



ADDENDUM NO. 1

October 15, 2018

RE: RFP 018.19.B5, Telecommunications Consulting Services

**FROM: Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax**

TO: PROSPECTIVE BIDDERS

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. **INSERT** Attachment "Request for Proposal No. 041.17.B5 for Telecommunications Replacement Solution" for reference only.
2. **INSERT** Pre-Bid Sign IN Sheet

END OF ADDENDUM



Office of Purchasing
10910 Clarksville Pike, Ellicott City, Maryland 21042-6198
(410) 313-4584, fax (410) 313-6789

Request for Proposal No. 041.17.B5
For
Telecommunications Replacement Solution

FOR REFERENCE ONLY

Issue Date	April 24, 2017
Last Day for Questions	May 5, 2017
Proposal Due Date	May 12, 2017 at 2:30PM
Contractor Selection Anticipated to be Finalized	June 2, 2017
Agreement Executed by Selected Contractor(s)	June 22, 2017
Contract Commencement	July1, 2017

Introduction and Background

Howard County, Maryland is a suburban community of over 304,580 situated midway along the Baltimore-Washington corridor. It is a county of contrasts - a blend of old and new, urban and rural, historical and progressive. The county's borders encompass Ellicott City, one of the country's oldest towns, and Columbia, a planned community conceived and designed 40 years ago by The Rouse Company. A great community deserves great schools, and the Howard County Public School System (HCPSS) is a recognized source of local pride. The school system consistently ranks among Maryland's top school districts based on student performance on the Maryland School Assessments. Howard County students score above the national averages on standardized tests and over 85% of graduates continue their education beyond high school.

HCPSS Mission and Goals

Our Mission

"We cultivate a vibrant learning community that prepares students to thrive in a dynamic world"

Goals

Goal 1: Students

Every student achieves academic excellence in an inspiring, engaging, and supportive environment.

Goal 2: Staff

Every staff member is engaged, supported, and successful.

Goal 3: Families and the Community

Families and the community are engaged and supported as partners in education.

Goal 4: Organization

Schools are supported by world-class organizational practices

The Howard County Public School System Tax Identification.

Federal Tax Id:	52-6000968
Maryland Sales Tax:	30001219
Federal Excise Tax:	52-73-0257k

Human Resources - HCPSS Employs Approximately 8,000 full and part-time regular employees in addition to a large number of temporary and seasonal employees. Approximately 400-500 employees (full-time and regular part-time) are hired each year with an average of 3,000 applications received. The Office of Human Resources is responsible for the recruitment and hiring of all staff in collaboration with other HCPSS offices.

Respondents to this solicitation are encouraged to review the data contained in HCPSS' website for a better understanding of HCPSS, its organization and management, and the services it provides. The website is <http://www.hcpss.org>.

SECTION I. SOLICITATION INSTRUCTIONS

1. Objective. The Howard County Public School System (HCPSS) seeks proposals to evaluate the capabilities of available communications Solutions (premises-based, hosted, or a hybrid configuration) and ultimately identify a replacement system for obsolete telephone (“Solution”, or “Service”). Refer to Section II for the scope and Section III for the procurement process.
2. Issuing Office. The Issuing Office shall be the sole point of contact within HCPSS for purposes of the preparation and submittal of proposals in response to this solicitation.

Ted Ludicke
Purchasing Office
Howard County Public School System
10910 Clarksville Pike
Ellicott City, MD 21042
Phone: (410) 313-5644
Fax: (410) 313-6789
Email: Ted_Ludicke@hcpss.org
<http://www.hcpss.org/about-us/purchasing/>

3. Questions and Inquiries. All questions and inquiries regarding this procurement must be directed to the individual(s) referenced within the Issuing Office above. Questions must be submitted in writing via email to tludicke@hcpss.org. Inquiries will receive a written reply. Copies of replies will be sent to all other Offerors, but without identification of the inquirer. All such questions and inquiries must be received by the date and time as listed on the Cover and the Solicitation Schedule of this RFP.
4. Pre-Proposal Conference. A Pre-Proposal Conference will not be held in conjunction with this RFP.
5. Proposal Closing Date/Due Date and Time
 - 5.1. Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. **Proposals are to be submitted in PDF format (or as otherwise indicated) on a USB flash drive sealed in a mail packet. If Proposals contain more than one file all files are to be bundled and compressed in a .zip file.** Hyperlinks to software products sent to HCPSS’s Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive, i.e. a “Click-Through Agreement” required to be accepted by HCPSS in order to download the Technical Proposal. By providing the Technical Proposal to HCPSS, the Proposer grants HCPSS an unlimited right to generate additional electronic and/or paper copies for distribution solely for the purpose of evaluation and review.
 - 5.2. To be considered, submittals must be received in the issuing office by the date and time specified on the invitation notice of this RFP. See Section H of this RFP for delivery address.
 - 5.3. Any submittals received after the time and date specified, or delivered to a different location, will not be opened nor given any consideration. HCPSS recommends against use of mail or delivery services that will not guarantee delivery directly to the Purchasing Office. Submittals delivered to the central mailroom or front desk will not be considered "received" until they arrive at the Purchasing Office. HCPSS will not waive delay in delivery resulting in delay on the part of a carrier. **LATE PROPOSALS CANNOT BE ACCEPTED**
 - 5.4. Proposals will not be opened publicly. The identity of Offerors will not be disclosed prior to the Contract Award.
6. Acceptance of Terms and Conditions. By submitting a Proposal, an Offeror shall be deemed to have accepted the terms, conditions, and requirements set forth in this RFP. The RFP, including all addenda, shall be incorporated into the Contract by reference.

7. Contractual Agreement and Term. Any Contract arising from this RFP action shall commence on the date the Contract is executed on behalf of HCPSS, or such other date as HCPSS and the Contractor shall agree. The initial term of the Contract is anticipated to start on or around July 1, 2017. The contract will terminate when HCPSS determines that the project is complete.
8. Withdrawal of Bids. Offers may be withdrawn by written, facsimile, or electronic notice if given prior to the RFP opening time and date. Verbal requests via phone are not acceptable. No offer shall be withdrawn after the scheduled closing time for opening bids.
9. Forms. This solicitation is designed for the Offeror to fill in responses where indicated. This entire solicitation document, along with any attachments indicated with the responses filled in, is to be submitted as the main part of the Offeror's proposal. The Offeror may adjust forms and insert space as needed for responses; however, the Offeror shall not alter any language provided by HCPSS in this solicitation; any such alterations will not be honored and the Offeror will be bound by the language in the solicitation as published. Any changes to the solicitation language must be explicitly requested.
10. Signature. The enclosed form titled "SIGNATURE SHEET" shall be completed and submitted with Offeror's proposal. The Signature Sheet shall be signed by the person or persons legally authorized to sign contracts on behalf of the offering company.

SECTION 2. TERMS AND CONDITIONS

1. Contractor's/Offeror's Responsibility. Offerors are advised to read the requirements very carefully to ensure that each requirement is understood. If in doubt, develop and submit applicable questions in writing to the contact at the Issuing Office. An Offeror's misinterpretation of requirements shall not relieve the Offeror of the responsibility to address accurately the requirements of the RFP or to perform the Contract, if awarded. HCPSS will enter into a contractual agreement with the selected Contractor(s) only. The selected Contractor(s) shall be solely responsible for all services as required by this RFP. Subcontractors, if any, will be the responsibility of the Contractor(s) and the role of subcontractors must be clearly identified in the proposal. The use of a subcontractor(s) does not relieve the Contractor(s) of liability under a Contract.
2. Rejection or Acceptance of Proposals. HCPSS reserves the right to: (i) accept or reject any and all proposals, in whole or in part; (ii) to waive minor irregularities; and (iii) to negotiate in any manner necessary to best serve the interests of HCPSS. Further, HCPSS reserves the right to make a whole award, multiple awards, a partial award, or no award at all. Offerors judged by the Purchasing Office not to be responsible or Offerors whose Proposals are classified as not reasonably susceptible to being selected for award shall be so notified. HCPSS reserves the right to increase or decrease the quantities of any materials, equipment, supplies or services.
3. Right to Amend, Modify or Withdraw. HCPSS reserves the right, in their sole discretion, to amend, or modify any provisions of this solicitation, or to withdraw this solicitation at any time prior to the award of a Contract. The decision of HCPSS shall be administratively final in this regard.
4. Incurred Expenses. HCPSS is not responsible for any expenses that Offerors may incur in preparing and submitting Proposals or in making oral presentations of their Proposals, if required.
5. Confidentiality. Offerors should give specific attention to the identification of those portions of the Proposal that the Offeror deems to be confidential, proprietary information, or trade secrets and provide any justification why such materials, upon request, should not be disclosed by HCPSS under the Freedom of Information Act (FOIA). Offerors are advised that, upon request for this information from a third party, the Purchasing Office is required to make an independent determination as to whether the information may or may not be disclosed to the requesting party. That decision will take into consideration the Offeror's position regarding its Proposal. A blanket statement by a Offeror that its entire Proposal is confidential or proprietary will not be considered.
6. Multiple Proposals. Contractors may not submit more than one Proposal.
7. Alternate Solution Proposals. Contractors may submit an alternate to the Solution in this RFP.
8. Contractor Responsibilities and Use of Subcontractors. HCPSS shall enter into contractual agreement with the selected Contractor(s) only. The Contractor(s) shall be responsible for all products and/or services required by this RFP. HCPSS will consider Proposals that reflect primary and secondary service providers or a prime/subcontractor relationship. There should be proof of ability of the primary to manage a subcontractor and successfully coordinate the delivery of quality service and support in a timely manner. Subcontractors, if any, shall be identified and a complete description of their role relative to the proposal shall be included. HCPSS's intent is not to direct the use of any particular subcontractor, however, the Contractor may not contract with any such proposed person or entity to whom HCPSS has a reasonable objection. Notification of such objection will be made by HCPSS within fifteen (15) days of Contract. The Contractor shall be fully responsible for the acts and omissions of its subcontractors and of persons directly or indirectly employed by them. The use of subcontractors does not relieve the Contractor of liability.
9. Non-Discrimination in Employment. The Contractor agrees: (a) not to discriminate in any manner against an employee or applicant for employment because of race, color, religion, creed, age, sex, marital status,

national origin, ancestry, or physical or mental disability unrelated in nature and extent so as reasonably to preclude the performance of such employment; (b) to include a provision similar to that contained in subsection (a), above, in any subcontract except a subcontract for standard commercial supplies or raw materials; and (c) to post and to cause subcontractors to post in conspicuous places available to employees and applicants for employment, notices setting forth the substance of this clause.

10. Behavior of Contractor Employees/Subcontractors. Howard County Public School System (HCPSS) is committed to providing a work and study environment that is free from discrimination and harassment on the basis of race, color, religious creed, ancestry, national origin, age, sex, marital status, handicap, pregnancy, or status as a disabled veteran or veteran of the Vietnam era. Behavior contrary to this philosophy, which has the purpose or effect of creating an intimidating, hostile, or offensive environment, will not be tolerated by HCPSS, and it is the Contractor's responsibility to ensure that such behavior by its employees, agents, and subcontractors does not occur. The policy extends to maintaining an environment free from sexual harassment. Therefore, sexual advances or sexual remarks, requests for sexual favors, and other verbal or physical conduct of a sexual nature must not be condoned or permitted by the Contractor. This prohibition extends to such harassment within the employment context as well as harassment of students, staff, and visitors to the HCPSS. It should be assumed that all sexual behavior by the Contractor's employees, agents, and subcontractors on any campus or facility of HCPSS, whether owned, operated, maintained or leased by the HCPSS, is improper and unwelcome. Contractor will also insure that all technicians who work with HCPSS users exhibit a high degree of professionalism in their dealings with those users. The Contractor's employees and subcontractors shall be subject to and comply with all applicable HCPSS rules, regulations and policies which shall include those regulations relating to safety, security and campus parking. If deemed necessary, HCPSS reserves the right to demand the removal of any of the Contractor's employees/subcontractors from duty on its premises as a result of their violation of the standards set forth herein.
11. Tobacco Free and Alcohol/Drug Free Environment. The Howard County Public School System maintains a tobacco, alcohol/drug free environment. The sale or use of tobacco, alcohol or drugs, in any form, or related product, is prohibited in school buildings and grounds at all times. Persons found violating this policy will be requested to remove the product and themselves from school premises.
12. Criminal History Background Checks. All employees, agents, or representatives of the awarded contractor who will be performing work on any phase of the contract arising out of this Bid may be subject to a criminal history background check by the school system. Such persons, if requested by the school system, must provide fingerprints and other required information to facilitate such a check, as well as the necessary fees to obtain such a check from the federal or state government. At the completion of a background check, the school system may, at its sole discretion, decide that a particular employee, agent, or representative of the contractor be barred from school system property.
13. Child Sex Offender Notification.
 - 13.1. Sex Offender Requirement: Maryland law requires certain sex offenders to register with the local law enforcement agency; See Maryland Annotated Code, Criminal Procedure Article, §11-704. One of the purposes of this law, is to inform school systems when a Registered Sex Offender is residing or working in the area. When the sex offender registers, the local police are required to notify the Superintendent of Schools, and the Superintendent, in turn, is required to send a notice to school principals.
 - 13.2. As a contractor working for Howard County Public School System (HCPSS), we require that you do not employ Registered Sex Offenders to work on projects for our school system if they, as a result, are required to perform delivery, installation, repair, construction or any other kind of services on HCPSS property. Further, Maryland Law that became effective June 22, 2006, requires that any person who enters a contract with a county board of education or a non-public school "may not knowingly employ an individual to work at a school" if the individual is a registered sex offender; See §11-722 Criminal Procedure Article. An employer who violates this requirement is guilty of a

misdemeanor and if convicted may be subject to up to five years imprisonment and/or a \$5,000 fine.

- 13.3. Each contractor shall screen their work-forces to ensure that a Registered Sex Offender does not perform work at a county public school and also ensure that a subcontractor and independent contractor conducts screening of its personnel who may work at a school. The term "work force" is intended to refer to all of the contractor's direct employees and subcontractors and/or independent contractors it uses to perform the work. Violations of this provision may cause HCPSS to take action against the contractor up to and including termination of the contract.
- 13.4. Effective July 1, 2015, amendments to § 6-113 of the Education Article of the Maryland Code further require that a contractor or subcontractor for a local school system may not knowingly assign an employee to work on school property with direct, unsupervised, and uncontrolled access to children, if the employee has been convicted of, or pled guilty or nolo contendere to, a crime involving a sexual offense, child sexual abuse and crimes of violence.
- 13.5. The Contractor shall submit to HCPSS a listing of any employees assigned to perform under this agreement and certify that the necessary criminal history records checks have been conducted and that each employee complies with the requirements.
14. Occupied Buildings – Sign-in Procedures. Work under this contract and any resulting contract or sub-contract will take place while school facilities are occupied by staff and often also by students and visitors. Every precaution shall be exercised to protect people from injury and to minimize disruption of activity. As well, contract employees shall conduct themselves in a professional manner while on The Howard County Public School System's premises. Any employee found to disregard the nature of the school system's surroundings shall be removed from the premises and may be prohibited from further servicing the HCPSS contract.
15. Identification. All contractor personnel, working in or around buildings designated under this contract, shall have a valid driver's license or photo ID in their possession at all times and wear distinctive uniform clothing while on the school system's premises. Contractors will be required to provide identification and sign-in and sign-out at the front office at each site on a daily basis during the course of each project.
16. Ethics Regulations.
 - 16.1. The Board of Education of Howard County has adopted an Ethics Regulation policy. Required by the Annotated Code of Maryland, these Ethics Regulations cover members of the Board of Education, the Superintendent, and all employees; and it specifies limits of participation of these individuals with entities doing business with The Howard County Public School System. For a copy of the regulations, please contact the Purchasing Office, Howard County Department of Education (410) 313-6644.
 - 16.2. Any resulting Contract is cancelable in the event of a violation of the HCPSS Ethics Regulation policy or the Maryland Public Ethics Law by a Contractor or any HCPSS employee in connection with this procurement.
17. Taxes. HCPSS is exempt from Federal Excise Taxes, Maryland Sales and Use Taxes. Exemption Certificates shall be provided upon request. In the instance a Contractor is required to furnish and install material in the construction or improvement of real property in performance of a Contract, the Contractor shall pay the Maryland Sales Tax and the exemption will not apply.
18. RFP Response Materials. All written materials submitted in response to this RFP become the property of HCPSS and may be appended to any formal documentation that would further define or expand the contractual relationship between HCPSS and the Contractor(s).
19. Addenda Acknowledgment. Offerors must acknowledge in writing the receipt of any and all addenda, amendments, and/or changes issued. Such acknowledgement must be included in the Technical Proposal.

It is the Offeror's sole responsibility to monitor the Purchasing web site prior to submitting their RFP for any addenda, amendments, and/or changes issued.

20. Duration of Offers. Proposals shall remain irrevocable for 120 days following the closing date of the Proposal due date. This period may be extended by mutual agreement between the Offeror and HCPSS.
21. Multi-Agency Participation.
 - 21.1. Under §5-112, Paragraph (3) of the Education Article of the Annotated Code of Maryland HCPSS may with Board of Education approval participate in contracts for goods or commodities that are awarded by other public agencies or by intergovernmental purchasing organizations if the lead agency for the contract follows the public bidding procedures. HCPSS therefore reserves the right to extend the terms and conditions of this solicitation to any and all other agencies within the state of Maryland as well as any other federal, state, municipal, county, or local governmental agency under the jurisdiction of the United States and its territories. This shall include but not limited to private schools, parochial schools, non-public schools such as charter schools, special districts, intermediate units, non-profit agencies providing services on behalf of government, and/or state, community and/or private colleges/universities that require these goods, commodities and/or services. A copy of the contract pricing and the requirements incorporated in this contract will be supplied to requesting agencies.
 - 21.2. Each participating jurisdiction or agency shall enter into its own contract with the awarded Offeror(s) and this contract shall be binding only upon the principals signing such an agreement. Invoices shall be submitted in duplicate "directly" to the ordering jurisdiction for each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the awarded Offeror(s).
 - 21.3. Resolution of Disputes
 - 21.3.1. Bid rejection for non-responsiveness and/or non-responsibility shall be made based on criteria established in the solicitation documents.
 - 21.3.2. Protests shall be filed in writing to the Purchasing Office prior to contract award by the Board of Education. Protests shall include the basis for the protest or appeal, complete in all respects, with relief sought, and whether the protester wishes to have a hearing with respect to the protest or appeal.
 - 21.3.3. Protests shall be addressed to Howard County Department of Education, 10910 Route 108, Ellicott City, MD 21042, Attn: Pierre Van Greunen, Purchasing Officer, labeled "Protest". The written protest shall include as a minimum the following:
 - a) Name and address of the protester
 - b) Appropriate identification of the bid
 - c) Supporting exhibits, evidence, and/or documents to substantiate any claims.
 - d) Suggested remedy(ies)

SECTION 3. Special Terms and Conditions

1. Agreement. Contractor shall provide to The Howard County Public School System professional services (the "Solution") in accordance with the terms and conditions of this solicitation.
 - 1.1. The resulting Contract consists of multiple documents as follows in order of precedence:
 - The Contract Form
 - The Request for Proposal and all amendments to the solicitation
 - Contractor's Technical Proposal and Price Proposal as accepted by HCPSS
 - 1.2. All terms and conditions of HCPSS's solicitation, and any amendments thereto, are made a part of this Agreement unless expressly contradicted by a term or condition of this Agreement. Proposals or suggestions of the Contractor for changes in the solicitation or the terms and conditions of the contract are not binding upon HCPSS and are not a part of this Agreement unless set forth in an amendment of the solicitation or in this Agreement and agreed to in writing by HCPSS.
2. HCPSS Project Coordinator. HCPSS will designate a staff member to act as coordinator ("Project Coordinator") between HCPSS and the Contractor. Throughout the period of the Project, copies of all correspondence, work products, specifications, estimates and other materials prepared by the Contractor should be directed to the Project Coordinator and also to any other HCPSS personnel designated by the Project Coordinator. Direct contact or communication by the Contractor with other HCPSS offices or any other entity concerning the Project shall be made only with the prior knowledge and concurrence of the Project Coordinator.
3. Professional Services.
 - 3.1. The professional services team for the Project shall be the same team identified in the Contractor's submittal responding to HCPSS's solicitation unless (a) a change is requested by the Contractor and approved in writing by the Project Coordinator; or (b) a change is requested in writing by the Project Coordinator for good cause, in which case the Contractor shall make an appropriate substitution, subject to HCPSS's approval, and notify HCPSS in writing. Major changes in the Contractor's organization or personnel (other than the Contractor's Team) shall be reported to HCPSS in writing as they occur.
 - 3.2. The Contractor shall perform the Project as described in accordance with a schedule agreed upon in writing by the parties. The Contractor shall perform the Project as expeditiously as is consistent with good professional skill and care and the orderly progress of the Project.
4. Billing and Payment.
 - 4.1. The contractor shall submit invoices to attention of the selected Project Coordinator, Howard County Department of Education, 10910 Rt. 108, Ellicott City, MD 21042.
 - 4.1.1. Invoices must contain the following information:
 - Purchase Order Number
 - Name of school
 - Description of work along with quantities
 - Start date and completion date
 - Total due
 - 4.2. All fees are exclusive of applicable federal, state, local, and foreign sales, use, excise, utility, gross receipts, value added and other taxes, tax-like charges and tax-related surcharges. HCPSS is generally exempt from such taxes, and Contractor agrees not to charge HCPSS for such taxes in accordance with applicable law. HCPSS will provide exemption certificates upon request.
 - 4.3. The HCPSS provides payments on a net 30-day basis for HCPSS approved invoices.

5. Evaluation and Acceptance Procedure.

- 5.1. Upon completion and delivery of each deliverable by Contractor, HCPSS will begin the evaluation and acceptance process, which shall include, but not be limited to, the steps described below. Payments will be based on the completion/delivery of a deliverable by Contractor and acceptance by HCPSS of each deliverable. Contractor will demonstrate to HCPSS that the deliverable has been completed or has occurred and will provide HCPSS with written notice of the same.
- 5.2. Within the time period specified in the Contract including any Contract Amendments, or if not specified, then within thirty (30) business days of receipt by HCPSS of a scheduled deliverable from Contractor, HCPSS shall determine whether such deliverable Materially Conforms to the specifications defined in the Contract. As used herein, the term "Materially Conforms" means that the deliverable is ready to be used in production and meets or exceeds its intended functionality and performance. If the deliverable Materially Conforms to the specifications, then HCPSS will provide written confirmation to Contractor that the deliverable is accepted.
- 5.3. If the deliverable does not Materially Conform, HCPSS shall immediately return notify the Contractor with a written list of deficiencies. Contractor, at no additional cost to HCPSS, shall thereafter make all appropriate and necessary fixes to the deliverable and notify HCPSS in writing of corrections made no later than a date mutually agreed to by both parties. If no date is given, then within ten (10) business days. If the deliverable again fails to Materially Conform, then this same process will be repeated one more time. If the deliverable fails to Materially Conform to the specifications after delivery for the second time then HCPSS may, at its sole discretion, (a) further extend the timeframe for cure and (b) extend the warranty period, if applicable, or (c) begin contract termination process as defined in this document. If HCPSS does not elect to terminate this Contract after the second failure, it has not automatically waived its right to do so following any additional failed attempt at correction by Contractor to which the parties may agree.

6. Confidential Information.

- 6.1. Contractor acknowledges and understands that HCPSS is required to protect certain Confidential Information from disclosure under applicable law, including but not limited to, the Family Educational Rights and Privacy Act ("FERPA"), the Gramm Leach Bliley Act ("GLBA"), or the Maryland Public Information Act ("PIA"), including regulations promulgated there under, as the laws and regulations may be amended from time to time (collectively the "Privacy Laws"). The Confidential Information that is protected under FERPA was provided to the Contractor as it is handling an institution service or function that would ordinarily be performed by HCPSS's employees. The Contractor agrees that it shall be obligated to protect the Confidential Information in its possession or control in accordance with the Privacy Laws to the same extent as HCPSS would be obligated if the Confidential Information was in the possession or control of HCPSS. The Contractor further agrees that it is subject to the requirements governing the use and re-disclosure of personally identifiable information from education records as provided in FERPA.
- 6.2. Contractor's obligations with respect to Confidential Information shall survive the expiration or the termination of this Contract.
- 6.3. Contractor acknowledges that Contractor's failure to comply fully with the restrictions placed upon use, disclosure and access to Confidential Information may cause HCPSS grievous irreparable harm and injury. Therefore, any failure to comply with the requirements of this Section shall be a material breach of this Contract.
- 6.4. Contractor agrees and acknowledges that it is not the custodian of any Confidential Information that may be in Contractor's possession or control. Contractor shall forward any request for disclosure of Confidential Information to:

Public Information Office
The Howard County Public School System
10910 Clarksville Pike

7. Relationship of The Parties. It is understood and agreed that Contractor is an independent contractor of HCPSS, and not an employee. Except as set forth in this Contract, the HCPSS will not withhold income taxes, social security or any other sums from the payments made to Contractor hereunder. All employees or contractors of Contractor shall in no way be considered employees of HCPSS, but rather they shall be employees or contractors of Contractor, and Contractor shall bear full responsibility for compensating those persons and for the performance of the Services by way of them.
8. Insurance. Contractor shall maintain in full force and effect adequate insurance coverage to protect against the risks associated with the performance of Services under this Contract, as further set forth in Insurance Requirements (Attachment A), or as set forth in Contractor's proposal should the coverage and limits therein exceed the required minimum levels. Contractor shall provide to the Purchasing Office a certificate of insurance including evidence of the required limits at the execution hereof, and annually thereafter.
9. Indemnification. The Awarded Contractor shall be responsible for any loss, personal injury, expense, death and/or any other damage which may occur by reason of Contractors acts, negligence, willfulness or failure to perform any of its obligations under this agreement. Furthermore, any acts on the part of any agent, director, partner, servant or employee of the Contractor are deemed to be the Contractors acts. Contractor agrees to indemnify and hold harmless the Howard County Public School System and its Board of Trustees, Employees, Agents and Students from any claim, damage, liability, expense, and/or loss, including defense costs and attorney fees, arising directly or indirectly out of the Contractor's performance under this agreement. The indemnification obligation of the successful Contractor shall include, but shall not be limited to injuries to individuals and property of individuals who are not parties to the contract. In addition, the indemnification obligation of the successful Contractor shall cover the acts or omissions of any subcontractors hired by the successful Contractor. Furthermore, the indemnification obligation of the successful Contractor shall survive termination of the contract for any reason.

Neither party shall be liable to the other for indirect, consequential, incidental, punitive, exemplary, or special damages, or losses, including without limitation lost profits and opportunity costs.

10. Termination for Default. If the Contractor fails to fulfill its obligation under this Contract properly and on time, or otherwise violates any provision of the Contract, HCPSS may terminate the Contract by written notice to the Contractor. The notice shall specify the acts or omissions relied upon as cause for termination. HCPSS will provide Contractor a reasonable opportunity, not to exceed 10 business days, to cure the act or omission, provided such opportunity to cure does not extend the deadline for any deliverables and does not cause HCPSS further damage. All finished or unfinished work provided by the Contractor, to which HCPSS is entitled pursuant to this Contract shall become HCPSS's property. HCPSS shall pay the Contractor fair and equitable compensation for satisfactory performance prior to receipt of notice of termination, less the amount of damages caused by Contractor's breach. If the damages are more than the compensation payable to the Contractor, the Contractor will remain liable after termination and HCPSS can affirmatively collect damages.
11. Termination for Convenience. The performance of work under this Contract may be terminated by HCPSS in accordance with this clause in whole, or from time to time in part, whenever HCPSS shall determine that such termination is in the best interest of HCPSS. HCPSS will pay all reasonable costs associated with this Contract that the Contractor has incurred up to the date of termination and all reasonable costs associated with termination of the Contract. However, the Contractor shall not be reimbursed for any anticipatory profits that have not been earned up to the date of termination.
12. Delays and Extension of Time. The Contractor agrees to prosecute the work continuously and diligently and no charges or claims for damages shall be made by it for any delays or hindrances from any cause whatsoever during the progress of any portion of the work specified in this Contract. Time extensions will be granted only for excusable delays that arise from unforeseeable causes beyond the control and without the fault or negligence of the Contractor, including but not restricted to, acts of God, acts of public enemy, acts of the State in either its sovereign or contractual capacity, acts of another Contractor in the performance of a

contract with the State or HCPSS, changes in law or regulation, action by government or other competent authority, fires, earthquakes, floods, epidemics, quarantine restrictions, strikes, freight embargoes, malicious or criminal acts of third parties, or delays of subcontractors or suppliers arising from unforeseeable causes beyond the control and without the fault or negligence of either the Contractor or the subcontractors or suppliers.

13. Suspension of Work. The Purchasing Office unilaterally may order the Contractor in writing to suspend, delay, or interrupt all or any part of its performance for such period of time as the Purchasing Office may determine to be appropriate for the convenience of HCPSS.
14. Subcontracting and Assignment.
 - 14.1. The Contractor may not subcontract any portion of the Services provided under this Contract without obtaining the prior written approval of HCPSS nor may the Contractor assign this Contract or any of its rights or obligations hereunder, without the prior written approval of HCPSS. HCPSS shall not be responsible for the fulfillment of the Contractor's obligations to subcontractors. Any such subcontract shall be subject to any terms and conditions that HCPSS deems necessary to protect its interests. Contractor shall remain responsible for performance of all Services under this Contract, and shall be subject to liability to HCPSS for acts and omissions of subcontractors.
 - 14.2. Neither party may assign this Contract without the prior written consent of the other party, which consent shall not be unreasonably withheld, except that Contractor may assign this Contract to any parent, subsidiary, affiliate or purchaser of all or substantially all its assets with notice to HCPSS. Contractor may designate a third party to receive payment without HCPSS's prior written consent unless in conflict with Maryland or federal law, but shall provide HCPSS with notification thereof.
15. Contract Integration and Modification. This Contract and the documents incorporated herein form the entire agreement of the parties with respect to the subject matter of this procurement, and supersede all prior negotiations, agreements and understandings with respect thereto. This Contract may be amended with the written consent of both parties. Amendments may not significantly change the scope of the Contract.
16. No Third Party Beneficiaries. This Agreement is only for the benefit of the undersigned parties and their permitted successors and assigns. No one shall be deemed to be a third party beneficiary of this Agreement.
17. Notices. Notices under this Contract will be written and will be considered effective upon personal delivery to the person addressed or five (5) calendar days after deposit in any U.S. mailbox, first class (registered or certified).
18. Retention of Records. Contractor shall retain and maintain all records and documents relating to this Contract for three years after final payment and will make them available for inspection and audit by authorized representatives of HCPSS, including the Purchasing Office or designee, at all reasonable times.
19. Contingent Fee Prohibition. The Contractor warrants that it has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee or agent working for the Contractor, to solicit or secure this Contract, and that it has not paid or agreed to pay any person, partnership, corporation, or other entity, other than a bona fide employee or agent, any fee or any other consideration contingent on the making of this Contract.
20. Compliance with Laws. The Contractor hereby represents and warrants that:
 - 20.1. It is qualified to do business in the State of Maryland and that it will take such action as, from time to time hereafter, may be necessary to remain so qualified;
 - 20.2. It shall comply with all federal, State, and local laws, regulations, and ordinances applicable to its activities and obligations under this Contract; and
 - 20.3. It shall obtain, at its expense, all licenses, permits, insurance, and governmental approvals, if any, necessary to the performance of its obligations under this Contract.

