

# **Request For Proposal Cloud Phone System**



**Request For Proposal  
Cloud Phone System**

**RFP issued: June 10, 2022**

**RFP Questions** to be submitted by email only, and must be received before **Friday, July 1, 2022, 3:00 p.m.**

Send questions to: [jluckey@aaa1b.org](mailto:jluckey@aaa1b.org)

Questions will be answered by **Friday, July 8, 2022** and distributed to all vendors.

**RFP Due Date: July 15, 2022, before 3:00 p.m.**

Submit two (2) hard copies and one (1) electronic copy to following address:

**Area Agency on Aging 1-B**

**29100 Northwestern Hwy**

**Suite 400**

**Southfield, MI 48034**

**Attention: James Luckey, Director, Technology and Analytics**

**Request for Proposal (RFP)**  
**Vendor RFP Compliance Certification**

**Vendor name:**

**Solution Proposed:**

The undersigned certifies that he/she:

1. Is authorized to submit bid & bind their corporation to legal obligations related to the requirements in this RFP.
2. Has read the RFP and all requirements including any specifications, proposal forms, and terms and conditions. The RFP response will follow the guidance provide for proposal structure & items that must be included with the RFP response.
3. Has read and reviewed the Addendum(s) for this RFP that include the vendor Questions and Answers.
4. Has read and acknowledges the RFP evaluation criterion
5. Price proposal must include everything needed to meet the requirements stated in this RFP. Any mistakes and resulting cost adjustments will be borne by the vendor.
6. Submitted an RFP response that addresses each item/question with clear concise explanations. Blanket statements like “comply with all requirements” will be deemed nonresponsive and will affect the RFP scoring.

Authorized person submitting RFP:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## **BACKGROUND INFORMATION**

The Area Agency on Aging 1-B (hereinafter referred to as the “AAA 1-B”) is a HIPAA covered entity that provides assistance to help senior citizens and individuals with disabilities live happy, fulfilled, independent lives. AAA 1-B has an office in Southfield, Michigan and a remote workforce throughout southeast Michigan. Established in 1974, the Area Agency on Aging 1-B is a nonprofit 501(c)(3) organization with a rich history of supporting older adults, people with disabilities and family caregivers in southeast Michigan. We are part of a national network of Area Agencies on Aging and a leader in aging services in a six-county region that includes Livingston, Macomb, Monroe, Oakland, St. Clair and Washtenaw counties. We help people access the services and programs they need to remain living independently and with dignity in their own home or with family caregivers. We provide direct care programs for seniors, along with funding and support for many programs provided by our community partner organizations.

Locations:

**AAA 1-B Central Office**

**29100 Northwestern Hwy**

**Suite 400**

**Southfield, MI 48034**

**Main Number: (248) 357-2255**

**Toll Free Number: (800) 852-7795**

**TTY: (800) 649-3777**

**(MICHIGAN RELAY)**

**FAX: (248) 262-9971**

## **SCOPE OF WORK**

### **Project Objectives**

Currently, AAA 1-B has a Mitel Connect Cloud phone system with 146 physical VoIP enabled telephones located in southeast Michigan which includes general system users and contact center staff. There are 52 contact center agents with 10 supervisors. AAA 1-B's needs are not being met with the current system.

AAA 1-B is seeking a replacement system that is a cloud-based phone system, scalable and able to meet our regulatory needs, which specifically includes being HIPAA-complaint, along with new realities of remote working in the post-Covid era. It is expected that the replacement system will support a mix of physical endpoints, laptop-based Softphones, along with a mobile app on a smart phone. Options to integrate the new cloud phone system with Microsoft 365 are of interest, but not necessarily required.

### **Late Submissions**

Offerors are responsible for submitting offers to reach the AAA 1-B contact designated in the solicitation on time. The entire proposal must be received, not merely a portion of it. Moreover,

no acts of God or similar factors will excuse lateness. No late submissions will be reviewed or considered.

Total System includes:

- 146 users with extension, voicemail, and softphone (52 of the 146 users are in contact center)
- 52 users with extension, voicemail, and softphone + Mobile phone app
- 20 four button phones
- 100 eight button phones
- 26 twelve button phones
- 45 contact center agents
- 7 contact center supervisors
- 52 contact center staff with automatic call recording
- 169 DIDs
- 131 unused #s
- 13 Toll Free Numbers
- 180 eFax

### **Network Infrastructure**

AAA 1-B maintains service at our main office through use of our current Internet Service Provider, Clear Rate, with 30 MBPS bandwidth, on a 24/7/365 basis.

