

Unified Communications as a Service (UCaaS)

Request for Proposal

For

**Pasquotank County
Department of Social Services**

Proposal Release Date: March 25, 2024

Proposal Due Date: April 24, 2024

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Customer Requirements

1. Intention of the RFP

The Pasquotank County Department of Social Services (also referred to as PCDSS), a department of the County of Pasquotank, is conducting this strategic sourcing initiative to evaluate options for a fully hosted, Unified Communications as a Service (UCaaS) solution from qualified respondents. The response to this RFP should include your best offer to provide the systems and services described within this document.

The purpose of this sourcing event is to:

- Present the Pasquotank County Department of Social Services current situation
- Solicit your recommendations and solutions, to better understand your company and your capabilities in this space
- Review responses and determine which supplier best meets our needs going forward

2. Customer Contacts

Vendors may contact the Pasquotank County Department of Social Services (PCDSS) for any questions related to this RFP. Vendors may submit questions about the RFP to Kathy Eason on or before April 15, 2024. Questions must be in writing and submitted by e-mail to **Kathy.eason@pcdss.com**. Questions will not be accepted over the telephone and anonymous questions will not be answered. All questions and answers will be posted on the County's website at **www.pasquotankcountync.org**. PCDSS reserves the right to provide a combined answer to similar questions.

Direct communication with any person at County of Pasquotank regarding this RFP is not permitted without prior consent.

3. Proposal Delivery Requirements

An electronic copy of the RFP and response documents is sufficient. Vendors are solely responsible for ensuring timely receipt of their responses.

Deliver an electronic copy on or before April 24, 2024 to the following individual:

Kathy.eason@pcdss.com

Proposals received after the submission deadline date will not be considered.

COUNTY RIGHTS AND OPTIONS

Pasquotank County Department of Social Services, a department of Pasquotank County, reserves the right:

- To supplement, amend, substitute or otherwise modify the RFP at any time;
- To cancel this RFP with or without the substitution of another RFP;

- To reject any or all proposals produced in response to this RFP;
- To take any action affecting this RFP, this RFP process, or the Services or facilities subject to the RFP that would be in the best interests of the county;
- To issue additional requests for information, and/or;
- To require one or more Service Providers to supplement, clarify or provide additional information in order for the PCDSS/the county to evaluate the responses submitted.

4. Schedule of Events

Dates	Activity
March 25, 2024	RFP distribution
April 24, 2024 by 5pm	Responses Due
April 25 - 30, 2024	Vendor Demonstrations, if necessary
May 10, 2024	Decision Award
May 17, 2024	Final Negotiations and Contract signed
May 31, 2024	Tentative Cutover into Production*
June 10, 2024	System Live*

5. Current Telephony/Communications Environment

Current General Environment

PCDSS currently utilizes Avaya IP Office 500 to provide telephony and voicemail services to the department. The current platform consists of approximately 105 endpoints, including IP, digital, and analog users, and (1) PRI trunks to support the users.

Challenges with current Unified Communications/Telephony System

The primary concerns with the current solution consist of the following:

- Complex administration
- Lack of flexibility
- Inability to quickly deploy new functionality
- Inability to scale up or down to meet individual needs of the business
- Cost model is unpredictable

6. Evaluation Criteria

The County of Pasquotank, specifically, the Pasquotank County Department of Social Services will base its decisions regarding responses to this RFP on the following criteria.

QUALIFICATION STATEMENT FORMAT

- Firm history and statement of qualifications

- Recent examples of similar projects, schedules, and results.
- Description of the work plan, proposed meetings, schedules, and approach to scope of work and reporting. Include any additional analysis or service that may be pertinent to this type of project.
- Other relevant information that demonstrates the team's qualifications for conducting this scope of work.
- Ongoing cost of calls and maintenance or how it is determined.