21. Indemnification. HCPSS shall not assume any obligation to indemnify, hold harmless, or pay attorneys' fees that may arise from or in any way be associated with the performance or operation of this Contract.
22. Multi-Year Contracts Contingent Upon Appropriations. If HCPSS fails to appropriate funds or if funds are not otherwise made available for continued performance for any fiscal period of this Contract succeeding the first fiscal period, this Contract shall be canceled automatically as of the beginning of the fiscal year for which funds were not appropriated or otherwise made available; provided, however, that this will not affect either HCPSS's rights or the Contractor's rights under any termination clause in this Contract. The effect of termination of the Contract hereunder will be to discharge both the Contractor and HCPSS from future performance of the Contract, but not from their rights and obligations existing at the time of termination. The Contractor shall be reimbursed for the reasonable value of any nonrecurring costs incurred but not amortized in the price of the Contract. HCPSS shall notify the Contractor as soon as it has knowledge that funds may not be available for the continuation of this Contract for each succeeding fiscal period beyond the first.
23. Network/Data Security. HCPSS is required to assess risks, ensure data integrity, and determine the level of accessibility that must be maintained.
 - 23.1. Specific activities include:
 - 23.1.1. Identification of security, privacy, legal, and other organizational requirements for recovery of institutional resources such as data, software, hardware, configurations, and licenses at the termination of the contract.
 - 23.1.2. Assessment of the contractor's security and privacy controls.
 - 23.1.3. Including HCPSS's security and privacy requirements in the agreement
 - 23.1.4. Periodic reassessment of contractor services provisioned to ensure all contract obligations are being met and to manage and mitigate risk.
 - 23.2. The Contractor is the owner or authorized user of the Contractor's software and all of its components, and Contractor software and all of its components, to the best of Contractor's knowledge, do not violate any patent, trademark, trade secret, copyright or any other right of ownership of any third party.
 - 23.3. Contractor shall (i) establish and maintain industry standard technical and organizational measures to help to protect against accidental damage to, or destruction, loss, or alteration of the materials; (ii) establish and maintain industry standard technical and organizational measures to help to protect against unauthorized access to the Services and materials; and (iii) establish and maintain network and internet security procedures, protocols, security gateways and firewalls with respect to the Services. Contractor software and its components are equipped and/or designed with systems intended to prevent industry known system attacks (e.g., hacker and virus attacks) and unauthorized access to confidential information.
 - 23.4. Report any confirmed or suspected breach of data to HCPSS within one hour of discovery or detection. Any confirmed or suspected computer security incidents not resulting in breach of HCPSS data shall be reported to HCPSS within 12 hours of discovery or detection.
 - 23.5. Follow strong identity management characteristics and practices, requiring users to adhere to organizational usage, construction, and change requirements.
 - 23.6. Configure and maintain network to be suitably hardened against security threats and ensure adequate performance.
 - 23.7. On an annual basis, Contractor shall provide Service Organization Control (SOC) 2, Type 2 reports or equivalent, for all services and facilities from which the services are provided. It is the Contractor's

responsibility that such Reports are provided under the terms and conditions of this Contract without HCPSS being required to agree to additional terms and conditions that may be applied by a third party. If a Report states that a facility has failed to materially satisfy one or more control objectives, Contractor will, as HCPSS's sole remedy, use commercially reasonable efforts to cause the facility to materially satisfy all control objectives. If, despite Contractor's efforts, the facility cannot materially satisfy all relevant control objectives, Contractor will mitigate the issue in a commercially reasonable manner which may include the migration to an alternate facility which materially satisfies all control objectives. Failure to do so may be considered a material breach of this Agreement in the sole and reasonable discretion of HCPSS.

23.8. HCPSS or an appointed audit firm (Auditors) has the right to audit Contractor and its sub-vendors or affiliates that provide a service for the processing, transport or storage of HCPSS data. Audits will be at HCPSS's sole expense which includes operational charges by Contractor, except where the audit reveals material noncompliance with contract specifications, in which case the cost, inclusive of operational charges by Contractor, will be borne by the Contractor. In lieu of HCPSS or its appointed audit firm performing their own audit, if Contractor has an external audit firm that performs a review, HCPSS has the right to review the controls tested as well as the results, and has the right to request additional controls to be added to the certified report for testing the controls that have an impact on its data.

24. School Calendar. Work performed inside HCPSS facilities shall be performed during HCPSS working hours (see HCPSS School Calendar at <http://www.hcpss.org/calendar>).

SECTION 4. SCOPE OF WORK

1. Current Environment

1.1. Hardware Infrastructure

1.1.1. HCPSS currently has two types of telephone systems: administrative and classroom. Approximately 74 standalone administrative telephone systems are in operation, most of which are Nortel Norstar key systems working behind Verizon Centrex®. Most, if not all of these systems have their own voicemail and/or answering capabilities for use by that specific location. However, there are additional systems from various manufacturers in various HCPSS locations. These include the following:

1.1.1.1. Two Mitel systems serving the administration building/complex Avaya Communication Manager, of which serves as an internet protocol telephony (IPT) pilot

1.1.1.2. Currently, the classroom count for HCPSS schools is just over 2,400. There are approximately 76 corresponding classroom telephone systems, 15 are Rauland Telecenter V systems and the remaining, with one exception, are Rauland Telecenter 21 systems (<http://www.rauland.com/TelecenterSystem21.cfm>). (Please see Attachment E for further details). The administrative phones are integrated with the classroom phone system via up to eight (four inbound, four outbound) loop start analog single lines connected to single line analog ports off the key telephone systems. The trunks connect to the public switched telephone network (PSTN) via Centrex facilities.

1.1.1.3. Two HCPSS organizations provide support for the two classes of systems. IT supports the administrative systems, while Building Services supports the classroom systems.

1.2. Software

1.2.1. HCPSS administrative and classroom systems are integrated without the use of custom software.

1.3. Current Network Infrastructure

1.3.1. The HCPSS network comprises 3Com/HP/Aruba Switches, Juniper/Cisco Routers and Metro Ethernet Services from Howard County Government. The LANs provide 100MB (non-power over Ethernet (POE)) station connections over a three-Gigabit backbone. The wide area network (WAN) services are 1GB at elementary schools, 3GB service at middle schools, and 5GB at high schools. Most locations have power-over-ethernet (POE) switches in place with virtual LANs (VLANs) already defined. HCPSS has not finalized its decision on whether to converge voice and data over one network or maintain discrete physical IP networks for voice and data. If the networks are to be converged, the number of switch ports must increase.

1.3.2. HCPSS has Wi-Fi coverage in all locations. The Aruba system in place is based on AP 105 access points that provide coverage in the schools and appropriate areas. An Aruba controller is in every school, equipped with a firewall and applications software. The system supports voice quality of service (QOS) and multiple voice protocols, i.e., Cisco "skinny," SIP, and H.323.

1.3.3. Based on its assessment activities, HCPSS identified its high-level management, user, technical, support, and operational requirements for the new communications Solution. These requirements are addressed in a later section of the RFP. **Attachment A - HCPSS WAN High Level Diagram and HCPSS LAN High Level Diagram** depict the current network topologies.

2. Objectives

- 2.1. This RFP focuses on the administrative telephones, classroom security, communication, and related requirements for the entire school systems including new construction or renovations.
- 2.2. HCPSS seeks to evaluate the capabilities of available communication Solutions (premises-based, hosted, or a hybrid configuration) and ultimately identify a replacement system for obsolete telephone systems in consideration of the following objectives:

Objective 1: Provide a cost effective telephone system Solution for elementary, middle and high schools and administrative offices.

Objective 2: Integrate with or replace the various overhead paging systems.

Objective 3: Leverage the use of HCPSS TLS WAN and the Howard County fiber network.

- 2.3. The RFP is not solely a list of features and functions. Although the RFP contains some specific required features and functions that the Offeror must address and provide requested details, the successful Offeror's response will address HCPSS requirements in a creative and thorough manner. The successful proposal will be concise, well organized, and provide details about how the proposed Solution addresses the requirements: technically, operationally, and financially.
- 2.4. It is HCPSS' intent to contract with a vendor for the purposes of acquiring and making fully operational all new systems and peripheral hardware/station devices with all software options and capabilities that this RFP's detailed specifications identify and require.
- 2.5. HCPSS has not determined the final architecture for its Solution and will evaluate premises-based, hosted, and/or hybrid configurations. HCPSS wants to acquire the best value Solution. Some requirements of this RFP will apply to all potential Solution architectures. Other sections will apply only to premises-based or hosted-based. In those cases, the RFP will specify what architecture applies to the particular section.
- 2.6. Offeror's proposal shall 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 HCPSS applications. Offerors must reply with all upfront, one-time costs and yearly recurring costs to show the all-inclusive, total cost of ownership.

3. High Level Requirements

- 3.1. The following high-level management, user, technical, support, and operational requirements shall be incorporated into the Proposer's Solution:
 - 3.1.1. Staged Implementation: The new Solution shall be implemented in stages.
 - 3.1.2. Scale: As the new Solution will support the entire HCPSS, including schools, classrooms, offices, administration, maintenance, and other non-academic locations, it must scale to a potential of 10,000 stations/endpoints.
 - 3.1.3. Include administrative technical training.
 - 3.1.4. Include end-User training.
 - 3.1.5. Support for the proposed Solution must be available to HCPSS from the manufacturer, and there shall be no restrictions on how that support is obtained.

- 3.1.6. Have central and remote management and administration capabilities for all locations. These include maintenance, management, administration, modifications (moves, adds, changes-MACs).
- 3.1.7. Allow alarms to be sent to a central HCPSS system, SNMP preferred.
- 3.1.8. Allow access to busy trunks, release trunks, run diagnostics, trace problems and any maintenance function that the system has available.
- 3.1.9. Allow digit drop/modify/add for station-station, trunk-trunk, trunk-station, and station to trunk
- 3.1.10. Ability to Hot-Swap components.
- 3.1.11. Ability to manage stations (buttons added/removed/changed) without requiring an interruption to service.
- 3.1.12. Support VoIP stations, speaker phones, and softphones.
- 3.1.13. Support stations that have full features, capable of working over Cat-3 up to 3,000 feet loop lengths without repeaters.
- 3.1.14. Support VoIP codecs for low bandwidth connections.
- 3.1.15. Support PRI, D4, H.323, SIP, DID and POTS trunk interfaces.
- 3.1.16. VoIP must be certified/approved for use with 3Com/HP/Aruba/Extreme and Cisco Meraki switches.
- 3.1.17. Have the capability for multiple, concurrent conference calls over different bridge lines with the same VoIP / softphone app capabilities mentioned above with variable numbers of callers e.g. 5, 25, 100 or even greater.
- 3.1.18. Have mute / unmute options for in-call privacy.
- 3.1.19. Have voicemail to email transcription with email forwarding to recipients.
- 3.1.20. Desktop and softphones must support telephone headset.
- 3.1.21. Have find me, follow-me, forward options to redirect calls to alternative devices.
- 3.1.22. Have unified messaging – deliver multiple message types to a single email box.

SECTION 5. EVALUATION PROCESS

General Requirements.

1. Transmittal Letter

A transmittal letter prepared on the Offeror's business stationery must accompany the Technical Proposal. The letter should be an executive summary that clearly and concisely summarizes the content of the Proposal. The letter must be signed by an individual who is authorized to bind the firm to all statements, including services and financial commitments. Include the Offeror's official business address and state in which it is incorporated or organized. An appropriate contact name, title, phone number, and email address should also be provided for HCPSS's use during the procurement process.

2. Signing of Forms

A Proposal, if submitted by an individual, shall be signed by the individual. If submitted by a partnership, a Proposal shall be signed by such member(s) of the partnership with authority to bind the partnership. If submitted by a corporation, a Proposal shall be signed by an officer, and attested by the corporate secretary or an assistant corporate secretary; if not signed by an officer, there must be attached a copy of a board resolution or that portion of the by-laws, duly certified by the corporate secretary, showing the authority of the person so signing on behalf of the corporation.

3. Technical Criteria.

Clear, concise, yet detailed responses to the technical criteria below are to be provided in the Proposal. Standard sales material may be provided, but must be attached as an Attachment rather than included within the body of the Proposal. Offerors must insert a page break for each section of the Proposal to separate responses to each of the technical criteria.

The information identified below must be furnished in the Proposal. Failure to include any of the items listed below may disqualify your firm's response. The Technical Criteria are listed below in order of importance. Offerors are requested to compile their Proposals in the same order. It is the Offeror's responsibility to tailor its response to demonstrate its qualifications to perform the scope of work specifically for HCPSS.

- 1.1. Proposed Solution and Capabilities: Proposing firms are to provide a detailed narrative about how the proposed Solution addresses the capabilities listed in Section II: Scope of Work.
- 1.2. Implementation: Provide a proposed timeline and schedule for implementation of the Solution. Include assumptions, HCPSS resources required and any other relevant information.
- 1.3. Training Support: Describe your training capabilities and ability to provide in-depth training, tailored to user roles, preferably provided virtually and on-demand, as needed by HCPSS.
- 1.4. Technical Support: Describe how your firm provides technical support for end users. Technical support personnel must be directly available, at a minimum, during HCPSS business hours (Monday-Friday, 9:00a.m. - 5:00p.m. EDT/EST), for the life of the contract to provide assistance and troubleshooting to HCPSS users. Technical support should also include a self-help knowledge base and documentation on the software and its functionality. Also to be included is the firm's SLA's in regard to technical support, specifically incident response time. HCPSS's selected firm will be expected to respond to Technical Support issues within one (1) business day.
- 1.5. Staffing Organization and Proposed Key Personnel Qualifications: Proposing firms are to provide a narrative as to how they plan to staff the contract. Provide a resume, including education and employment history, as well as the role to be assigned to HCPSS for the following Key Personnel who are proposed as part of the Solution:
 - 1.5.1. Account/Client Relationship Representative. This is the person who is HCPSS's point of contact

("POC") for managing the relationship between the firm and HCPSS from contract award through contract expiration or termination. It is expected that this person be available for periodic face-to-face and/or teleconference meetings for relationship check-ups.

In addition to the Key Personnel positions listed above, please include resumes for all other team members that are required to fulfill this Solution.

2. Company Profile/Demonstration of Prior Work:
 - 2.1. The Contractor must demonstrate and certify that it possesses at a minimum three (3) years of experience providing product and services as described in this document to institutions similar to HCPSS in complexity and scale.
 - 2.2. Offeror Identifying Information: Provide details on company history, number of employees, financial attestation, and annual sales volume for 2014 and 2015.
 - 2.3. Firms shall provide a statement or attestation of its financial condition to confirm that it has adequate financial resources to support its Technical Proposal response. Such statement and/or attestation may include: financial statements (unaudited) for the past three (3) years, audited financial statements for the past three (3) years, prospectus of publicly traded firms, letter signed by authorized company personnel attesting to its financial viability (preferably notarized statement), or any other documentation that the firm feels adequately attests to its financial resource viability.
3. Signature: Complete and sign the Bid/RFP Signature Sheet (Attachment F)
4. Acknowledgement ability to comply with the insurance requirements identified under Attachment G.
5. Acknowledge compliance with HCPSS Employee Sharing Agreement (Attachment H).
6. Acknowledge compliance with HCPSS Student Data Sharing Agreement (Attachment H).
7. Acknowledgement of Receipt of Addenda Form: If any addenda to the RFP documents are issued prior to the due date and time for Proposals, this form (Attachment J) must be completed, signed, and included in the Offeror's Proposal.
8. Proposal Affidavit: Complete and sign the Proposal Affidavit enclosed in Appendix K and enclose with the Technical Proposal.
9. Acknowledgement of Review of Contract: The HCPSS Contract for this procurement will contain the provisions in Attachment L as well as any additional terms required by HCPSS. By submitting a Proposal, the Offeror warrants that they have reviewed Attachment L, Agreement for Professional Services, and will execute a contract with these terms and conditions after award by the Board of Education. For accounting purposes only HCPSS will issue a purchase order to the awarded firm.
10. Modifications of Technical Proposal.
 - 10.1. Proposals may not be modified, supplemented, cured, or changed in any way after the due date and time, unless specifically requested by HCPSS.
11. Evaluation Process
 - 11.1. Following evaluation of the Proposals the Evaluation Committee will make an initial overall ranking of the Proposals and recommend to the Purchasing Office the award of the contract(s) to the Offeror whose Proposal(s) is (are) determined to be the most advantageous to HCPSS. Minor irregularities contained in Proposals, which are immaterial or inconsequential in nature, may be waived wherever it is determined to be in HCPSS's best interest and when permitted by law. The decision of the award(s) of the Contract will be made at the discretion of the Purchasing Office and will depend on the facts and circumstances of the procurement.

11.2. Following the Purchasing Office's qualifying review and approval. The decision for progressing in the procurement process will be made based on the strengths, weaknesses, advantages, and deficiencies that the Proposals represent.

11.3. Shortlisting: A shortlist may be developed based on the Evaluation results. All Offerors will be notified of the results as they pertain to their respective Proposal. Shortlisted Offerors may also be required to provide a product trial.

12. Oral Presentations/Discussion Sessions.

12.1. Purpose: Based on the Evaluation Committee's initial Evaluation, HCPSS may invite, without cost to itself, the shortlisted Offerors to an oral presentation/discussion session ("Discussion Session"). The purposes of the Discussion Session are as follows:

12.1.1. To provide the Offeror the opportunity to demonstrate its product;

12.1.2. To discuss/clarify any and all aspects of the Technical Proposal, in particular the proposed solution, cost model options, approach/methodologies, implementation process, schedule, staffing of the contract, and ongoing support of the Solution and other applicable professional services;

12.1.3. To allow the HCPSS to meet the Offeror's key personnel and for these personnel to convey directly their experience and expertise in the proposed product and its implementation; and,

12.1.4. To provide an opportunity to clarify the scope of services for the intended contract and discuss any items addressed in the Technical Proposal that may require additional clarification.

12.2. Format: The Discussion Session will be informal, as HCPSS is not interested in a sales presentation by executives and business development staff; rather, HCPSS is requesting a demonstration of the proposed Solution and an interactive discussion with each of the shortlisted Offerors. It is important that those key personnel who are proposed to be assigned to HCPSS fully participate in the presentation and discussion. Ample time will be available for the HCPSS and the Offeror to ask questions and discuss issues and concerns related to the Solution, the scope of the services, and the Offeror's capabilities and qualifications. We anticipate that the Discussion Session will be approximately 90 to 120 minutes in length.

Following the Discussion Session, additional follow-up and/or clarification documentation may be requested of each Offeror.

12.3. Date: The times and dates for the Discussion Session(s) will be set upon completion of the Initial Evaluation. Offerors are advised to set these dates aside in their entirety on the calendars of key personnel identified in their offer.

13. Best and Final Offers, as determined by the Purchasing Office, may be requested at this time.

14. Negotiations: HCPSS may select for award one (1) or more Offeror(s) to negotiate the terms and conditions of the Contract. HCPSS reserves the right to make an award with or without negotiation.

15. Basis for Award: Technical merit will have a greater weight than cost in the final ranking. Award may be made to the Offeror with a higher technical ranking even if its Price Proposal is not the lowest. The Purchasing Office retains the discretion to examine all factors to determine the award of the contract. The goal is to contract with the Offeror(s) that would best meet the needs of HCPSS as set forth in the RFP.

16. **References:** Offeror must provide three (3) customer references for which Offeror provides similar service at a similar scale to those required under this RFP. Offeror must have performed at least three (3) installations of its proposed platform and proposed service model in the last three years. References that HCPSS may contact shall be provided in the format provided below.

Reference #1	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

Reference #1	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

Reference #1	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

1. FCC Approved Offering

The potential Solution must be FCC approved. Offeror shall list the FCC approvals for the potential Solution.

Response:

Submission Instructions

2. Proposal Format

The Offeror's response shall contain an Executive Summary, not to exceed three pages, that summarizes the proposed Solution, its distinctive features, and how it will fulfill HCPSS' stated requirements. Marketing and generic verbiage are neither necessary nor desired. The Executive Summary shall also contain a high-level "block" diagram of the proposed Solution in addition to the three-page limit.

The proposal format shall follow that of the RFP, matching each section's numbering scheme in a paragraph-by-paragraph method. Each paragraph or requirement statement will be repeated in the Offeror's proposal, with the Offeror's response to follow. Every paragraph must be listed. Those paragraphs that do not require an explanation shall be responded to by one of the following statements:

- "Read and understands the requirement and will comply"
- "Takes exception to the requirement." If this is the response, then the Offeror should include its reason for exception and propose its alternative in The Deviation Form: **Attachment B**

Be sure to provide all requested information in response to each specific question or any other request for information in the order and format stipulated in this Solicitation. Do not give partial answers, and do not leave questions blank.

The Offeror may *supplement* its response by referring to appropriate sections of its associated documentation. Such references *should not be in place of a response in the RFP context*. The referral *shall be explicit* in its location; i.e., document, section, page number, paragraph. Vague references, e.g., "see Product Description", "found in Attachment X" or "see www.vendor.com", are *not acceptable*. RFP evaluators will not spend time searching for non-explicit references, nor should Offerors assume that evaluators will read supplemental information.

Response: (Please provide as an Attachment)

3. Proposal Exceptions and Deviations

A Offeror may take an exception to or deviate from a specified requirement. If the proposed Solution does not or cannot conform to the specification, the Offeror shall prepare a Deviation Form (using **Attachment B**) by stating all features and functions to which exceptions or deviations are being taken, explaining why the exception/deviation is being taken, and providing details of how or if its system shall satisfy the required service or capability. The Offeror may deviate from a specified requirement only if it can satisfy the requirement in an alternate manner. Submission of a deviation form does not relieve the Offeror of meeting the specified requirement.

The absence of a completed and signed Deviation Form at the time of proposal submission will hold the Offeror strictly accountable to HCPSS and the specifications as written.

While exceptions and/or deviations themselves are not necessarily grounds for disqualification, the quantity or type of exceptions/deviations may be cause for disqualification, as judged by the proposal evaluation committee. Additionally, any exception/deviation from the specifications as written that is not submitted, as required by preceding description, will be grounds for rejection of the material and/or equipment if delivered.

Response:

4. Supporting System Documentation

Provide at least three electronic copies of supporting system documentation at System Acceptance. Documentation shall include, but not be limited to, the following.

- System or Product Descriptions, including all hardware, software, specifications, and capacities for key components of the proposed Solution
- System Administration and Network Management Description
- Enhanced or Peripheral Applications and/or Systems Descriptions
- Feature and Function Descriptions (not simply a list) for all components being proposed
- Any other documentation that will describe and clarify the proposed Solution's capabilities

Response: (Please provide as an Attachment)

5. Solution Requirements

While the selected Offeror will be ultimately responsible for the Solution's service provision, HCPSS must understand how the proposed new Solution will address HCPSS's requirements. The proposal should be detailed and provide technical specifications to address the following business and communications requirements. In most instances, the Offeror can and should respond directly to the compliance and availability information being requested. When more detailed information is requested, the proposal response should be direct and concise. Boilerplate and generic verbiage is discouraged unless it is *directly applicable* to the requested information.

NOTE: Unless otherwise noted, all terms are found and defined in Newton's Telecom Dictionary, 21st Edition, CMP Books, ©2005 and/or Thomas' Concise Telecom & Networking Dictionary, McGraw-Hill, ©2000. Additionally, **Attachment C** contains a Glossary of Terms for the acronyms in this document.

5.1 General Solution and Capacity Requirements

For **each set of features, functions, and capabilities** the Offeror shall indicate in the appropriate column with the appropriate symbol the status of each:

- **Compliance Requirement**

- **FC** – Indicates “full compliance” with the stated requirement(s) with no reservations, limitations, *caveats*, or deficiencies.
- **PC** – Indicates “partial compliance” with the stated requirement(s) with some reservations, limitations, *caveats*, or deficiencies. Offeror must provide a brief description of why it is only partially compliant and if or how the response could become totally compliant.
- **NC** – Indicates “non-compliance” with the stated requirement(s).

- **Availability Status**

- **S** - Standard equipment and/ or software-based feature/function or capability included in the proposed Solution's feature complement at no additional charge.
- **OI** - “Optional Included” indicates the feature/function is optional to the basic proposed Solution's configuration, available at an extra charge, and is included in the total system price.
- **ON** - “Optional, Not Included” indicates the feature/function is optional to the basic proposed Solution's configuration, available at an extra charge to be listed as a separate line item in the Pricing Table.
- **NA** - Not Available.

NOTE: If a column is “blacked out” or shaded for one of the preceding symbols, Offeror need not populate the shaded cell, unless other pertinent information is added. If columns are open or unshaded, then Offeror shall provide the appropriate compliance and status indications and the requested information. The Offeror's response will correspond with any identifying numbers or letter in the requirement so that the response can be easily correlated with the appropriate requirement(s).

If additional space is required, Offeror may attach additional sheets, and so indicate in the indicated cell. However, please ensure that any additional pages are cross-referenced with the questions or requirements to which they apply.

5.2 General Solution and Capacity Requirements

General Solution & Capacity Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1. Commercially available offering			
a. (PREMISES) Provide the model and designation of the proposed solution			
b. (HOSTED) Provide the call processing platform of the proposed solution			
c. Provide the introduction Date (month/year) of the proposed solution			
d. Provide the proposed major version (month/year of introduction)			
e. Provide the anticipated upgrade date for proposed major version (Month/year)			
f. Provide the number of annual major software upgrades, i.e., generic releases			
2. Engineered as totally non-blocking so that all extensions can go off hook simultaneously and receive dial tone			
3. Describe the proposed Solution's operating system for call processing and voicemail services			
4. Provide 99.99% dial tone availability to users. Offeror shall confirm that the proposed Solution will meet the requirement, excluding scheduled downtime that HCPSS approves in advance. HCPSS defines dial tone as the readiness of the system to support call origination and receipt			
5. Support HCPSS' current four-digit dialing plan			

General Solution & Capacity Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
6. 9+Four-digit dialing any HC agency based on a separate Centrex, Briefly describe how this is accomplished			
7. Retain HCPSS current telephone numbers			
8. Certified and proven to operate seamlessly on all data infrastructures including the following:			
a. Cisco			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
b. 3Com			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
c. Hewlett Packard/Aruba			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
d. Extreme Networks			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
e. List SIP trunking service providers			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
f. List PRI service providers			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>
9. 911/E911 capabilities for emergencies or incidents occurring in the classroom			

General Solution & Capacity Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
a. Describe briefly how the proposed Solution provides information and what level of data to the public safety answering position (PSAP)			
b. Describe how the proposed Solution integrates with the current paging system to provide the PSAP data			
10. Proposed solutions must be designed, owned, and certified by the manufacturer and not just be an assembly of other vendors' components			

5.3 Redundancy and Failover Requirements

The proposed Solution must provide multiple levels of redundancy, including high availability and geo-redundant components to meet the availability requirements. "High availability" is defined as collocated redundant components, either of which can take over fully for its counterpart during a planned or unplanned outage before the proposed Solution fails over to a secondary call processing infrastructure. Geo-redundancy is defined as call processing infrastructure located in geographically separate facilities. Both Solution locations, i.e., Primary and Secondary, will have high availability configurations. Additionally, HCPSS requires that at minimum dial tone and messaging applications have the highest level of redundancy and failover.

Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1. Briefly describe the redundancy and failover architecture of the proposed Solution and which of the following components of the Solution are redundant in a high availability and/or geo-redundant configuration in the Primary and Secondary sites:			
a) Call control unit/CPU			
b) System database			
c) Storage components			

Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
d) Site-specific components			
e) List other redundant components and indicate whether they are high availability or geo-redundant			
2. Describe the frequency of database replication and synchronization in the Primary and Secondary locations			
3. Describe the redundancy alternatives for proposed peripheral servers			
4. Provide the following redundancy capabilities of the proposed solution:			
a) Maximum and recommended network round trip delay tolerance values between the Primary and Secondary core call control processors			
b) Maximum and recommended network round trip delay, tolerance values, including call set up and tear down, between endpoints			
c) Type(s) of required or actual connectivity between spatially redundant call processor assemblies			
d) Method by which fault tolerance and redundancy among the Solution sites is categorized and measured			
5. The Solution <u>must automatically failover</u> to secondary call processing unit(s) if the Primary call processing unit fails. "Hot standby" is defined such that calls in progress remain connected and the backup system database is fully and continuously synchronized with the primary system database. Should one component fail, the standby			

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Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
provides full services without interruption			
a) Describe the connectivity requirements or existent connectivity between the primary and standby call processing units. Include distance limitations, acceptable physical infrastructure (such as fiber, copper), network requirements & facilities (such as PRIs or metro-ethernet services), and any other conditions necessary to support the automatic failover requirement			
b) Include a high-level configuration diagram (it may be on a separate page) depicting all primary components and necessary or existent network connectivity for this configuration for the Primary and Secondary Call Processing Infrastructures			
c) Provide the time interval for all stations to reregister to the secondary call processing unit			
d) Provide the recovery time objective (in minutes) following restoration after a total loss of power			
e) Describe what happens to "calls already established" during a power loss			
f) Confirm how or if endpoints will reregister with the Primary once the outage is resolved			
6. Support a disaster recovery/business continuity capability. Describe the proposed Solution's recovery/business continuity capability, e.g., ability to move units & set up if the Primary and Secondary sites are out of			

Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
commission			
a) Provide the failover interval, also known as the Recovery Time Objective, within the high availability components			
b) Provide the failover intervals, in milliseconds, between the Primary and Secondary sites			
c) State the Recovery Point Objective, defined for this RFP as the point in time at which system can recover previous configuration data to restore the system			
7. HCPSS requires a well-defined, documented, and periodic restoration test process. Offeror shall describe its process and frequency to test failure, failover, and restoration conditions for the proposed solution			
8. In the event of a WAN failure, HCPSS requires that remote locations must retain multiple levels of survivability a) At Level 1, location(s) must be survivable, retain internal calling and feature capabilities and the ability to make/receive external calls, i.e., dial tone			
b) At Level 2 HCPSS prefers to have the survivable mode also provide a basic complement of features and functions at the remote locations during the WAN failure. These features include at minimum Call Hold, Call Transfer, Call Forward, and, if possible, message waiting indication			
c) At Level 3 the remote location will also continue to have access to centralized applications, such as voice messaging, call accounting, or			

Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
unified messaging, that are normally provided over the WAN link			
d) Describe how the proposed Solution will address each of these three survivability levels			
e) Describe the level of features and functions that will be available at the remote location during the WAN outage. Note any features/functions that will not be available during the outage			
f) Describe how centralized applications will remain available during the WAN outage, e.g., PSTN reroute or an alternate means			

5.4 Physical Components and Environmental Requirements

Physical Components and Environmental Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide a logical box and line diagram of the proposed solution(s) that depicts the primary components, quantities of each, and associated connectivity. The diagram may be on a separate page(s) or be included in the Executive Summary			
2) Provide a bay face/elevation diagram with all racks, components, and hardware of the proposed solution(s). The diagram may be provided on separate pages in the response following this page. For HOSTED solutions, the elevation diagram			

Physical Components and Environmental Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
should be for the customer site			
3) Uninterruptible power supply (UPS) for common equipment for one hour.			
4) (PREMISES) Provide the proposed system's environmental and required space specifications.			
5) HCPSS requires that all user and applications licenses be a "single cost" item. These universal licenses will apply to any HCPSS user in any HCPSS location. Licenses will be totally transferable among locations and users. (Include licensing package options and pricing)			
6) Licenses are customer installable. Briefly describe the process to accomplish this			
7) (PREMISES) Replace components with restart or power			
a) Describe the process			
b) Identify which components can be "hot swapped."			
c) Identify any components that cannot be "hot swapped."			

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6. System Requirements

These HCPSS requirements for the new system are necessary to provide a flexible and comprehensively featured solution.

