases
One Capitol Hill
Providence, RI 02908-5855
Fax: (401) 222-6387

2.1.15 Exceptions to Specification

All RFP responses are expected to be in close compliance with these bid specifications. However, the University understands that not all vendors will have configurations that can comply 100% with these specifications. In the event that a specification cannot be met as called out in this RFP, then the vendor's technical response shall have, as a separate sheet, a listing of the specifications of the RFP that have not been met.

2.1.16 Multiple Responses

Vendors may submit more than one bid RFP response. The University reserves the right to select the RFP response that seems best suited to its needs and to set aside additional responses from the same vendor. Each RFP response must be complete and stand on its own. Its language must be clear, free of acronyms (unless defined therein) and suitable for comprehension by a magistrate not schooled in telecommunications sciences. The vendor's RFP response will be attached to and become part of the final contract between parties.

2.1.17 Inspection Tours

University plant inspection tours will be conducted at the pre-bid meeting. No other contact with URI Officials will be granted.

2.1.18 Taxes

Vendor's bid proposals shall exclude all taxes. The University is exempt from taxes.

2.1.19 Insurance

The successful vendor shall maintain such **liability insurance** as to protect both itself and the University from any claims or damages to property and personal injury, including death, which may arise from operations under this contract, whether such operations are by themselves, sub-contractors, or anyone directly employed by, or under the direction of, either of them. Certificates of Insurance shall be filed and reviewed by the Office of Purchases before commencing work on this project.

The Successful vendor shall also maintain **workers compensation insurance**. For insurance coverage amounts, please see the State's General Conditions of Purchase (available at www.purchasing.ri.gov)

The Successful vendor will be required to maintain proof of insurance coverage for the life of the contract term.

2.1.20 Due Care

In delivering, installing and removing equipment, due care shall be exercised to avoid damage to, or disfigurement of, buildings, equipment, driveways or other property. Any blemish, made by the vendor, to physical plant or property of the University or its community of staff and students is to be restored by the vendor. The successful vendor shall be required to complete restorations at its expense for any damage caused by it or by any of the subcontractors.

2.1.21 Vendor Activities

Vendor's activities are not to be disruptive of classroom activity—including excessive construction noises—and must not compromise the safety, security or self-respect of any student or staff employee of the customer in any way. The University reserves the right to insist that any individual under the direction of the vendor may, without a statement of cause, be taken off this project. The vendor will comply without compromising schedules or other contract terms.

2.1.22 Site familiarity

Each vendor is responsible for being knowledgeable of all conditions of these specifications. Each vendor, by making a bid, represents that the bid documents have been read and understood and the site has been visited and the vendor is familiar with the local conditions under which the work is to be performed. This includes the first-hand inspection and understanding of each individual building's cable distribution peculiarities. No approval for additional funds will be given for work resulting from the vendor or its subcontractors being unfamiliar with the conditions under which the work is to be performed.

2.1.23 Right to Reject

The Customer reserves the **right to reject** the proposal of any vendor that fails to comply with all of the specifications and requirements contained herein. The Customer also reserves the **right to reject** any or all proposals and cancel or re-advertise a new round of bidding in its own best interest. Proposals offering terms other than those contained in this RFP may be rejected.

The Customer reserves the right to make partial awards, and/or multiple awards under this solicitation, in its own best interest.

The Customer also reserves the right to reject any or all subcontractors proposed by vendor, and the right to reject or approve any changes to subcontractors after the response date.

2.1.24 Evaluation Criteria

The selection will be based on a three-point evaluation. These are: compliance to specifications (35%), vendor resourcefulness in the Providence area (35%), and cost (30%). Credit in these three categories is earned based upon what the vendor documents in his RFP response and how resourceful¹ the vendor is in the local area.

2.1.25 Clarity of Language

The University expects to incorporate vendor RFP responses into contractual paragraphs in the purchase and sales agreement. For example, it is important in the RFP response to guarantee service response time in hours rather than to simply assert your company will give 'prompt' responses to service requests. The former provides the basis for an understandable contract where the latter would be too vague. Such vagueness could cause a strong vendor to appear weak in the evaluation and result in a bidding loss.