REVIEW OF QUALIFICATIONS AND EVALUATION CRITERIA

- Specialized and relevant experience
- Overall performance based on past projects, evidenced by at least (3) references of similar size completed in the last two years.
- Project approach and proposed organization to complete objectives
- Proposed schedule
- Demonstrated understanding of the proposed project engagement

7. Proposal Format Instructions

The best RFP responses specifically address Pasquotank County Department of Social Services' particular requirements and demonstrate a fit between those requirements and the solution's strengths. It is best to limit your responses to explanations of your architecture specific to this RFP, highlights of your strengths in areas that we feel are important, and explanations for any non-compliance.

Vendors should respond in the Word document provided. Responses should be stated in the body of the document following the specific questions.

Section 1 – Executive Overview

The Vendor should include with their response an introduction to, and summary of, the RFP response and its specific fit for Pasquotank County Department of Social Services (a department of the County of Pasquotank). Anyone reading only this section should have a clear understanding of the bidder's proposal and why the solution best fits department's specific requirements.

Section 2 – Solution Diagram

Provide a diagram that depicts the proposed UCaaS solution.

Section 3 – Bidder Profile and Capabilities

Complete the following table:

Corporate Profile:	
Corporate Name	
Corporate HQ Address	
Telephone Number	
Internet URL	
Doing Business Since	
State Incorporated	
Contact Information:	
Account Representative:	
email Address	
Telephone Number	
Fax Number	
Address	
Technical Support:	
email Address	
Telephone Number	
Sales Manager:	
email Address	
Telephone Number	
Address where hosted equipment will be positioned	
Location of geo-redundant sites	
Name of the developer and/or manufacturer of the proposed UCaaS solution.	
Make/model of the UCaaS solution	

3.1 Vendor Background

Provide a brief overview and history.

3.2 Financial Stability

Vendor must describe their financial stability, and provide a copy of their most recent Annual Report with their response.

3.3 Research and Development

Bidder should describe its commitment to ongoing research and development defining those areas that support the strategic direction of the proposed solution.

3.4 Industry Awards and Recognition

Bidder must indicate any Industry Awards and/or Recognition received.

3.5 Competitive Advantages

Please summarize the key differentiators of your services. What do you believe distinguishes your company from the other Service Providers being considered by the Pasquotank County Department of Social Services? Please include the key benefits PCDSS will receive by becoming a partner or client of your organization.

3.6 Customer Base and Case Studies

Describe your customer base and provide any case studies that are relevant to the Pasquotank County Department of Social Services' proposed solution.

Section 4 – Unified Communications as a Solution (UCaaS)

4.1 UCaaS Overview

The Pasquotank County Department of Social Services/County of Pasquotank wants an open standards UCaaS solution that provides four-digit dialing within a single building location, a centralized voicemail system that can be used transparently, and the ability for to support remote work as part of a single phone system. PCDSS utilizes a single Internet Service Provider (Brightspeed) using fiber lines/50Mbps. The solution should act as a single system and be scalable for additional users. All equipment purchased shall be new models and in current production. Reconditioned, remanufactured or demo models shall not be accepted.

4.2 Desktop and Application Standards

- 4.2.1 The Pasquotank County Department of Social Services utilizes a mixture of Windows, Mac, Android, and iOS devices.

4.3 VoIP Compatible Network

It is understood that the network infrastructures will meet best practices and standards for a VoIP deployment.

4.4 VoIP Readiness

Please describe your network process, procedures to assure our network meets the VoIP readiness requirements of your proposed solution. If there are additional costs associated with third party products, software, hardware and or services please specify these additional costs and note in the pricing section of your response.

4.5 Telephony requirements

Offerors should possess and use their extensive knowledge and experience with telephone systems to recommend a creative solution that will meet or exceed the PCDSS requirements. Preference will be given to the Offeror that provides a comprehensive, effective proposal for current specifications, future capacity requirements, and ongoing service and support. The PCDSS wants a telephone system with modern capabilities. Offerors proposals should explain how the following will be provided:

1. Basic telephone features and functionality – please detail these in your proposal.
2. Advanced telephone features such as audio/video conference calling, single number reach, etc.
3. Voicemail Features with indicator lights and integration with Microsoft Outlook 2019 and higher.