6.1 System Features and Capabilities

6.11 Conferencing, Intercom, and Call Coverage Requirements

Conference, Intercom, and Call Coverage Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
Offeror shall respond to the following requirements:			
1) Support Six-Party, Station-Controlled Ad Hoc Calling/ Audio Conferencing (six parties minimum). Provide the maximum number of simultaneous six-party conferences supported by the proposed Solution regardless of network facilities' limitations			
2) The conferencing capability must enable the <i>ad hoc</i> conference originator to leave the conference and allow the remaining parties, either internal, external, or both, to continue the audio conference			
3) Support 24-Party, Station-Controlled Ad Hoc or Scheduled Calling/ Audio Conferencing:			
a) Provide the maximum number of simultaneous 24-party conferences supported by the proposed Solution regardless of network facilities' limitations			
b) Briefly describe how this is accomplished			
4) Support the following requirements:			
a) Dial Intercom - Set up or emulate an intercom call based on dialing three or fewer digits to an "intercom" button on the destination telephone			

Conference, Intercom, and Call Coverage Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
b) Automatic Intercom provides the equivalent of a dedicated talk path between two telephones with multiple line appearances. The called terminal is alerted when the calling terminal goes off-hook and/or the appropriate "intercom" feature button is selected			
c) Support a minimum of 20 Intercom Groups. Specify the maximum number of intercom groups.			
d) Provide maximum number of intercom group members system wide			
5) Support flexible Call Coverage features and functions. Offeror shall describe Coverage Features that the proposed Solution provides to meet the following requirements:			
a) Privacy among shared line appearances unless explicit Privacy Release is granted by primary line owner.			
b) View the executives' line statuses at all times			
c) Executive Barge-In (EBI)			
i) Disallowed			
ii) With tone			
iii) Without tone			
d) Call Pick Up (CPU) on direct lines			
e) Parallel, or serial "search" capability for coverage endpoints, to be determined on a station or COS basis			

Conference, Intercom, and Call Coverage Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
6) Hunt Groups:			
a) Circular			
b) Terminal			
c) Pick-up Groups			
d) Secretarial, in which one station may serve as the single last station overflow point from two or more hunt groups within the system			

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6.12 General System Feature Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
1) Support up to 500 Authorization Codes (three-digit) for Long Distance or messaging system access			
2) Support entry of two separate codes, e.g., personal and departmental for each call			
3) Automatic Callback			
4) Automatic Number Identification (ANI) display			
5) Automatic Recall			
6) (PREMISES) Automatic Route Selection (ARS) - briefly describe the criteria by which ARS can be activated			
7) (HOSTED) Indicate if long distance calling (domestic and/or international) is included in the proposed solution. Briefly describe any conditions, caveats, or restraints that apply			
8) Support multiple connectivity for trunk and station interfaces			
a) Direct T1/Primary Rate Interface connectivity			If not a direct interface, describe any necessary components that must be and are included in the response.
b) SIP trunking interface			If not a direct interface, describe any necessary components that must be and are included in the response.
c) Analog trunk (loop start)			If not a direct interface, describe any necessary components that must be and are included in the response.
d) Analog trunk (ground start)			If not a direct interface, describe any necessary components that must be and are included in the response.
e) H.323 internet protocol (IP) trunk			If not a direct interface, describe any necessary components that must be and are included in the response.
f) Analog (POTS) station			If not a direct interface, describe any necessary components that must be and are included in the response.
g) Proprietary digital station, capable of operating on a minimum of Category 5e			If not a direct interface, describe any necessary components that must be and are included in the response.

(Cat5e) cabling with a loop length of at least 100 meters (300 feet).			
h) IP station			If not a direct interface, describe any necessary components that must be and are included in the response.
i) SIP station			If not a direct interface, describe any necessary components that must be and are included in the response.
9) Support 25 Classes of Service (COS). Provide quantity of COS available. HCPSS's current COS parameters include, but are not limited to, unrestricted, restricted, internal only, time of day restricted			
10) Malicious Call Trace.			Describe how this function is invoked and by whom. What components are necessary to support this function.
11) Night Service can be invoked manually.			
12) Night Service can be invoked via timer or programmable variable, such as time of day, day of week, etc			
13) Paging through the speakerphones. Briefly describe required input, types of connector(s), number of zones (at least eight and "all call" are required), maximum number of telephones that support simultaneous paging, and other pertinent characteristics			
14) Paging through a third party overhead paging /public address system. Briefly describe the following:			
a) Number of zones that can be programmed.			
b) Maximum number of telephones that support simultaneous paging.			
c) Other pertinent			

characteristics			
15) Call Logging with Station Message Detail Recording (SMDR) output that can be exported to a third party call accounting system. Briefly describe the output			
16) Describe how to access/integrate to an overhead paging system is accomplished with the proposed solution.			
a) Describe how the proposed Solution can accomplish classroom monitoring via the OHP system			
i) Silent			
ii) Entry indication tone.			
17) Describe how the proposed Solution can provide classroom monitoring directly OHP system integration			
i) Silent			
ii) Entry indication tone.			
18) Describe how the proposed Solution supports classroom-to-classroom calling			
19) Describe how the proposed Solution supports two-way classroom-to-office and office-to-classroom calling/intercom			
a) Describe the configuration and function if the proposed Solution integrates with the OHP system			
b) Describe the configuration and function if HCPSS opts to install classroom telephones off the proposed solution			
c) Visual indication of call from the classroom.			
d) Audible indication of call from the classroom.			

6.1.3 Station and User Requirements

HCPSS requires that the proposed system will have a comprehensive complement of station and user features, functions, and capabilities. The following requirements address the Station and User Requirements. These requirements address will meet staff’s basic business communications requirements. They also include more specific requirements identified by special usage groups, such as professional “knowledge workers,” management, call center, and executive administrative/ clerical. Provide the required information specified below in its response.

Station and User Requirements	Compliance with Requirements. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror’s Response
1) Support the following:			
a) CLID Blocking from the calling party’s side			
b) Automatic Callback			
c) Call Hold			
d) Call Waiting with Indication			
e) Call Pick Up			
f) Call Park with single button pick up			If not single button pick up, describe the process for parking and picking up a parked call.
g) Do Not Disturb with indication			
h) Station Privacy			Is this the default setting?
i) Privacy Release			
j) Ringer Off			
k) Whisper Page via Speakerphone			
2) Headset interface. Some HCPSS staff will require headsets, e.g., attendants, selected administrative and professional staff, and softphone users			
i) Describe interface for conventional wired headset			
ii) Describe interface for cordless/wireless headset including “Bluetooth” devices			
iii) Provide the quantity limit, if any, of headsets/adapters for the solution			
3) Volume Control Settings for endpoint:			

Station and User Requirements	Compliance with Requirements. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
a) Handset			
b) Ringer			
c) Headset			
4) Call Forward and the following variations for internal, external or international calls with up to 15 digits:			
a) Call Forward – Busy (or Universal) in which all calls are sent to a user-programmed destination			
b) Call Forward – No Answer			
c) Call Forward – All Calls			
d) Call Forward – Manual in which calls may be sent to a programmed destination on a per-call basis			
5) Remote Call Forwarding (RCF) or "Follow Me" capabilities:			
a) RCF – Internal and/or External calls			
b) RCF – Activation from a remote location			
c) RCF – Change destination from a remote location			
6) The number of station rings before going to voicemail must be programmable on a per-station basis			If not available on a per-station basis, describe the level of "granularity" to which the phone can be programmed.
7) Multiple Call Logs with at least 20 entries in each of the following logs:			
a) Incoming			
b) Outgoing			
c) Received			
d) Missed calls			
e) Discrete automated attendant for designated offices/departments			
8) Multiple-line, Multiple Appearance in which a line may appear on multiple			

Station and User Requirements	Compliance with Requirements. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
instruments or devices in different offices and locations around HCPSS. State the maximum number of instruments or devices on which the line appearance may appear			
9) Distinctive Ringing			
a) Provide the number of distinctive rings available			
b) Different distinctive rings can be assigned to different line appearances or call sources/trunks on the same physical endpoint			
i) Any or all distinctive rings can be disabled on a per station basis			
ii) Any or all distinctive rings can be disabled on a per line basis			

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6.2 Endpoints

HCPSS requires that the following types of IP endpoints *or equivalent* be proposed. The actual endpoints and quantities will be used by different user communities as determined in the final system design developed with the selected Offeror. While the RFP describes the endpoints generically in this section, Offerors should provide photographs and model numbers of the proposed endpoints. The required or equivalent instruments include the following:

1. **Multi-Line Telephone (MLT-8)** – This MLT-8 will be the primary instrument for most HCPSS staff, including most clerical, supervisory, management, and professional workers. It will have the following capabilities:
 - a. Display of 4x32 characters or equivalent
 - b. Full duplex speakerphone
 - c. At least 8 user-programmable hard/soft line/features buttons
2. **Multi-Line Telephone, 16-button set (MLT-16)** – The MLT-16 will be used by administrative staff that have “receptionist” duties and/or cover for multiple executives and managers. The MLT-16 will have the following capabilities:
 - a. Display of 4x32 characters or equivalent
 - b. Full duplex speakerphone
 - c. At least 16 user-programmable hard/soft line/features buttons
 - d. Accommodate at least one DSS/BLF module (see description below) with enough buttons for assigned executives and managers.
3. **Multi-Line Telephone, 24-button set (MLT-24)** – The MLT-24 will be used by administrative staff that have “receptionist” duties and/or cover for multiple executives and managers. The MLT-24 will have the following capabilities:
 - a. Display of 4x32 characters or equivalent
 - b. Full duplex speakerphone
 - c. At least 24 user-programmable hard/soft line/features buttons
 - d. Accommodate at least one DSS/BLF module (see description below) with enough buttons for assigned executives and managers.
4. **Attendant Console Instrument** – This endpoint will be used by HCPSS receptionist and back up receptionist position. The Attendant Console Instrument must have the following capabilities:
 - a. Display of 8x32 characters or equivalent
 - b. At least 20 user-programmable hard/soft line/feature buttons
 - c. Accommodate enough DSS/BLF buttons to ascertain status and/or select all active stations plus up to 14 trunk terminations.
5. **Mobile “Twin”** – This device will provide wireless/Wi-Fi connectivity, so that users may move away from their desk and still receive, answer, make, and handle calls with features and functions comparable to the wired desktop. The Mobile “Twin” will have the following capabilities:
 - a. Display appropriate to its size and function

- b. Headset (corded or wireless) compatibility
 - c. Multi-line capability
 - d. Wi-Fi phones that will work on any network segment that can be reached via IP, i.e., “routable”
 - e. DECT-based devices
6. **Single Line telephone (SLT)** for use in public areas such as lobbies, conference rooms, reception areas, workrooms, closet areas, and/or locations with basic telephone requirements
 - a. Monitor speaker and/or full duplex speakerphone
 7. **Analog Device Interface** for fax, modem, analog telephones, and other analog devices
 8. **DSS/BLF Module** – This module will be used by administrative and attendant users to provide status for the stations being covered by the particular user. In the case of the attendant, the combination of the Attendant Console Instrument and the DSS/BLF module must be sufficient to accommodate all active stations.
 9. **Conference Room Telephone** – Used in conference rooms and equipped with high-gain microphone(s) and full duplex speakerphone. Must be proposed with digital, analog, and IP versions.
 10. IP Softphone – Used to totally replace or supplement the desktop instrument.

6.2.1 Desk Instruments

For **each endpoint** the Offeror shall indicate its compliance using the appropriate compliance and availability abbreviation and provide the appropriate additional information when requested:

- **Compliance Requirement**
 - **FC** – Indicates “full compliance” with the stated requirement(s) with no reservations, limitations, *caveats*, or deficiencies.
 - **PC** – Indicates “partial compliance” with the stated requirement(s) with some reservations, limitations, *caveats*, or deficiencies. Offeror must provide a brief description of why it is only partially compliant and if or how the response could become totally compliant.
 - **NC** – Indicates “non-compliance” with the stated requirement(s).
- **Availability Status**
 - **S** - Standard equipment and/ or software-based feature/function or capability included in the feature complement at no additional charge.
 - **OI** - “Optional Included” indicates the feature/function is optional to the basic proposed system configuration, available at an extra charge, and is included in the total system price.
 - **ON** - “Optional, Not Included” indicates the feature/function is optional to the basic proposed system configuration, available at an extra charge.
 - **NA** - Not Available.

NOTE: If a column is “blacked out” or shaded for one of the preceding symbols, Offeror need not populate the shaded cell. If columns are open or unshaded, then Offeror shall provide the appropriate compliance and status indications and the requested information. If additional space is required, Offeror may attach additional sheets, and so indicate in the indicated cell. However, please ensure that any additional pages are cross referenced with the questions to which they apply.

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Endpoints Requirements Desk Instruments	MLT-8	MLT-16	MLT-24	Attendant Console Instrument	Mobile "Twin"	SLT
Offeror shall indicate how its endpoints meet the following requirements, i.e., compliance to requirement and availability status:						
1) Display as specified						
2) Full duplex speakerphone						
3) Specified number of user programmable hard/soft buttons						
4) Maximum number of simultaneous calls/line appearances						
5) Delivery & display of Calling Number / Name identification for all internal HCPSS calls and external calls if the public network delivers that data						
6) Headset connectivity						
a) Direct connection, wired without adaptor box						
b) Wireless, e.g., Bluetooth						
7) Wi-Fi phones that will work on any network segment that can be reached via IP, i.e., "routable"						

6.2.2 Analog Device Interfaces

Analog Device Interfaces	Offeror's Response
Describe the proposed analog device interfaces for the following: 1) Fax machines 2) Analog telephones 3) Modems	

6.2.3 Direct Station Selection/Busy Lamp Field (DSS/BLF) Module

DSS/BLF Module	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
1) Support at least 60 additional programmable line/feature buttons			Maximum number of programmable line/feature buttons.
2) The DSS/BLF module must support a "shift" feature to enable a single hard button to support at least two soft appearances			
3) Power source for each proposed DSS/BLF module: local or centrally powered			Describe power options
4) If local, confirm if multiple DSS/BLF modules can be "daisy chained" off one power source			
5) If so, provide the maximum number of modules that can work in the single power source configuration			
6) Works with MLT-8, MLT-16, MLT-24, , and Attendant Console Instrument.			State the maximum number of DSS/BLF Modules that can be configured with any single endpoint.

6.2.4 IP Softphone

Endpoints Requirements IP Softphone	Offeror's Response
1. Identify the proposed softphone's computer compatibility and additional components, e.g., headset, handset, microphone, camera, etc. to support call origination and reception and	
2. Provide a photo of the proposed softphone as it appears on the monitor screen	Include the name and/or model for the proposed softphone.
3. Provide the recommended, not minimum, hardware, software, processor, and operating system requirements to support the IP softphone	

6.3 System Administration and Management

HCPSS requires access to management information so that it can monitor system performance, access and produce reports as necessary, verify data, and react to potential issues. HCPSS requires logical central system management and administration for all applications and locations. The Offeror should provide succinct, yet complete, responses as necessary to HCPSS requirements listed below.

System Administration & Management	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Context-Sensitive Help based on the screen or area being currently accessed by the user			
2) Centralized management and administration for all applications and locations			
3) Single terminal for all system administration requirements listed below			
4) Maintenance and Administration requirements listed below:			
a) Full access to all maintenance and administration capabilities by client personnel.			
b) Batch moves, adds, and changes (MACs).			
c) Real-time MACs without service interruption.			
d) Automatic directory update based on MAC completion.			
e) Remote Access Capabilities			
i) Via web			
ii) Via virtual private network (VPN)			
iii) Diagnostics			
iv) Problem trace			
v) Alarm notification to remote monitoring center.			
vi) All maintenance functions			

System Administration & Management	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
vii) Identify any maintenance functions that are not accessible remotely.			
f) Administration			
g) Diagnostics			
5) Comprehensive statistical reporting for internal and external network-related traffic			Briefly describe what statistical reporting topics are available.
6) SNMP-compliant protocol			
7) Web access to change telephony feature(s) and /or perform administrative functions			
8) Multiple user interfaces listed below:			
a) Command line			
b) Graphical user interface (GUI)			
c) Menu			
d) Web portal			

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6.4 Attendant Requirements

HCPSS's attendants will be located in the suite reception area of the Administration Building as well as other locations and serve primarily as "answer and transfer" points for incoming calls to HCPSS general telephone numbers, "zero out" destinations for callers that want to speak with a person, and informational points of contact for callers. Primary requirements for the attendants are multiple call handling with appropriately configured instrumentation and changing greetings remotely in a simple manner. Provide complete yet succinct and concise responses for the following attendant requirements.

Attendant Requirements	Compliance Reqt (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Dedicated attendant console instrument as specified earlier. HCPSS attendants currently have a PC and console interface			
2) Alternate LAN-connected dedicated workstation with attendant console application and capabilities			Describe dedicated and/ or alternate PC-based workstation with photos, model number, and specifications.

6.5 Accessibility Requirements

HCPSS considers accessibility to information and information technology a priority for its staff and contractors. The new system must meet the standards of Section 508 (29 U.S.C. '794d) 194.21 and/or 1194.22 of the federal Rehabilitation Act, be compatible with HCPSS standard assistive technology devices, and provide an "accessible option" for staff with disabilities. The Offeror shall respond to the requirements below.

Accessibility Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Hearing aid compatible (HAC) for cellular & standard telephones with: a) 40 dB amplification b) Direct connection to hearing aids with microphone/telephone (M/T) switches			
2) Support HAC, TTY/TDD, CLID access devices especially for sight & hearing impaired			
3) M4 rating for personal digital assistant (PDA) or cellular devices for hearing aid compatibility performance.			
4) In-line handset amplifier.			

6.6 Public Address Integration Requirements

Currently HCPSS school buildings are equipped with Rauland Telecenter School Wide Communications Systems (one exception is a location equipped with a Care Hawk 1000 system). Fifteen of the oldest systems are Telecenter V Systems. All other schools have Telecenter 21 Systems. The Telecenter 21 Systems are currently equipped with 12 master ports in addition to the station ports indicated (please see Attachment E for further details). The proposed VoIP Solution must have the ability to integrate with the Telecenter system. To interface with a Business Telephone System, All Telecenter systems require the following MINIMUM number of ports:

Type	Central Office (CO) Ports	Analog Telephone Adapter (ATA) Ports*
Elementary	4	4
Middle School	4	4
High School	4	8

HCPSS envisions that it will replace the Rauland systems as schools are renovated. Until then, the Rauland systems will continue to control and be used for individual schools' paging, bells, and clock functions.

The new proposed Solution must provide capabilities that the Rauland now provides. Every classroom will have a telephone off the new solution. Describe in detail how the proposed Solution will address the following use cases:

- 1) Currently if a situation arises in a classroom, the teacher can dial "***", and a preprogrammed messages appear on a message board in the office.
- 2) If a classroom phone is knocked "off hook," it automatically rings the office and sends a preprogrammed message to the office message board,

Response: (Please provide as an Attachment)

*All of the ATA ports must be capable of transmitting ACCURATE IN-Band DTMF AFTER CALL COMPLETION.

The following features are currently available through the HCPSS existing Business Telephone System and are requirements of the proposed replacement system:

Rauland System Integration Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
Allow DIRECT calls from ANY classroom DIRECTLY TO any Business Telephone WITHOUT ANY ADDITIONAL CODE ENTRY			
Provide a Splash tone when initialing a classroom speaker.			
Provide a privacy tone every 15 seconds while the room is being monitored.			
Contact the main office by going off hook and dialing the * key on the classroom telephone			
Dial ** places EMERGENCY Call to the Main office display			
Classrooms can dial any business phone directly.			
Classrooms can dial any outside number, including 911, by dialing "9" or a pin code then the access code			
Building wide "All Call."			
"All Call" to multiple schools.			

NOTE: Finalists will be expected to demonstrate their proposed solutions' capabilities, based on an HCPSS test plan, at a designated HCPSS location to ensure that all requirements can be fully implemented and successfully tested with the Rauland Telecenter Systems.

6.7 Voice Messaging Requirements

The vendor will provide a voice messaging system with uniform messaging capabilities for all HCPSS locations. Offeror shall address the following voice messaging and unified messaging requirements.

Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, software version, and manufacturer of the proposed voice messaging Solution (VMS).			
1) Any new system proposed by the Offeror must include a totally integrated voice messaging system. "Integrated" is defined as including several capabilities:			
a) All calls forwarded to a mailbox go directly to the mailbox without caller intervention or requiring additional digits.			
b) Caller may opt out of voicemail and reach a live person when needed			
c) Visual Message waiting indication (MWI) is provided for all user devices.			
2) This is a critical requirement. Remote recording to dynamically change and rerecord messages based on <i>ad hoc</i> circumstances, e.g., snow, office closure			Briefly describe how this is accomplished.
3) Message Waiting Indication (MWI) and the following requirements:			
a) Audio/stutter dial tone			
b) Visual			
4) Support minimum total of 2,500 voicemail boxes and automated attendants with a potential ultimate quantity of 10,000.			

Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
5) ***Support a minimum of 500 hours of storage for messages and automated attendants			
6) Greetings requirements listed below:			
a) Multiple personal greetings:			
i) Pre-record multiple greetings for routine/emergency use.			
ii) Standard System greeting.			
iii) Line status (busy, ring, no answer), greeting to indicate line status.			
iv) Separate greetings for internal and external callers.			
v) Extended absence greeting.			
vi) Expiration date and time for extended absence greeting.			
b) Override or bypass greeting or prompts.			
c) Information voicemailboxes only with no opportunity to leave a message.			
7) 100 Distribution Lists.			
8) Broadcast list management access is or can be separate from overall system management			
9) Send, receive, forward message, and reply to messages.			

Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
10) Access to voicemail box from a remote location.			
11) Callback to Sender.			
12) Automatic time/date stamp.			
13) Directory access/ dial by name.			
14) Single, logical system appearance to internal and external users.			
15) Single voicemailbox for multiple devices, such as a desk phone, softphone, cell phone, or mobile device.			
16) Common features, functions, and user interfaces.			
17) Automated Attendant.			
18) Automated attendant deactivation:			
a) Manually by location			
b) Automatically by location			
c) Automatically for all locations			
19) "Forms" voicemailboxes, e.g., to place orders for moves, adds, and changes.			
20) Paging or out calling capabilities and message notification to a pager or other internal or external telephone number.			

Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
21) Broadcast capability on manual or scheduled basis, e.g., time of day, day of week (Is there a limit to the amount of numbers that can be included? If so, please provide.)			
22) Special purpose and/or temporary voicemail boxes, used for limited time campaigns, promotions, or surveys.			
23) Save and transfer voice messages from current system to new system.			Briefly describe how this will be accomplished.
24) Programmable threshold alarm for "voicemailbox full" situation.			

FOR REFERENCE ONLY

6.8 Call Accounting System

HCPSS requires a call accounting system that will provide high quality telecom Solution call accounting, CDR, expense management capabilities, work order and procurement, and related services system. The selected Offeror will be responsible for implementation of new software/hardware and reuse of HCPSS' cost center codes. Specific requirements include the following:

Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, software version, and manufacturer of the proposed CAS			
2) Reporting Requirements:			
a) Customized reports to contain HCPSS-selected information and <i>ad hoc</i> reporting capability:			
i) Schedule reports directly to printer.			
ii) Real time and scheduled reports to file.			
iii) Report to file in CSV and HTML formats.			
b) Exception reporting required with at least the following programmable criteria:			
i) Telephone numbers			
ii) Time of day (TOD), day of week (DOW)			
iii) Cost of call			
iv) Call duration			
v) Charge/account codes			
vi) Called number			
vii) Location			
viii) Originating number			
c) Graphic reporting, e.g., charts			
d) Reports to e-mail, scheduled			

Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
e) Reports to e-mail, <i>ad hoc</i> :			
i) Daily			
ii) Weekly			
iii) Monthly			
3) HCPSS requires the following types of accounts to be included in the CAS:			
a) Long distance			
b) Message units / usage charges			
c) Accounting charge, e.g., NRC replacement			
d) Move, add, change (MAC) costs			
e) Cellular telephones (future)			
f) Pagers			
g) Repair charges			
4) Call Accounting Call Processing Requirements:			
a) Receive and process CDR, in batch mode			
b) Receive and process CDR, in real time mode			
c) Sort and review raw CDR data			
d) Toll fraud monitoring			
e) Variety of costing methods			
f) Simultaneous assignment of costing methods			
g) Multiple charge codes:			
i) Fixed rate			
ii) Prorated			
iii) Advance billing			
iv) NRC			

Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
v) Recurring charges			
vi) Others (describe briefly)			
5) General Call Accounting Requirements:			
a) Customized tariffs based on terminating city and LATA			
b) Fixed billing periods			
c) Updated tariff tables (V&H coordinates)			
d) Outbound calls' cost at standard tariff rates			
6) Direct access via web portal to billing and call activity data. The following capabilities are required:			
a) Users for their own account(s)			
b) Super user password for an administrator to enable access to more than one departments billing records.			
c) Authentication of agency web access.			
d) Support of views to database via the web for different users, such as customer, technician, administrator, & agency.			
e) Remote management and administration over the web.			
f) Allow departmental inquiries on billing history details with access to the following:			
i) Past bills			
ii) Call detail			
iii) Call summaries			
iv) Rate information for called number			
v) Monthly recurring charges			

Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
vi) Non-recurring charges			
g) On-line calculation inquiry for agencies/departments with rate quotations for local, toll, and international calls.			
7) Security and Application Administration Requirements:			
a) Prevent unauthorized access to the system.			
b) Determine which applications that departments /users may access.			
c) Applications & menu level security to allow administrator to add, change, or delete by user, group, or agency.			
d) Set access rights			
e) Single point of authentication to track & audit log on assignments.			
f) Audit trail across all functions by associating a user ID, date, & time stamp to all changes.			
8) Provide a description of the following for the call accounting/billing system:			
a) Operating System			
b) Disk storage configuration			
c) Memory requirements			
d) Call collection interface			
e) Network interface			***Backup technology, sized for three years' storage Assume ***XXX long distance calls and ***XXX minutes annually
f) Describe the recommended, not minimum, client platform including CPU model & speed, memory, operating system, and storage disk space.			

6.9 Contact Center/ Help Desk Agent and Supervisor Requirements

HCPSS has multiple small call centers in various business units and locations. While each call center has its unique call handling, reporting, and call treatment requirements, a common technological foundation can accommodate all centers' needs. HCPSS call centers are open during regular business hours. Most of the call centers are small and/or "informal" call centers in various units and departments with basic requirements. Examples of the informal call centers include unit-level help desks, IT help desk, transportation center, Building Services, and administrative support groups that receive relatively high volumes of incoming calls and messages. Cumulatively, the number of agents is about 30 and about five supervisors. The quantity is never expected to exceed 100 total agents and 10 supervisors. Additionally, the call centers will be relatively simple in design.

Supervisors and managers require real time and historical reporting and monitoring tools to facilitate managing the front line agents and representatives. Primary requirements for these groups are call handling and processing capabilities and reporting. The proposed offering should be at a basic call center level as opposed to a sophisticated, contact center. During Solution design and implementation, Offerors should be prepared to develop the initial set of HCPSS ACD reports and provide ACD Supervisor training to perform future report creation/modification. The Offeror should address the following Agent and Supervisor requirements in complete yet concise responses.

ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) The proposed Solution must be able to support up to multiple separate call center "identities" on the same technological platform. Describe briefly in terms of call treatment, routing, reporting, agent supervision, workforce management, announcements/music on hold, and monitoring and/or recording how the proposed Solution will meet this requirement			Provide the name, model, software version, and manufacturer of the proposed call center solution.
2) The associated agent device must support at least 20 programmable buttons so that ACD-specific features/ functions can be added			
3) Support up to 100 agents			
4) Support up to 10 supervisors			
5) The associated agent or supervisor device must support multiple headset options listed below:			
a) Dual headset compatibility for monitoring purposes			

ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
b) Multiple USB interface port for handset or headset			
c) RJ-11 interface or standard "peg" port for handset or headset			
d) Wireless interface, e.g., Blue Tooth			
6) DID/ private, non-ACD line in addition to ACD line			
7) The proposed Solution must support the following:			
a) System and Agent Features/ Functions			
i) Agent Log On/ Log Off			
ii) One button log on for physical phone and soft-phone			
iii) Log On from secondary location should log off the initial logged on device or ID of same profile			
b) The proposed Solution must support the following:			
i) Automatic Answer with Zip Tone			
ii) Agent Wrap Up with "reason codes"			
iii) Calls in Queue (Agent Set Display) including the following requirements:			
(1) Call source identification			
(2) Calling line ID (CLID)			
c) The proposed Solution must support Queuing/ Distribution requirements listed below:			
i) First In, First Out (FIFO)			

ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
queuing			
ii) Longest Idle Agent			
d) Create ACD groups with agents at any location			
e) The proposed Solution should support multiple separate Music / Announcement on Hold interfaces			
i) Provide the maximum number of MOH access ports or inputs on the proposed solution			
ii) List types of playback devices supported			
iii) Describe how MOH is multicast support to remote locations			
f) The proposed Solution should support "One Touch" Recording			Briefly describe how this is accomplished including required components.
g) Agent Monitoring			
h) The proposed Solution must support Supervisor features and functions and the requirements listed below:			
i) Agent help			
(1) Verbal via consultation (caller cannot hear supervisor)			
(2) Via text message or "banner" on agent workstation			
i) The proposed Solution must support Real Time Supervisory Display and the requirements listed below:			
i) Monitor multiple splits, queues, and/or agent groups from single			

ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
supervisory work station			
ii) Provide maximum number of concurrent active Supervisory workstations:			
(1) View only mode			
(2) View/ modify mode			
iii) Change messages and parameters remotely			
j) The proposed Solution must support Work Mode-Agent feature and requirements listed below:			
i) Automatic			
ii) Manual			
iii) Multiple "reason" codes (20 required, list number & types available)			
8) Administrator			
a) Ten separate administrator identities			Provide maximum number of separate simultaneous administrator identities.
b) Restricted access to one or more partitions by each administrator, such that an administrator for one department cannot access administration and configuration settings for another department			Provide maximum number of separate simultaneous administrator identities.
c) "Super" administrator rights, such that an authorized "super" administrator can access configuration settings for any contact center			Provide maximum number of concurrent "super" administrators. Does a "super" administrator require a different license from an administrator?
9) Reporting			Briefly describe the basic reporting capabilities and number of standard reports included in the proposed solution.

10) Administrator			
a) Ten separate administrator identities			Provide maximum number of separate simultaneous administrator identities.
b) Restricted access to one or more partitions by each administrator, such that an administrator for one department cannot access administration and configuration settings for another department			Provide maximum number of separate simultaneous administrator identities.
c) "Super" administrator rights, such that an authorized "super" administrator can access configuration settings for any contact center			Provide maximum number of concurrent "super" administrators. Does a "super" administrator require a different license from an administrator?
11) Reporting			Briefly describe the basic reporting capabilities and number of standard reports included in the proposed solution.

6.10 Internal Conference Bridge

HCPSS regularly conducts scheduled "meet me" conference calls with large groups (up to 24) of internal and external users. Currently, HCPSS uses a third party conferencing service for all conference calls with more than three parties. HCPSS wants to investigate the use of an internal conference bridge that will address the following requirements:

Conference Bridge	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) State the number of bridge lines Vendor will supply			
2) Support up to 24 parties simultaneously			
a) Provide the maximum number of simultaneous parties			
b) State the increments for scalability for the bridge			
3) Multi-mode conversation			

Conference Bridge	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
a) Conversation			
b) Presentation/lecture			
c) Question and answer			
d) Polling			
4) Participant list data			
a) Real time			
b) Post call			
c) Data for each participant			
i) Originating telephone number			
ii) Connect date, time			
iii) Disconnect date, time			
iv) Number of minutes on the bridge			
v) Participant name			
5) Touch-tone control			
a) Moderator			
b) Participant			
6) Organizer/Moderator			
a) Web-based portal and control			
b) Control access of participants			
c) Mute participants - all			
d) Mute participants - selectively			
e) Disconnect participants - all			
f) Disconnect participants - selectively			
7) Recording			
a) Moderator one-touch recording start			
b) Web-based recording & retrieval			

Conference Bridge	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
c) Record and stream real time on internet			
d) Navigate through recording to advance, rewind, skip, etc			
8) Replay link			
9) Security			
a) Entry announcements			
i) None			
ii) Name – record & playback when entering			
iii) Beep			
b) Separate moderator, participant PINs			
c) Lock conference option			
d) Audible participant count			
e) Conference start when moderator joins conference			
f) Conference continues when moderator leaves conference			
g) Dial out only to invited parties			
10) Reporting Requirements			
a) Customized reports to contain HCPSS-selected information & <i>ad hoc</i> reporting capability			
i) Schedule reports directly to printer			

6.11 Emergency Response & Notification Requirements

Emergency responsiveness is particularly important for an organization as large and widespread as HCPSS. Staff moves within and among HCPSS buildings and locations. Literally, a life or lives could hang in the balance, and HCPSS as well as public safety first responders, such as firemen, emergency medical technicians, security, and police, must receive accurate and timely location information during emergencies or crises. The primary requirements that the proposed Solution must address are maintenance and updating of staff and asset locations and notification to the appropriate parties as mandated by law and HCPSS policies.