2.1.26 Cutover Date

Vendors will note that equipment shall be installed / completed no later than January 6, 2006. Vendors will take this date into consideration when completing their bids.

2.1.27 Clarifications to RFP

Prospective bidders may make written inquiries concerning this RFP to obtain clarification of requirements. See the cover page of this solicitation for instructions.

Upon release of this RFP, discussions with State Employees, or the Consultant hired by the State for this solicitation, is limited only to the terms and conditions expressed on the cover page of this solicitation.

2.1.28 Modifications to RFP

The State reserves the right to revise, modify, supplement, or withdraw this RFP at any time. In the event that it becomes necessary or desirable to revise, modify, supplement, or withdraw any part or all of this RFP, an addendum to this RFP or other notification will be issued.

Vendor will follow the format set forth by this RFP. Additional information such as marketing and sales brochures is welcome, but is in no way a substitute for the

¹ Resourcefulness is explained in the following section "Vendor Qualifications".

information format requested in the RFP. Non-conformance to the format requested may result in rejection of vendor's proposal. Vendors are advised to respond to all system requirements detailed in each section of this RFP.

2.1.29 Submission Materials

All materials submitted regarding this RFP will become the property of the customer and will only be returned to the vendor at customer's option. Customer reserves the right to use any RFP ideas or options presented in reply to this request. Disqualification of a vendor or non-acceptance of the RFP does not eliminate this right.

2.1.30 Right to Reject

The Customer reserves the right to accept or reject any or all RFPs and to waive informalities and irregularities in the RFPs received, and to accept or reject any or all items in the RFP, if deemed to be in its best interest.

2.1.31 Schedules

To assure adequate planning and execution of the Work so that the Work is completed within the number of calendar days allowed in the Contract, Vendor will prepare and maintain schedules and reports. Graphically show the order and interdependence of all activities necessary to complete the Work, and the sequence in which each activity is to be accomplished. Submit this schedule / work plan as part of vendor response.

2.1.32 Permits

The Bidder is responsible for obtaining all municipal permits and inspections as mandated by law.

2.1.33 Documentation

Complete documentation of installation will be provided on reproducible drawings.

2.1.34 Sample Contract

The vendor will attach to their response copies of any executable contracts that the vendor will ask the State and/or the University to execute, should they be awarded the project under this RFP. Contracts that are submitted at a later date may be rejected, especially if they differ or conflict with the terms outlined in this RFP or the State's General Conditions of Purchase. In any event, the State of Rhode Island General Conditions of Purchases (available at <http://www.purchasing.ri.gov>) shall control.

2.1.35 Confidentiality

Vendor must agree to maintain confidentiality relative to all matters pertaining to URI information. Customer database remains the property of the State and/or the University of Rhode Island and cannot be used, reproduced and/or sold to a third party without the expressed permission of the respective Customer's designated representative(s).

2.2 Vendor Qualifications

Please provide the following information:

2.2.1 Provide a brief corporate overview (2 pages or less).

2.2.2 Describe the project team that would be assigned to the URI project. Include names, titles, and list responsibilities for each individual.

2.2.3 Describe the number of employees that vendor currently employs nationally.

2.2.4 Describe the number of employees, grouped by job function, that vendor currently employs in the Rhode Island area.

2.2.5 Of these RI area employees, how many are manufacturer-trained and certified to install / repair the systems/service being proposed?

2.2.6 For the technical support group that would be assigned to support URI:

2.2.6.1 Identify the locations where the technicians/programmers are based who would be expected to provide services to URI.

2.2.6.2 What is the breakdown of staff by job function. (I.e., field technician, NOC remote monitoring, linguist, etc.

2.2.6.3 Describe the geographical boundaries of the coverage area of this office or maintenance depot.

2.2.6.4 How many installed systems are supported from this depot?

2.2.6.5 List the sizes and configurations of these systems.

2.2.7 In an extraordinary circumstance, such as an equipment room fire or flood, how will the vendor respond to patch in a temporary replacement?

