

**ATTACHMENT E
TO
RFP 17-06-01**

PROPOSAL RESPONSE AND CHECKLIST

Fully complete the following pages and submit along with Page 2 (Signature Page) of the RFP and all applicable attachments.

I. General Information

Offeror's (Legal Business) Name: _____

Doing Business As (If Different Name): _____

Person to Contact Regarding this RFP (Name): _____

Telephone Number: () _____

Email Address: _____

Check type of organization:

Corporation ____

Partnership ____

Sole Proprietor (Individual) ____

Other (describe) _____

If Sole Proprietor (individually owned), number of years in business: ____

Have you ever operated under another name? Yes ____ No ____

If yes -

Other name:

Number of years in business under this name:

State license number under this name:

II. Organization of Firm

The Offeror shall submit as **Attachment 1** at a minimum the length of time in the business, corporate experience, strengths in the industry, business philosophy, and a description of the organizational structure of the firm; a description of the organizational structure for the management and operation of the services requested and/or provision of the items referred to in this RFP, including a partnering and organizational chart denoting all positions, the number of personnel in each position, and resumes of key personnel.

III. Financial Condition of Offeror

The sufficiency of the financial resources and the ability of the Offeror to comply with the duties and responsibilities described in this RFP.

The Offeror shall submit as **Attachment 2**, a current annual financial report and the previous year's report and a statement regarding any recent or foreseeable mergers or acquisitions. Financial statements may be marked as "confidential" in accordance with the requirements set out in Section 3(G) of this RFP.

IV. Experience

The Offeror shall submit as **Attachment 3**, a narrative of their firm's experience in providing the services and/or items in this RFP, including type of business, business location, and number of years in business.

V. References

The Offeror shall submit as **Attachment 4**, the names, addresses, and telephone numbers of at least three (3) references in connection with supplying the services or items requested in this RFP, especially from other local government operations similar to those being requested in this RFP by the City. Each reference should include organizational name, official address, contact person, title of contact, and phone number.

VI. Executive Summary of Solution

The Offeror shall submit as **Attachment 5**, an executive summary of the proposed solution, its distinctive features, and how it will fulfill the City of Roanoke's stated requirements.

The summary is to include all products, components, activities, services, licenses, and any other aspect necessary to properly design, engineer, manufacture, ship, deliver, install, order local exchange carrier (LEC) and interexchange carrier (IXC) facilities, program, cross-connect, test, verify/validate, document, train, and cutover the entire solution(s) being proposed. Offerors are advised that programming services will include all solution integration and application programming required to duplicate all current operational City of Roanoke applications.

The executive summary shall also include a high-level "block" diagram of the proposed solution.

VII. System Design Including Drawings

The Offeror shall submit as **Attachment 6**, an indication of its level of compliance with the numbered requirements listed below, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

It is the City of Roanoke's intent to contract with a vendor-partner for the purposes of acquiring, installing, and making fully operational a new voice telecommunications solution, including all new components and peripheral hardware/station devices with all software options and capabilities identified and required by City. Therefore, the Offeror's scope of work includes all activities and services necessary to properly design, manufacture, ship, deliver, install, engineer, program, integrate, cross-connect, test, verify/validate, document, train, prepare draft standard reporting, or develop necessary custom programming and reports, and migrate to the new solution.

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| <p>1) The Awarded Offeror is required to develop a complete and detailed solution design in collaboration with City, including call flow charts and reporting, through <u>on-site</u> meetings with multiple City departments and user groups. The Awarded Offeror is required to identify specific business and technical requirements with unique classes of service (COS), and provide presentations to City-designated managers and departmental staff. Offeror should assume it will perform the majority of solution design using a "like-for-like replacement" method based on current configurations, although it may recommend options to improve efficiency and performance.</p> |
| <p>2) The overall solution design shall include all hardware platforms and software versions installed on the proposed solution. Once the solution design has been finalized, the Awarded Offeror shall provide a Macro Design document summarizing the solution components, including hardware platforms, software versions, and additional information as directed by City.</p> |
| <p>3) The Awarded Offeror shall work as City's agent. Subject to approval from the City, the Awarded Offeror shall order local exchange carrier (LEC) and interexchange carrier (IXC) facilities, work with the service providers to ensure correct specifications on the orders, manage the implementation, installation, testing, and certification of all local, tie, and long distance facilities.</p> |
| <p>4) The Awarded Offeror shall be responsible for populating all requisite software database fields for all products provided under this procurement, including but not limited to, call processing and voice mail/messaging to make all facets of the new solution operational.</p> |
| <p>5) The proposed solution shall meet Federal Communications Commission (FCC) approval, and each Offeror shall provide their FCC registration number.</p> |