The current switches are Cisco 7200 model switches. These data switches are used in conjunction with phones which utilize separate power supplies.

### **New Cloud Phone System Specifications**

Vendors submitting proposals must provide clear concise explanations to each of the items listed in blue text in the specifications below. Answer all questions for each item, and for the items listed as Options, provide a concise explanation of the feature(s) including the cost for each optional item per user per month, and any other associated costs. ***Do Not include the optional items in the pricing proposal for the RFP.***

Refer to the RFP evaluation section; these are the criteria we will use in evaluating proposals. AAA 1-B reserves the right to award to the responsive, responsible vendor whose proposal represents the Best Value to the AAA 1-B. Diligent responses are required for the system specifications section of this RFP.

### **SUBMITTAL REQUIREMENTS/PROPOSAL FORMAT**

1. **System Overview**: Please provide a brief overview of the proposed system.
2. **Reliability 99.999% uptime**: Describe the system architecture and provide evidence the proposed system meets this requirement. Network drawings with brief overview should be included here.

3. What backup contingency plans are available to keep the cloud phone system up and running if internet circuits are out of service, or if the cloud system provider services are interrupted?
4. **Enhanced E911 Conformance:** Describe how the proposed system meets the requirements of Kari's Law, Ray Baum's Act, and the state of Michigan square footage requirements for location "tagging" for outbound calls to E911 centers that carry specific location information.
5. **Paging:** Describe how the proposed system incorporates overhead paging. What additional hardware and user licensing on the system is required? Is paging through the phones included in the proposed system?
6. **Music On Hold:** Describe how the proposed system incorporates Music On Hold and messaging within the Music On Hold. Is this included in the system at no charge?
7. **Auto Attendant with options for on hold messaging:** Describe how the proposed system handles Auto Attendants. Does the system have the ability to add layered messaging with different routing options for callers on hold?



8. **eFax** -- Describe the eFax capabilities of the proposed system. What is the monthly cost? What upfront costs are charged to set up the eFax numbers? Can old physical fax machines be kept in the system and used in the eFax format?
9. **Video Conference:** Describe how the proposed system enables video conferencing. Is this feature included in the same software client interface for the Softphone functionality? What are the specific benefits of the proposed system's video conferencing?
10. **Emergency Notifications:** What options does the proposed system have for emergency notification systems?
11. **Mass Notification:** What options does the proposed system have for mass notification systems?
12. **System Administration:** Describe how the proposed system enables system administration. Graphical depictions would be helpful to get an understanding of what the portal looks like. What type of changes can be made in the portal? Would we have direct access to call routing and contact center configurations so we can change settings?
13. **Warranty & Support:** What is included in the system warranty and support? If a phone breaks, is it covered 100% and a new one shipped out? What happens if other ancillary hardware like ATA (Analog Telephony Adapters) breaks?
14. **Design, Project Management, Installation, Cutover Support:** Describe how the proposed system incorporates the design, project management, installation and cutover support. Describe each item individually if they have separate costs. Make sure to include all upfront and long-term costs as listed in the Price Proposal section of this RFP.

**15. Design, Project Management, Installation, Cutover Support:** Describe how the proposed system incorporates the design, project management, installation and cutover support. Describe each item individually if they have separate costs. Make sure to include all upfront and long-term costs as listed in the Price Proposal section of this RFP.

**16. Training**

Describe the training included in the proposal for general users, and contact center agents and supervisors.

Is the training live in person at AAA 1-B facilities? What is the cost to do this?

Is the training provided by a remote led trainer over video / web conference? Please include cost.

Is training available in You Tube style format for following instructions and watching the video?

Are simple user guides available in paper and electronic format?

Is system administration training included? If not, what is the cost to do this in person vs. remote. Describe how this training is conducted, and what is total time required?

**17. Service & Support after Go Live on new system**

Describe how the proposed solution will provide high quality focused customer service and support long after the initial installation is complete and Go Live date has passed. Does AAA 1-B get a dedicated resource (staff) to handle service and support requests, or do we access general support and service channels? Describe how a service request is handled and what mechanisms are used to communicate the service request and issue resolution. Does the service and support provide instant on the spot resolution, or is there a ticketing system with estimated resolution times? Are there any costs associated with service and support? Are there different levels of support offered?