2.2.8 How many similar installations has the vendor completed in the New England area? Please provide dates, locations and sizes of installations. Identify those that are in higher education settings, and indicate whether or not residence students are included.

2.2.9 How does the University summon emergency service on weekends, holidays or during non-standard working hours? Give telephone numbers, alternate telephone numbers and identify parties who will respond.

2.2.10 Provide an organizational chart of the vendor's and any subcontractor's company. Include names, titles, and contact information. Include where possible at least two levels of management higher than the senior person assigned to the project.

2.2.11 Provide a narrative of staff experience. Attach resumes of key personnel.

2.2.12 Provide customer lists of similarly situated customers (include contact names and numbers).

2.2.13 Provide a list of references (include contact names and numbers).

2.2.14 Include a discussion of market share enjoyed by vendor and subcontractors.

2.2.15 Submit the most current audited financial report for the vendor (or the vendor's parent company). A link to the electronic version is preferred if available.

2.2.16 Any other documentation that the vendor wishes to have considered may be attached to the RFP response.

3 System Requirements

3.1 Current Environment

3.1.1 The University provides telephone and voice messaging services across all its campuses.

3.1.2 Dial tone is leased from Verizon via a Centrex product platform. The switch serving Kingston, and that will connect to the ADS, is a Nortel DMS-100.

3.1.3 Station sets are mostly analog 2500 sets, except for display phones and electronic sets, which are 5000 series phones ("p-phones") from Nortel.

3.1.4 Voice messaging on campus is provided via three Octel voice mail systems. (One serves the student residence hall population, the others faculty and staff).

3.1.5 Station line estimates:
Staff/Faculty Analog Lines: 3,250
Staff/Faculty Digital Lines: 550
Resident Hall Analog Lines: 2,200

3.1.6 Population
Total Students: 15,000
Faculty and Staff: 4,800

Department Listings: 1,600

3.1.7 Directory Information

Directory Database – Peoplesoft/Oracle version 9.1

3.1.8 Operator Staffing

Two full-time, and 3-4 part time student assistants

3.1.9 Daily Call Volumes

Help Desk (874-2301) – Daily MAX 298; Daily AVG 77

Main Number (874-1000) – Daily MAX 770; Daily AVG 479

Enrollment Services (874-9500) – Daily MAX 1,644; Daily AVG 625

See Appendix A for weekly call arrivals

3.2 Features and Functionality

Please respond to the following requirements and information requests. If a feature or functionality is optional, be sure to include that cost as an option in the pricing section. If no “additional cost” is itemized, the feature or functionality shall be interpreted as standard and included in the base price.

3.2.1 Directory and Directory updates

The University maintains the majority of directory information in a Peoplesoft application running on Oracle version 9.1. There are other sources of directory info as well, such as the student room data from Housing and Residential Life (HRL).

The initial directory data will be provided in a one or several flat .csv file(s), and will include at a minimum “name”, “telephone number”, and “department”. More data fields are available and may be included (such as “building” or “title”).

Beyond the initial database population, the ADS must be able to periodically poll and receive updated directory information from the Peoplesoft database. Vendor is responsible for designing and maintaining the interface for this polling and directory updates.

Please describe this process, including any responsibilities of the customer and recommended frequency of download.

3.2.2 Initial database entries

The initial system shall include the faculty, staff, and department database. The students will not be included in the initial system. Staff and department entries total 6,400. Miscellaneous entries may total 600, therefore the system should

have the capacity for a minimum of 7,000 directory entries. Note that this does NOT include aliases, nicknames or alternate pronunciations.

The student entries (~15,000) may be added at a later date. What is the maximum number of directory entries possible with the proposed system? What is the cost for additional entries?

3.2.3 Nicknames

Please detail how the system licenses and counts nicknames. For example, are Robert, Bob, Bobby, and Rob all the same entry the same directory entry, or are they counted separately? Are these common nicknames automatically included in the directory, or do they need to be manually entered?