VIII. Deployment & Implementation Methodology

The Offeror shall submit as **Attachment 7**, an indication of its response to the numbered requirements listed below.

7.1 Installation

Section IX. Schedule

- 1) The City requires manufacturer-certified installers and engineers for the migration to the new solution. Offerors shall provide the number and city locations of certified installers and engineers in proximity to Roanoke City. Vendor shall identify any proposed equipment, software, or work performed outside of the United States.
 - 2) Offerors shall include in this response a description of who will be on-site at the City leading up to system cutover, during the cutover, and during the business week following cutover, their titles, and their responsibilities. Minimally, the Offeror's personnel will be on-site to perform the following activities:
 - i) System design
 - ii) Station reviews
 - iii) Implementation planning
 - iv) Current configuration review
 - v) End User training
 - vi) Pre-cutover testing, cutover
 - vii) Troubleshooting, attendant assistance for up to three days following each phased migration
 - viii) Roving, on site help personnel
 - ix) Cutover/post-cutover help desk for two to five days following each phased migration/ cutover, depending on location
 - x) LEC liaison
 - xi) Follow-up or remedial training
- i)
 - ii)
 - iii)
 - iv)
 - v)
 - vi)
 - vii)
 - viii)
 - ix)
 - x)
 - xi)

3) Each Offeror shall state its anticipated on-site storage and staging needs. The City will attempt to accommodate the Awarded Offeror's storage needs with a secured room, but will not guarantee the security of its contents, and therefore will not be responsible for tools, parts, or other items stored by the Awarded Offeror. As appropriate, the City and the Awarded Offeror will inspect and inventory all deliveries of parts, components, and instruments before the transfer of responsibility.

4) Each Offeror shall state its project team's on-site communications, network access, office, and working space requirements.

5) The City requires each Offeror to discuss its plans to utilize subcontractor labor, identify who the subcontractor will be, areas of responsibility for each subcontractor, and documented assurance that it will be responsible for subcontractors' quality of work.

6) Each Offeror shall propose a trade-in value for the City's current equipment, which is primarily key station equipment and telephones. The Awarded Offeror shall be responsible for removing and remarketing/disposing of the current equipment, and all the related peripherals and telephone sets.

7.2 Single Point of Contact (SPOC)

Each Offeror will indicate its compliance and a brief description of how it complies with the requirements below.

1) The City requires that the Awarded Offeror provide a SPOC. The SPOC shall be responsible for specific activities including, but not limited to, the following:

- a) Coordinating all solution-related activities
- b) Providing a contact point for all solution-related activities (including all hardware and software components of the new solution and integrations with other systems/applications, even if they are from another vendor and/or subcontractor)
- c) Managing all new solution-related issues and problems, including working with representatives of other systems and applications, to resolution in cooperation with City staff
- d) Acting as general liaison and advocate for City in discussions and dealings with other vendors and /or subcontractors
- e) Working with the other vendor-partner(s)' /subcontractor(s)' Service Manager(s) to address and resolve solution-related issues.

2) Each Offeror must identify its SPOC for City.

- a) Provide internal SLAs or escalation process to ensure prompt response and resolution by partners. If higher or lower SLA's have cost impacts, please identify.

7.3 Post-Cutover Traffic Studies

Each Offeror shall indicate its compliance and a brief description of how it complies with the requirements below.