For widespread notification purposes to schools, students, and parents, HCPSS uses a cloud-based application called School Messenger® (www.schoolmessenger.com). School Messenger provides a variety of capabilities for which participants, e.g., parents, must volunteer to receive.

The Offeror shall respond to the requirements below in a succinct and comprehensive manner.

Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, version, and manufacturer of the proposed Solution for these requirements or if the proposed Solution will integrate with School Messenger			
a) Describe if and how the proposed Solution interfaces with School Messenger			
b) Describe what functions and communication modes are supported			
2) The proposed Solution must provide automatic update of public safety answering position (PSAP) databases with accurate new locations after equipment and telephone relocation activities such as moves, adds, changes (MAC) (immediate or "near real time", i.e., under five minutes required)			
3) HCPSS requires that the proposed Solution create and maintain an accurate database that correlates HCPSS telephone numbers with locations			Briefly describe how this will be accomplished.
4) The proposed Solution's Emergency Response offering must provide location information for mobile devices such as wireless telephones and softphone clients when the user is located in an HCPSS facility			Briefly describe how this will be accomplished.

Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
5) Describe the process by which the proposed Solution will update the following databases with new, <u>accurate</u> location (minimum of building, floor, and quadrant) information:			
a) Proposed Solution			
b) HCPSS human resources database			
c) PSAP location			
6) The Offeror must provide its database update process that will meet the following requirements:			
a) Daily upgrade of changed records is required			
b) Provide the minimum update frequency of changed records as supported by the proposed solution			
c) State the approximate download duration of update for up to 1000 records			
d) Provide the approximate bandwidth requirement and communication formats for changed records update			
e) State the recommended frequency for record updates			
7) The proposed Solution shall support automatic database update based on programmable criteria, such as the following:			
a) Time of day or night			
b) Day of week			
c) Specific dates			
d) Recurring criteria			
e) List the criteria that can be programmed			
8) HCPSS requires a weekly update of entire database:			
a) State the approximate duration to update approximately 3,000 records			
b) Provide the approximate bandwidth requirement to update all records			
9) HCPSS requires a manual or "on demand" database update capability			

Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
10) Describe the potential effect of the Emergency Response activities, including but not limited to, database update, enterprise-wide emergency broadcast, and emergency calls, on network performance			
11) HCPSS requires a logical diagram of proposed E911 configuration (it may be on a separate page), including all primary hardware and software components, connectivity with internal stations, such as Security, and public safety answering positions (PSAP), assumptions used in the configuration, and any inherent limitations			
12) List what solution-related hardware and software will be required on HCPSS premises			
13) HCPSS requires that emergency calls are routed from calling station to internal and PSAP destinations on a station-by-station basis:			
a) Provide the maximum number of external parties that can be notified simultaneously			
b) Provide the maximum number of internal parties that can be notified simultaneously			
14) HCPSS requires the following capabilities for the proposed emergency notification capability:			
a) Serial notification			
b) Parallel notification for up to 50 internal and 50 external parties			
c) At least five repetitive call back "retries"			
d) Provide the number of maximum number of call back "retries"			
15) The Emergency Response and Notification Solution must provide the following reports:			
a) Update attempts and successful updates			
b) Number of records changed			

Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
per update			
c) Number of calls and notified parties			
d) Number of responses from identified parties and identification of who actually responded by name or identification number			
e) Number of "false alarms"			
f) List types and frequency of standard reports available			
16) HCPSS requires the following emergency mass notification capabilities:			
a) Voice			
b) Text			
c) Telephone display			
d) Paging via the telephone speaker			
e) HCPSS requires mass notification with a message, i.e., a "voicemail push"			
f) HCPSS requires a notification/indicator of new mass messages			
i) Describe the types of notifications			
ii) Describe the "alert message to phone" process and capabilities			
iii) State the interval to publish a mass message to all HCPSS users and locations			

6.12 Solution Quantities

Each Offeror is to propose a Solution based upon the capacities shown below. There is no guarantee on these quantities, which are estimates only. The “Equipped” level indicates those items that will be operational at Solution cutover or the final site cutover. The “Growth” level indicates capacities to which HCPSS can reasonably expect to increase over the next five years. The “Capacity” level indicates the ultimate Solution capacity; **Offeror shall provide this quantity.**

On average, an elementary school will have about 20-25 administrative telephones; a middle school will have about 35-50; and a high school will have 50-70. The Rauland TeleCenters have about 7,300 instruments in HCPSS non-administrative areas.

When addressing the ultimate Solution capacity, Offerors should describe the specific hardware and software additions required to achieve the projected capacity.

Solution Configuration (Administrative phones only)

HCPSS Sites	Equipped	Growth (20%)	Capacity (to be completed by Offeror)
1) User Licenses	3,000	3,600	
2) ACD Agent/Supervisor Licenses	35/5	100/10	
3) MLT-8 (IP)	2,000	2,400	
4) MLT-16 (IP)	550	240	
5) MLT-24 (IP)	50	60	
6) Attendant Console Instrument	4	5	
7) Mobile “Twin”	100	120	
8) SLT	300	360	
9) Analog Device Interface	400	480	
10) DSS/BLF Module	50	60	
11) Conference Room Telephone (optional)	20	24	
12) Voice Messaging System ports	20	24	
13) Voice Messaging System storage hours	***500	600	

7. Optional Features and Applications

The Optional Features and Applications are peripheral capabilities that HCPSS might select but are not part of the core call processing infrastructure. These features and applications apply to specific user groups, business units, and/or special operations. Indicate compliance with the following capabilities.

7.1 Future Capabilities

7.1.1 Classroom Lockdown and Notification Requirements

HCPSS has a unique set of requirements that address reasonable communications needs in time of classroom lockdown during an incident. In a lockdown situation all classrooms (CR) and miscellaneous non-classroom locations, (such as library, cafeteria, and coaches' offices,) must check with the front office and provide their location and status. The status is based on a three-level system:

1. situation severe, i.e., there is an immediate need for outside help
2. situation moderate, i.e., there is a problem but outside help is not immediately needed
3. situation stable, i.e., everything is ok

The current Rauland TeleCenter configuration, which is equipped in every school except one, supports only four CR/locations to check in simultaneously. The other locations must wait until a circuit is free to convey their statuses, which is critical to know in a "lockdown" situation. As a result, HCPSS has several requirements that the proposed Solution must address.

Currently HCPSS is equipped with Rauland Telecenter School Wide Communications Systems (one exception is a location equipped with a Care Hawk 1000 system). Fifteen of the oldest systems are Telecenter V Systems. All other schools have Telecenter 21 Systems. The Telecenter 21 Systems are currently equipped with 12 master ports in addition to the station ports indicated (please see Attachment E for further details). HCPSS envisions that it will replace the Rauland systems as schools are renovated. Until then, the Rauland systems will continue to control and be used for individual schools' paging, bells, and clock functions.

The new proposed Solution must provide capabilities that the Rauland now provides. Every classroom will a telephone off the new solution. Describe in detail how the proposed Solution will address the following use cases:

- 1) Currently if a situation arises in a classroom, the teacher can dial "***", and a preprogrammed messages appear on a message board in the office.
- 2) If a classroom phone is knocked "off hook," it automatically rings the office and sends a preprogrammed message to the office message board., the teacher can dial "***", and a preprogrammed messages appears on a message board in the office.

Response: (Please provide as an Attachment)

Classroom Lockdown and Notification Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror Response
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1) The proposed Solution must be engineered as non-blocking, such that all CR and other locations can go off-hook simultaneously, receive internal dial tone, and notify the office of their statuses			
2) The initial notification from a class room (CR) will appear in the office and secondary command center as a text or SMS message with 1 of 3 messages (as listed above... 1=severe situation 2=situation but under control 3=situation normal) as well as room # or name			Describe on what type of output device the message would appear, e.g., mobile device, wall board, telephone display, PC/laptop display.
3) The room number or name will be pre-programmed assigned to the CR station such that no action is required by the CR station user for that information to be communicated to the office along with status			
4) The caller will enter the above described status notification with minimal buttons or input, e.g., touchtone input, e.g., “**”, button press, off hook, etc.			
5) The status and location information must be conveyed to the office in real time or near real time. This is especially pertinent if up to 100 CR/locations are attempting to check in simultaneously			
6) Describe how a secondary location, such as a classroom, could become the call receipt point if the office was unavailable to receive the CR status and location notification			
7) Offeror shall describe in non-technical terms and specific details about how its proposed Solution will meet the stated requirements above. Offeror should assume a total of 2,700 locations system wide scattered among HCPSS locations must be addressed. HCPSS schools and ancillary locations range in size from 15 to over 80 CR and locations			

FOR REFERENCE ONLY

7.1.2 Unified Communications (UC)

HCPSS desires information about potential UC applications that is could use in the future for selected user communications. Describe how HCPSS might migrate to a Unified Communications (UC) package, including unified messaging (UM), could be part of HCPSS’ core application suite for selected units or communities of

users and would meet the requirements listed below.

Offeror should provide the following:

- 1) Define its vision of UC, including instant messaging (IM), presence, enhanced messaging, mobility, collaboration, and status.
- 2) Describe “click to dial” capabilities.
- 3) Describe how/if contact information is available when an e-mail address is typed in or selected.
- 4) Describe how cellular/smartphone devices can “twin” off a station
 - a) What components are necessary to make this work?
 - b) What cellular/smartphones with which this Solution has been proven and is commercially available?
 - c) What features and functions are available on the cellular/smartphone that are different from a desk instrument?
- 5) Provide a high level roadmap of how HCPSS would migrate to UC capabilities.
- 6) Include the components necessary to migrate to UC.
- 7) Provide a budgetary estimate that includes hardware, software, licenses, and professional services.

Response: (Please provide as an Attachment)

7.1.3 Mobile Devices

Offeror shall describe capabilities of its **Mobile Devices**. Devices shall be capable of working with HCPSS Aruba Wi-Fi network or DECT-based devices. Mobile devices shall have the capacity to supplement desktop instruments and emulate desktop capabilities, e.g., features, functions, ring notifications, in a simultaneous or “twinned” manner. Mobile Devices shall function on the public cellular network. Offeror should describe the following:

Endpoints Requirements Mobile Device/ Wireless IP Phone	Offeror’s Response
1) Nominal battery life – standby (in hours)	Wi-Fi DECT
2) Nominal talk time per battery (in hours)	Wi-Fi DECT
3) Charge battery separately from mobile device	Wi-Fi DECT
4) Procedure description to change batteries	Wi-Fi DECT
5) User controlled “Twin” off proposed Solution instruments	Wi-Fi DECT
6) Any/all FMC/cellular interface capabilities (options)	Wi-Fi DECT

7.1.4 Optional Third Party Endpoints

Optional Third Party Endpoints	Compliance to Requested Info (FC, PC, NC)	Availability Status (S, OI, ON/, NA)	Offeror's Response
<p>1) Offeror should support third party endpoints (TPE), such as Session Initiated Protocol (SIP) phones, which support a comprehensive feature / function complement with the proposed Solution at a less expensive price point per endpoint. Offeror is requested to provide the following information in a tabular format about TPEs:</p>			
<p>a) Brand and model numbers of third party instruments that work with the proposed solution</p>			
<p>b) Confirmation that the TPE supports the entire feature/ function complement of the proposed solution</p>			
<p>c) If not, list features that are supported</p>			
<p>d) Protocols supported by the TPE(s):</p>			
<p>i) Session initiation protocol (SIP)</p>			
<p>ii) H.323</p>			
<p>iii) Analog</p>			
<p>iv) Digital</p>			
<p>v) Others (please specify)</p>			
<p>2) Offeror is invited to propose TPEs in its proposed Solution in place of or in conjunction with proprietary TIPP Solution endpoints and should provide specifications and photographs of the optional TPE</p>			

8. Implementation Scope of Work

It is HCPSS' 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 HCPSS. 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.

As part of its response Offeror must indicate its level of compliance with the requirement, i.e., full, partial, or none, and provide a brief description of its capabilities as necessary.

- 1) The successful Offeror is required to develop a complete and detailed Solution design in collaboration with HCPSS, including call flow charts and reporting, through on-site meetings with multiple HCPSS departments and user groups. The successful Offeror is required to identify specific business and technical requirements with unique Classes of Service (COS), and provide presentations to HCPSS-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.

Response:

- 2) The overall Solution design will include all hardware platforms and software versions installed on the proposed solution. Once the Solution design has been finalized, the successful Offeror shall provide a Macro Design document summarizing the Solution components, including hardware platforms, software versions, and additional information as directed by HCPSS.

Response:

- 3) The successful Offeror will work as HCPSS's agent. Subject to approval from HCPSS the vendor will 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.

Response:

- 4) Offeror is responsible for populating all requisite software database fields for all products provided under this procurement, including but not limited to, call processing and voicemail/messaging to make all facets of the new Solution operational.

Response:

8.1 Installation

1) HCPSS requires a Preliminary Implementation Plan & Schedule, assuming a phased, site-by-site implementation. Offeror will prepare (**and include in a separate sheet(s)**) a Preliminary/Sample Implementation Plan & Schedule that includes tasks, such as design for implementation and total solution, review and approval by HCPSS, equipment ordering and delivery, installation, cutover day activities and responsibilities, and integration with HCPSS systems and applications, schedule for all locations, including responsibilities, estimated duration of each activity, and "place holder" dates.

Response:

2) HCPSS requires manufacturer-certified installers and engineers for the migration to the new solution. Provide the number and city locations of certified installers and engineers in proximity to Howard County.

Response:

3) Include in this response a description of who will be on-site at HCPSS including their title and responsibilities 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) Follow-up or remedial training

Response:

i)
ii)
iii)
iv)
v)
vi)

vii)
viii)
ix)
x)
xi)

4) Offeror shall provide and execute 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 HCPSS migration to the new solution.

- a) Assume that 10% of all endpoints will be tested at minimum, for capabilities that include, but are not limited to, the following:
 - i) Make /receive internal calls via reduced digit dialing
 - ii) Make/ receive external local/long distance calls
 - iii) Leave, forward, and pick up voicemail via multiple interfaces or devices
 - (1) Desktop instrument
 - (2) Cellular device
 - iv) Basic features: Hold, Forward, Transfer, Conference, MWI
 - v) Call coverage patterns

Response:

5) 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.

Response:

6) Offeror shall provide a **sample Acceptance Test Plan** for HCPSS' review and evaluation. After HCPSS selects its Vendor and design for the final solution, the two parties will review the Acceptance Test Plan and modify it as necessary subject to HCPSS approval.

Response:

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

Response:

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

Response:

9) HCPSS requires 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.

Response:

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

Response:

8.2 Training

1) The selected Offeror shall offer training sessions to sufficiently train all users. HCPSS will provide rooms for the training sessions. Items and equipment that HCPSS 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 scheduled throughout a day during a location's opening hours.

Response:

2) Describe your training capabilities and ability to provide in-depth training, tailored to user roles, preferably provided virtually and on-demand, for all users. The training shall 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, forwarding, transferring and holding a call. All training materials will be turned over to HCPSS for distribution to staff.

Response:

3) HCPSS requires that designated HCPSS personnel will be trained in a "Train the Trainer" curriculum to provide remedial and subsequent training for new employees. Trainers will be trained during each HCPSS location implementation and materials will be included with the end user training.

Response:

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.

Response:

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.

Response:

8.2.1 Management, Administration, & Operations Training (PREMISES)

1. The selected Provide manufacturer certification-level system management/operations training for up to six HCPSS personnel. This includes training classes for administering the new system, messaging system, and automated attendant capabilities, and performing first echelon maintenance. Offeror will include recommended courses and pricing in its response (Travel-related expenses need to be included if outside a 50 miles' radius of HCPSS).

Response:

2. The selected Provide CAS (call accounting) training for up to three HCPSS personnel.

Response:

3. Selected Provide dynamic web links for all system level manuals to HCPSS upon acceptance of the new system.

Response:

FOR REFERENCE ONLY

8.3 Post-Cutover Support (PREMISES)

This section deals with how the selected vendor will provide post-cutover/conversion support and maintenance to HCPSS. HCPSS 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.” Offeror will clearly indicate its compliance and identify how it will maintain and repair the new Solution’s components and at what intervals.

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 HCPSS, all equipment provided will be new.

Response:

2. Provide and maintain a complete equipment and system inventory and maintenance record in Microsoft Excel.

Response:

8.4 Single Point of Contact (SPOC)

Indicate compliance and a brief description of how it complies with the requirements below.

- 1) HCPSS requires that the successful Offeror provide an SPOC. The SPOC will 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 HCPSS staff
 - d) Acting as general liaison and advocate for HCPSS 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

Response:

- 2) Identify its SPOC and an alternate for HCPSS.

Response:

- 3) Provide internal SLAs or escalation to ensure prompt response and resolution by partners.

Response:

8.5 Post-Cutover Traffic Studies

Indicate compliance and a brief description of how it complies with the requirements below.

1. The Offeror shall perform a trunking traffic study of no less than one (1) normal business week in duration within 10 days of HCPSS's cutover.

Response:

2. The Offeror is expected to recommend trunking configuration changes appropriate to industry standard grades of service (GOS) based on specific findings from the study. Any changes agreed to by HCPSS will be accomplished at pre-cutover pricing.

Response:

FOR REFERENCE ONLY

8.6 Post-Cutover Maintenance and Support (PREMISES)

Indicate compliance and a brief description of how it complies with the requirements below.

1. Provide written confirmation from an authorized senior level executive that Provide contract maintenance, parts, and engineering support for the new Solution for at least seven years following HCPSS's signed acceptance of the systems.

Response:

2. Provide information on maintenance pricing and coverage if HCPSS opts to sign a multi-year maintenance agreement. Provide any escalation factors for Years 3-7.

Response:

FOR REFERENCE ONLY

8.7 Local Inventory (PREMISES)

Indicate compliance and a brief description of how it complies with the requirements below.

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

Response:

FOR REFERENCE ONLY

8.8 Guaranteed Hardware/Software Upgrades (PREMISES)

1. 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 will be scheduled with and approved by HCPSS 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.

Response:

2. Include details cost on any "investment protection" programs for hardware, software, and/or applications available to HCPSS.

Response:

3. Briefly summarize the conditions and coverage of the proposed upgrade program.

Response:

FOR REFERENCE ONLY

8.9 Maintenance Organization and Guidelines

Describe its organization that will support its proposed solution. Indicate compliance and a brief description of how it complies with the requirements below.

<p>1) Provide an operational support chart.</p> <p>Response:</p>
<p>2) Provide the number of certified engineers in the Howard County area with experience and credentials to service the new Solution's components.</p> <p>Response:</p>
<p>3) Provide a detailed escalation process for the proposed Solution in case of unresolved issues. Include the following information:</p> <ul style="list-style-type: none">a) Standard resolution processes for different types of alarms and problemsb) Time intervals for escalationc) Escalation paths for different types of issues or alarmsd) Contact lists for each step of escalatione) Resolution/progress update contact schedule for HCPSS & internal vendor personnelf) Names and phone numbers of escalation path membersg) Name and proposed duties of service manager dedicated to HCPSS <p>Response:</p>
<p>4) Offeror will briefly describe its notification and resolution process for afterhours service calls to a standby technician/engineer.</p> <p>Response:</p>
<p>5) Describe its remote monitoring capabilities, including location of its operations center(s), hours of operation, staff on duty during "off hours," and how HCPSS issues will be prioritized.</p> <p>Response:</p>

9. OPERATIONAL SUPPORT

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

Response:

10. Cost Summary

10.1 Configuration Options

Offerors must provide related detail pricing information in **the Attachment D - 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 an “Additional Options” and included as a separate attachment to the RFP response.

Response:

--

FOR REFERENCE ONLY

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 HCPSS 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 the proposed hardware and software according to HCPSS-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 HCPSS’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, so that HCPSS Evaluation committee will understand its purpose

Response:

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, HCPSS retains the right to purchase the equipment at the fair market value at that time. Offeror will propose phased payments with regards to phased installation.

Response:

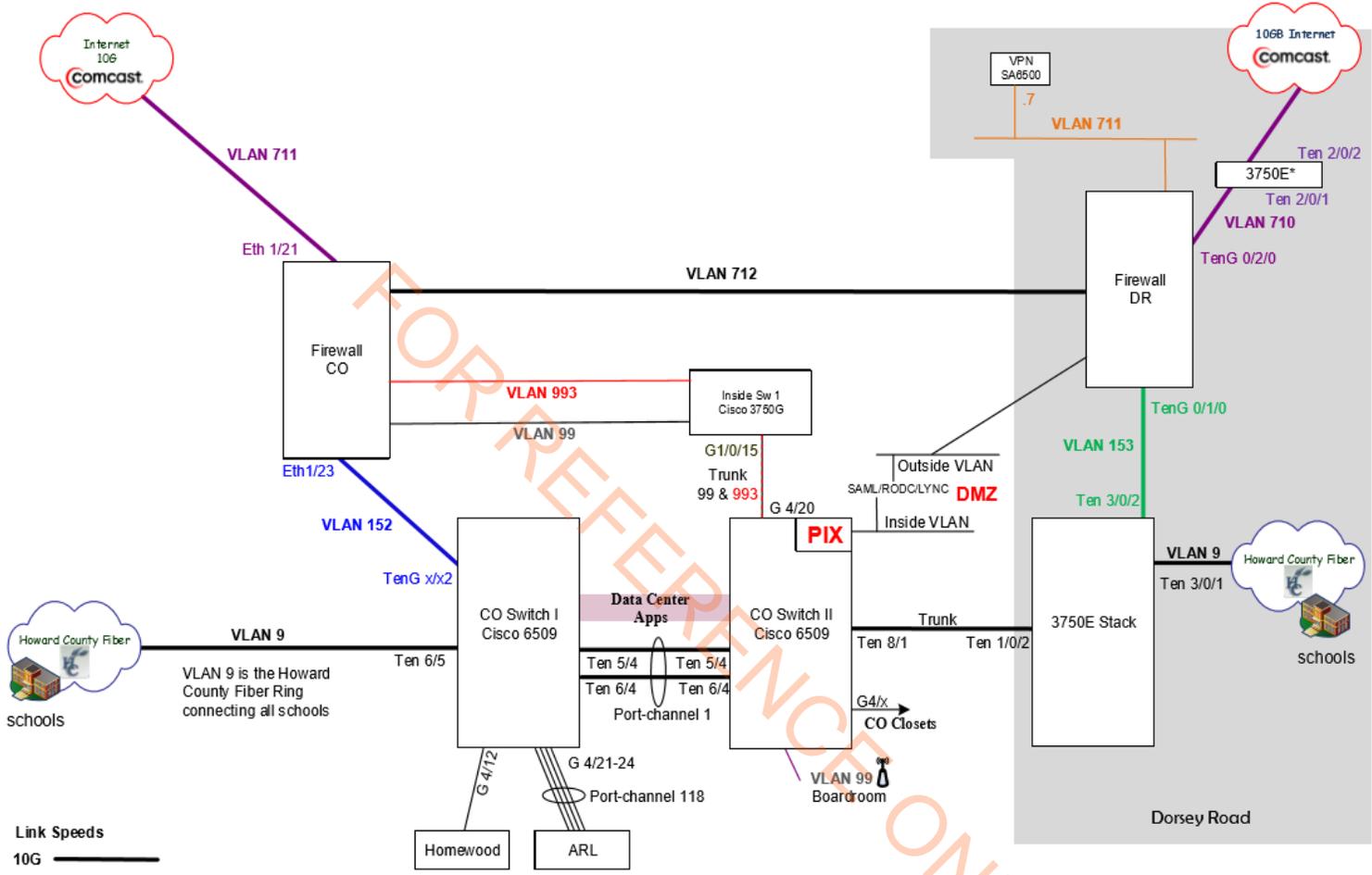
FOR REFERENCE ONLY

Attachments and Forms

Attachment A	HCPSS LAN and WAN High-Level Diagrams
Attachment B	Exceptions by Offeror – Deviation Form
Attachment C	Glossary of Terms
Attachment D	Pricing Tables
Attachment E	Telecenter School-Wide Systems Section (5.6)
Attachment F	Signature Sheet
Attachment G	Insurance Requirements
Attachment H	Employee Sharing Agreement
Attachment I	Student Data Sharing Agreement
Attachment J	Acknowledgement of Receipt of Addenda Form
Attachment K	Bid/Proposal Affidavit
Attachment L	Agreement For Professional Services

FOR REFERENCE ONLY

Attachment A HCPSS WAN High Level Diagram



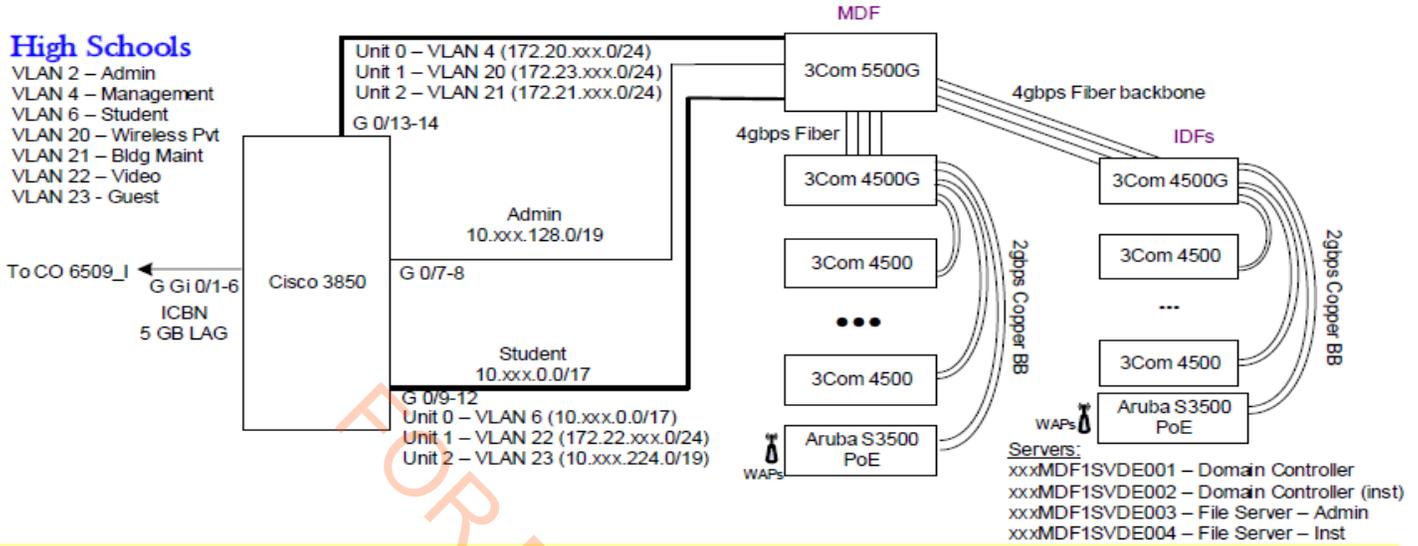
Link Speeds
 10G
 1G

* Switch used to convert SMF to MMF

Attachment A HCPSS LAN High Level Diagram

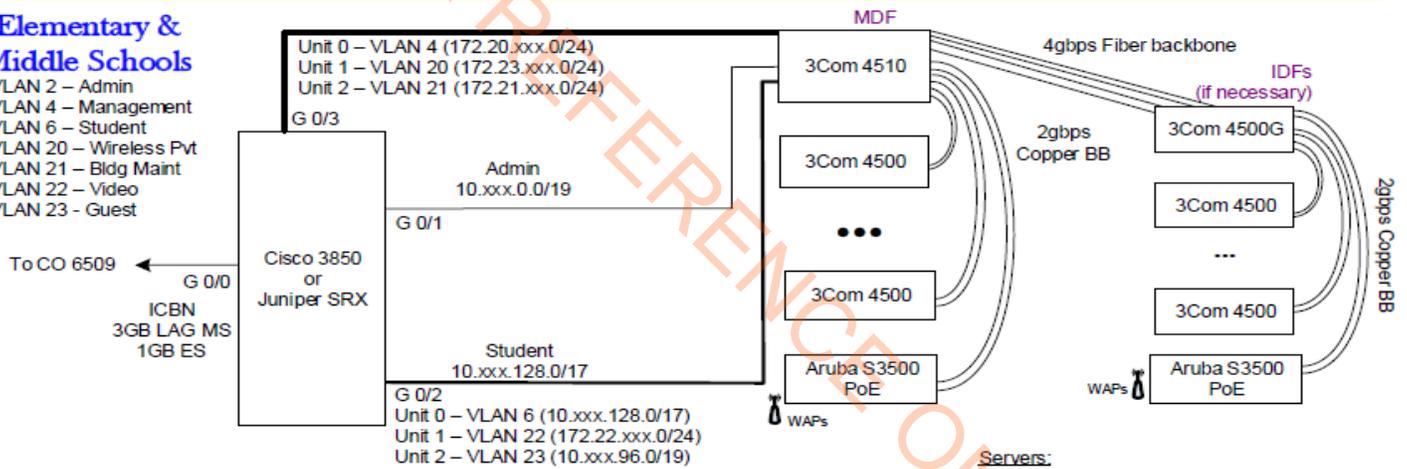
High Schools

- VLAN 2 – Admin
- VLAN 4 – Management
- VLAN 6 – Student
- VLAN 20 – Wireless Pvt
- VLAN 21 – Bldg Maint
- VLAN 22 – Video
- VLAN 23 – Guest



Elementary & Middle Schools

- VLAN 2 – Admin
- VLAN 4 – Management
- VLAN 6 – Student
- VLAN 20 – Wireless Pvt
- VLAN 21 – Bldg Maint
- VLAN 22 – Video
- VLAN 23 – Guest



Router Configurations:

Identical except in the following schools:

- LKMS has a static route to CLS Admin network
- HaES and CRES do not have Management VLANs

Attachment C – Glossary of Terms

NOTE: Unless otherwise noted, all terms are found and defined in Newton's Telecom Dictionary, 21st Edition, CMP Books, ©2005 and/or Thomas' Concise Telecom & Networking Dictionary, McGraw-Hill, ©2000.