**18. System performance requirements for general users and contact center agents and supervisors**

For each of the features below respond with comply or does not comply:

- Auto-attendant and custom call routing for the different agency departments
- Multiple, simultaneous, outgoing/incoming call capability
- Standard hold as well as call parking/pickup directed at a specific extension – transfer callers to both internal and external destinations (and direct to voicemail)
- Three-way conference calling
- Ability to configure and handle multiple DID lines
- Voicemail to email notification
- Remote voicemail access
- Caller-ID for incoming calls
- Intercom & paging
- Restricted dialing
- System reporting (call logs and reports)
- Gigabit connectivity for phones (with pass-through connection for a PC or other device)
- Multiple phones to choose from (up to 10 extension/line buttons, PoE capable or Power adapter supplied)
- Soft phone (software client) options
- Cell phone app options
- Must be able to use headsets with each desk phone
- Configurable so calls to call center are only transferred to active agents

- Call center or system wide call recording should be presented as an option
- Ability for agents and staff to manage and route calls on their computers
- Ability for staff to easily change settings and configurations for call greetings and to set schedules for holidays, etc.

## 19. Phones for system – note this mix may change based on RFP responses and various vendor options that may be presented

- 20 four button phones
- 100 eight button phones
- 26 twelve button phones

### Phone & Headset Options

Conference room phones – Please provide options and cost for each.

Are wireless phones an option? What is the incremental cost to add these? Are these phones able to connect to the phone system via WiFi access points, or is there a separate base station and repeaters required? List all items required and pricing for each

What other phones with unique features may be of interest – please list and provide pricing

What type of headsets can be used with the phones for system listed above?

What type of headsets will work for Softphone application?

## 20. Conference Bridge

What capabilities are available in the proposed system to provide an audio conference bridge? Please detail capacities and costs per user.

## 21. Contact Center

**There are 52 agents licensed Contact Center agents/supervisors spread among 7 unique groups**

Currently the call routing is fairly simple and queues are not really desired since AAA 1-B's goal is to have all inbound calls answered by available agents and not make callers wait.

### Clinical Screener Queue

- **Current agents: 6**
- The group is configured to play one queue announcement every 60 seconds and also gives the caller the option to opt out of the queue to leave a VM for the group.
- The group utilizes a Longest Idle ring sequence.

### CLP Care Team Queue

- Current agents: 21
- The group is configured to play one queue announcement and then a second announcement after 120 seconds of hold music.
- The group utilizes a Longest Idle ring sequence.

### MiChoice Care Team Queue

- Current agents: 0
- This group has been converted to a hunt group. Staff would need to confirm if a simple hunt group will suffice moving forward or if additional call volume warrants the need for a queue.



### MiChoice Queue

- Current agents: 1
- The group is configured to play one queue announcement every 30 seconds.
- The group utilizes a Circular ring sequence.

### MMAP Queue

- Current agents: 5
- The group is configured to play one queue announcement every 30 seconds.
- The group utilizes a Circular ring sequence.

### Resource Center Queue

- Current agents: 13
- The group is configured to play a mandatory message before you get into the queue, followed by 180 seconds of hold music before the second announcement plays.
- The group utilizes a Longest Idle ring sequence.

### Washtenaw CG Queue

- Current agents: 11
- The group is configured to play one announcement, followed by a second announcement after 30 seconds. Callers have the option during the second announcement to opt out of the queue and leave a VM for the group.
- The group utilizes a Terminal ring sequence.

## **22. Please detail how the proposed system will enable call routing to ensure a live person answers all inbound calls. Can agents be part of multiple contact center groups and adjusted spontaneously if work conditions merit quick changes? Can calls be forwarded out of the contact center group to general users for backup if needed?**

### Queue Options

What types of queuing and call routing choices are available, and make note of any choices that are options and have an incremental costs associated with them?

Call Back feature: Can callers enter their phone number to retain their place in the queue and have agents call them back

How are messages for callers on hold handled? What options are available?

Are there any extra charges to have professionally created messages for Auto Attendants, or messaging for callers on hold?

## **23. Contact Center Agent & Supervisor Features**

Detail what features are included in the proposed system for contact center agents and supervisors.

## **24. Agent & Supervisor Options**

Describe what add on options are available for agents and supervisors.

Provide price add for each option:

- Omni channel features to enable email, web chat, SMS texting with business identity, social media feeds, etc.?
- Screen captures for agents that are synchronized with call recordings so supervisors can listen to an agent handling service and watch how they navigate the internal data systems to get the answers needed to assist callers?
- What database integrations are available that have been created already?

What is involved to create customized database integrations?