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| 1) Each Offeror shall perform a trunking traffic study of no less than one (1) week in duration within 10 days of City's cutover. |
| 2) Each Offeror shall recommend trunking configuration changes appropriate to industry standard grades of service (GOS) based on specific findings from the study. Any changes agreed to by the City will be accomplished at pre-cutover pricing. |

IX. Schedule MS Project

The Offeror shall submit as **Attachment 8**, an MS Project Gantt depicting a Preliminary/Sample Implementation Plan & Schedule that includes tasks, such as design for implementation and total solution, review and approval by City, equipment ordering and delivery, installation, cutover day activities and responsibilities, integration with City systems and applications, schedule for all locations, including responsibilities, estimated duration of each activity, and "place holder" dates.

X. Training Plan

The Offeror shall submit as **Attachment 9**, an indication of its level of compliance with the numbered requirements listed below, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

9.1 User Training

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| 1) The City requires structured classroom-based training (classroom and web-based) for most users. Therefore, the Awarded Offeror will be expected to organize one to two days of training sessions at an appropriate City location. Each training group will have 10-12 attendees. City will provide one or more rooms for the training sessions. Items and equipment that City is required to provide, e.g., PCs, overhead projectors, etc., should be indicated in the proposal. It should be noted that for purposes of this RFP, Offerors should assume that the duration of the training course will be multiple 45-minute sessions during the day between the hours of 9:00 a.m. and 4:30 p.m. |
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2) Offeror will provide training alternatives for all users. The alternate training methods should be easy-to-use, be relatively short in length, provide “intuitive” instructions for basic functions, including but not limited to, making & receiving a call, retrieving messages, setting up a unified messaging client, establishing an audio conference, and forwarding, transferring, and holding a call. Describe “alternative to class room” training tools, e.g., web, computer, user information booklets/quick reference guides (hard, electronic, computer, or web-based formats) web or video based tutorials that are available to City.

3) City requires that designated City personnel will be trained in a “Train the Trainer” curriculum to provide remedial and subsequent training for new employees. Trainers will be trained at each City location’s implementation and included with the end user training.

4) Two to four trainers are to be on-site after each cutover the first one to three days following cutover to provide *ad hoc* support, training, and answer user questions.

5) User information booklets/quick reference guides (hard, electronic, or web-based formats) are to be provided by the Offeror for all users shown in training above.

9.2 Management, Administration, Operations Training

1) The Awarded Offeror shall provide manufacturer certification-level system management/operations training for up to four City personnel. This includes training classes for administering the new system, messaging system, and automated attendant capabilities, and performing first level maintenance. Each Offeror shall include recommended courses and pricing in its response (Please note if training location is outside a 50-mile radius of City).

2) The Awarded Offeror shall provide CAS (call accounting) training for up to three City personnel.

3) The Awarded Offeror shall provide CD-ROM, DVD, and/or links for all system level manuals to City upon acceptance of the new system.

XI. Cost Summary

The Offeror shall submit as **Attachment 10**, all upfront, one-time costs and yearly recurring costs to show the all-inclusive, total cost of ownership. Offeror shall complete all worksheets (1-Premises Summary Pricing, 2- Premises Purchase Price Summary, 3-Additional Professional Services and Products, 4-Hosted Pricing, and 5- Leasing Data) and submit as part of attachment 10.

10.1 Configuration Options

Offerors shall provide related detail pricing information in **Attachment F - Pricing Table spreadsheet**, which contains tabs for premises and hosted pricing solutions. If Offeror wishes to propose additional service options, this should be done in addition to the required responses. Any additional options proposed by Offeror should be clearly labeled as “Additional Options” in a separate tab of the Pricing Table.

10.2 All Inclusive Pricing

Offeror is to respond with pricing for its proposed solutions to meet the requirements described in its technical response, Offeror shall respond with “**all inclusive**” non-recurring charges (NRC) and monthly recurring charges (MRC) pricing that will represent the basis for comparing competing offerings.

Offeror should confirm that the NRCs reflect all hardware, software, licensing, and professional services necessary to ensure that the City will have a fully functional solution. Pricing detail provided by Offeror should include shipping, installation, programming, and whatever else is required to “make the system work” – to install and provide support for all proposed hardware and software according to City-approved system design.