1. AAR – Alternate automatic routing
2. *AC – Audio conferencing
3. AP – Access point
4. API – Application programming interface
5. ARS – Automatic route selection
6. ATM – Asynchronous transfer mode
7. *BB – Blackberry
8. BHCA - Busy hour call attempts
9. BHCC – Busy hour call completions
10. CAC – Call admission control
11. CAS – Centralized attendant service
12. CBWFQ – Class-based weighted fair queuing
13. CDR – Call detail record
14. CLID – Calling line identification
15. CNID – Calling name identification
16. COS – Class of service
17. COT – Central office trunk
18. COTS – Commercial off the shelf
19. CPE – Customer premises equipment
20. CTI – Computer telephony integration
21. DID – Direct Inward Dial
22. DNS – Domain name system
23. DOD – Direct Outward Dial
24. DSS/BLF – Direct station selection/busy lamp field
25. *DVC – Desktop videoconferencing
26. FTE – Full-time equivalent
27. GOS – Grade of service
28. GUI – Graphical user interface
29. *HCPSS – Howard County Public School System
30. HSM – Hardware and software maintenance
31. HVAC – Heating, ventilation, air conditioning
32. ICB – Individual case basis
33. IDF – Intermediate distribution frame
34. IEC – See IXC
35. IM – Instant messaging
36. IP – Internet protocol
37. IPT – Internet protocol telephony
38. ISDN – Integrated Services Digital Network
39. ITU – International Telecommunications Union, international standards body
40. IVR – Interactive voice response
41. IXC – Interexchange carrier, also IEC
42. KTS – Key telephone system
43. LAN – Local area network
44. LDAP – Lightweight Directory Access Protocol
45. LEC – Local exchange carrier
46. LLQ – Low latency queuing
47. LOE – Level of effort
48. MAC – Move, add, & change
49. MAN – Metropolitan area network
50. MCGP – Media control gateway protocol
51. MDF – Main distribution frame
52. MLT – Multi-line telephone
53. MOS – Mean opinion score
54. MPLS – Multi-protocol labeling service
55. *MSP – Managed service provider
56. MTBF – Mean time between failures
57. MWI – Message waiting indicator
58. NANP – North American Numbering Plan
59. NOC – Network operations center
60. O&S – Operations and support
61. OPX – Off-premises extension
62. PABX – private automated branch exchange
63. PBX – Private branch exchange (more commonly used acronym)
64. PC – Personal computer
65. PDA – Personal digital assistant
66. PFT – Power failure transfer, also PF Xfer; this feature enables an organization to directly connect up to five percent of the total stations at any location directly to outside lines in the event of total system failure.
67. PF Xfer – See PFT
68. POE – Power over ethernet
69. POTS – Plain old telephone service, i.e., basic analog dial tone
70. PRI – Primary Rate Interface
71. PSAP – Public safety answering position
72. PSTN – Public switched telephone network
73. QOS – Quality of service
74. RADIUS - Remote Authentication Dial-in User Service
75. RAID – Redundant array of independent disks
76. RFI – Request for information
77. RFP – Request for proposal
78. ROI – Return on investment
79. *RPO - Recovery point objective

- 80. *RTO – Recovery time objective
- 81. RTU – Right to use
- 82. SID – Station identification
- 83. SIP – Session initiation protocol
- 84. SLA – Service level agreement
- 85. SLM – Service level metrics
- 86. SLT – Single line telephone
- 87. *SME – Subject matter expert
- 88. SNMP – Simplified Network Management Protocol
- 89. SNR – Saved number redial
- 90. *SNR – Single number reach
- 91. *SOP – Service Offering Package
- 92. *SPOC – Single point of contact
- 93. *SPOE – Single point of entry
- 94. *SPOF – Single point of failure
- 95. SMDI – Station (or Simplified) Message Desk Interface
- 96. SMDR – Station message detail record
- 97. TDM – Time division multiplexing
- 98. Telco – abbreviation for local operating telephone company
- 99. TMS – Tele management system
- 100. *TOIP – Telephony over internet protocol
- 101. TTS – Text to speech
- 102. TUI – Telephone user interface
- 103. UC – unified communications
- 104. UCD – Uniform call distribution
- 105. UDP – Unified dial plan
- 106. UM – Unified messaging
- 107. UPS – Uninterruptible power supply
- 108. URL - Universal resource locator
- 109. VAR – Value added reseller
- 110. VC – Videoconferencing
- 111. VMS – Voice messaging system
- 112. VOIP – Voice over internet protocol
- 113. VPC – Virtual private connection
- 114. VPIM – Voice Profile for Internet Messaging
- 115. VPN – Virtual private network
- 116. VRU – Voice response unit

Attachment D – Pricing Tables

Pricing Table Spreadsheet

Offerors must provide detail pricing in an electronic spreadsheet. Spreadsheet shall be submitted in MS excel or similar and in pdf format.

Checklist

<input type="checkbox"/>	Electronic Spreadsheet submitted
<input type="checkbox"/>	Name of xls file:
<input type="checkbox"/>	Name of pdf file:

FOR REFERENCE ONLY

Attachment E

Paging System and Device Counts per Location

#	Elementary	Ports	Phones	Manufacturer	SYSTEM	Year Installed	current production
1	Atholton	81	63	Rauland	TC21	2001-2002	END 2017
2	Bellows Spring	144	89	Rauland	TC21	2003	END 2017
3	Bollman Bridge	144	74	Rauland	TC21	2001 2014	END 2017
4	Bryant Woods	80	68	Rauland	TC21	2001-2002	END 2017
5	Bushy Park	128	92	Rauland	TC21	2007	END 2017
6	Centennial Lane	128	86	Rauland	TC21	2001-2002	END 2017
7	Clarksville	80	59	Rauland	TC21	2001-2002	END 2017
8	Clemens Crossing	128	83	Rauland	TC21	2001-2002	END 2017
9	Cradlerock	96	73	Rauland	TC21	2002	END 2017
10	Dayton Oaks	128	95	Rauland	TC21	2006	END 2017
11	Deep Run	112	99	Rauland	TC21	2001-2002	END 2017
12	Ducketts Lane	112	84	Rauland	TC21	2013	END 2017
13	Elkridge	128	96	Rauland	TC21	2001-2002	END 2017
14	Forest Ridge	112	98	Rauland	TC21	2001-2002	END 2017
15	Fulton	143	74	Rauland	TC V	1998	NO
16	Gorman Crossing	154	90	Rauland	TC V	1998	NO
17	Guilford	96	80	Rauland	TC21	2001-2002	END 2017
18	Hammond	80	46	Rauland	TC21	2001-2002	END 2017
19	Hollifield Station	119	81	Rauland	TC V	1997	NO
20	Ilchester	124	86	Rauland	TC V	1996	NO
21	Jeffers Hill	80	50	Rauland	TC21	2001-2002	END 2017
22	Laurel Woods	80	70	Rauland	TC21	2001-2002	END 2017
23	Lisbon	96	75	Rauland	TC21	2001-2002	END 2017
24	Longfellow	112	82	Rauland	TC21	2001 2017	END 2017
25	Manor Woods	125	73	Rauland	TC V	1994	NO
26	Elementary #42					2018	
27	Northfield	112	48	Rauland	TC21	2001 2014	END 2017
28	Phelps Luck	112	96	Rauland	TC21	2001 2015	END 2017
29	Pointers Run	112	98	Rauland	TC21	2001-2002	END 2017
30	Rockburn	103	88	Rauland	TC V	1993	NO
31	Running Brook	96	80	Rauland	TC21	2001-2013	END 2017

#	Elementary	Ports	Phones	Manufacturer	SYSTEM	Year Installed	current production
32	St. John's Lane	128	78	Rauland	TC21	2000	END 2017
33	Stevens Forest	112	62	Rauland	TC21	2015	END 2017
34	Swansfield	96	72	Rauland	TC21	1999	END 2017
35	Talbot Springs	80	75	Rauland	TC21	1999	END 2017
36	Thunder Hill	96	77	Rauland	TC21	2001 2002	END 2017
37	Triadelphia Ridge	115	77	Rauland	TC V	1998	NO
38	Veterans	144	82	Rauland	TC21	2007	END 2017
39	Waterloo	160	91	Rauland	TC21	2001 2002	END 2017
40	Waverly	96	72	Rauland	TC21	2001 2002	END 2017
41	West Friend	80	57	Rauland	TC21	2001 2002	END 2017
42	Worthington	128	88	Rauland	TC21	2001 2002	END 2017
	Elem. Total	4580	3207				
	Middle						
1	Bonnie Branch	107	76	Rauland	TC V	1999	NO
2	Burleigh Manor	128	88	Rauland	TC21	2001 2002	END 2017
3	Clarksville	112	82	Rauland	TC21	2001 2002	END 2017
4	Dunloggin	80	78	Rauland	TC21	1999	END 2017
5	Elkridge Landing	159	117	Rauland	TC V	1995	NO
6	Ellicott Mills	144	115	Rauland	TC21	1999	END 2017
7	Folly Quarter	112	85	Rauland	TC21	2003	END 2017
8	Glenwood	112	72	Rauland	TC21	1999	END 2017
9	Hammond	112	80	Rauland	TC21	2001 2002	END 2017
10	Harper's Choice	80	72	Rauland	TC21	1999	END 2017
11	Lake Elkhorn	96	67	Rauland	TC21	2002	END 2017
12	Lime Kiln	110	80	Rauland	TC V	1999	NO
13	Mayfield Woods	128	102	Rauland	TC21	2002	END2017
14	Mount View	223	102	Rauland	TC V	1993	NO
15	Murray Hill	114	71	Rauland	TC V	1997	NO
16	Oakland Mills	128	80	Rauland	TC21	2001 2002	END 2017
17	Patapsco	160	105	Rauland	TC21	2001 2002	END 2017
18	PVMS REN			Care Hawk 1000	1000	2017	YES
19	Patuxent Valley	144	94	Rauland	TC21	2017	END 2017
20	New Wilde Lake					2017	NO

#	Elementary	Ports	Phones	Manufacturer	SYSTEM	Year Installed	current production
21	Wilde Lake	128	72	Rauland	TC21		END 2017
22	TVMS	112	105	Rauland	TC21	2015	END 2017
	Middle Total	2489	1743				
	High						
1	Atholton	256	182	Rauland	TC21	2015	END 2017
2	Centennial	208	174	Rauland	TC21	2000	END 2017
3	Glenelg	192	153	Rauland	TC21	1999	END 2017
4	Hammond	192	174	Rauland	TC21	1999	END 2017
5	Howard	256	183	Rauland	TC21	1999	END 2017
6	Long Reach	195	132	Rauland	TC V	1995	NO
7	Marriotts Ridge	256	155	Rauland	TC21	2005	END 2017
8	Mt. Hebron	208	166	Rauland	TC21	2014	END 2017
9	Oakland Mills	224	174	Rauland	TC21	2001 2002	END 2017
10	Reservoir	256	226	Rauland	TC21	2002	END 2017
11	River Hill	191	148	Rauland	TC V	1994	NO
12	Wilde Lake	239	165	Rauland	TC V	1996	NO
	High Total	2673	2032				
	Special						
1	ARL	176	100	Rauland	TC21		END 2017
2	Homewood	144	122	Rauland	TC21		END 2017
3	Cedar Lane	96	71	Rauland	TC21		END 2017
	Spec. Total	416	293				
	Grand Total	10158	7275				

Attachment F - Signature Sheet

A. Offeror's Certification

I/we hereby propose to furnish and deliver supplies and or services, in accordance with specifications and stipulations contained herein, and at the prices quoted. I/we certify that this bid is made without any previous understanding, agreement, or connection with any person, firm, or corporation making a bid for the same supplies, materials, or Lumber and is in all respects fair and without collusion or fraud.

I/we certify that this bid is made without having contacted any employee within The Howard County Public School System unless such contacts were previously authorized by the Purchasing Officer.

I/we certify that this bid is genuine and not collusive or sham; that said offeror has not colluded, conspired, connived and agreed, directly or indirectly, with any offeror or person to put in a sham bid or to refrain from bidding and is not in any manner, directly or indirectly, sought by agreement of collusion or communication or conference, with any person to fix the bid prices of the affidavit or any other offeror, or to fix any overhead, profit or cost element of said bid price, or that of any offeror, or to secure any advantage against the Board of Education of Howard County or any other person interested in the proposed contract; and that all statements in said proposal or bid are true.

I affirm that this firm will not knowingly employ an individual to work at a school if the individual is a Registered Sexual Offender, pursuant to section 11-722 (C) of the Criminal Procedure Article of the Annotate Code of Maryland. A firm or person who violates this section is guilty of a misdemeanor and on conviction is subject to imprisonment not exceeding 5 years or a fine not exceeding \$5,000 or both.

I hereby certify that I am authorized to sign for the offeror.

B. Vendor/Contractor Disqualification - Bribery

A person convicted for bribery, attempted bribery, or conspiracy to bribe shall be disqualified from entering into a contract with any county or other subdivision of the state. Every business entity upon submitting a bid or otherwise applying for a contract shall submit an affidavit stating whether it, its officers, directors, or partners, or its employees have been convicted of bribery, attempted bribery, or conspiracy to bribe under the laws of any state or federal government.

Submitted by:

(company name)

(street address)

(city, state and zip)

(company telephone number)

(name of person authorized to sign bid)

(title of authorized representative)

(signature of authorized representative)

(Date)

(e-mail of authorized representative)

(telephone number of representative)

ATTACHMENT G

INSURANCE REQUIREMENTS

1 - General Insurance Requirements:

1.1 - The Contractor shall not commence Work until he has obtained at his own expense all of the insurance as required hereunder and such insurance has been approved by the Board of Education of Howard County Maryland; nor shall the Contractor allow any Subcontractor to commence Work on his subcontract until all similar insurance required of the Subcontractor has been so obtained and approved by the Contractor. Approval of insurance required of the Contractor will be granted only after submission to the Board of Education of Howard County Maryland of original, signed certificates of insurance or, alternately, at the Board of Education of Howard County Maryland's request, certified copies of the required insurance policies.

1.2 - The Contractor shall require all Subcontractors to maintain during the term of this agreement, commercial general liability insurance, business automobile liability insurance, and Workers' Compensation and employers' liability insurance, in the same manner as specified for the Contractor. The Contractor shall furnish Subcontractors' certificates of insurance to the Board of Education of Howard County Maryland immediately upon request.

1.3 - All insurance required hereunder shall include the following provision: "It is agreed that this policy is not subject to cancellation, non-renewal, material change, or reduction in coverage until sixty (60) days prior written notice has been given to the Board of Education of Howard County Maryland."

The phrases "endeavor to" and "... but failure to mail such notice shall impose no obligation or liability of any kind upon the company, its agents or representatives" are to be eliminated from the cancellation provision of standard ACORD certificates of insurance.

1.4 - No acceptance and/or approval of any insurance by the Board of Education of Howard County Maryland shall be construed as relieving or excusing the Contractor, or the Surety, or his bonds, from any liability or obligation imposed upon either or both of them by the provisions of the Contract Documents.

1.5 - The Board of Education of Howard County Maryland and its elected or appointed officials, agents and employees are to be named as an additional insured under all coverages except Workers compensation and business automobile liability, and the certificate of insurance, or the certified policy, if requested, must so state this. Coverage afforded under this paragraph shall be primary as respects the Board of Education of Howard County Maryland, its agents and employees.

1.6 - The Contractor shall be responsible for the Work performed under the Contract Documents and every part thereof, and for all materials, tools, equipment, appliances, and property of any and all description used in connection with the Work. The Contractor assumes all risk for direct and indirect damage or injury to the property or persons used or employed on or in connection with the Work contracted for, and of all damage or injury to any person or property wherever located, resulting from the action, omission, commission or operation under the contract, or in connection in any way whatsoever with the contracted Work, until final acceptance of the Work by the Board of Education of Howard County Maryland.

1.7 - Insurance coverage required in these specifications shall be in force throughout the contract term. Should the Contractor fail to provide acceptable evidence of current insurance within seven days of written notice at any time during the contract term, the Board of Education of Howard County Maryland shall have the absolute right to terminate the contract without any further obligation to the Contractor, and the Contractor shall be liable to the Board of Education of Howard County Maryland for the entire additional cost of procuring performance and the cost of performing the incomplete portion of the contract at time of termination.

1.8 - Contractual and other liability insurance provided under this contract shall not contain a supervision, inspection or engineering services exclusion that would preclude the Board of Education of Howard County Maryland from supervising or inspecting the project as to the end result. The Contractor shall assume all on-the-job responsibilities as to the control of persons directly employed by it and of the Subcontractors and any persons employed by the Subcontractor.

1.9 - Nothing contained in the specifications shall be construed as creating any contractual relationship between any Subcontractor and the Board of Education of Howard County Maryland. The Contractor shall be fully responsible to the Board of Education of Howard County Maryland for the acts and omissions of the Subcontractors and of persons employed by them as it is for acts and omissions of persons directly employed by it.

1.10 - Precaution shall be exercised by the Contractor at all times for the protection of persons, (including employees) and property. All existing structures, utilities, roads, services, trees and shrubbery shall be protected against damage or interruption of service at all times by the Contractor and its Subcontractors during the term of the contract, and the Contractor shall be held responsible for any damage to property occurring by reason of its operation on the property.

1.11 - If the Contractor does not meet the insurance requirements of the specifications, alternate insurance coverage, satisfactory to the Board of Education of Howard County Maryland, may be considered. Written requests for consideration of alternate coverages must be received by the Board of Education of Howard County Maryland at least ten Working days prior to the date set for receipt of bids or proposals. If the Board of Education of Howard County Maryland denies the request for alternate coverages, the specified coverages will be required to be submitted.

1.12 - All required insurance coverages must be acquired from insurers allowed to do business in the State of Maryland and acceptable to the Board of Education of Howard County Maryland. The insurers must also have a policyholders' rating of "A-" or better, and a financial size of "Class VII" or better in the latest edition of Best's Insurance Reports, unless the Board of Education of Howard County Maryland grants specific approval for an exception.

1.13 - The Board of Education of Howard County Maryland will consider any deductible amounts as part of its review of the financial stability the Contractor. Any deductibles shall be disclosed by the Contractor, and deductible amounts are the responsibility of the Contractor.

2 - Contractor's Liability Insurance - "Occurrence" Basis:

2.1 - The Contractor shall purchase the following insurance coverages:

2.1.1 - Commercial general liability with a minimum limit of \$1,000,000 per occurrence, \$1,000,000 annual aggregate including all of the following:

- i. General aggregate limit is to apply per project;
- ii. Premises/operations;
- iii. Actions of independent Contractors;
- iv. Products/completed operations to be maintained for two years after completion of the Work;
- v. Contractual liability including protection for the Contractor from claims arising out of liability assumed under this contract;
- vi. Personal injury liability including coverage for offenses related to employment;

- vii. Explosion, collapse, or underground (XCU) hazards (confirmation of underground hazard coverage must be confirmed by either certificate of insurance or in writing by Contractor's agent, broker or insurer);

2.1.2 - Business automobile liability including coverage for any owned, hired, or non-owned motor vehicles and automobile contractual liability with a limit of \$1,000,000 per accident; uninsured motorist coverage at minimum statutory limits.

2.1.3 - Workers compensation with statutory benefits as required by Maryland law or the U. S. Longshoremen's and Harbor Workers' Compensation Act, or other laws as required by labor union agreements, including standard other states coverage; employers' liability coverage with limits of \$100,000 per accident, \$100,000 per employee for disease, and a \$500,000 disease policy limit.

2.1.4 - Total limit requirements of 2.1.1, 2.1.2 and 2.1.3 may be met by a combination of primary and umbrella excess liability coverage.

2.1.5 - Aircraft liability including coverage for any owned, hired or non-owned aircraft utilized in the project (e.g. installation of HVAC unit on school roof) with a minimum limit of \$ NA per occurrence applicable to aircraft while in flight or in motion. A higher limit may be required by the Board of Education of Howard County Maryland upon exposure review.

3 - Commercial General or Other Required Liability Insurance - "Claims Made" Basis

3.1 - If commercial general or other liability insurance purchased by the Contractor has been issued on a "claims made" basis, the Contractor must comply with the following additional conditions:

- i. Agree to provide certificates of insurance evidencing the above coverages for a period of two years after final payment for the contract. Such certificates shall evidence a retroactive date, no later than the beginning of the Contractors' or Subcontractors' Work under this contract, or
- ii. Purchase an extended (minimum two years) reporting period endorsement for the policy or policies in force during the term of this contract and evidence the purchase of this extended reporting period endorsement by means of a certificate of insurance or a copy of the endorsement itself.

Attachment H

EMPLOYEE SHARING AGREEMENT

APPLICABLE TO HOWARD COUNTY PUBLIC SCHOOL SYSTEM USERS AND VENDORS

HCPSS, as a Government entity, is required when entering into agreements with other parties to follow all applicable laws and regulations, including those related to data privacy and security; accessibility; and records retention. Accordingly, the Terms of Service (TOS) of all agreements between the parties ("Current Contracts") are hereby modified by this Amendment as they pertain to HCPSS's use of the Company's Site and/or Services.

- A. **Definition of "Data":** Non-public information, including all Personally Identifiable Information (PII), and information related to students, employees, metadata, and user content.
- B. **Definition of "Personally Identifiable Information" (PII):** Information that reasonably could lead to identification of an individual either directly or in conjunction with other available information, including, but is not limited to, a person's name and/or identification number, date of birth, race/ethnic or other demographic information, personal address, and identification of school or other work location.
- C. **Definition of Employee Data:** Information pertaining to an individual employee's, agent's, contractor's, or subcontractor's personal information, financial information, social security number, health insurance, work performance, demographic data, evaluations, family data, education, training, professional licenses and all other similar information of a confidential nature prohibited from public disclosure, unless otherwise available under applicable state and federal laws and regulations.
- D. **Definition of Confidential Information:** Information, not generally known, and proprietary to VENDOR or CLIENT or to a third party for whom VENDOR or CLIENT is performing work, including, without limitation, information concerning any patents or trade secrets, confidential or secret designs, processes, formulae, source codes, plans, devices or material, research and development, proprietary software, analysis, techniques, materials or designs (whether or not patented or patentable), directly or indirectly useful in any aspect of the business of VENDOR or CLIENT. Confidential Information includes all information which VENDOR or CLIENT acquires or becomes acquainted with during the period of the Agreements, whether developed by VENDOR, CLIENT or others, which VENDOR or CLIENT has a reasonable basis to believe to be Confidential, such as data that is personally identifiable to an individual employee, agent or contractor and information within the definition of "Employee Data." The parties agree that the following will be treated as "Confidential Information": (i) all database information ("Data") provided by or on behalf of CLIENT to VENDOR; (ii) all information provided by VENDOR to CLIENT pertaining to the Services; (iii) all information which is labeled as such in writing and prominently marked as "Confidential," "Proprietary" or words of similar meaning by either party; or (iv) business information of a party which a reasonable person would understand under the circumstances to be confidential.
- E. **Data Collection and Use:** VENDOR will only collect and use CLIENT Data for the purpose of fulfilling its duties and providing services under the Current Contracts and this Agreement (hereinafter collectively referred to as "the Agreements"), and for improving services under the Agreements.
 - 1. Specific Data Shared Under this Agreement
 - i. Xxx

- ii. Yyy
- iii. Zzz

- F. **Use of Confidential Information:** In performing services under the Agreements, VENDOR and CLIENT may be exposed to and will be required to use certain “Confidential Information”, as defined below. VENDOR and CLIENT along with their employees, agents or representatives will not, use, directly or indirectly, such Confidential Information for purposes other than the purposes outlined in the Agreements.
- G. **Maintenance of Confidentiality:** Any Confidential Information acquired or received by either party (the “Recipient”) in the course of the Agreements will not be disclosed or transferred to any person or entity other than to employees of a party and, as to VENDOR, for the purpose of performing its obligations under the Agreements. Confidential Information received under the Agreements will be treated with the same degree of care and security as each party uses with respect to its own Confidential Information, but not less than a reasonable degree of care. The parties agree to use Confidential Information only for the purpose of performance of the Agreements and to make no copies except as necessary for performance of the Agreements. Any confidential information and copies thereof made by a party, or any representative of a party, shall be completely and promptly destroyed at the conclusion of contract performance except as set forth in paragraph G.2 below.
1. Each party acknowledges that unauthorized disclosure or use of the Confidential Information by a party may irreparably damage the other party in such a way that adequate and/or complete compensation could not be obtained from damages in an action at law alone. Accordingly, the actual or threatened unauthorized disclosure or use of any Confidential Information by the Recipient shall give the other party the right to seek injunctive relief restraining such unauthorized disclosure or use, in addition to any other remedy otherwise available (including reasonable attorneys’ fees). Each party hereby waives the posting of a bond with respect to any action for injunctive relief.
 2. Upon termination or completion of the Services hereunder, upon request of CLIENT, VENDOR will deliver to CLIENT (in a VENDOR format) CLIENT’s Confidential Information as housed in VENDOR production database(s), provided that VENDOR may maintain archival copies for audit purposes and dispute resolution purposes and VENDOR may retain copies of Confidential Information on back-up media in which such Data is co-resident with other employment and income data. VENDOR shall remain under its contractual obligation of confidentiality and security to CLIENT and such obligations shall survive termination of the Agreement. This Section shall survive the termination of each of the Current Agreements and this Agreement.
- H. **Data De-Identification:** VENDOR may only use de-identified CLIENT Data for product development, research, or other internal purposes. De-identified Data will have all PII removed. Furthermore, VENDOR agrees not to attempt to re-identify de-identified Data.
- I. **Data Mining, Marketing and Advertising:** VENDOR is prohibited from mining PII for any purposes other than those agreed to by the parties. **Data mining or scanning of user content for the purpose of advertising or marketing to HCPSS employees, agents, and contractors or their families is prohibited. Any and all forms of advertisement, directed towards HCPSS students, parents, guardians, HCPSS employees, agents, and contractors is strictly prohibited unless allowed with express written consent of HCPSS.**
- J. **Modification of Terms of Service:** VENDOR will not change in any way how Data are collected, used, or shared under the terms of the Agreements without advance notice to and written consent from CLIENT. The Agreements are the entire agreements between CLIENT (including all CLIENT end users) and the VENDOR. All other agreements or understandings, whether electronic, click-through, verbal

or in writing, with HCPSS employees or other end users are superseded by this Employee Data Sharing Agreement.

- K. **Data Sharing:** VENDOR will not share CLIENT data, including de-identified data, with or disclose it to any third party without prior written consent of CLIENT, except as required by law.
- L. **Data Storage:** CLIENT Data will not be stored outside of the United States without prior, specific and informed written consent from CLIENT.
- M. **Terms, Data Transfer, Survival and Destruction:** CLIENT may immediately terminate this Data Sharing Agreement if CLIENT determines VENDOR has breached the Agreements. Each of the Agreements will automatically terminate at their expiration date, except for VENDOR's continuing obligations set for in G.2 above.
- N. **Rights and License in and to Data:** All goods, products, materials, documents, reports, writings, video images, photographs, papers, and intellectual property of any nature including software or computer images prepared by VENDOR (or subcontractors) for the CLIENT or from client-provided material will not be disclosed to any other person or entity and remains the property of the school system. VENDOR has a limited, nonexclusive license to CLIENT Data solely for the purpose of performing its obligations as contained in the Agreements. The Agreements do not give VENDOR any rights, implied or otherwise, to CLIENT Data, content, or intellectual property, except as expressly stated in the Agreements, including any right to sell or trade such Data.
- O. **Access:** Unless expressly prohibited by law, VENDOR will notify CLIENT as soon as possible, but in no event later than 10 calendar days of receipt by VENDOR, of any subpoenas, warrants, or other legal orders, demands or requests, including audits, and governmental requests and demands, received by VENDOR seeking CLIENT Data. If CLIENT receives a similar request, VENDOR will promptly supply CLIENT with copies of records or information if required by CLIENT to respond.
- P. **Security Controls and Risk Management:** VENDOR will store and process CLIENT Data in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to: 1) ensure the security and confidentiality of PII and Confidential Information; 2) protect against any anticipated threats or hazards to the security or integrity of Confidential Information; 3) protect against unauthorized access to or use of Confidential Information; and 4) dispose of PII and Confidential Information in a secure manner.
 - 1. To comply with VENDOR security control and confidentiality obligations, VENDOR has (a) designated an employee to coordinate its information security program, (b) identified reasonably foreseeable internal and external risks to the security, confidentiality, and integrity of CLIENT Information that could result in the unauthorized disclosure, misuse, alteration, destruction, or other compromise of such information, and assessed the sufficiency of any safeguards in place to control these risks, and (c) designed and implemented information safeguards to control the risks identified through the risk assessment, and regularly tests or otherwise monitors the effectiveness of security controls, systems and procedures.
 - 2. VENDOR will remediate any identified security vulnerabilities in a timely manner. VENDOR also will have a written incident response plan, to include prompt notification of HCPSS in the event of a breach of security, as well as best practices for responding to a breach of PII and/or Confidential Data. The VENDOR agrees to share its incident response plan upon request.
- Q. **Data Breaches:** When VENDOR has actual or constructive knowledge of a breach which affects CLIENT's Data (an "Incident") VENDOR shall notify CLIENT in writing, as soon as commercially practicable, but not later than forty-eight (48) hours after the incident, unless it is determined by law enforcement that such

notification would impede or delay their investigation. If such a determination is made by Law enforcement, then the notification required by this section shall be made as soon as commercially practicable after the law enforcement agency determines that notification will not impede or compromise the investigation. VENDOR shall have actual or constructive knowledge of an Incident if VENDOR, through an employee or agent, has actual knowledge that there has been an Incident or if VENDOR, through an employee or agent, has reason to believe that an Incident has occurred, based on facts or circumstances, including unexpected or unexplained acts or omissions. The VENDOR shall promptly take appropriate action, at VENDOR's expense, to remediate the Incident and mitigate future risk of a future Incident. In the event an Incident damages or causes loss of CLIENT Data, VENDOR shall, at its sole cost and expense, fully repair or restore the CLIENT Data, including, without limitation any and all Confidential Information, and institute appropriate measures to prevent any recurrence of the problem as soon as is commercially practicable.

- R. **Employee and Subcontractor Qualifications:** VENDOR shall ensure that its employees and all subcontractors who have potential access to CLIENT Data have undergone appropriate background screening and possess all needed qualifications to comply with the terms of the Agreements. Further, all employees and subcontractors as agents of VENDOR are subject to the same compliance with federal and state employment laws as VENDOR and should receive appropriate training, including confidentiality requirements contained in the Agreements and in federal and state laws.
- S. **Sex Offender Requirement:** Maryland law requires certain sex offenders to register with the local law enforcement agency. See Maryland Annotated Code, Criminal Procedure Article, §11-704. One of the purposes of this law, is to inform school systems when a Registered Sex Offender is residing or working in the area. When the sex offender registers, the local police are required to notify the Superintendent of Schools, and the Superintendent, in turn, is required to send a notice to school principals.

Maryland Law requires that any person who enters a contract with a county board of education or a non-public school "may not knowingly employ an individual to work at a school" if the individual is a registered sex offender. See §11-722 Criminal Procedure Article. An employer who violates this requirement is guilty of a misdemeanor and if convicted may be subject to up to five years imprisonment and/or a \$5,000 fine. As a contractor working for HCPSS, you are prohibited from employing Registered Sex Offenders to work on projects for the school system if they are required or permitted to perform delivery, installation, repair, construction, or any other kind of services **on HCPSS property.**

VENDOR shall screen its work-forces to ensure that a Registered Sex Offender does not perform work at a county public school and also ensure that a subcontractor and independent contractor conducts screening of its any personnel whose work may involve entering school property. The term "work force" is refers to all of the VENDOR's employees and to subcontractors and/or independent contractors VENDOR engages to perform work required by the Agreements. This is a material provision of the Agreements with VENDOR and violation of this provision may cause HCPSS to take action against VENDOR up to and including termination of the Agreements.

Effective July 1, 2015, amendments to § 6-113 of the Education Article of the Maryland Code further require that a contractor or subcontractor for a local school system may not knowingly assign an employee to work on school property with direct, unsupervised, and uncontrolled access to children, if the employee has been convicted of, or pled guilty or nolo contendere to, a crime involving a sexual offense, child sexual abuse and crimes of violence.

VENDOR shall submit to HCPSS a listing of any employees assigned to perform work under the Agreements and shall certify that the necessary criminal history records checks have been conducted

and that each employee complies with the requirements.