Further, if there is a less common, unrelated nickname, one that needs to be entered manually (such as “Skip” or “Buddy”), how does the system count this entry, as an alias or as an additional directory entry?

How many alias or nicknames are allowed per directory entry? How many are allowed system wide?

3.2.4 On campus Directory access

The customer expects to use the system extensively for internal callers. The system shall be able to distinguish internal calls from external calls, and answer with a shortened custom greeting.

3.2.5 Touch Tone entry

Can the system recognize and use touch tone entry where speech is either not useful or not available?

3.2.6 Multi-Lingual support

Provide list of languages supported. Be sure to include the cost in section 4 to add languages (Chinese, Portuguese, Spanish).

Does the system automatically recognize different spoken languages, or is an upfront directory option necessary (e.g., “For English, press or say 1, Para el Español, presione o la opción una...”)

3.2.7 Multiple Greetings

The system shall have the capability to answer calls with custom greetings based on various parameters. Please detail the system’s capability to discern and answer with appropriate greetings by:

1. Internal calls

2. External calls
3. Caller ID (greeting is determined based on calling number)
4. Called party ID (greeting is determined based on the called number)
5. Port number (or range of ports) – greeting is determined by which port receives the incoming call

3.2.8 Dynamic Call Routing

Can the system route calls dynamically based on caller ID information? For example, two callers both request “Admissions”, and the system automatically routes the calls to different admissions officers based on the area code of the caller.

3.2.9 Multi Level Menu Structure

Can the system route calls based on a multi-level menu? For example, the caller asks for “enrollment services”, and the system then follows up with another greeting to clarify which office? (This should be a true multi-level structure, and not just standard ambiguous response algorithms).

3.2.10 Speech recognition Engine

- 3.2.10.1 What is the speech recognition engine in the proposed system?
- 3.2.10.2 What is the version of the speech engine software?
- 3.2.10.3 If vendor is not the manufacturer of the speech recognition engine, please explain the relationship with the manufacturer, history / duration of relationship.
- 3.2.10.4 Is it possible or foreseeable that the speech engine could change at some point in the next 5 years? (Not just a software upgrade to the same engine, but a replacement with another manufacturer’s product?)
- 3.2.10.5 If yes, would the new engine be installed to all customers at no charge?
- 3.2.10.6 How often have there been updates in the past?
- 3.2.10.7 Historically, how much time typically passes between the release of a new version of the engine, and its incorporation into the product being proposed?

3.2.11 Text to Speech Engine

- 3.2.11.1 What is the text to speech engine in the proposed system?
- 3.2.11.2 What is the version of the text to speech software?
- 3.2.11.3 If vendor is not the manufacturer of the text to speech engine, please explain the relationship with the manufacturer, history / duration of relationship.

3.2.11.4 Is it possible or foreseeable that the text to speech engine could change at some point in the next 5 years? (Not just a software upgrade to the same engine, but a replacement with another manufacturer's product?)

3.2.11.5 If yes, would the new engine be installed to all customers at no charge?

3.2.11.6 How often have there been updates in the past?

3.2.11.7 Historically, how much time typically passes between the release of a new version of the engine, and its incorporation into the product being proposed?

3.2.12 Dictionary

How large is the resource dictionary and how are updates provided?

3.2.13 License issues

Explain the licensing methods for the speech engine. For example, is it licensed by number of users, number of ports, number of simultaneously active ports, directory entries, etc.?

Detail the costs to expand on the license, and note any minimum increments.

3.2.14 Recording of greetings – professional or URI staff

The system should have the capability to allow for users to record their own names, so that when a valid name is spoken, the system can play back the verification in the called party's actual voice. Alternatively, if no name is recorded, the system should revert to text to speech.

Please detail if this is a system wide option, or user specific, and also describe how this feature is managed (by the end user, the system administrator, or on/off system wide.)

3.2.15 Barge In Option

It is preferable to have the system allow the calling party to speak the name at any time, interrupting the greeting message. Is this "barge in" feature available, and if so, is it optional, by greeting, or system wide?