Offeror should also be aware that any proposed MRCs must support all operational requirements, system monitoring and surveillance, reporting, continuing upgrades, and all preventive and corrective maintenance requirements. Offeror should be aware that the stated non-recurring charges (NRC) and recurring monthly charges (MRC) price will establish a firm ADD/DELETE price for adjustments in quantities at the City’s discretion.

Offeror shall also provide an “auto quote” for its solution. The auto quote will include the following:

- All hardware, software, and licensing components of its proposal
- Part numbers
- Quantities
- List price
- Pre-cutover pricing
- Post-cutover pricing
- Installation pricing
- Level of discount being provided
- Short description of each item, such that the City Evaluation Team will understand what the item is

10.3 Financing/Leasing

Provide in the Pricing Table alternative leasing arrangements that will help reduce any impact on cash flow management. Include lease factors, length of lease, amortization tables, and assumptions, assuming a \$1.00 buyout at the end of the term of the lease. If terminated early, the City retains the right to purchase the equipment at the fair market value at that time.

XII. Maintenance and Support Plan with Service Level Agreement(s)

The Offeror shall submit as **Attachment 11**, an indication of its level of compliance with the numbered requirements listed below, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

11.1 Post-Cutover Support

This section deals with how the Awarded Offeror will provide post-cutover/conversion support and maintenance to the City. The City defines “maintenance” as the “support, preventive and normal maintenance, urgent maintenance measures, and upgrades of the solution’s “core” components, such as hardware, software, applications, and peripherals.” Each Offeror will clearly indicate its compliance and identify how it will maintain and repair the new solution’s components and at what intervals.

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| 1) The new solution will be installed with a comprehensive full warranty for all parts (“Equipment Warranty”), labor (“Workmanship Warranty”) and professional services/software programming for at least one year regardless of stated manufacturer warranties. Warranties will apply to all equipment, software, and services. The warranty period will begin upon Final Acceptance or at mutually agreed upon implementation milestones. Unless agreed to in writing by the City, all equipment provided will be new. |
| 2) The Awarded Offeror shall provide and maintain a complete equipment and system inventory and maintenance record in Microsoft Excel. |

11.2 Post-Cutover Maintenance and Support

Each Offeror will indicate its compliance and a brief description of how it complies with the requirements below.

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| 1) The Awarded Offeror shall provide written confirmation from an authorized senior level executive that the Awarded Offeror shall provide contract maintenance, parts, and engineering support for the new solution for at least seven years following City’s signed acceptance of the systems. |
| 2) Each Offeror shall provide information on maintenance pricing and coverage if City opts to sign a multi-year maintenance agreement. Provide any escalation factors for Years 3-7. |

11.3 Local Inventory

Each Offeror will indicate its compliance and a brief description of how it complies with the requirements below.

- 1) For maintenance purposes, the Awarded Offeror shall warehouse locally (in Roanoke area) at least one of every part proposed for the new solution. Each Offeror shall discuss its plans and requirements to maintain on-site spares for critical components.

11.4 Guaranteed System Hardware/Software Upgrades)

- 1) The Awarded Offeror shall guarantee all software and firmware maintenance releases, patches, security upgrades, problem solution, and/or generic product solution level upgrades for all proposed solutions including, but not limited to, switch, peripheral systems and components, and endpoints. Implementation of these upgrades shall be scheduled with and approved by City personnel and applied to the system, as part of the on-going maintenance plan, for the initial warranty period and during the maintenance agreement term.

- 2) Each Offeror shall submit details cost on any "investment protection" programs for hardware, software, and/or applications available to City.

- 3) Each Offeror shall briefly summarize the conditions and coverage of the proposed upgrade program.

11.5 Maintenance Organization and Guidelines

Each Offeror shall describe its organization that will support its proposed solution. Offeror shall state if the maintenance organization is a third party. Each Offeror shall indicate its compliance and a brief description of how it complies with the requirements below.

- 1) Each Offeror will provide an operational support chart.

- 2) Each Offeror shall provide the number of certified engineers in the Roanoke City area with experience and credentials to service the new solution's components.