4. Portability of handsets to other locations.
5. Automated attendant and operator attendant features.
6. Customized call plans for the PCDSS.
7. Detailed reporting features for extension and long-distance call auditing.
8. On-call help desk support service.
9. Phone and Voicemail system disaster resilience for the building/department.
10. System reliability and availability – see below
11. Training – see below
12. Tell us how you would integrate fax services, paging, fire alarms, panic buttons, other analog devices, etc.
13. Instant messaging – integration with other messaging apps.
14. Mobile and desktop apps.
15. Offers are encouraged to provide any additional services that would be within the project scope to enhance serviceability beyond those mentioned in the general specifications above.
16. Options for different types of phones based on customer needs, i.e. speaker phones, etc.

4.6 General Requirements

It is critical during the hours of 8:00 AM to 5:00 PM Monday – Friday for citizens and other stakeholders to be able to contact Pasquotank County Department of Social Services staff by phone. Consideration will be given to solutions that minimize call-processing issues regardless of the state of the County data network or localized power outages. It is acceptable for peripheral functions such as voicemail or conferencing to be less functional, for a limited time, during major outages.

Required Features:

1. Ability to keep basic telephone services should the network fail.
2. The proposed solution should provide 99.99% availability.

4.7 Redundancy

4.7.1 **Core Cloud Resiliency:** Hot standby failover to a synchronized secondary processor, preferably positioned in geographically diverse locations, that has a synched database copy and awareness of all calls in progress. Active calls should not drop, and phones should home to the second processor immediately when idle without rebooting the phone. When the primary server comes back into service, phones should not require a reboot to recover to the primary processor.

4.7.2 Carrier Resiliency

4.7.2.1 Multiple carrier links configured with automatic failover mechanisms in order to preserve inbound ANI/DNIS information.

- 4.7.2.2 Provide a brief description and discussion of the recommended system architecture. Describe connectivity and communication between its integral parts. Include a diagram to illustrate the quoted architecture.

4.8 Security

- 4.8.1 Describe how historical reports are generated. Is your system HIPAA compliant? Are you able to execute a Business Associate Agreement, if requested?

- 4.8.2 Describe your security process and other certifications and capabilities you may have.

4.9 Compliance with 911

The proposed solution should be 911 compatible, which we define as the following:

- Route calls to the Public Service Answering Point with the correct physical address for that station
- Allow a 911 call to be made from any station, even if that station is restricted to extension dialing only

4.10 Telephone Specifications

- 4.10.1 Your recommended IP desk phones should include two options, one with a minimum of 6 lines and one with a minimum of 12 lines, HD call quality (or equivalent), duplex speakerphone, hold key (dedicated), transfer key (dedicated), redial, headset toggle, three-way conference calling, integrated soft keys, wired and wireless headset compatibility, high resolution display, a spare gig port for connectivity to a computer.
- 4.10.2 Please describe your systems capabilities to work with any industry standard SIP IP phone or device. Please provide the minimum SIP specifications.
- 4.10.3 Executive assistants require visibility to their executive's line appearance(s) and ability to answer those calls.
- 4.10.4 The ability to utilize non-desk phones as a telephony endpoint in a seamless manner. This should minimally include: Smartphones (Android, iPhone), Desktops (Windows, MAC), Tablet (Windows, MAC, and Google).

4.10.5 **Music on Hold:** PCDSS expects the ability to present different music options.

4.10.6 **Fax Services:** PCDSS will require fax services as part of the proposed solution. PCDSS is interested in both traditional and desktop fax services. Please describe the fax functionality proposed.

4.11 System Administration Requirements

The Pasquotank County Department of Social Services requires a system administration tool capable of supporting all offices within the enterprise from a single intuitive user interface. Ideally, this program will allow management of the phone system, voicemail, etc. from a single unified interface. Please describe all functions and applications the administration tools can support and include screenshots for each application.