3.2.16 Follow-me call forwarding or call redirect

Detail the systems capabilities to allow for multiple destinations for a single directory entry (e.g., desk, cell phone, home).

Can the system allow end users to change the preferred destination to alternate locations?

Can this capability be limited to certain users? Or only the system administrator?

3.2.17 Protected private access menus

Detail the system's ability to store and control access to protected directories, such as pager or cell phone numbers.

Describe the various means of authenticating users for access to these protected directories.

Be sure to detail in section 4 the cost implications of the various authentication methods.

3.2.18 Third Party contact manager integration

Describe the extent to which the system can integrate with address books of individual users, such as Outlook or Lotus notes productivity suites.

List the supported packages (Outlook/Exchange, Lotus, Palm, Act, etc.).

How is this integration accomplished, in real time? Through a periodic synchronization? Is there end user desktop software involved?

3.2.19 Time of day routing per menu

Can the system route calls to different destinations based on the time of day?

Is this a user-programmable function, or need it be programmed by the system manager?

3.2.20 Audiotext (directions, special events, etc.)

Describe the system's ability to provide text to speech announcements. The University frequently has announcements for sporting events, concerts, etc., where it would be helpful to be able to store the information in a text file, and have the ADS text-to-speech engine deliver the announcements.

Please detail the capabilities here, including the method for loading the text announcements on the ADS. (I.e. file transfer, e-mail, or manual typing, cut/paste).

What voice options (male/female, accents, languages) are available? Include a link to an on-line demo of the various choices.

Include the impact these types of applications will have on the number of required ports/talk paths to the system.

3.2.21 Easy out – press 0 for assistance

The system should have at all levels a user friendly “help” function to route calls to a live attendant when possible. This attendant position may vary by time of day, for example the operator console during the day, and Security after hours. Can the system route calls to different attendants based on time of day?

Can the system have different “0-out” destinations based on the menu level? (E.g., the “0-out” destination for the main greeting may be the operator, while “0” for a caller who is listening to options on how to pay their bill would be an enrollment services representative).

3.2.22 Help menu

Describe the systems options / responses to callers who ask for “help”.

3.2.23 Voice enabled conference calling

Describe the system’s capabilities to act as a conference bridge, allowing callers to set up a multi-party conference call using voice prompts.

3.2.24 Additional Features and Product Differentiators

Include here any additional features, functionality, or capabilities of the proposed system that have not been specifically addressed thus far. Indicate if these features are included as standard, or optional. If features are optional, please itemize the associated costs.

3.3 Reports

The system shall have user friendly reporting capability to allow for management of the system. Please describe the standard reporting capabilities of the system, including:

- System and Application Logs
- Error Log
- Type of Available Reports (include samples)
- Generation of reports – available file formats
- Time Frame for availability (how far back can historical reports be maintained before data loss or overwrite).
- Archival options – what type of media?

Is there an advanced reporting module or application to allow for more detailed and customized reports of the standard capabilities? If so, please describe (and include costs in section 4).

3.4 System Interface

3.4.1 The system shall initially be connected to the customer’s telecommunications system, a Nortel DMS-100 Centrex from Verizon.

3.4.2 What interfaces are supported, such as

- 3.4.2.1 PRI trunking, full or partial?
- 3.4.2.2 ISDN
- 3.4.2.3 Nortel 5000 series telephone set
- 3.4.2.4 analog loop start
- 3.4.2.5 ground start
- 3.4.2.6 E+M?
- 3.4.2.7 IP trunks
- 3.4.2.8 Other?

3.4.3 For each of the interfaces supported, detail the functional limitations, especially around incoming caller ID receipt.

3.4.4 For each of the interfaces supported, does the system support answer supervision and disconnect signaling?

3.4.5 Describe the impact of the various interfaces on the ultimate port capacity of the system. (e.g., does using analog trunks to connect limit the maximum number of ports in the system?)