- 3) Each Offeror shall provide a detailed escalation process for the proposed solution in case of unresolved issues. Include the following information:
 - a) Standard resolution processes for different types of alarms and problems
 - b) Time intervals for escalation
 - c) Escalation paths for different types of issues or alarms
 - d) Contact lists for each step of escalation
 - e) Resolution/progress update contact schedule for City & internal vendor personnel
 - f) Names and phone numbers of escalation path members
 - g) Name and proposed duties of service manager dedicated to City

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| 4) Each Offeror shall briefly describe its notification and resolution process for after-hours service calls to a standby technician/engineer. |
| 5) Each Offeror shall describe its remote monitoring capabilities, including location of its operations center(s), hours of operation, staff on duty during “off hours,” and how City issues will be prioritized. |

XIII. Enhanced Support Services/Operational Support

The Offeror shall submit as **Attachment 12**, an indication of its level of compliance with the numbered requirements listed below, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

“Operations” are defined as the daily activities focused on providing or improving service to the City’s users, such as MACs, trouble resolution, improved applications, management of resources to meet City’s service level metrics and daily telephony needs.

Three levels of operational support are defined for this document:

- Level 1 – A problem or alarm is noted, identified, and documented. Initial diagnostic and resolution activities occur in an attempt to clear. Either on-site staff, during normal work hours, nominally 7 a.m. to 5 p.m., and/ or the remote monitoring facility, usually during evening, night, and weekend hours, will provide this function. Level 1 issues require four-hour response and next business day resolution intervals.
- Level 2 – Level 1 and/or remote diagnostics and resolution have not been successful. A technician/engineer will be dispatched or directed to provide on-site support and resolution. Level 2 issues require two-hour response and four-hour resolution intervals.
- Level 3 – If contact at Levels 1 and 2 has not corrected the situation, the issue will escalate to a technical assistance center (TAC) or similarly named facility, which is manned by manufacturer engineers, software specialists, and other manufacturer personnel. Normally, Level 3 staff has access to source code and can provide unique or customized issue resolution. Level 3 issues require one-hour response and two-hour resolution intervals.

Enhanced Support/Managed Services Option – The City would like the option of Vendor provided on-site staffing to manage the new system and interface with the City IT Team. Please provide details regarding this optional service.

This option should include, but not be limited to, the following tasks:

- All Moves, Add, Changes
- Building, recording and maintaining all menu/auto attendant services
- Maintaining E911 database for 911ETC
- Perform daily system backups
- Initial troubleshooting and submittal of trouble tickets to vendors when required.
- Manage Equipment orders and inventory
- Initiate work orders with vendors

- Replace defective telephone sets
- Maintain Long Distance services/database
- Maintain financial information for billing internal departments
- Provide reports as needed.

XIX. Test Plan Sample

The Offeror shall submit as **Attachment 13**, an indication of its level of compliance with the numbered requirements listed below, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

<p>1) Offerors shall provide a detailed sample test plan for endpoints, applications and all levels of testing that are considered standard and customary to an installation of this size and scope, and that will be employed for City migration to the new solution.</p> <p>Response:</p> <ul style="list-style-type: none"> a) Assume that 10% of all endpoints will be tested at minimum, for capabilities that include, but are not limited to, the following: <ul style="list-style-type: none"> i) Make /receive internal calls via reduced digit dialing ii) Make/ receive external local/long distance calls iii) Leave, forward, and pick up voice mail via multiple interfaces or devices <ul style="list-style-type: none"> (1) Desktop instrument (2) Cellular device iv) Basic features: Hold, Forward, Transfer, Conference, MWI v) Call coverage patterns
<p>2) The sample test plan description should address all key areas typically tested for functionality, including that for dial tone, copper-pairs continuity, station equipment validation of operations and programmed features, call routing tables, network device configurations, port access, security/firewall functionality, and any other software configuration verification processes typically provided during an installation.</p>
<p>3) Offerors shall provide a sample Acceptance Test Plan for City’s review and evaluation. After City selects the Awarded Offeror and design for the final solution, the two parties will review the Acceptance Test Plan and modify it as necessary subject to City approval.</p>

XX. Completed Compliance Response Form

The Offeror shall submit in digital format on removable media and in hard copy as **Attachment 14**, the completed Compliance Response Spreadsheet (See RFP Attachment G and **Attachment G1**).