4.12 Call Recording Features - Optional

4.12.1 Does your platform any included call recording capabilities?

4.12.2 Do recording capabilities include the ability to “record all” and “record on demand”?

4.12.3 How long are recordings retained for? How are the recordings accessed?

4.13 Auto Attendant Requirements

4.13.1 Automated Attendant – Incoming calls to the Pasquotank County Department of Social Services are answered by an Automated Attendant that directs calls to the appropriate units, programs, or individual extensions.

4.13.2 The Auto Attendant should provide unique treatment based on time of day, day of week and holidays.

4.13.3 The Pasquotank County Department of Social Services would also like to setup a backup Auto Attendant service which could be introduced as a front-end in the event of a natural disaster or emergency situation.

- 4.13.4 The system should allow system administrators to easily update menu options and related announcements.

4.14 Voice Mail Requirements

It is imperative that any new voicemail platform be easy to use and easy to change greetings. Describe your solution.

- 4.14.1 Are voice messages stored in an industry standard format?
 - 4.14.1.2 What are the limitations for greeting, message or announcement length?
 - 4.14.1.3 How does your voice mail system react if an individual mailbox becomes full?
 - 4.14.1.4 What are the minimum and maximum voicemail password lengths?
 - 4.14.1.5 How are voice mails retrieved by the user from alternate locations? Transcribed to email?
 - 4.14.1.6 Are user voice mails retrievable by an administrator, if needed?

4.15 Unified Communications

Many vendors commonly group together applications that empower onsite and remote workers through what is now commonly referred to as Unified Communications. This umbrella term may include Unified Messaging, Find Me/Follow Me, Instant Messaging, Presence, Text to Speech access to emails, Speech Recognition access to system features, Computer Telephone Integration, etc.).

Describe your solutions capabilities:

4.16 Unified Messaging

- 4.16.1 Please provide a general description of your Unified Messaging offering, including where its messages are queued and stored, physical connectivity to the phone system and Email Server (Exchange Online), logical connectivity to the Email Client (Outlook), server and desktop requirements, and architecture.
- 4.16.2 Briefly describe how voicemail messages are accessed from different endpoints.

4.16.3 Please describe fax messaging capabilities that may be accessible via your Unified Messaging system.

4.16.4 What are your contact import capabilities? Identify static and dynamic connectivity options for connecting with contacts from other services.

4.17 Unified Communications and Collaboration

4.17.1 Describe any Unified Communications functionality available with the proposed solution. Please summarize the components and software required to add desktop Presence, Instant Messaging, Collaboration, Desktop Video, etc. Vendor should clearly state what Unified Communications functionality is provided in the base platform specifically.

4.17.2 Click to Dial – Will the proposed solution allow a user to dial a phone number from on-line web pages or similar? Will your Click to Dial functions work with user contacts and a company directory?

4.17.2.1 Are there any endpoint limitations to use your Click to Dial functions?

4.17.2.2 Is there any additional software or licensing required? If so, please describe which application provides this functionality and include this application in your base price for all employees.

4.17.3 Does your solution include internal Chat capabilities?

4.17.3.1 Is the solution native to our product, a separate server or via a third-party provider?

4.18 Mobility Applications (Find Me/Follow Me)

4.18.1 Describe any functionality in which the system has the ability to simultaneously outcall to a person's cell phone and desk phone.

4.18.2 If the call answered on the desk phone, how do you extend the call to the cell phone?

4.18.3 Will the user see the inbound caller's Caller ID on the display of their cell phone?

- 4.18.4 Can your mobile application seamlessly move between WIFI and cellular data (4G/5G or greater). Please describe.
- 4.18.5 Does your mobile application provide seamless access to voice, video, and collaboration tools?
- 4.18.6 What is the caller ID that is shown for outbound calls made from the mobile application?
- 4.18.7 If a user is not able to obtain a strong WIFI or cellular data connection, does your mobile application have an alternative way to complete the call? In particular to outbound calls, is the caller ID still maintained using this alternative method?

4.19 Business Application Integration

- 4.19.1 Describe what native integrations your solution supports.