### **Additional Contact Center Questions**

All phone calls into these contact center groups must include automatic call recording that is persistent from when the call arrives on the system through transfers internally and externally. Describe any limitations of contact center agents that receive a call on their cell phones using a software app included with the proposed system. There are 40 users in the contact center whom are clinicians traveling out in the field to help senior citizens on a regular basis; therefore, the proposed system must also enable automatic call recording if a contact center member is using their cell phone to conduct AAA 1-B business. The call recordings must be stored for retrieval to resolve any service requests, along with a simple way to download recordings with a reporting system that produces reports to capture total call volumes into each contact center group, along with the general system users. These reports will be submitted to federal and state authorities as part of the AAA 1-B funding process each year.

- 1. Describe how the system ensures that all calls into the contact center are automatically recorded**
- 2. Describe the system reporting and searching capabilities for contact center call recordings, and provide sample reports and examples of how a call recording can be located. Describe how process meets HIPAA requirements and regulations.**
- 3. Describe how contact center agents and supervisors can utilize a software application on their cell phones, and detail what features are included. Are there any added costs for users to have this capability?**

### **Options for call recording:**

- Ad Hoc on demand recording.
  - Phonetic searches on all recorded calls, and any advanced call recording features should be described in the RFP response with costs for these features.
  - Quality Assurance application(s) to allow supervisors to rate phone call recordings and provide agent scoring metrics for employee evaluation and growth in performance. This could include just call recordings, or may also include synchronized screen capture recordings as well. Are these features priced separately? Please delineate any costs associated with these features.
- 4. Vendor References:** Provide information pertaining to your experience in designing, installing and maintaining similar systems. Provide references (including customer name, contact name and telephone number) for similar system installations. Vendors are required to have 3 (or more) customer references of a similar size.

- 5. Vendor Company background:** Provide information on the vendor company submitting the cloud phone system proposal, and provide information on the cloud phone system provider that has been proposed for this RFP.

## RFP Evaluation Criteria

The AAA 1-B evaluators will make such investigations as are considered necessary for complete evaluation. The evaluators will determine the proposal that offers the best value to AAA 1-B, price and other factors considered. This means that AAA 1-B does not have to necessarily make an award to either the lowest priced proposal or to the highest qualified offeror. Rather, proposals will be analyzed and scored in accordance with the following weighted criteria:

**Vendor responses to specifications:** *How well has the firm described and met the features outlined in the Scope of Work in the description of each feature, enough to make a reasonable evaluation* **25%**

**Vendor's Understanding of the Project:** *Has the firm demonstrated the ability to successfully provide services for projects of a similar complexity and nature?* **25%**

**Vendor's specific experience/references:** *Are the firm's references from past clients and associates favorable?* **15%**

**Vendor's specific knowledge/credentials/education:** *Do the qualifications of key Personnel to coincide with tasks listed in the Scope of Work?* **15%**

**Cost: Are the firm's cost for services competitive and reasonable?** **15%**

**Proposed timelines and schedules** **5%**

## RFP Evaluation Procedures

AAA 1-B reserves the right to select proposals that are in a competitive range, conduct discussions, and request Best and Final Offers. AAA 1-B also reserves the right to make an award with or without discussions or with or without requesting Best and Final Offers.

# Price Proposal

1. Pricing must be provided for following items:

## **Up Front Costs:**

- Network Assessment for cloud system readiness
- Design, project management, installation, system tests
- Coordination with AAA 1-B's IT service provider
- Cutover assistance – detail costs for onsite vs. remote assistance
- Training for general users
- Training for contact center agents and supervisors
- System Admin training

## **Monthly bill that includes the following:**

- 146 users with extension, voicemail, and softphone
- 20 four button phones
- 100 eight button phones
- 26 twelve button phones
- 52 of the 146 total users will need extension, voicemail, and softphone + Mobile phone app
- 45 contact center agents
- 7 contact center supervisors
- 52 contact center staff with automatic call recording
- 169 DIDs
- 131 unused #s
- 13 Toll Free Numbers
- 180 eFax
- Estimated taxes and surcharges (federal, state, E911, USF, excise, etc.) – need to confirm details on this point to see if AAA 1-B is immune from some of these taxes

## **Long Term Support Costs:**

- What options are available for long term service and support after Go Live?
  - What are typical wait times for assistance to be provide for support phone calls or chat service tickets
  - How are broken phones handled? Are these covered 100% and replacements shipped out overnight?
  - What if AAA 1-B has to reduce staffing levels. Is there any cost implications to downsizing the users from the signed contract?
  - What if AAA 1-B has to add new staff to the system. Are the new staff adds included at the same price agreed to in original contract?
2. All prices expressed by the vendor in its offer must be firm, expressed in U.S. dollars, defined as to be clearly understandable and without ambiguity as to the meaning.
  3. RFP responses must include a summary for **Total Costs incurred by AAA 1-B over 36 months & 60 months** which includes all of the items listed in point 1 above. Please list those summary totals here.