XXI. Conditions of Offeror’s Proposal

Offeror shall submit as **Attachment 15**, any conditions to the Offeror’s proposal or exceptions to the sample contract, other than exceptions to any liability provisions, which will be considered during negotiations (Attachment E to the RFP).

XXII. Conflict of Interest

_____ Offeror, owner, officer, employees, agents and immediate family members are not now, and have not been in the past year, an employee of the City of Roanoke or has no responsibility or authority with the City that might affect the procurement transaction or any claim resulting therefrom.

OR

State the complete name and address of each such person and their connection to the City of Roanoke. Each Offeror is advised that the Ethics in Public Contracting and Conflict of Interests Act of the Virginia Code, as set forth in Section 4 (L) of the RFP, apply to this RFP.

Name	Address
_____	_____
_____	_____
_____	_____

XXIII. Convictions and Debarment

If you answer yes to any of the following, state on **Attachment 16** the person or entity against whom the conviction or debarment was entered, give the location and date of the conviction or debarment, describe the project involved, and explain the circumstances relating to the conviction or debarment, including the names, addresses and phone numbers of persons who might be contacted for additional information.

1. In the last ten years, has your organization or any officer, director, partner, owner, project manager, procurement manager or chief financial officer of your organization:
 - a. ever been found guilty on charges relating to conflicts of interest?
Yes ____ No ____

2. a. Is your organization or any officer, director, partner or owner currently debarred or enjoined from doing federal, state or local government work for any reason?

Yes ___ No ___

- b. Has your organization or any officer, director, partner or owner ever been debarred or enjoined from doing federal, state or local government work for any reason?

Yes ___ No ___

XXIV. Compliance

If you answer yes to any of the following, give the date of the termination order, or payment, describe the project involved, and explain the circumstances relating to same, including the names, addresses and phone numbers of persons who might be contacted for additional information on **Attachment 17**.

- 1. Has your organization:

- a. ever been terminated on a contract for cause?

Yes ___ No ___

XXV. Confidential & Proprietary Information

Identify the section and page number of any information in your proposal that has been identified as confidential, proprietary or a trade secret (see Section 4(A) of the RFP.

Page Number	Section	Description of Confidential and/or Proprietary Information
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Offeror shall provide one redacted copy of its proposal fit for public dissemination, in the event the City must respond to a Freedom of Information Act request. The redacted copy of Offeror's proposal shall be provided on CD or other electronically transferable media and shall be redacted to protect any confidential and/or proprietary information and shall be labeled as such. Offeror shall not mark its entire proposal as confidential and/or redact the entire proposal; doing so may result in the disqualification of Offeror's proposal.

Attachments:

The following items should be included with your RFP response. Place a check mark on the line next to each applicable item submitted with your proposal. Write N/A (not applicable) on the line next to those items that do not apply to your response.

Signature Page (Pg. 2) of RFP _____

Removable Media Containing
Redacted Version of Proposal,
Attachment F, & Attachment G-1 _____

Attachment E (Proposal Response
And Checklist) to RFP 17-06-01 _____

1. Organization of Firm _____

2. Financial Reports _____

3. Experience _____

4. References _____

5. Executive Summary _____

6. System Design _____

a. Macro Design document _____

7. Deployment & Implementation Method _____

8. Schedule MS Project _____

9. Training Plan _____

10. Cost Summary _____

a. Attachment F (Pricing Tables) _____

b. Auto quote _____

11. Maintenance & Support Plan _____

12. Enhanced Support Services _____

13. Test Plan Sample _____

a. Sample Acceptance Test Plan _____

14. Compliance Response Spreadsheet
(Attachment G-1) _____

a. High level configuration diagram _____

b. Logical box and line diagram _____

c. Bay face/elevation diagram _____

15. Conditions of Proposal (If Applicable) _____

16. Debarment Explanation (If Applicable) _____

17. Compliance Explanation (If Applicable) _____