3.5 System Size

3.5.1 The customer understands that capacity and call handling speeds can vary across platforms. Additionally, port functions and speech engine licensing can also vary across platforms. Therefore, the Vendor shall recommend the appropriate configuration and size for the proposed system based on the specifications herein. Salient considerations referenced elsewhere in this specification include but are not limited to:

- Historical traffic and call arrivals (calculate for peak traffic using MAX not average)
- Number of users
- Total staff and faculty using internal directory functions
- Number of directory entries

3.5.2 Based on the information provided, and for the system as proposed,

- 3.5.2.1 What is the recommended number of ports?
- 3.5.2.2 Number of possible directory entries?
- 3.5.2.3 Number of port licenses?
- 3.5.2.4 Detail the assumptions used to size the system, as well as the system specific or industry specific metrics used in the calculation. (For example, if vendor assumes an average holding time of X seconds, or assumes that Y% of calls will come in from internal users, include this information). It is important that Vendor detail the formulas and variables used to determine size and port capacity

so that the calculations can be recreated by the customer. Simply stating the number of recommended ports will be considered non-responsive.

- 3.5.3 What are the minimum and maximum sizes of the system?
- 3.5.4 What are the typical architectural breakpoints of the system for
 - 3.5.4.1 Number of ports
 - 3.5.4.2 Number of port licenses
 - 3.5.4.3 Number of directory entries
 - 3.5.4.4 Number of voice print / authentication entries

In the cost section 4 of your proposal, include the costs for the system as proposed, but also include the cost for the system at minimum configurations, and also the costs to incrementally increase capacity. For example, if the recommended system is 6 ports and 7500 directory entries, please include pricing info as possible to allow the customer to evaluate a smaller deployment (e.g., 4 ports), as well as estimate the cost to grow the system in the future (to 8, 12, 16 ports).

3.6 System Configuration

- 3.6.1 Please detail the hardware configuration of the proposed system. Include server type and model, memory, drives and interface ports, etc.
- 3.6.2 Is there an option for the customer to supply their own server hardware? If so, please detail the minimum system requirements, and itemize the add/delete cost for the hardware in the cost section.
- 3.6.3 The University is interested in assessing the reliability options for the system. Please describe the expected uptime for the system, as well as the optional configurations to improve the reliability and backup capabilities. Include discussion of (and costs in section 4 for):
 - 3.6.3.1 Hardware
 - 3.6.3.2 Redundancy Options
 - 3.6.3.3 RAID array
 - 3.6.3.4 Redundant Server Configurations
 - 3.6.3.5 Other options
- 3.6.4 What are the environmental requirements of the system as proposed?
- 3.6.5 What are the physical space requirements of the system as proposed?
- 3.6.6 What are the electrical requirements of the system as proposed?

3.7 Backup and archiving

The system shall have a means of completely backing up the system, greetings, programming information, and any other information that would be required to restore service in the event of system failure or replacement.

Please detail the backup capabilities, either stand alone or network based, that will allow the customer to properly maintain regular backups of the system. Include preferred media choices.

3.8 Project Management

3.8.1 Provide a proposed outline of the project implantation (scheduled as days from receipt of order).

3.8.2 Include project management process and time frames for each step.

3.8.3 Please identify the time and information requirements for URI staff for the various work phases.

4 Pricing

4.1 Basic system cost in recommended configuration.

4.1.1 Include in this section pricing for the systems, materials, labor, engineering, coordination, shipping, insurance, programming, training, supervision, testing, and any other task required to deliver a working speech recognition Automated Directory System (ADS), in the recommended configuration.

4.1.2 Itemize all costs.

4.1.3 The format of the pricing section can be at your discretion, but be sure to clearly identify all costs, for basic and optional features, including but not limited to:

4.1.3.1 Basic system

4.1.3.2 Optional features (speech authentication, redundancy options, etc.).

4.1.3.3 System Maintenance Contract (after first year warranty period).

4.1.3.4 Other (please detail)

Be careful to include all costs. If a charge relates to an optional system or service, (such as an upgrade, or an available feature not specifically required herein), indicate such.

4.2 Unit Pricing for system additions

In addition to the system as configured at installation, please include the cost to add / delete the following.