- T. **Governing Law:** The Agreements shall be governed by and construed in accordance with the laws of Maryland, excluding its choice of law rules. Any action or proceeding seeking any relief under or with respect to the Agreements shall be brought solely in the appropriate Maryland Court.
- U. **Compliance:** In addition to complying with the confidentiality requirements herein and the Maryland Code sections cited above, VENDOR shall ensure that it complies with federal and state laws protecting the privacy of employee personnel records, including an employee's personal information included in the definition of "personal information" in the General Provision Article, Section 4-101.
- V. **Monitoring:** VENDOR agrees to allow CLIENT the ability to audit VENDOR's use of CLIENT data to ensure compliance with the terms of the Agreements.
- W. **Indemnification:** VENDOR agrees to indemnify and hold harmless CLIENT, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action in connection with or arising out of the acts or omissions of either Party or its employees, subcontractors, or agents under the Agreements. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement, or any liability resulting from the unauthorized disclosure of PII or Confidential Information, or a breach of the obligations contained in this Data Sharing Agreement, including those obligations set forth in paragraph S above. The indemnities set forth herein will survive the expiration or termination of the Agreements.

CLIENT agrees to indemnify and hold harmless VENDOR, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action arising out of the intentional or malicious acts of CLIENT or its employees, subcontractors, or agents under the Agreements. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement or any liability resulting from the unauthorized disclosure of PII or Confidential Information or a breach of the obligations contained in this Data Sharing Agreement. Nothing herein shall be construed to abrogate, impair or waive any defense, liability or damages limitation, or governmental immunity of the Howard County Public School System, the Board of Education of Howard County, or their officers and employees pursuant to Maryland law or otherwise. The indemnities set forth herein will survive the expiration or termination of the Agreements.

Attachment I

STUDENT DATA SHARING AGREEMENT

Amendment to Terms of Service

APPLICABLE TO HOWARD COUNTY PUBLIC SCHOOL SYSTEM USERS/MEMBERS

HCPSS, as a Government entity, is required when entering into agreements with other parties to follow all applicable laws and regulations, including those related to data privacy and security; accessibility; and records retention. Accordingly, the Terms of Service (TOS) are hereby modified by this Amendment as they pertain to HCPSS's use of the Company's Site and/or Services.

- G. **Definition of "CLIENT Data":** CLIENT Data include all Personally Identifiable Information (PII) and other non-public information. CLIENT Data include, but are not limited to, student data, metadata, and user content.
- H. **Data Collection and Use:** VENDOR will collect and use CLIENT Data only for the purpose of fulfilling its duties and providing services under this Agreement, and for improving services under this Agreement.
 - 1. **Specific Data Shared Under this Agreement**
 - i. Xxx
 - ii. Yyy
 - iii. Zzz
- I. **Education Records:** If VENDOR will have access to "education records" as defined under the Family Educational Rights and Privacy Act (FERPA) (34 CFR Part 99), the VENDOR acknowledges that for the purpose of this Agreement it will be designated as a 'school official' with 'legitimate educational interests' and will use the data only for the purpose of fulfilling its duties under this Agreement. VENDOR agrees to indemnify and hold harmless the Board of Education of Howard County for any damages or costs, including reasonable attorney's fees, associated with any act or omission by VENDOR, its agents and employees concerning its FERPA obligations under this section.
- J. **Obligation of Confidentiality:** In performing services under this Agreement, VENDOR and CLIENT may be exposed to and will be required to use certain "Confidential Information", as defined below. VENDOR and CLIENT along with their employees, agents or representatives will not, use, directly or indirectly, such Confidential Information for purposes other than the purposes outlined in this Agreement.
- K. **Definition of Confidential Information:** "Confidential Information" means information, not generally known, and proprietary to the VENDOR or CLIENT or to a third party for whom the VENDOR or CLIENT is performing work, including, without limitation, information concerning any patents or trade secrets, confidential or secret designs, processes, formulae, source codes, plans, devices or material, research and development, proprietary software, analysis, techniques, materials or designs (whether or not patented or patentable), directly or indirectly useful in any aspect of the business of the VENDOR or CLIENT. Confidential Information includes all information which VENDOR or CLIENT acquires or becomes acquainted with during the period of this Agreement, whether developed by VENDOR, CLIENT or others, which VENDOR or CLIENT has a reasonable basis to believe to be Confidential, such as data that is personally identifiable to an individual student and information within the definition of "Education Record." The parties agree that the following will be treated as "Confidential Information": (i) all database information ("Data") provided by or on behalf of CLIENT to VENDOR; (ii) all information provided by

VENDOR to CLIENT pertaining to the Services; (iii) all information which is labeled as such in writing and prominently marked as “Confidential,” “Proprietary” or words of similar meaning by either party; or (iv) business information of a party which a reasonable person would understand under the circumstances to be confidential.

- L. **Maintenance of Confidentiality:** Any Confidential Information acquired or received by either party (the “Recipient”) in the course of this Agreement will not be disclosed or transferred to any person or entity other than to employees of a party and, as to VENDOR, for the purpose of performing its obligations under this Agreement. Confidential Information received under this Agreement will be treated with the same degree of care and security as each party uses with respect to its own Confidential Information, but not less than a reasonable degree of care. The parties agree to use Confidential Information only for the purpose of performance of this Agreement and to make no copies except as necessary for performance of this Agreement. Any such confidential information and copies thereof made by a party, or any representative of a party, shall be completely and promptly destroyed at the conclusion of contract performance subject to paragraph F.2 below.
1. Each party acknowledges that unauthorized disclosure or use of the Confidential Information by a party may irreparably damage the other party in such a way that adequate compensation could not be obtained from damages in an action at law. Accordingly, the actual or threatened unauthorized disclosure or use of any Confidential Information shall give the owner the right to seek injunctive relief restraining such unauthorized disclosure or use, in addition to any other remedy otherwise available (including reasonable attorneys’ fees). Each party hereby waives the posting of a bond with respect to any action for injunctive relief.
 2. Upon termination or completion of the Services hereunder, upon request of CLIENT, VENDOR will deliver to CLIENT (in a VENDOR format) the CLIENT’s Confidential Information as housed in the VENDOR production database(s), provided that VENDOR may maintain archival copies for audit purposes and dispute resolution purposes and VENDOR may retain copies of Confidential Information on back-up media in which such Data is co-resident with other employment and income data. VENDOR shall remain under its contractual obligation of confidentiality and security to CLIENT and such obligations shall survive termination of the Agreement. This Section shall survive the termination of this Agreement.
- M. **Data De-Identification:** VENDOR may use de-identified CLIENT Data for product development, research, or other internal purposes. De-identified CLIENT Data will have all direct and indirect personal identifiers removed. This includes, but is not limited to, name, ID numbers, date of birth, demographic information, location information, and school ID. Furthermore, VENDOR agrees not to attempt to re-identify de-identified CLIENT Data.
- N. **Data Mining, Marketing and Advertising:** Except as indicated in Section G above, VENDOR is prohibited from mining CLIENT Data for any purposes other than those agreed to by the parties. Data Mining DOES NOT include deploying data analytics to deliver **Data mining or scanning of user content for the purpose of advertising or marketing to students or their parents is prohibited. Any and all forms of advertisement, directed towards children, parents, guardians, or District Employees will be strictly prohibited unless allowed with express written consent of the District.**
- O. **Modification of Terms of Service:** VENDOR will not change how CLIENT Data are collected, used, or shared under the terms of this Agreement in any way without advance notice to and specific and informed written consent from the CLIENT. This Agreement is the entire agreement between the CLIENT (including all District end users) and the VENDOR. All other agreements or understandings, whether electronic, click-through, verbal or in writing, with District Employees or other End Users shall be null and void.

- P. **Data Sharing:** VENDOR will not share CLIENT data, including de-identified data, with or disclose it to any third party without prior specific and informed written consent of the CLIENT, except as required by law.
- Q. **Data Storage:** CLIENT Data will not be stored outside of the United States without prior, specific and informed written consent from the CLIENT.
- R. **Terms, Data Transfer, Survival and Destruction:** The CLIENT may immediately terminate the Agreement if the CLIENT determines the VENDOR has breached this Agreement. The Agreement will automatically terminate at the expiration date. However, the VENDOR's obligations shall survive termination of this Agreement until ALL CLIENT Data has been returned and/or securely removed or destroyed. VENDOR will ensure that all Data in its possession and in the possession of any subcontractors, or agents to which the VENDOR may have transferred Data, are destroyed or transferred as specified by the CLIENT, except as provided in F.2 above.
- S. **Rights and License in and to Data:** All goods, products, materials, documents, reports, writings, video images, photographs, papers and intellectual property of any nature including software or computer images prepared by the VENDOR (or subcontractors) for the CLIENT or from client-provided material will not be disclosed to any other person or entity and remains the property of the school system. All student produced work remains the property of that student. The VENDOR has a limited, nonexclusive license to the data described herein solely for the purpose of performing its obligations as outlined in the Agreement. This Agreement does not give VENDOR any rights, implied or otherwise, to Data, content, or intellectual property, except as expressly stated in the Agreement, including any right to sell or trade Data.
- T. **Access:** Except as otherwise expressly prohibited by law, the VENDOR will immediately notify the CLIENT of any subpoenas, warrants, or other legal orders, demands or requests, including Audits, and governmental requests and demands, received by the VENDOR seeking CLIENT Data. If the CLIENT receives a similar request, the VENDOR will promptly supply the CLIENT with copies of records or information required by the CLIENT to respond.
- U. **Security Controls and Risk Management:** VENDOR will store and process CLIENT Data in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to: 1) ensure the security and confidentiality of PII and Confidential Information; 2) protect against any anticipated threats or hazards to the security or integrity of Confidential Information; 3) protect against unauthorized access to or use of Confidential Information that could result in substantial harm or inconvenience to any customer or to any client employee and/or student; and 4) dispose of PII and Confidential Information in a secure manner.
1. To comply with the safeguard obligations generally described above, VENDOR has (a) designated an employee to coordinate its information security program, (b) identified reasonably foreseeable internal and external risks to the security, confidentiality, and integrity of CLIENT Information that could result in the unauthorized disclosure, misuse, alteration, destruction, or other compromise of such information, and assessed the sufficiency of any safeguards in place to control these risks, and (c) designed and implemented information safeguards to control the risks identified through the risk assessment, and regularly tests or otherwise monitors the effectiveness of safeguards' key controls, systems and procedures.
 2. VENDOR will conduct periodic risk assessments and remediate any identified security vulnerabilities in a timely manner. VENDOR will also have a written incident response plan, to include prompt notification of HCPSS in the event of a security or privacy incident, as well

as best practices for responding to a breach of PII. VENDOR agrees to share its incident response plan upon request.

- V. **Data Breaches:** VENDOR shall notify CLIENT in writing as soon as commercially practicable, however no later than forty-eight (48) hours, after VENDOR has either actual or constructive knowledge of a breach which affects CLIENT's Data (an "Incident") unless it is determined by law enforcement that such notification would impede or delay their investigation. VENDOR shall have actual or constructive knowledge of an Incident if VENDOR actually knows there has been an Incident or if VENDOR has reasonable basis in facts or circumstances, whether acts or omissions, for its belief that an Incident has occurred. The notification required by this section shall be made as soon as commercially practicable after the law enforcement agency determines that notification will not impede or compromise the investigation. VENDOR shall cooperate with law enforcement in accordance with applicable law provided however, that such cooperation shall not result in or cause an undue delay to remediation of the Incident. VENDOR shall promptly take appropriate action to mitigate such risk or potential problem at VENDOR's expense. In the event of an Incident, VENDOR shall, at its sole cost and expense, fully restore the Confidential Information, including, without limitation any and all Data, and institute appropriate measures to prevent any recurrence of the problem as soon as is commercially practicable.
- W. **Employee and Subcontractor Qualifications:** VENDOR shall ensure that its employees and all subcontractors who have potential access to CLIENT Data have undergone appropriate background screening and possess all needed qualifications to comply with the terms of this Agreement. Further, all employees and subcontractors are subject to the same FERPA compliance in relation to the 'school official' designation, and should receive training that the re-disclosure of PII and/or Confidential Information will violate federal and state laws and may result in criminal and/or civil penalties.
- X. **Sex Offender Requirement:** Maryland law requires certain sex offenders to register with the local law enforcement agency; See Maryland Annotated Code, Criminal Procedure Article, §11-704. One of the purposes of this law, is to inform school systems when a Registered Sex Offender is residing or working in the area. When the sex offender registers, the local police are required to notify the Superintendent of Schools, and the Superintendent, in turn, is required to send a notice to school principals.

As a contractor working for Howard County Public School System (HCPSS), we require that you do not employ Registered Sex Offenders to work on projects for our school system if they, as a result, are required to perform delivery, installation, repair, construction or any other kind of services **on HCPSS property**. Further, Maryland Law that became effective June 22, 2006, requires that any person who enters a contract with a county board of education or a non-public school "may not knowingly employ an individual to work at a school" if the individual is a registered sex offender; See §11-722 Criminal Procedure Article. An employer who violates this requirement is guilty of a misdemeanor and if convicted may be subject to up to five years imprisonment and/or a \$5,000 fine.

Each contractor shall screen their work-forces to ensure that a Registered Sex Offender does not perform work at a county public school and also ensure that a subcontractor and independent contractor conducts screening of its personnel who may work at a school. The term "work force" is intended to refer to all of the contractor's direct employees and subcontractors and/or independent contractors it uses to perform the work. Violations of this provision may cause HCPSS to take action against the contractor up to and including termination of the contract.

Effective July 1, 2015, amendments to § 6-113 of the Education Article of the Maryland Code further require that a contractor or subcontractor for a local school system may not knowingly assign an employee to work on school property with direct, unsupervised, and uncontrolled access to children, if

the employee has been convicted of, or pled guilty or nolo contendere to, a crime involving a sexual offense, child sexual abuse and crimes of violence.

The Contractor shall submit to HCPSS a listing of any employees assigned to perform under this agreement and certify that the necessary criminal history records checks have been conducted and that each employee complies with the requirements.

- Y. **Governing Law:** This agreement shall be governed by and construed in accordance with the laws of Maryland, excluding its choice of law rules. Any action or proceeding seeking any relief under or with respect to this Agreement shall be brought solely in the appropriate Maryland Court. VENDOR will comply with Maryland Education Code ANN. § 4-131, "Operators of School Internet Web sites, Online Services, Online Applications, and Mobile Applications." VENDOR agrees to be bound as an "operator" under the law regardless of the VENDOR's exemptions that may exist in Maryland Education Code ANN. § 4-131(a)(3).
- Z. **Compliance:** In addition to complying with FERPA and the Maryland Education Code cited above, the VENDOR shall ensure that its products/services comply with the Federal Protection of Pupil Rights Act (34 CFR Part 98), the Federal Children's Internet Protection Act (47 CFR 54.520), and the Federal Children's Online Privacy and Protection Act (16 CFR Part 312).
- AA. **Monitoring:** The VENDOR agrees to allow the CLIENT the ability to audit the VENDOR's use of CLIENT data to ensure compliance with the terms of this agreement.
- BB. **Indemnification:** VENDOR agrees to indemnify and hold harmless CLIENT, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action of every kind, nature, or character, in connection with or arising out of the acts or omissions of either Party or its employees, subcontractors, or agents under this Agreement. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement or any liability resulting from the unauthorized disclosure of PII or Confidential Information or a breach of the obligations contained in this Data Sharing Agreement, including those set forth in paragraph R above. The indemnities set forth herein will survive the expiration or termination of this Agreement.

CLIENT agrees to indemnify and hold harmless VENDOR, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action of every kind, nature, or character, arising out of the intentional or malicious acts of CLIENT or its employees, subcontractors, or agents under this Agreement. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement or any liability resulting from the unauthorized disclosure of PII or Confidential Information or a breach of the obligations contained in this Data Sharing Agreement. The indemnities set forth herein will survive the expiration or termination of this Agreement.

APPENDIX J

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA FORM

RFP NO.: 014.14.B5

TECHNICAL PROPOSAL DUE DATE:

RFP FOR: Telecommunications Replacement Solution

NAME OF OFFEROR: _____

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned, hereby acknowledges the receipt of the following addenda:

Addendum No. _____ dated _____

As stated in the RFP documents, this form is included in our Technical Proposal.

Signature

Printed Name

Title

ATTACHMENT K - Bid/Proposal Affidavit

A. AUTHORIZED REPRESENTATIVE

I HEREBY AFFIRM THAT:

I am the (title) _____ and the duly authorized representative of (business) _____ and that I possess the legal authority to make this Affidavit on behalf of myself and the business for which I am acting.

B. CERTIFICATION REGARDING COMMERCIAL NONDISCRIMINATION

The undersigned bidder hereby certifies and agrees that the following information is correct: In preparing its bid on this project, the bidder has considered all proposals submitted from qualified, potential subcontractors and suppliers, and has not engaged in "discrimination" as defined in §19-103 of the State Finance and Procurement Article of the Annotated Code of Maryland. "Discrimination" means any disadvantage, difference, distinction, or preference in the solicitation, selection, hiring, or commercial treatment of a vendor, subcontractor, or commercial customer on the basis of race, color, religion, ancestry, or national origin, sex, age, marital status, sexual orientation, or on the basis of disability or any otherwise unlawful use of characteristics regarding the vendor's, supplier's, or commercial customer's employees or owners. "Discrimination" also includes retaliating against any person or other entity for reporting any incident of "discrimination". Without limiting any other provision of the solicitation on this project, it is understood that, if the certification is false, such false certification constitutes grounds for the State to reject the bid submitted by the bidder on this project, and terminate any contract awarded based on the bid. As part of its bid or proposal, the bidder herewith submits a list of all instances within the past 4 years where there has been a final adjudicated determination in a legal or administrative proceeding in the State of Maryland that the bidder discriminated against subcontractors, vendors, suppliers, or commercial customers, and a description of the status or resolution of that determination, including any remedial action taken. Bidder agrees to comply in all respects with the State's Commercial Nondiscrimination Policy as described under Title 19 of the State Finance and Procurement Article of the Annotated Code of Maryland.

B-1. Certification Regarding Minority Business Enterprises.

The undersigned bidder hereby certifies and agrees that it has fully complied with the State Minority Business Enterprise Law, State Finance and Procurement Article, §14-308(a)(2), Annotated Code of Maryland, which provides that, except as otherwise provided by law, a Contractor may not identify a certified minority business enterprise in a bid or proposal and:

- (1) Fail to request, receive, or otherwise obtain authorization from the certified minority business enterprise to identify the certified minority proposal;
- (2) Fail to notify the certified minority business enterprise before execution of the contract of its inclusion in the bid or proposal;
- (3) Fail to use the certified minority business enterprise in the performance of the contract; or
- (4) Pay the certified minority business enterprise solely for the use of its name in the bid or proposal.

Without limiting any other provision of the solicitation on this project, it is understood that if the certification is false, such false certification constitutes grounds for the State to reject the bid submitted by the bidder on this project, and terminate any contract awarded based on the bid.

C. AFFIRMATION REGARDING BRIBERY CONVICTIONS

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business (as is defined in Section 16-101(b) of the State Finance and Procurement Article of the Annotated Code of Maryland), or any of its officers, directors, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities including obtaining or performing contracts with public bodies has been convicted of, or has had probation before judgment imposed pursuant to Criminal Procedure Article, §6-220, Annotated Code of Maryland, or has pleaded nolo contendere to a charge of, bribery, attempted bribery, or conspiracy to bribe in violation of Maryland law, or of the law of any other state or federal law, except as follows (indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of person(s) involved, and their current positions and responsibilities with the business):

D. AFFIRMATION REGARDING OTHER CONVICTIONS

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business, or any of its officers, directors, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities including obtaining or performing contracts with public bodies, has:

- (1) Been convicted under state or federal statute of:
 - (a) A criminal offense incident to obtaining, attempting to obtain, or performing a public or private contract; or
 - (b) Fraud, embezzlement, theft, forgery, falsification or destruction of records or receiving stolen property;
- (2) Been convicted of any criminal violation of a state or federal antitrust statute;
- (3) Been convicted under the provisions of Title 18 of the United States Code for violation of the Racketeer Influenced and Corrupt Organization Act, 18 U.S.C. §1961 et seq., or the Mail Fraud Act, 18 U.S.C. §1341 et seq., for acts in connection with the submission of bids or proposals for a public or private contract;
- (4) Been convicted of a violation of the State Minority Business Enterprise Law, §14-308 of the State Finance and Procurement Article of the Annotated Code of Maryland;
- (5) Been convicted of a violation of §11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland;

(6) Been convicted of conspiracy to commit any act or omission that would constitute grounds for conviction or liability under any law or statute described in subsections (1)—(5) above;

(7) Been found civilly liable under a state or federal antitrust statute for acts or omissions in connection with the submission of bids or proposals for a public or private contract;

(8) Been found in a final adjudicated decision to have violated the Commercial Nondiscrimination Policy under Title 19 of the State Finance and Procurement Article of the Annotated Code of Maryland with regard to a public or private contract; or

(9) Admitted in writing or under oath, during the course of an official investigation or other proceedings, acts or omissions that would constitute grounds for conviction or liability under any law or statute described in §§B and C and subsections D(1)—(8) above, except as follows (indicate reasons why the affirmations cannot be given, and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved and their current positions and responsibilities with the business, and the status of any debarment):

E. AFFIRMATION REGARDING DEBARMENT

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business, or any of its officers, directors, partners, controlling stockholders, or any of its employees directly involved in the business's contracting activities, including obtaining or performing contracts with public bodies, has ever been suspended or debarred (including being issued a limited denial of participation) by any public entity, except as follows (list each debarment or suspension providing the dates of the suspension or debarment, the name of the public entity and the status of the proceedings, the name(s) of the person(s) involved and their current positions and responsibilities with the business, the grounds of the debarment or suspension, and the details of each person's involvement in any activity that formed the grounds of the debarment or suspension).

F. AFFIRMATION REGARDING DEBARMENT OF RELATED ENTITIES

I FURTHER AFFIRM THAT:

(1) The business was not established and it does not operate in a manner designed to evade the application of or defeat the purpose of debarment pursuant to Sections 16-101, et seq., of the State Finance and Procurement Article of the Annotated Code of Maryland; and

(2) The business is not a successor, assignee, subsidiary, or affiliate of a suspended or debarred business, except as follows (you must indicate the reasons why the affirmations cannot be given without qualification):

G. SUB-CONTRACT AFFIRMATION

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business, has knowingly entered into a contract with a public body under which a person debarred or suspended under Title 16 of the State Finance and Procurement Article of the Annotated Code of Maryland will provide, directly or indirectly, supplies, services, architectural services, construction related services, leases of real property, or construction.

H. AFFIRMATION REGARDING COLLUSION

I FURTHER AFFIRM THAT:

Neither I, nor to the best of my knowledge, information, and belief, the above business has:

(1) Agreed, conspired, connived, or colluded to produce a deceptive show of competition in the compilation of the accompanying bid or offer that is being submitted;

(2) In any manner, directly or indirectly, entered into any agreement of any kind to fix the bid price or price proposal of the bidder or offeror or of any competitor, or otherwise taken any action in restraint of free competitive bidding in connection with the contract for which the accompanying bid or offer is submitted.

I. FINANCIAL DISCLOSURE AFFIRMATION

I FURTHER AFFIRM THAT:

I am aware of, and the above business will comply with, the provisions of Section 13-221 of the State Finance and Procurement Article of the Annotated Code of Maryland, which require that every business that enters into contracts, leases, or other agreements with the State of Maryland or its agencies during a calendar year under which the business is to receive in the aggregate \$100,000 or more shall, within 30 days of the time when the aggregate value of the contracts, leases, or other agreements reaches \$100,000, file with the Secretary of State of Maryland certain specified information to include disclosure of beneficial ownership of the business.

J. POLITICAL CONTRIBUTION DISCLOSURE AFFIRMATION

I FURTHER AFFIRM THAT:

I am aware of, and the above business will comply with, Election Law Article, §§14-101—14-108, Annotated Code of Maryland, which requires that every person that enters into contracts, leases, or other

agreements with the State of Maryland, including its agencies or a political subdivision of the State, during a calendar year in which the person receives in the aggregate \$100,000 or more shall file with the State Board of Elections a statement disclosing contributions in excess of \$500 made during the reporting period to a candidate for elective office in any primary or general election.

K. DRUG AND ALCOHOL FREE WORKPLACE

(Applicable to all contracts unless the contract is for a law enforcement agency and the agency head or the agency head's designee has determined that application of COMAR 21.11.08 and this certification would be inappropriate in connection with the law enforcement agency's undercover operations.)

I CERTIFY THAT:

- (1) Terms defined in COMAR 21.11.08 shall have the same meanings when used in this certification.
- (2) By submission of its bid or offer, the business, if other than an individual, certifies and agrees that, with respect to its employees to be employed under a contract resulting from this solicitation, the business shall:
 - (a) Maintain a workplace free of drug and alcohol abuse during the term of the contract;
 - (b) Publish a statement notifying its employees that the unlawful manufacture, distribution, dispensing, possession, or use of drugs, and the abuse of drugs or alcohol is prohibited in the business' workplace and specifying the actions that will be taken against employees for violation of these prohibitions;
 - (c) Prohibit its employees from working under the influence of drugs or alcohol;
 - (d) Not hire or assign to work on the contract anyone whom the business knows, or in the exercise of due diligence should know, currently abuses drugs or alcohol and is not actively engaged in a bona fide drug or alcohol abuse assistance or rehabilitation program;
 - (e) Promptly inform the appropriate law enforcement agency of every drug-related crime that occurs in its workplace if the business has observed the violation or otherwise has reliable information that a violation has occurred;
 - (f) Establish drug and alcohol abuse awareness programs to inform its employees about:
 - (i) The dangers of drug and alcohol abuse in the workplace;
 - (ii) The business' policy of maintaining a drug and alcohol free workplace;
 - (iii) Any available drug and alcohol counseling, rehabilitation, and employee assistance programs; and
 - (iv) The penalties that may be imposed upon employees who abuse drugs and alcohol in the workplace;
 - (g) Provide all employees engaged in the performance of the contract with a copy of the statement required by §K(2)(b), above;
 - (h) Notify its employees in the statement required by §K(2)(b), above, that as a condition of continued employment on the contract, the employee shall:
 - (i) Abide by the terms of the statement; and

(ii) Notify the employer of any criminal drug or alcohol abuse conviction for an offense occurring in the workplace not later than 5 days after a conviction;

(i) Notify the procurement officer within 10 days after receiving notice under §K(2)(h)(ii), above, or otherwise receiving actual notice of a conviction;

(j) Within 30 days after receiving notice under §K(2)(h)(ii), above, or otherwise receiving actual notice of a conviction, impose either of the following sanctions or remedial measures on any employee who is convicted of a drug or alcohol abuse offense occurring in the workplace:

(i) Take appropriate personnel action against an employee, up to and including termination; or

(ii) Require an employee to satisfactorily participate in a bona fide drug or alcohol abuse assistance or rehabilitation program; and

(k) Make a good faith effort to maintain a drug and alcohol free workplace through implementation of §K(2)(a)—(j), above.

(3) If the business is an individual, the individual shall certify and agree as set forth in §K(4), below, that the individual shall not engage in the unlawful manufacture, distribution, dispensing, possession, or use of drugs or the abuse of drugs or alcohol in the performance of the contract.

(4) I acknowledge and agree that:

(a) The award of the contract is conditional upon compliance with COMAR 21.11.08 and this certification;

(b) The violation of the provisions of COMAR 21.11.08 or this certification shall be cause to suspend payments under, or terminate the contract for default under COMAR 21.07.01.11 or 21.07.03.15, as applicable; and

(c) The violation of the provisions of COMAR 21.11.08 or this certification in connection with the contract may, in the exercise of the discretion of the Board of Public Works, result in suspension and debarment of the business under COMAR 21.08.03.

L. CERTIFICATION OF CORPORATION REGISTRATION AND TAX PAYMENT

I FURTHER AFFIRM THAT:

(1) The business named above is a (domestic ___) (foreign ___) corporation registered in accordance with the Corporations and Associations Article, Annotated Code of Maryland, and that it is in good standing and has filed all of its annual reports, together with filing fees, with the Maryland State Department of Assessments and Taxation, and that the name and address of its resident agent filed with the State Department of Assessments and Taxation is:

Name: _____ Address: _____
(If not applicable, so state).

(2) Except as validly contested, the business has paid, or has arranged for payment of, all taxes due the State of Maryland and has filed all required returns and reports with the Comptroller of the Treasury, the State Department of Assessments and Taxation, and the Department of Labor, Licensing, and

regulation, as applicable, and will have paid all withholding taxes due the State of Maryland prior to final settlement.

M. CONTINGENT FEES

I FURTHER AFFIRM THAT:

The business has not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee, bona fide agent, bona fide salesperson, or commercial selling agency working for the business, to solicit or secure the Contract, and that the business has not paid or agreed to pay any person, partnership, corporation, or other entity, other than a bona fide employee, bona fide agent, bona fide salesperson, or commercial selling agency, any fee or any other consideration contingent on the making of the Contract.

N. Repealed.

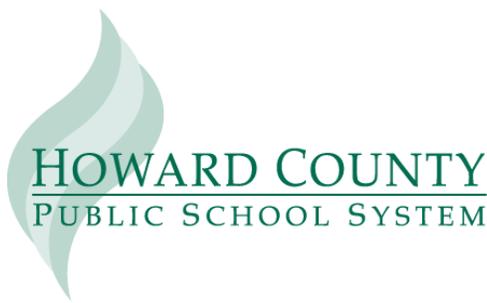
O. ACKNOWLEDGEMENT

I ACKNOWLEDGE THAT this Affidavit is to be furnished to the Procurement Officer and may be distributed to units of: (1) the State of Maryland; (2) counties or other subdivisions of the State of Maryland; (3) other states; and (4) the federal government. I further acknowledge that this Affidavit is subject to applicable laws of the United States and the State of Maryland, both criminal and civil, and that nothing in this Affidavit or any contract resulting from the submission of this bid or proposal shall be construed to supersede, amend, modify or waive, on behalf of the State of Maryland, or any unit of the State of Maryland having jurisdiction, the exercise of any statutory right or remedy conferred by the Constitution and the laws of Maryland with respect to any misrepresentation made or any violation of the obligations, terms and covenants undertaken by the above business with respect to (1) this Affidavit, (2) the contract, and (3) other Affidavits comprising part of the contract.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Date: _____

By: _____
(Authorized Representative and Affiant)



STANDARD CONTRACT

Attachment L AGREEMENT FOR PROFESSIONAL SERVICES

AGREEMENT # _____

THIS AGREEMENT is entered into this ____ day of _____ 2017, by and between the Board of Education of Howard County (hereinafter referred to as the "Board") and _____, (hereinafter referred to as the "Consultant").

RECITALS

WHEREAS, the Consultant submitted a proposal to RFP # issued by the Board and has been selected to perform ____ (scope) _____ services in accordance with the terms and conditions expressed in the RFP;

WHEREAS, the Board desires the Consultant to perform certain work and services, on the terms and conditions herein set forth and the Consultant is ready, willing, and able to perform such work and services; and

WHEREAS, this Agreement shall be administered by the Project Manager or such other persons designated by The Board of Education; and

NOW, THEREFORE, in consideration of the premises contained herein and the promises each to the other made, the parties hereby agree as follows:

ARTICLE I - CATEGORY OF WORK AND SERVICES

The work and services to be performed by the Consultant shall be in accordance with the following documents:

RFP # _____
Proposal Response per dated _____.

ARTICLE II - TERMS AND CONDITIONS

Consultant agrees to perform the work and services required under this Agreement in accordance with RFP # _____ whose general terms, conditions and specifications and General Provisions for Professional Services are incorporated herein by reference.

ARTICLE III - TERM OF AGREEMENT

The term of agreement shall begin on the date indicated above and continue for a period of one year commencing on _____ and terminating _____. The agreement may be extended an additional four (4) one year periods subject to funding.

ARTICLE IV - PAYMENTS AND SCHEDULE OF PAYMENTS

(1) The Consultant shall receive his full compensation for all work and services performed according to conditions outlined in the solicitation.

(2) Payment shall be made in three installments upon submission of an invoice.

ARTICLE V - INSURANCE

The Consultant agrees to and has complied with the insurance requirements set forth in the RFP.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the day and year first above-written.