4. Pricing may be in the vendor's own format so long as the pricing is complete, comprehensive, and covers all charges in connection with performing the scope of work. Charges not listed in the proposal response will not be allowed.
5. AAA 1-B will not be liable for any error in calculations in vendor submissions or subjected to revised prices during the annual subscription period except if mutually agreeable.
6. Proposers should include any cash discounts for prompt payment offered.
7. Proposed prices must include all costs associated with the performance of the work, including equipment, supervision, labor, transportation, delivery, and related costs. Charges not listed in the proposal response will not be allowed.
8. All-inclusive Price. The prices proposed shall include any items of labor, materials, tools, equipment, overhead, profit, insurance, and all other costs necessary to complete the work to specifications. Any items omitted from AAA 1-B's Scope of Work which are clearly necessary for the completion of the project, shall be considered a portion of such work, although not directly specified or called for in these specifications.

## **Modification or Withdrawal of Proposals**

- a. A proposed unilateral modification by a Proposer to any part of a proposal already received will be accepted by AAA 1-B only if the modification is received prior to the proposal due date.
- b. A Proposer may withdraw the entire Proposal already received prior to the proposal due date by submitting a written request for withdrawal executed by the Proposer's authorized representative. After the proposal due date, a Proposal may be withdrawn only if AAA 1-B fails to award the contract within the proposal validity period or any agreed upon extension thereof. The withdrawal of a Proposal does not prejudice the right of a Proposer to submit another proposal within the time set for receipt of proposals.
- c. This provision for modification and withdrawal of Proposals may not be utilized by a Proposer as a means to submit a late proposal and, as such, will not alter AAA 1-B right to reject a late proposal.

## **Terms & Conditions**

### **a. Terms of Payment**

The prime contractor will complete the project AND submit an invoice to AAA 1-B for any agreed upon upfront costs and the monthly bill for cloud phone system services.

**All invoices shall be itemized.**

### **b. Proposal Protests**

All protests shall be addressed in writing to the AAA 1-B. Protests about specifications must be received ten (10) days before the proposal due date. Post award protests may be received by STC at any time after proposal opening, but not later than five (5) working days after notification to all proposers of the contract award decision. AAA 1-B will review respond within ten (10) days of receiving the protest. AAA 1-B is the final arbitrator on any question or dispute pertaining to proposals, proposal forms, and awards. This "disputes" clause does not preclude consideration of questions of law in connection with decisions provided for above; provided that nothing in this contract shall be construed as making final the decision of any administrative official, representative, or board on a question of law.

Proposal protests shall contain:

- a) The name and address of the protester.
- b) Identification of the project.
- c) A statement of the grounds for the protest and any supporting documentation. The grounds for protest shall be fully supported to the extent feasible. Additional materials in support of an initial protest may be permitted only at the sole discretion of AAA 1-B.
- d) The relief desired of AAA 1-B.

### **c. Cancel RFP Solicitation**

AAA1B reserves the right to waive any informality in the request for proposals; to reject any or all proposals for sound, documentable, business reasons. AAA 1-B reserves the right to use whatever reasonable and prudent evaluation techniques it deems appropriate.

#### **d. Vendor Obligations**

The contractor shall provide all supervision, labor, materials, supplies, parts, tools transportation, and equipment necessary to perform the scope of this project.



#### **e. Inspection**

Final inspection and acceptance of all work, reports, performance, and other deliverables required under this contract shall be performed at the place of delivery by AAA 1-B. The agency reserves the right to waive any informalities or minor defects.

#### **f. Assignment**

Neither party may assign, directly or indirectly, all or part of its rights or obligations under this Agreement without the prior written consent of the other party, which consent shall not be unreasonably withheld or delayed.



## **IMPACT OF FEDERAL, STATE, AND LOCAL TAXES**

AAA 1-B is exempt from Federal, State, and local taxes. AAA 1-B will not be responsible for any taxes levied on the respondent because of the contract resulting from this RFP.

### **Disputes**

The parties shall attempt to resolve any dispute arising out of or relating to this contract through negotiations between senior executives of the parties, who have authority to settle the same.

If the matter is not resolved by negotiation within 30 days of receipt of a written 'invitation to negotiate', the parties will attempt to resolve the dispute in good faith through an agreed Alternative Dispute Resolution (ADR) procedure.

### **Governing Law**

This Agreement shall be governed by and construed in accordance with the laws of the State of Michigan.