4.2.1 Ports and/or port licenses

4.2.2 Directory entries (up to an additional 15,000, in increments)

4.2.3 Other available equipment / options

4.3 Payment options

The University expects that it will purchase the system and pay for it in full at system acceptance. However, if there are financing or lease to own options, or other pure lease or service bureau options that Vendor would like to offer as options, include them here.

4.4 Maintenance and Training

Itemize the costs from Section 5 for system maintenance beyond the warranty period, training, etc., here.

5 Warranty and Ongoing Service and Support

5.1 Initial Guarantee

5.1.1 The following definitions shall prevail throughout this document and the eventual sales agreement with the vendor:

Cutover Date: This is the date when the new, fully functional system begins to carry voice traffic and provide directory functions.

Acceptance Date: The date of the letter written by the customer's telecommunications representative or designate consultant engineer certifying that the installation substantially meets the specifications of this RFP and the terms of the Sales Contract between the parties.

This letter is herein referred to as the Certificate of Conformance. The Certificate of Conformance will be issued after three continuous weeks of operation (21 calendar days) with no service disruptions, hardware or software failures, or other service affecting alarms or troubles. The issuance of the Certificate of Conformance triggers final payment to the vendor and the beginning of the guarantee period.

5.1.2 Warranty Period: The vendor shall maintain the entire installation for a period of twelve (12) months from the date of Acceptance. The vendor shall not assign the maintenance responsibility to any third party without the written authorization from the customer. All installed components that carry a guarantee from the OEM (manufacturer) that is longer than 12 months shall be guaranteed for the duration of the manufacturer's guarantee.

5.1.3 In addition, vendor shall certify that any hardware and software proposed will be supported by the vendor for a period of at least ten (10) years after the Acceptance date, and the customer will not be required to upgrade any software or hardware to be eligible for that support.

5.2 After Guarantee Services

After the expiration of the guarantee period, the vendor shall offer the customer the opportunity to continue the same level of service with the same response times as existed under the initial guarantee. In the RFP response, please respond to the questions that follow:

Q1. What is the cost of an annual full service maintenance contract? This would provide the cost of a maintenance contract for the customer if the RFP configuration were now up for maintenance contract renewal.

- a) Recommended system configuration \$_____
- b) Additional Maintenance costs for optional features \$_____
- c) Other \$_____

Q2. Will the vendor agree to cap this cost for a period of five years from system installation?

If no, will the vendor cap increases in the cost quoted in the response to Q1 so as not to exceed the US Department of Labor Consumer Price Index rate as published for Boston, MA? A "yes" response implies that this cap shall remain in force as long as the customer continues, without interruption, to renew an annual maintenance contract with the vendor. {A "no" response will result in vendor disadvantage in the cash flow study to be done as part of the vendor selection. "No" responding vendors will suffer a 2% higher price escalation factor for future maintenance contracts in the cash flow study.}

Q3. What other service options are available, such as flat price caps, term agreements, etc.?

5.3 Other maintenance activities

5.3.1 Beyond service and repair, what options are available to the Customer for active management and troubleshooting of the system to increase performance? (e.g., provide analysis of error files and creation of phonetic strings for new or unknown names).

For these service options, include a description of what is included in the normal warranty and subsequent service contracts, and what services, if any, have additional costs.

5.3.2 Describe the process of updating the phonetic library. How often do these updates occur? Is there a cost associated with their installation?

5.3.3 Please describe how trouble reports are initiated. Is there an automatic reporting of system troubles to the vendor's support staff?

5.3.4 Does the vendor have the capability to provide remote maintenance on the system, through a secure IP connection or other means? Are any firewall modifications required by the University to provide access? Describe.

5.3.5 Please attach a detailed description of the escalation procedures used by the vendor, and the manufacturer, in the event a trouble or problem cannot be solved.

5.4 Training

Four URI employees will be trained and certified by the vendor on system administration and operation.

What is the cost of these classes, including books? Is this training able to be delivered on-site?

The University will have up to thirty-six months to register students for this training.

6 Appendix A: Weekly Call Arrivals