WITNESS: BOARD OF EDUCATION OF HOWARD COUNTY

By: _____ (SEAL)
Cynthia L. Vaillancourt, Chairman
Board of Education of Howard County

APPROVED: By: _____ (SEAL)
Renee A. Foose, Ed. D., Superintendent
Howard County Public School System

WITNESS: By: _____
Signature

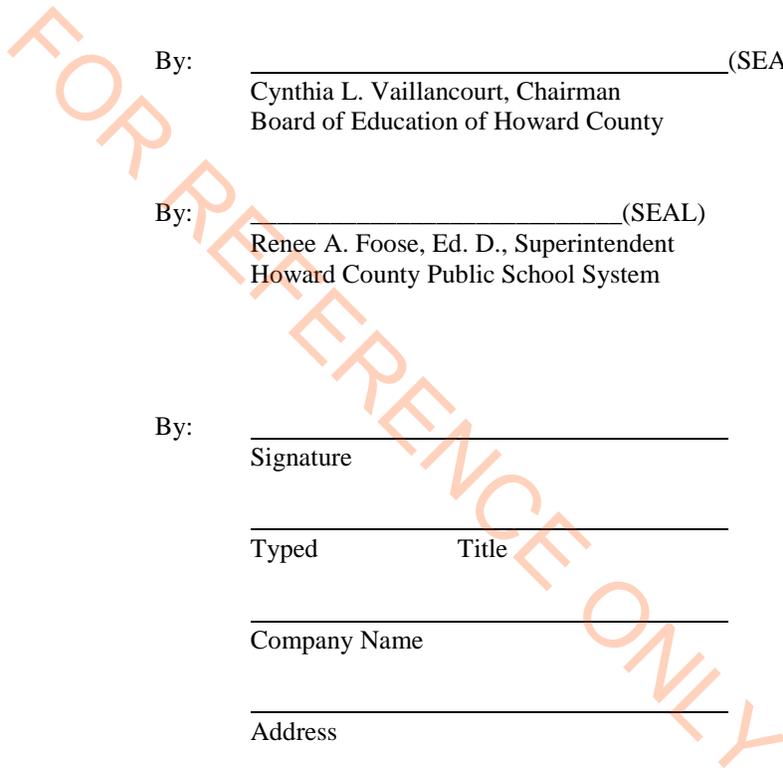
Typed Title

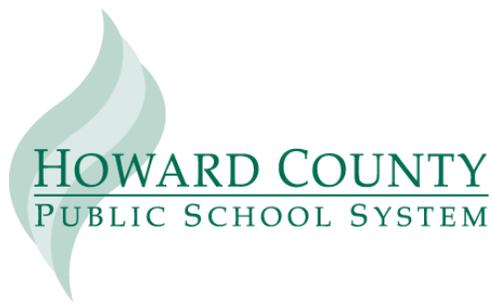
Company Name

Address

City, State Zip

Telephone Fax





ADDENDUM NO. 1

May 3, 2017

RE: **RFP No. 041.17.B5, Telecommunications Replacement Solution**

FROM: **Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax**

TO: **PROSPECTIVE BIDDERS**

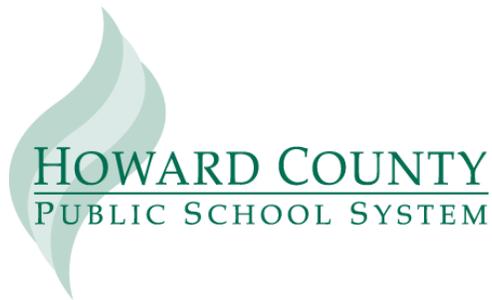
This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. CHANGE

Bid Due Date to: June 29, 2017 at 2:30 PM

Note: Q & A to be posted in upcoming addenda. Please be prompt with any questions and/or concerns. Send via email to: tludicke@hcpss.org

END OF ADDENDUM



ADDENDUM NO. 2

May 31, 2017

RE: RFP No. 041.17.B5, Telecommunications Replacement Solution

**FROM: Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax**

TO: PROSPECTIVE BIDDERS

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. CHANGE

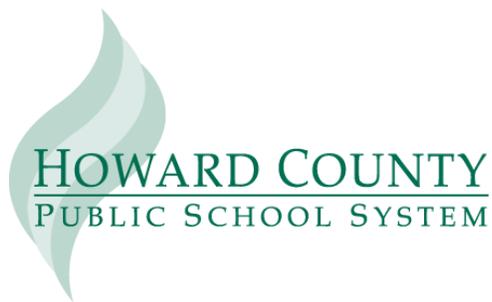
Bid Due Date to: July 6, 2017 at 2:30 PM

2. CHANGE

Last Day for Questions to: June 15, 2017

Note: Q & A to be posted in upcoming addenda.

END OF ADDENDUM



ADDENDUM NO. 3

June 9, 2017

RE: **RFP No. 041.17.B5, Telecommunications Replacement Solution**

FROM: **Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax**

TO: **PROSPECTIVE BIDDERS**

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. CHANGE

~~4.1.1.1. Two Mitel systems serving the administration building/complex. Avaya Communication Manager, of which serves as an internet protocol telephony (IPT) pilot.~~

2. CHANGE

~~4. Supporting System Documentation, Page 23 of 116
Provide at least three electronic copies of supporting system documentation. at System Acceptance.~~

3. DELETE

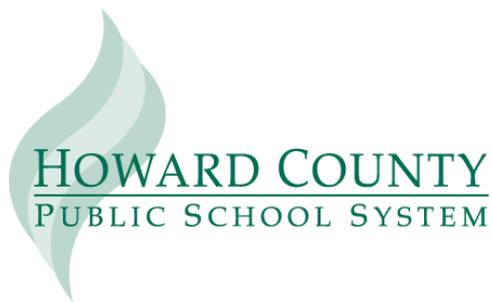
~~1. FCC Approved Offering
The potential Solution must be FCC approved. Offeror shall list the FCC approvals for the potential Solution.~~

4. ADD

Addendum Attachments M through R.

Note: A forthcoming addendum will address procurement and bid format related questions.

END OF ADDENDUM



ADDENDUM NO. 4

June 26, 2017

RE: **RFP No. 041.17.B5, Telecommunications Replacement Solution**

FROM: **Purchasing Office
Howard County Public Schools
10910 Clarksville Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax**

TO: **PROSPECTIVE BIDDERS**

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. CHANGE

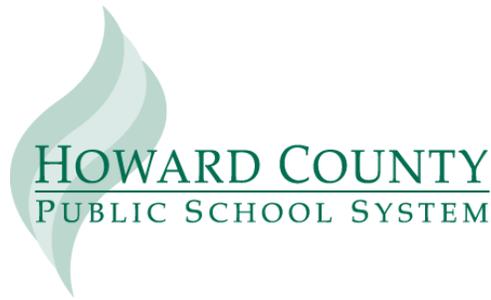
Bid Due Date to: July 20, 2017 at 2:30 PM

2. CHANGE

Last Day for Questions to: Open for questions until further notice.

Note: Q & A to be posted in upcoming addenda.

END OF ADDENDUM



ADDENDUM NO. 5

July 10, 2017

RE: RFP No. 041.17.B5, Telecommunications Replacement Solution

FROM: Purchasing Office
Howard County Public
Schools 10910 Clarksville
Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax

TO: PROSPECTIVE BIDDERS

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. **DELETE**
Section 5. Evaluation Process, General Requirements, Paragraph 3:
~~The Technical Criteria are listed below in order of importance. Offerors are requested to compile their Proposals in the same order.~~
2. **REPLACE**
Section 10.3 Financing/Leasing:
~~If terminated early, HCPSS retains the right to purchase the equipment at the fair market value at that time.~~
- with -
If terminated, HCPSS retains the right to exercise all its rights and remedies under any resulting agreement and/or under the Uniform Commercial Code (UCC) Article 2A – Leases.
3. **ADD**
Questions & Answers - Attachment S
4. **ADD**
Reference Sheet in Microsoft Word format (*Bidders shall request this document by contacting the Issuing Office, Ted Ludicke tludicke@hcpss.org*)
5. **ADD**
Technical and Price Proposal in Microsoft Word format (*Bidders shall request this document by contacting the Issuing Office, Ted Ludicke tludicke@hcpss.org*)
6. **CHANGE**
Last Day for Questions: July 14, 2017

END OF ADDENDUM

Attachment S – Addendum #5
Questions & Answers

Question No.	Question	Answer
1	Analog devices, how many are in each school?	The only analog devices are fax machines which are analog lines straight to the machine from the NID. See Telecenter section for classroom phone replacement.
2	Where the analog devices are needed, is there a Data Port near them?	Yes
3	Are there any scenarios where an employee would have a voicemail box, but no physical phone? (hardphone or softphone)	yes
4	Is the provider required to have its NOC in Howard County, or the state of Maryland?	No
5	Does HCPSS require the selected provider to support any or all of its existing legacy voice environment prior to or during the cut-overs?	It is expected that the selected contractor will ensure minimum downtime during the cutover and be prepared to maintain either system at cutover..
6	Is HCPSS open to the entire management and operations support being performed remotely with onsite dispatch available if needed?	HCPSS requires an onsite project manager with the ability to make changes to installation staff, order equipment and manage change orders as needed
7	Is the provider to perform Moves, Adds, Changes, Deletions (MACD) at the device level? User level? Physical phone placements (bulk or otherwise)?	No. After installation is complete, HCPSS will be responsible for all MAC work.
8	How many and what types of trunks are required for each site?	Proposers may offer a solution that best meets the needs of the school system.
9	What series of IP Telephones are in use? I.e. (5000, 5200, 5300 Series)	5200
10	Are there Fiber connected Peripheral Nodes with Digital, Analog line cards and/or Loop Start/ Ground Start Trunk cards installed?	Yes
11	School Buildings. Are the phones integrated with the Rauland System to be replaced or re-used?	Replaced
12	Based on Section 6.12, we can account for all 3,000 equipped phones just by adding all of the schools. We also wish to propose the replacement of the two Mitel switches which will require the total number of administrative phones that are presently supported by the Mitel PBX's. Please provide the	See Attachment P for quantities. All phones are models 4025(digital) and 5220(IP)

Attachment S – Addendum #5
Questions & Answers

Question No.	Question	Answer
	<u>number of administrative phones</u> and the specific <u>type of phones</u> , (8 button / 12 button / 16 button / single line) in each administrative building.	
13	Do the analog devices all run into a central location within the school itself?	All lines enter through the MDF.
14	Is the Rauland a centralized solution, or is it a single system at each school?	Single at each location
15	Are all school employees going to utilize Jabber as a softphone?	Proposers may offer a solution that best meets the needs of the school system.
16	Call Recording (Section 6.9.7F) One touch call recording: Is this for all devices in the district, or only for your “Agents”?	For ACD Agents only.
17	Will the provider be managing the network equipment connected to the voice environment? Routers, switches, any wireless, etc?	HCPSS will manage all IP network components. Routers, switches, and access points.
18	Does HCPSS have any exception to the provider installing the monitoring appliance within the HCPSS data center or location where the primary voice equipment will reside?	HCPSS has no objections
19	Would HCPSS entertain the provider using dedicated/ onsite engineering resources if warranted based on the design and service level requirements?	HCPSS has no objections
20	Will the schools kindly provide us with a list of manufacturers, quantities, and model numbers for trade-in credit determination?	Manufacturers, quantities, and model numbers are identified in RFP documents.
21	Section 6.7 – Voice Messaging Requirements. Question: Please provide the total number of automated attendant scripts required.	Proposers shall allow for script quantity to be that of institutions of similar size and capacity.
22	Section 6.12 – Solution Quantities: Page 70 Our question is in reference to the 20% growth column. The mathematical growth does not match the requested 20%. Do you wish to have 20% growth or the amount as listed in the column under growth for each category? Example: ACD agent: equipped for 35/5 and growth (20%) would not equal 100/10.	Corrected 20% growth estimate: 3,600 42/6 2,400 660 60 5 120

Attachment S – Addendum #5
Questions & Answers

Question No.	Question	Answer
		360 480 60 24 24 600
23	For the administration building there are currently 2 Mitel systems in use. (Additional information necessary to re-utilize some Hardware and Licenses of current Mitel system)	There is one Mitel System in use it has two nodes in the central office MDF and two nodes in the ARL MDF
24	a) What series of Digital Telephones are in Use if any? I.e. (400, 4000 Series)	4000 series
25	b) Do the Mitel Controllers have Redundant Hard Drives & Power Supplies?	Yes
26	c) Are there Fiber connected Peripheral Nodes with Digital, Analog line cards and/or Loop Start/ Ground Start Trunk cards installed?	yes
27	d) How many T1/PRI circuits are currently in use?	7 PRI
28	e) What type of Mitel controllers are being utilized? I.e. (MXe, MXell, MXelll, CX, CXI, or AX)	Mitel 3300 MXelll
29	f) Do the Mitel Controllers have Redundant Hard Drives & Power Supplies?	yes
30	g) Do you currently use the MiContact Center (PrairieFyre) ACD Reporting Package for reports for the Agents? If so what software version?	Yes Version 8.0.0.1 (8.0.02016.1)
31	h) In the Admin buildings are you currently Paging through the Telephones only or do you also have an external Paging system?	HCPSS can page and set up paging groups through the pbx, although it is rarely used. HCPSS uses an external paging system for special announcements building wide.
32	Will the proposed solution be expected to replace the existing admin AND classroom phones? OR would a standalone system that replaces the current Mitel and which integrates with the existing classroom phones be an acceptable solution?	<u>Either</u> . All Solutions offered by Proposers will be considered. Proposers may offer multiple Solutions. If Proposers offer more than one (1) Solution or Response to this RFP, please indicate that clearly in your response. Submit in separate envelopes and pdf files.
33	Please clarify if the intent is to integrate with the Rauland systems for these functions terminally, or for the proposed solution to replace the existing Rauland systems and provide	<u>Either</u> . If Proposers offer more than one (1) Solution or Response to this RFP, please indicate that clearly in your response. Submit in separate envelopes and pdf files.

Attachment S – Addendum #5
Questions & Answers

Question No.	Question	Answer
	paging, bell and clock functions. If the later, the bell and clock functionality requirements are not defined in the RFP. Can you please provide details about the requested functionality?	Remotely schedule and synchronize all PA or mechanical bell systems throughout the school system.
34	Will there be any difference in the rating of technical merit for on-premises vs. hosted/cloud based solutions?	HCPSS is seeking the best Solution. Submitted offers will be evaluated on cost and performance relative to available funding and current and future needs as foreseen by HCPSS as the school system grows. Proposers are encouraged offer leasing options for HCPSS to consider when evaluating on cost.
35	Please confirm that bidders are to bid on (10,195) phones – 2,920 admin + 7,275 classrooms = 10,195	Correct
36	Please note that the (400) analog devices are in addition to the 10,195 above	Correct
37	Telephones are not required for analog devices but the system must be configured to support these as well.	Correct
38	What will be done with the existing ceiling or wall speakers?	Existing ceiling or wall speakers may stay in place
39	If IP telephones are offered to replace the Rauland analog phones and paging can be accomplished by paging thru the IP phones, is this an acceptable approach for paging into the classrooms? If the Rauland phones are replaced as each site is implemented, how does HCPSS expect the clock and bell services to be provided?	The Rauland paging system will be replaced by an updated paging system which will handle clock, bell services, and overhead paging. Currently the telephone systems in the schools are integrated with the paging system to eliminate the need for two phones on one desk. The phones are integrated using analog lines from the Telecenter and phone system as trunks to access overhead paging through the speakers. The selected contractor shall offer a functionally similar solution.
40	If speakers are to be re-used, is the Rauland amplifier/controller for these speakers to remain? ? If so, what type of connection to the Rauland amplifier/controller is required (FXO or FXS)?	Proposers shall propose any amplifier/controller integration.
41	Please provide the number of PRI's <u>by location</u> and include the number of DID's required.	5 PRIs are at Central Office 2 PRIs are at old Cedar Lane See Attachment N for DID quantity.
42	You have requested both on-premise and hosted solutions. When performing a multi-year cost analysis the hosted solution will appear cost effective for the first five years but will be more costly over a ten-year comparison. Will HCPSS be evaluating the Total Cost of Ownership (TCO) on a five-year or ten-year basis?	HCPSS would evaluate both 5 and 10 TCO cost of ownerships

Attachment S – Addendum #5
Questions & Answers

Question No.	Question	Answer
43	Skype for Business is a future requirement as per Addendum #3 question 96. Most, if not all, vendors required additional licensing for Skype for Business. Should these license requirements be included in the bid and if so, how many users are required to have this?	HCPSS already owns the Microsoft Skype for Business licensing as part of the MEC contract, therefore there is no need to include it in the proposal. The total number of Skype for Business licenses that can be utilized by HCPSS is 7321
44	RFP Section 10.1 Configuration Options, page 89, references an Attachment D - Pricing Table spreadsheet, which contains tabs for premises and hosted pricing solutions. Can you please provide a copy of the referenced MS Excel spreadsheet?	Offerors shall submit pricing for proposed Solution(s) on a Pricing Table spreadsheet formatted by the Offeror that clearly delineates all costs. The Pricing Table shall be saved in both excel and pdf.
45	Submission Instructions 2. Proposal Format, page 22, states that the proposal format shall follow that of the RFP, matching each section’s numbering scheme in a paragraph-by-paragraph method. Each paragraph or requirement statement will be repeated in the Offeror’s proposal, with the Offeror’s response to follow. General Requirements 3. Technical Criteria, page 18, states the following: The information identified below must be furnished in the Proposal. Failure to include any of the items listed below may disqualify your firm’s response. The Technical Criteria are listed below in order of importance. Offerors are requested to compile their Proposals in the same order. Can you please provide clarification?	Delete: The Technical Criteria are listed below in order of importance. Offerors are requested to compile their Proposals in the same order.
46	Section 10.3 Financing/Leasing: Within HCPSS description of your request for options, it is indicated that a \$1.00 Purchase Option is to be provided, yet if terminated early, “HCPSS retains the right to purchase the equipment for its then Fair Market Value”. This seems to conflict, so can HCPSS please clarify this statement?	Delete: If terminated early, HCPSS retains the right to purchase the equipment at the fair market value at that time. Replace with: If terminated, HCPSS retains the right to exercise all its rights and remedies under any resulting agreement and/or under the Uniform Commercial Code (UCC) Article 2A – Leases.

Note: All answers on this Addendum supersede those in previous addenda if there are discrepancies in HCPSS answers.

Reference Sheet

Request for Proposal No. 041.17.B5
Telecommunications Replacement Solution

Company Name:
Completed by:

16. **References:** Offeror must provide three (3) customer references for which Offeror provides similar service at a similar scale to those required under this RFP. Offeror must have performed at least three (3) installations of its proposed platform and proposed service model in the last three years. References that HCPSS may contact shall be provided in the format provided below.

Reference #1	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

Reference #2	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

Reference #3	
Organization	
Address	
Point of Contact Name	
Title	
Telephone Number	
E-Mail Address	
Dates of Installation	
Industry Sector or Market	
Brief description of work covered by contract/project	

Technical and Price Proposal

Howard County Public School System
Request for Proposal No. 041.17.B5
Telecommunications Replacement Solution

Company Name:
Completed by:

1. FCC Approved Offering

The potential Solution must be FCC approved. Offeror shall list the FCC approvals for the potential Solution.
Response:

<u>2. Proposal Format</u> Response: <div style="border: 1px solid black; height: 80px; width: 100%;"></div>
<u>3. Proposal Exceptions and Deviations</u> Response: <div style="border: 1px solid black; height: 80px; width: 100%;"></div>
<u>4. Supporting System Documentation</u> Response: <div style="border: 1px solid black; height: 80px; width: 100%;"></div>

FOR REFERENCE ONLY

Company Name: _____

5.2 General Solution & Capacity Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1. Commercially available offering			
a. (PREMISES) Provide the model and designation of the proposed solution			
b. (HOSTED) Provide the call processing platform of the proposed solution			
c. Provide the introduction Date (month/year) of the proposed solution			
d. Provide the proposed major version (month/year of introduction)			
e. Provide the anticipated upgrade date for proposed major version (Month/year)			
f. Provide the number of annual major software upgrades, i.e., generic releases			
2. Engineered as totally non-blocking so that all extensions can go off hook simultaneously and receive dial tone			
3. Describe the proposed Solution's operating system for call processing and voicemail services			
4. Provide 99.99% dial tone availability to users. Offeror shall confirm that the proposed Solution will meet the requirement, excluding scheduled downtime that HCPSS approves in advance. HCPSS defines dial tone as the readiness of the system to support call origination and receipt			
5. Support HCPSS' current four-digit dialing plan			
6. 9+Four-digit dialing any HC agency based on a separate Centrex, Briefly describe how this is accomplished			
7. Retain HCPSS current telephone numbers			
8. Certified and proven to operate seamlessly on all data infrastructures including the following:			
a. Cisco			<p>Provide evidence of certification and operational compatibility with proposed solution.</p> <p>Identify any components incompatible with proposed solution.</p>

Company Name:

5.2 General Solution & Capacity Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
b. 3Com			Provide evidence of certification and operational compatibility with proposed solution. Identify any components incompatible with proposed solution.
c. Hewlett Packard/Aruba			Provide evidence of certification and operational compatibility with proposed solution. Identify any components incompatible with proposed solution.
d. Extreme Networks			Provide evidence of certification and operational compatibility with proposed solution. Identify any components incompatible with proposed solution.
e. List SIP trunking service providers			Provide evidence of certification and operational compatibility with proposed solution. Identify any components incompatible with proposed solution.
f. List PRI service providers			Provide evidence of certification and operational compatibility with proposed solution. Identify any components incompatible with proposed solution.
9. 911/E911 capabilities for emergencies or incidents occurring in the classroom			
a. Describe briefly how the proposed Solution provides information and what level of data to the public safety answering position (PSAP)			
b. Describe how the proposed Solution integrates with the current paging system to provide the PSAP data			
10. Proposed solutions must be designed, owned, and certified by the manufacturer and not just be an assembly of other vendors' components			

FOR REFERENCE ONLY

Company Name:

5.3 Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1. Briefly describe the redundancy and failover architecture of the proposed Solution and which of the following components of the Solution are redundant in a high availability and/or geo-redundant configuration in the Primary and Secondary sites:			
a) Call control unit/CPU			
b) System database			
c) Storage components			
d) Site-specific components			
e) List other redundant components and indicate whether they are high availability or geo-redundant			
2. Describe the frequency of database replication and synchronization in the Primary and Secondary locations			
3. Describe the redundancy alternatives for proposed peripheral servers			
4. Provide the following redundancy capabilities of the proposed solution:			
a) Maximum and recommended network round trip delay tolerance values between the Primary and Secondary core call control processors			
b) Maximum and recommended network round trip delay, tolerance values, including call set up and tear down, between endpoints			
c) Type(s) of required or actual connectivity between spatially redundant call processor assemblies			
d) Method by which fault tolerance and redundancy among the Solution sites is categorized and measured			
5. The Solution must automatically failover to secondary call processing unit(s) if the Primary call processing unit fails. "Hot standby" is defined such that calls in progress remain connected and the backup system database is fully and continuously synchronized with the primary system database. Should one component fail, the standby provides full services without interruption.			

Company Name:

5.3 Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
a) Describe the connectivity requirements or existent connectivity between the primary and standby call processing units. Include distance limitations, acceptable physical infrastructure (such as fiber, copper), network requirements & facilities (such as PRIs or metro-ethernet services), and any other conditions necessary to support the automatic failover requirement			
b) Include a high-level configuration diagram (it may be on a separate page) depicting all primary components and necessary or existent network connectivity for this configuration for the Primary and Secondary Call Processing Infrastructures			
c) Provide the time interval for all stations to reregister to the secondary call processing unit			
d) Provide the recovery time objective (in minutes) following restoration after a total loss of power			
e) Describe what happens to "calls already established" during a power loss			
f) Confirm how or if endpoints will reregister with the Primary once the outage is resolved			
6. Support a disaster recovery/ business continuity capability. Describe the proposed Solution's recovery/ business continuity capability, e.g., ability to move units & set up if the Primary and Secondary sites are out of commission			
a) Provide the failover interval, also known as the Recovery Time Objective, within the high availability components			
b) Provide the failover intervals, in milliseconds, between the Primary and Secondary sites			
c) State the Recovery Point Objective, defined for this RFP as the point in time at which system can recover previous configuration data to restore the system			
7. HCPSS requires a well-defined, documented, and periodic restoration test process. Offeror shall describe its process and frequency to test failure, failover, and restoration conditions for the proposed solution			

Company Name:

5.3 Redundancy and Failover Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
8. In the event of a WAN failure, HCPSS requires that remote locations must retain multiple levels of survivability a) At Level 1, location(s) must be survivable, retain internal calling and feature capabilities and the ability to make/receive external calls, i.e., dial tone			
b) At Level 2 HCPSS prefers to have the survivable mode also provide a basic complement of features and functions at the remote locations during the WAN failure. These features include at minimum Call Hold, Call Transfer, Call Forward, and, if possible, message waiting indication			
c) At Level 3 the remote location will also continue to have access to centralized applications, such as voice messaging, call accounting, or			
unified messaging, that are normally provided over the WAN link			
d) Describe how the proposed Solution will address each of these three survivability levels			
e) Describe the level of features and functions that will be available at the remote location during the WAN outage. Note any features/functions that will not be available during the outage			
f) Describe how centralized applications will remain available during the WAN outage, e.g., PSTN reroute or an alternate means			

Company Name:

5.4 Physical Components and Environmental Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide a logical box and line diagram of the proposed solution(s) that depicts the primary components, quantities of each, and associated connectivity. The diagram may be on a separate page(s) or be included in the Executive Summary			
2) Provide a bay face/elevation diagram with all racks, components, and hardware of the proposed solution(s). The diagram may be provided on separate pages in the response following this page. For HOSTED solutions, the elevation diagram should be for the customer site			
3) Uninterruptible power supply (UPS) for common equipment for one hour.			
4) (PREMISES) Provide the proposed system's environmental and required space specifications.			
5) HCPSS requires that all user and applications licenses be a "single cost" item. These universal licenses will apply to any HCPSS user in <i>any</i> HCPSS location. Licenses will be totally transferable among locations and users. (Include licensing package options and pricing)			
6) Licenses are customer installable. Briefly describe the process to accomplish this			
7) (PREMISES) Replace components with restart or power			
a) Describe the process			
b) Identify which components can be "hot swapped."			
c) Identify any components that cannot be "hot swapped."			

Company Name:

6.1.1 Conference, Intercom, and Call Coverage Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
Offeror shall respond to the following requirements:			
1) Support Six-Party, Station- Controlled <i>Ad Hoc</i> Calling/ Audio Conferencing (six parties minimum). Provide the maximum number of simultaneous six-party conferences supported by the proposed Solution regardless of network facilities' limitations			
2) The conferencing capability must enable the <i>ad hoc</i> conference originator to leave the conference and allow the remaining parties, either internal, external, or both, to continue the audio conference			
3) Support 24-Party, Station- Controlled <i>Ad Hoc or Scheduled</i> Calling/ Audio Conferencing:			
a) Provide the maximum number of simultaneous 24-party conferences supported by the proposed Solution regardless of network facilities' limitations			
b) Briefly describe how this is accomplished			
4) Support the following requirements:			
a) Dial Intercom - Set up or emulate an intercom call based on dialing three or fewer digits to an "intercom" button on the destination telephone			
b) Automatic Intercom provides the equivalent of a dedicated talk path between two telephones with multiple line appearances. The called terminal is alerted when the calling terminal goes off-hook and/or the appropriate "intercom" feature button is selected			
c) Support a minimum of 20 Intercom Groups. Specify the maximum number of intercom groups.			
d) Provide maximum number of intercom group members system wide			
5) Support flexible Call Coverage features and functions. Offeror shall describe Coverage Features that the proposed Solution provides to meet the following requirements:			

Company Name:

6.1.1 Conference, Intercom, and Call Coverage Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
a) Privacy among shared line appearances unless explicit Privacy Release is granted by primary line owner.			
b) View the executives' line statuses at all times			
c) Executive Barge-In (EBI)			
i) Disallowed			
ii) With tone			
iii) Without tone			
d) Call Pick Up (CPU) on direct lines			
e) Parallel, or serial "search" capability for coverage endpoints, to be determined on a station or COS basis			
6) Hunt Groups:			
a) Circular			
b) Terminal			
c) Pick-up Groups			
d) Secretarial, in which one station may serve as the single last station overflow point from two or more hunt groups within the system			

CONFERENCE ONLY

Company Name:

6.1.2 General System Feature Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
1) Support up to 500 Authorization Codes (three- digit) for Long Distance or messaging system access			
2) Support entry of two separate codes, e.g., personal and departmental for each call			
3) Automatic Callback			
4) Automatic Number Identification (ANI) display			
5) Automatic Recall			
6) (PREMISES) Automatic Route Selection (ARS) - briefly describe the criteria by which ARS can be activated			
7) (HOSTED) Indicate if long distance calling (domestic and/or international) is included in the proposed solution. Briefly describe any conditions, caveats, or restraints that apply			
8) Support multiple connectivity for trunk and station interfaces			
a) Direct T1/Primary Rate Interface connectivity			If not a direct interface, describe any necessary components that must be and are included in the response.
b) SIP trunking interface			If not a direct interface, describe any necessary components that must be and are included in the response.
c) Analog trunk (loop start)			If not a direct interface, describe any necessary components that must be and are included in the response.
d) Analog trunk (ground start)			If not a direct interface, describe any necessary components that must be and are included in the response.
e) H.323 internet protocol (IP) trunk			If not a direct interface, describe any necessary components that must be and are included in the response.
f) Analog (POTS) station			If not a direct interface, describe any necessary components that must be and are included in the response.
g) Proprietary digital station, capable of operating on a minimum of Category 5e (Cat5e) cabling with a loop length of at least 100 meters (300 feet).			If not a direct interface, describe any necessary components that must be and are included in the response.

Company Name:

6.1.2 General System Feature Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
h) IP station			If not a direct interface, describe any necessary components that must be and are included in the response.
i) SIP station			If not a direct interface, describe any necessary components that must be and are included in the response.
9) Support 25 Classes of Service (COS). Provide quantity of COS available. HCPSS's current COS parameters include, but are not limited to, unrestricted, restricted, internal only, time of day restricted			
10) Malicious Call Trace.			Describe how this function is invoked and by whom. What components are necessary to support this function.
11) Night Service can be invoked manually.			
12) Night Service can be invoked via timer or programmable variable, such as time of day, day of week, etc			
13) Paging through the speakerphones. Briefly describe required input, types of connector(s), number of zones (at least eight and "all call" are required), maximum number of telephones that support simultaneous paging, and other pertinent characteristics			
14) Paging through a third party overhead paging /public address system. Briefly describe the following:			
a) Number of zones that can be programmed.			
b) Maximum number of telephones that support simultaneous paging.			
c) Other pertinent characteristics			
15) Call Logging with Station Message Detail Recording (SMDR) output that can be exported to a third party call accounting system. Briefly describe the output			
16) Describe how to access/integrate to an overhead paging system is accomplished with the proposed solution.			
a) Describe how the proposed Solution can accomplish classroom monitoring via the OHP system			

Company Name:

6.1.2 General System Feature Requirements	Compliance to Req. (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
i) Silent			
ii) Entry indication tone.			
17) Describe how the proposed Solution can provide classroom monitoring directly OHP system integration			
i) Silent			
ii) Entry indication tone.			
18) Describe how the proposed Solution supports classroom- to-classroom calling			
19) Describe how the proposed Solution supports two-way classroom-to-office and office- to-classroom calling/intercom			
a) Describe the configuration and function if the proposed Solution integrates with the OHP system			
b) Describe the configuration and function if HCPSS opts to install classroom telephones off the proposed solution			
c) Visual indication of call from the classroom.			
d) Audible indication of call from the classroom.			