4.20 Business Intelligence and Telephony Analytics

- 4.20.1 Is your system capable of aggregating call volume summaries across individual locations?
- 4.20.2 Are summaries of inbound and outbound calls available by department, workgroup, etc.?
- 4.20.3 Do you provide reporting on endpoint connectivity status?
- 4.20.4 Do you provide reporting on call quality?

4.21 Call Detail Reporting

Describe the call detail reports that are available from the administration interface.
Are the call detail reports able to be scheduled to run automatically?

4.22 General Questions

4.22.1 Usage: Is usage included in your solution and if so, please describe your pricing for the following elements:

- Local
- Long Distance
- International
- Inbound toll-free

4.23 Telephone Specifications

4.23.1 Provide a description and picture for each telephone being proposed including optional snap-in interfaces available, and power requirements (or which PoE class) for each phone.

4.23.2 Provide a screenshot and brief description for the PC softphone or client software.

4.24 VoIP Specifications

4.24.1 Which CODECs are supported natively by the telephones and in order to support Fax over IP?

4.24.2 Is there an additional charge for requesting more than one CODEC (G.711 + G.729) with the platform proposed?

4.24.3 What network parameters are, or should be observed with the platform, i.e. 802.1p/q, Differential Services (DSCP), weighted fair queuing, Rapid Spanning Tree, VLAN pruning, device discovery, etc.?

4.25 System Admin & Diagnostic Questions

4.25.1 Can moves and changes be batched: that is, can changes be made to a number of subscribers or classes of service simultaneously?

4.25.2 What diagnostic tools, logs and reports are available to aid in isolating faults?

4.25.3 Does the proposed system have the ability to monitor VoIP Quality of Service?

Section 5 – Implementation Expectations

5.1 Installation

Please describe your implementation and deployment process and include a sample project plan with your response.

5.2 Training

The successful Vendor is expected to include training. Please describe your proposed training services. Describe any self-service built-in help menus that might be used to offset training requirements.

Section 6 – Warranty, Maintenance, and Customer Support

6.1 Support Questions

Describe Vendor's proposed service and support.

- 6.1.1 Describe how Pasquotank County Department of Social Services would open tickets, receive service, obtain replacement parts, and receive onsite support through the manufacturer.
- 6.1.2 Please describe maintenance and software assurance after initial purchase requirements to maintain system and upgrades.
- 6.1.3 Please describe what warranty comes with the proposed telephones.
- 6.1.4 Please provide a copy of your Service Level Agreement.

Section 7 – Contract Terms and Conditions

7.1 General Conditions

The vendor shall provide a copy of their general terms and conditions.

Section 8 - Pricing

The vendor shall provide a detailed Quote for the proposed solution based on 150 total users.

Required Features:

- Web console with instant messaging, phone apps, etc.
- Windows, Mac, Android, and iOS apps to compliment or replace an IP phone
- Voicemail to email
- Callers must have the ability to leave a voice mail message at any time - includes the ability to leave a voice mail message outside of business hours, including weekends and holidays
- Callers must have the option to leave a voice mail message via the mainline number including when the main PCDSS phone line is busy.
- Callers should have the ability at any time while on hold to opt out of being on hold and to be able to leave a voice mail.
- Staff must have the ability to merge calls
- Easy management through a web console
- Scalable to thousands of phones
- Receptionist module on computers to allow dragging and dropping of calls for high volume call takers.
- Built in audio and video conferencing. No additional charge, included with license.
- No "per feature" add on charges. No "per extension" add on charges. Licensing is done by simultaneous call. Allowing extensions, voicemail boxes, etc. to be added without additional charges.
- Compatible with SIP trunks allowing a 50 to 80% reduction in phone bills. However, we could use existing PRI lines if desired.
- Ability to add remote phones over any internet connection.
- Interoperable with multiple vendors' phones -- avoid being locked in to one brand of hardware.
- Ability to have failover plans, eliminating call failures due to on premises line problems.
- Panic buttons available for system that provides instant call to central communications and one way audio to better help them assess situation. This also eliminates line and monitoring charges.

No additional desired features.