FOR REFERENCE ONLY

Company Name:

6.1.3 Station and User Requirements	Compliance with Requirements. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Support the following:			
a) CLID Blocking from the calling party's side			
b) Automatic Callback			
c) Call Hold			
d) Call Waiting with Indication			
e) Call Pick Up			
f) Call Park with single button pick up			If not single button pick up, describe the process for parking and picking up a parked call.
g) Do Not Disturb with indication			
h) Station Privacy			Is this the default setting?
i) Privacy Release			
j) Ringer Off			
k) Whisper Page via Speakerphone			
2) Headset interface. Some HCPSS staff will require headsets, e.g., attendants, selected administrative and professional staff, and softphone users			
i) Describe interface for conventional wired headset			
ii) Describe interface for cordless/wireless headset including "Bluetooth" devices			
iii) Provide the quantity limit, if any, of headsets/adapters for the solution			
3) Volume Control Settings for endpoint:			
a) Handset			
b) Ringer			
c) Headset			
4) Call Forward and the following variations for internal, external or international calls with up to 15 digits:			
a) Call Forward – Busy (or Universal) in which all calls are sent to a user-programmed destination			
b) Call Forward – No Answer			
c) Call Forward – All Calls			
d) Call Forward – Manual in which calls may be sent to a programmed destination on a per-call basis			
5) Remote Call Forwarding (RCF) or "Follow Me" capabilities:			
a) RCF – Internal and/or External calls			
b) RCF – Activation from a remote location			

Company Name:

6.1.3 Station and User Requirements	Compliance with Requirements. (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
c) RCF – Change destination from a remote location			
6) The number of station rings before going to voicemail must be programmable on a per-station basis			If not available on a per-station basis, describe the level of “granularity” to which the phone can be programmed.
7) Multiple Call Logs with at least 20 entries in each of the following logs:			
a) Incoming			
b) Outgoing			
c) Received			
d) Missed calls			
e) Discrete automated attendant for designated offices/departments			
8) Multiple-line, Multiple Appearance in which a line may appear on multiple			
instruments or devices in different offices and locations around HCPSS. State the maximum number of instruments or devices on which the line appearance may appear			
9) Distinctive Ringing			
a) Provide the number of distinctive rings available			
b) Different distinctive rings can be assigned to different line appearances or call sources/trunks on the same physical endpoint			
i) Any or all distinctive rings can be disabled on a per station basis			
ii) Any or all distinctive rings can be disabled on a per line basis			

Company Name:

6.2.1 Endpoints Requirements Desk Instruments	MLT-8	MLT-16	MLT-24	Attendant Console Instrument	Mobile "Twin"	SLT
Offeror shall indicate how its endpoints meet the following requirements, i.e., compliance to requirement and availability						
1) Display as specified						
2) Full duplex speakerphone						
3) Specified number of user programmable hard/soft buttons						
4) Maximum number of simultaneous calls/line appearances						
5) Delivery & display of Calling Number / Name identification for all internal HCPSS calls and external calls if the public network delivers that data						
6) Headset connectivity						
a) Direct connection, wired without adaptor box						
b) Wireless, e.g., Bluetooth						
7) Wi-Fi phones that will work on any network segment that can be reached via IP, i.e., "routable"						

FOR REFERENCE ONLY

Company Name:

6.2.2 Analog Device Interfaces	Offeror's Response
Describe the proposed analog device interfaces for the following: 1) Fax machines 2) Analog telephones 3) Modems	

6.2.3 DSS/BLF Module	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON), NA)	Offeror's Response
1) Support at least 60 additional programmable line/feature buttons			Maximum number of programmable line/feature buttons.
2) The DSS/BLF module must support a "shift" feature to enable a single hard button to support at least two soft appearances			
3) Power source for each proposed DSS/BLF module: local or centrally powered			Describe power options
4) If local, confirm if multiple DSS/BLF modules can be "daisy chained" off one power source			
5) If so, provide the maximum number of modules that can work in the single power source configuration			
6) Works with MLT-8, MLT-16, MLT- 24, , and Attendant Console Instrument.			State the maximum number of DSS/BLF Modules that can be configured with any single endpoint.

FOR REFERENCE ONLY

Company Name:

6.2.4 Endpoints Requirements IP Softphone	Offeror's Response
1. Identify the proposed softphone's computer compatibility and additional components, e.g., headset, handset, microphone, camera, etc. to support call origination and reception and	
2. Provide a photo of the proposed softphone as it appears on the monitor screen	Include the name and/or model for the proposed softphone.
3. Provide the recommended, not minimum, hardware, software, processor, and operating system requirements to support the IP softphone	

FOR REFERENCE ONLY

Company Name:

6.3 System Administration & Management	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Context–Sensitive Help based on the screen or area being currently accessed by the user			
2) Centralized management and administration for all applications and locations			
3) Single terminal for all system administration requirements listed below			
4) Maintenance and Administration requirements listed below:			
a) Full access to all maintenance and administration capabilities by client personnel.			
b) Batch moves, adds, and changes (MACs).			
c) Real-time MACs without service interruption.			
d) Automatic directory update based on MAC completion.			
e) Remote Access Capabilities			
i) Via web			
ii) Via virtual private network (VPN)			
iii) Diagnostics			
iv) Problem trace			
v) Alarm notification to remote monitoring center.			
vi) All maintenance functions			
vii) Identify any maintenance functions that are not accessible remotely.			
f) Administration			
g) Diagnostics			
5) Comprehensive statistical reporting for internal and external network- related traffic			Briefly describe what statistical reporting topics are available.
6) SNMP-compliant protocol			
7) Web access to change telephony feature(s) and /or perform administrative functions			
8) Multiple user interfaces listed below:			
a) Command line			

Company Name:

6.3 System Administration & Management	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
b) Graphical user interface (GUI)			
c) Menu			
d) Web portal			

FOR REFERENCE ONLY

Company Name:

6.4 Attendant Requirements	Compliance Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Dedicated attendant console instrument as specified earlier. HCPSS attendants currently have a PC and console interface			
2) Alternate LAN-connected dedicated workstation with attendant console application and capabilities			Describe dedicated and/ or alternate PC-based workstation with photos, model number, and specifications.

6.5 Accessibility Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Hearing aid compatible (HAC) for cellular & standard telephones with: a) 40 dB amplification b) Direct connection to hearing aids with microphone/telephone (M/T) switches			
2) Support HAC, TTY/TDD, CLID access devices especially for sight & hearing impaired			
3) M4 rating for personal digital assistant (PDA) or cellular devices for hearing aid compatibility performance.			
4) In-line handset amplifier.			
Public Address Integration Requirements Response: (Please provide as an Attachment)			

Company Name:

6.6 Rauland System Integration Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
Allow DIRECT calls from ANY classroom DIRECTLY TO any Business Telephone WITHOUT ANY ADDITIONAL CODE ENTRY			
Provide a Splash tone when initialing a classroom speaker.			
Provide a privacy tone every 15 seconds while the room is being monitored.			
Contact the main office by going off hook and dialing the * key on the classroom telephone			
Dial ** places EMERGENCY Call to the Main office display			
Classrooms can dial any business phone directly.			
Classrooms can dial any outside number, including 911, by dialing "9" or a pin code then the access code			
Building wide "All Call."			
"All Call" to multiple schools.			

FOR REFERENCE ONLY

Company Name:

6.7 Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, software version, and manufacturer of the proposed voice messaging Solution (VMS).			
1) Any new system proposed by the Offeror must include a totally integrated voice messaging system. "Integrated" is defined as including several capabilities:			
a) All calls forwarded to a mailbox go directly to the mailbox without caller intervention or requiring additional digits.			
b) Caller may opt out of voicemail and reach a live person when needed			
c) Visual Message waiting indication (MWI) is provided for all user devices.			
2) This is a critical requirement. Remote recording to dynamically change and rerecord messages based on <i>ad hoc</i> circumstances, e.g., snow, office closure			Briefly describe how this is accomplished.
3) Message Waiting Indication (MWI) and the following requirements:			
a) Audio/stutter dial tone			
b) Visual			
4) Support minimum total of 2,500 voicemail boxes and automated attendants with a potential ultimate quantity of 10,000.			
5) ***Support a minimum of 500 hours of storage for messages and automated attendants			
6) Greetings requirements listed below:			
a) Multiple personal greetings:			

FOR REFERENCE ONLY

Company Name:

6.7 Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
i) Pre-record multiple greetings for routine/emergency use.			
ii) Standard System greeting.			
iii) Line status (busy, ring, no answer), greeting to indicate line status.			
iv) Separate greetings for internal and external callers.			
v) Extended absence greeting.			
vi) Expiration date and time for extended absence greeting.			
b) Override or bypass greeting or prompts.			
c) Information voicemail boxes only with no opportunity to leave a message.			
7) 100 Distribution Lists.			
8) Broadcast list management access is or can be separate from overall system management			
9) Send, receive, forward message, and reply to messages.			
10) Access to voicemail box from a remote location.			
11) Callback to Sender.			
12) Automatic time/date stamp.			
13) Directory access/ dial by name.			
14) Single, logical system appearance to internal and external users.			
15) Single voicemail box for multiple devices, such as a desk phone, softphone, cell phone, or mobile device.			
16) Common features, functions, and user interfaces.			

FOR REFERENCE ONLY

Company Name:

6.7 Voice Messaging Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
17) Automated Attendant.			
18) Automated attendant deactivation:			
a) Manually by location			
b) Automatically by location			
c) Automatically for all locations			
19) "Forms" voicemail boxes, e.g., to place orders for moves, adds, and changes.			
20) Paging or out calling capabilities and message notification to a pager or other internal or external telephone number.			
21) Broadcast capability on manual or scheduled basis, e.g., time of day, day of week (Is there a limit to the amount of numbers that can be included? If so, please provide.)			
22) Special purpose and/or temporary voicemail boxes, used for limited time campaigns, promotions, or surveys.			
23) Save and transfer voice messages from current system to new system.			Briefly describe how this will be accomplished.
24) Programmable threshold alarm for "voicemail box full" situation.			

FOR REFERENCE ONLY

Company Name:

6.8 Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, software version, and manufacturer of the proposed CAS			
2) Reporting Requirements:			
a) Customized reports to contain HCPSS-selected information and <i>ad hoc</i> reporting capability:			
i) Schedule reports directly to printer.			
ii) Real time and scheduled reports to file.			
iii) Report to file in CSV and HTML formats.			
b) Exception reporting required with at least the following programmable criteria:			
i) Telephone numbers			
ii) Time of day (TOD), day of week (DOW)			
iii) Cost of call			
iv) Call duration			
v) Charge/account codes			
vi) Called number			
vii) Location			
viii) Originating number			
c) Graphic reporting, e.g., charts			
d) Reports to e-mail, scheduled			
e) Reports to e-mail, <i>ad hoc</i> :			
i) Daily			
ii) Weekly			
iii) Monthly			
3) HCPSS requires the following types of accounts to be included in the CAS:			
a) Long distance			
b) Message units / usage charges			
c) Accounting charge, e.g., NRC replacement			
d) Move, add, change (MAC) costs			
e) Cellular telephones (future)			
f) Pagers			
g) Repair charges			

FOR REFERENCE ONLY

Company Name:

6.8 Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
4) Call Accounting Call Processing Requirements:			
a) Receive and process CDR, in batch mode			
b) Receive and process CDR, in real time mode			
c) Sort and review raw CDR data			
d) Toll fraud monitoring			
e) Variety of costing methods			
f) Simultaneous assignment of costing methods			
g) Multiple charge codes:			
i) Fixed rate			
ii) Prorated			
iii) Advance billing			
iv) NRC			
v) Recurring charges			
vi) Others (describe briefly)			
5) General Call Accounting Requirements:			
a) Customized tariffs based on terminating city and LATA			
b) Fixed billing periods			
c) Updated tariff tables (V&H coordinates)			
d) Outbound calls' cost at standard tariff rates			
6) Direct access via web portal to billing and call activity data. The following capabilities are required:			
a) Users for their own account(s)			
b) Super user password for an administrator to enable access to more than one departments billing records.			
c) Authentication of agency web access.			
d) Support of views to database via the web for different users, such as customer, technician, administrator, & agency.			
e) Remote management and administration over the web.			

Company Name:

6.8 Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
f) Allow departmental inquiries on billing history details with access to the following:			
i) Past bills			
ii) Call detail			
iii) Call summaries			
iv) Rate information for called number			
v) Monthly recurring charges			
vi) Non-recurring charges			
g) On-line calculation inquiry for agencies/departments with rate quotations for local, toll, and international calls.			
7) Security and Application Administration Requirements:			
a) Prevent unauthorized access to the system.			
b) Determine which applications that departments /users may access.			
c) Applications & menu level security to allow administrator to add, change, or delete by user, group, or agency.			
d) Set access rights			
e) Single point of authentication to track & audit log on assignments.			
f) Audit trail across all functions by associating a user ID, date, & time stamp to all changes.			
8) Provide a description of the following for the call accounting/billing system:			
a) Operating System			
b) Disk storage configuration			
c) Memory requirements			
d) Call collection interface			
e) Network interface			***Backup technology, sized for three years' storage Assume ***XXX long distance calls and ***XXX minutes annually

FOR REFERENCE ONLY

Company Name:

6.8 Call Accounting System (CAS)	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
f) Describe the recommended, not minimum, client platform including CPU model & speed, memory, operating system, and storage disk space.			

FOR REFERENCE ONLY

Company Name:

6.9 ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) The proposed Solution must be able to support up to multiple separate call center "identities" on the same technological platform. Describe briefly in terms of call treatment, routing, reporting, agent supervision, workforce management, announcements/music on hold, and monitoring and/or recording how the proposed Solution will meet this requirement			Provide the name, model, software version, and manufacturer of the proposed call center solution.
2) The associated agent device must support at least 20 programmable buttons so that ACD-specific features/ functions can be added			
3) Support up to 100 agents			
4) Support up to 10 supervisors			
5) The associated agent or supervisor device must support multiple headset options listed below:			
a) Dual headset compatibility for monitoring purposes			
b) Multiple USB interface port for handset or headset			
c) RJ-11 interface or standard "peg" port for handset or headset			
d) Wireless interface, e.g., Blue Tooth			
6) DID/ private, non-ACD line in addition to ACD line			
7) The proposed Solution must support the following:			
a) System and Agent Features/ Functions			
i) Agent Log On/ Log Off			
ii) One button log on for physical phone and soft-phone			
iii) Log On from secondary location should log off the initial logged on device or ID of same profile			
b) The proposed Solution must support the following:			

Company Name:

6.9 ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
i) Automatic Answer with Zip Tone			
ii) Agent Wrap Up with "reason codes"			
iii) Calls in Queue (Agent Set Display) including the following requirements:			
(1) Call source identification			
(2) Calling line ID (CLID)			
c) The proposed Solution must support Queuing/ Distribution requirements listed below:			
i) First In, First Out (FIFO) queuing			
ii) Longest Idle Agent			
d) Create ACD groups with agents at any location			
e) The proposed Solution should support multiple separate Music / Announcement on Hold interfaces			
i) Provide the maximum number of MOH access ports or inputs on the proposed solution			
ii) List types of playback devices supported			
iii) Describe how MOH is multicast support to remote locations			
f) The proposed Solution should support "One Touch" Recording			Briefly describe how this is accomplished including required components.
g) Agent Monitoring			
h) The proposed Solution must support Supervisor features and functions and the requirements listed below:			
i) Agent help			
(1) Verbal via consultation (caller cannot hear supervisor)			
(2) Via text message or "banner" on agent workstation			
i) The proposed Solution must support Real Time Supervisory Display and the requirements listed below:			

Company Name:

6.9 ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
i) Monitor multiple splits, queues, and/or agent groups from single			
supervisory work station			
ii) Provide maximum number of concurrent active Supervisory workstations:			
(1) View only mode			
(2) View/ modify mode			
iii) Change messages and parameters remotely			
j) The proposed Solution must support Work Mode-Agent feature and requirements listed below:			
i) Automatic			
ii) Manual			
iii) Multiple "reason" codes (20 required, list number & types available)			
8) Administrator			
a) Ten separate administrator identities			Provide maximum number of separate simultaneous administrator identities.
b) Restricted access to one or more partitions by each administrator, such that an administrator for one department cannot access administration and configuration settings for another department			Provide maximum number of separate simultaneous administrator identities.
c) "Super" administrator rights, such that an authorized "super" administrator can access configuration settings for any contact center			Provide maximum number of concurrent "super" administrators. Does a "super" administrator require a different license from an administrator?
9) Reporting			Briefly describe the basic reporting capabilities and number of standard reports included in the proposed solution.
10) Administrator			
a) Ten separate administrator identities			Provide maximum number of separate simultaneous administrator identities.

Company Name:

6.9 ACD Agent/ Supervisor/ Call Center	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
b) Restricted access to one or more partitions by each administrator, such that an administrator for one department cannot access administration and configuration settings for another department			Provide maximum number of separate simultaneous administrator identities.
c) "Super" administrator rights, such that an authorized "super" administrator can access configuration settings for any contact center			Provide maximum number of concurrent "super" administrators. Does a "super" administrator require a different license from an administrator?
11) Reporting			Briefly describe the basic reporting capabilities and number of standard reports included in the proposed solution.

FOR REFERENCE ONLY

Company Name:

6.10 Conference Bridge	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) State the number of bridge lines Vendor will supply			
2) Support up to 24 parties simultaneously			
a) Provide the maximum number of simultaneous parties			
b) State the increments for scalability for the bridge			
3) Multi-mode conversation			
a) Conversation			
b) Presentation/lecture			
c) Question and answer			
d) Polling			
4) Participant list data			
a) Real time			
b) Post call			
c) Data for each participant			
i) Originating telephone number			
ii) Connect date, time			
iii) Disconnect date, time			
iv) Number of minutes on the bridge			
v) Participant name			
5) Touch-tone control			
a) Moderator			
b) Participant			
6) Organizer/Moderator			
a) Web-based portal and control			
b) Control access of participants			
c) Mute participants - all			
d) Mute participants - selectively			
e) Disconnect participants - all			
f) Disconnect participants - selectively			
7) Recording			
a) Moderator one-touch recording start			
b) Web-based recording & retrieval			
c) Record and stream real time on internet			

FOR REFERENCE ONLY

Company Name:

	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
6.10 Conference Bridge			
d) Navigate through recording to advance, rewind, skip, etc			
8) Replay link			
9) Security			
a) Entry announcements			
i) None			
ii) Name – record & playback when entering			
iii) Beep			
b) Separate moderator, participant PINs			
c) Lock conference option			
d) Audible participant count			
e) Conference start when moderator joins conference			
f) Conference continues when moderator leaves conference			
g) Dial out only to invited parties			
10) Reporting Requirements			
a) Customized reports to contain HCPSS-selected information & <i>ad hoc</i> reporting capability			
i) Schedule reports directly to printer			

FOR REFERENCE ONLY

Company Name:

6.11 Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
1) Provide the name, model, version, and manufacturer of the proposed Solution for these requirements or if the proposed Solution will integrate with School Messenger			
a) Describe if and how the proposed Solution interfaces with School Messenger			
b) Describe what functions and communication modes are supported			
2) The proposed Solution must provide automatic update of public safety answering position (PSAP) databases with accurate new locations after equipment and telephone relocation activities such as moves, adds, changes (MAC) (immediate or "near real time", i.e., under five minutes required)			
3) HCPSS requires that the proposed Solution create and maintain an accurate database that correlates HCPSS telephone numbers with locations			Briefly describe how this will be accomplished.
4) The proposed Solution's Emergency Response offering must provide location information for mobile devices such as wireless telephones and softphone clients when the user is located in an HCPSS facility			Briefly describe how this will be accomplished.
5) Describe the process by which the proposed Solution will update the following databases with new, <u>accurate</u> location (minimum of building, floor, and quadrant) information:			
a) Proposed Solution			
b) HCPSS human resources database			
c) PSAP location			
6) The Offeror must provide its database update process that will meet the following requirements:			

FOR REFERENCE ONLY

Company Name:

6.11 Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
a) Daily upgrade of changed records is required			
b) Provide the minimum update frequency of changed records as supported by the proposed solution			
c) State the approximate download duration of update for up to 1000 records			
d) Provide the approximate bandwidth requirement and communication formats for changed records update			
e) State the recommended frequency for record updates			
7) The proposed Solution shall support automatic database update based on programmable criteria, such as the following:			
a) Time of day or night			
b) Day of week			
c) Specific dates			
d) Recurring criteria			
e) List the criteria that can be programmed			
8) HCPSS requires a weekly update of entire database:			
a) State the approximate duration to update approximately 3,000 records			
b) Provide the approximate bandwidth requirement to update all records			
9) HCPSS requires a manual or "on demand" database update capability			
10) Describe the potential effect of the Emergency Response activities, including but not limited to, database update, enterprise-wide emergency broadcast, and emergency calls, on network performance			

FOR REFERENCE ONLY

Company Name:

6.11 Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
11) HCPSS requires a logical diagram of proposed E911 configuration (it may be on a separate page), including all primary hardware and software components, connectivity with internal stations, such as Security, and public safety answering positions (PSAP), assumptions used in the configuration, and any inherent limitations			
12) List what solution-related hardware and software will be required on HCPSS premises			
13) HCPSS requires that emergency calls are routed from calling station to internal and PSAP destinations on a station-by-station basis:			
a) Provide the maximum number of external parties that can be notified simultaneously			
b) Provide the maximum number of internal parties that can be notified simultaneously			
14) HCPSS requires the following capabilities for the proposed emergency notification capability:			
a) Serial notification			
b) Parallel notification for up to 50 internal and 50 external parties			
c) At least five repetitive call back "retries"			
d) Provide the number of maximum number of call back "retries"			
15) The Emergency Response and Notification Solution must provide the following reports:			
a) Update attempts and successful updates			
b) Number of records changed per update			
c) Number of calls and notified parties			

Company Name:

6.11 Emergency Response and Notification	Compliance to Requirement (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror's Response
d) Number of responses from identified parties and identification of who actually responded by name or identification number			
e) Number of "false alarms"			
f) List types and frequency of standard reports available			
16) HCPSS requires the following emergency mass notification capabilities:			
a) Voice			
b) Text			
c) Telephone display			
d) Paging via the telephone speaker			
e) HCPSS requires mass notification with a message, i.e., a "voicemail push"			
f) HCPSS requires a notification/indicator of new mass messages			
i) Describe the types of notifications			
ii) Describe the "alert message to phone" process and capabilities			
iii) State the interval to publish a mass message to all HCPSS users and locations			

FOR REFERENCE ONLY

Company Name:

6.12 Solution Quantities			
HCPSS Sites	Equipped	Growth (20%)	Capacity (to be completed by Offeror)
1) User Licenses	3,000	3,600	
2) ACD Agent/Supervisor Licenses	35/5	100/10	
3) MLT-8 (IP)	2,000	2,400	
4) MLT-16 (IP)	550	240	
5) MLT-24 (IP)	50	60	
6) Attendant Console Instrument	4	5	
7) Mobile "Twin"	100	120	
8) SLT	300	360	
9) Analog Device Interface	400	480	
10) DSS/BLF Module	50	60	
11) Conference Room Telephone (optional)	20	24	
12) Voice Messaging System ports	20	24	
13) Voice Messaging System storage hours	***500	600	

FOR REFERENCE ONLY

Company Name:

7.1.1 Classroom Lockdown and Notification Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror Response
1) The proposed Solution must be engineered as non-blocking, such that all CR and other locations can go off-hook simultaneously, receive internal dial tone, and notify the office of their statuses			
2) The initial notification from a class room (CR) will appear in the office and secondary command center as a text or SMS message with 1 of 3 messages (as listed above... 1=severe situation 2=situation but under control 3=situation normal) as well as room # or name			Describe on what type of output device the message would appear, e.g., mobile device, wall board, telephone display, PC/laptop display.
3) The room number or name will be pre-programmed assigned to the CR station such that no action is required by the CR station user for that information to be communicated to the office along with status			
4) The caller will enter the above described status notification with minimal buttons or input, e.g., touchtone input, e.g., "***", button press, off hook, etc.			
5) The status and location information must be conveyed to the office in real time or near real time. This is especially pertinent if up to 100 CR/locations are attempting to check in simultaneously			
6) Describe how a secondary location, such as a classroom, could become the call receipt point if the office was unavailable to receive the CR status and location notification			

FOR REFERENCE ONLY

Company Name:

7.1.1 Classroom Lockdown and Notification Requirements	Compliance with Requirements (FC, PC, NC)	Availability Status (S, OI, ON, NA)	Offeror Response
7) Offeror shall describe in non- technical terms and specific details about how its proposed Solution will meet the stated requirements above. Offeror should assume a total of 2,700 locations system wide scattered among HCPSS locations must be addressed. HCPSS schools and ancillary locations range in size from 15 to over 80 CR and locations			

FOR REFERENCE ONLY

Company Name:

7.1.3 Mobile Devices Endpoints Requirements Mobile Device/ Wireless IP Phone	Offeror's Response
1) Nominal battery life – standby (in hours)	Wi-Fi DECT
2) Nominal talk time per battery (in hours)	Wi-Fi DECT
3) Charge battery separately from mobile device	Wi-Fi DECT
4) Procedure description to change batteries	Wi-Fi DECT
5) User controlled “Twin” off proposed Solution instruments	Wi-Fi DECT
6) Any/all FMC/cellular interface capabilities (options)	Wi-Fi DECT

FOR REFERENCE ONLY

Company Name:

7.1.4 Optional Third Party Endpoints	Compliance to Requested Info (FC, PC, NC)	Availability Status (S, OI, ON/, NA)	Offeror's Response
1) Offeror should support third party endpoints (TPE), such as Session Initiated Protocol (SIP) phones, which support a comprehensive feature / function complement with the proposed Solution at a less expensive price point per endpoint. Offeror is requested to provide the following information in a tabular format about TPEs:			
a) Brand and model numbers of third party instruments that work with the proposed solution			
b) Confirmation that the TPE supports the entire feature/ function complement of the proposed solution			
c) If not, list features that are supported			
d) Protocols supported by the TPE(s):			
i) Session initiation protocol (SIP)			
ii) H.323			
iii) Analog			
iv) Digital			
v) Others (please specify)			
2) Offeror is invited to propose TPEs in its proposed Solution in place of or in conjunction with proprietary TIPP Solution endpoints and should provide specifications and photographs of the optional TPE			

Company Name:

8. Implementation Scope of Work

1) The successful Offeror is required to develop a complete and detailed Solution design in collaboration with HCPSS, including call flow charts and reporting, through on-site meetings with multiple HCPSS departments and user groups. The successful Offeror is required to identify specific business and technical requirements with unique Classes of Service (COS), and provide presentations to HCPSS-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.

Response:

2) The overall Solution design will include all hardware platforms and software versions installed on the proposed solution. Once the Solution design has been finalized, the successful Offeror shall provide a Macro Design document summarizing the Solution components, including hardware platforms, software versions, and additional information as directed by HCPSS.

Response:

3) The successful Offeror will work as HCPSS's agent. Subject to approval from HCPSS the vendor will 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.

Response:

4) Offeror is responsible for populating all requisite software database fields for all products provided under this procurement, including but not limited to, call processing and voicemail/messaging to make all facets of the new Solution operational.

Response:

OR REPLY TEND ONLY

Company Name:

8.1 Installation

1) HCPSS requires a Preliminary Implementation Plan & Schedule, assuming a phased, site-by-site implementation. Offeror will prepare (and include in a separate sheet(s)) a Preliminary/Sample Implementation Plan & Schedule that includes tasks, such as design for implementation and total solution, review and approval by HCPSS, equipment ordering and delivery, installation, cutover day activities and responsibilities, and integration with HCPSS systems and applications, schedule for all locations, including responsibilities, estimated duration of each activity, and “place holder” dates.

Response:

2) HCPSS requires manufacturer-certified installers and engineers for the migration to the new solution. Provide the number and city locations of certified installers and engineers in proximity to Howard County.

Response:

3) Include in this response a description of who will be on-site at HCPSS including their title and responsibilities 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

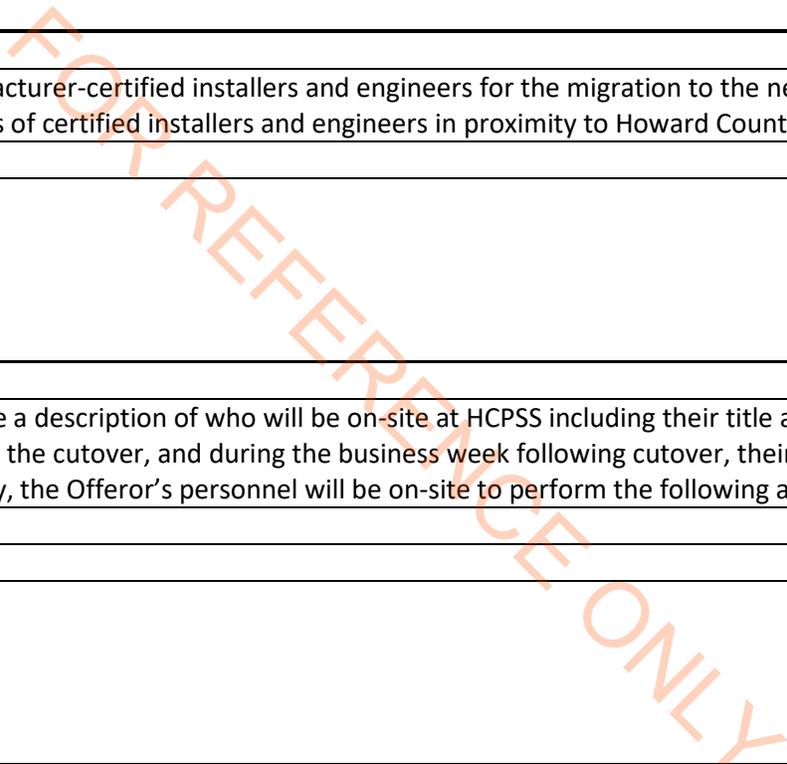
Response:

ii) Station reviews

Response:

iii) Implementation planning

Response:



Company Name:

8.1 Installation

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iv) Current configuration review

Response:

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v) End User training

Response:

--

vi) Pre-cutover testing, cutover

Response:

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vii) Troubleshooting, attendant assistance for up to three days following each phased migration

Response:

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viii) Roving, on site help personnel

Response:

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FOR REFERENCE ONLY

Company Name:

8.1 Installation

ix) Cutover/post-cutover help desk for two to five days following each phased migration/ cutover, depending on location

Response:

x) Follow-up or remedial training

Response:

4) Offeror shall provide and execute 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 HCPSS migration to the new solution.

a) Assume that 10% of all endpoints will be tested at minimum, for capabilities that include, but are not limited to, the following:

i) Make /receive internal calls via reduced digit dialing

Response:

ii) Make/ receive external local/long distance calls

Response:

iii) Leave, forward, and pick up voicemail via multiple interfaces or devices

Response:

(1) Desktop instrument

Response:

FOR REFERENCE ONLY

Company Name:

8.1 Installation

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Response:

--

(2) Cellular device

Response:

--

iv) Basic features: Hold, Forward, Transfer, Conference, MWI

Response:

--

v) Call coverage patterns

Response:

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Response:

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5) 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.

Response:

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FOR REFERENCE ONLY

Company Name:

8.1 Installation

--

6) Offeror shall provide a sample Acceptance Test Plan for HCPSS' review and evaluation. After HCPSS selects its Vendor and design for the final solution, the two parties will review the Acceptance Test Plan and modify it as necessary subject to HCPSS approval.

Response:

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

Response:

--

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

Response:

--

9) HCPSS requires 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.

Response:

--

FOR REFERENCE ONLY

Company Name:

8.1 Installation

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

Response:

FOR REFERENCE ONLY

Company Name:

8.2 Training

The selected Offeror shall offer training sessions to sufficiently train all users. HCPSS will provide rooms for the training sessions. Items and equipment that HCPSS 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 scheduled throughout a day during a location's opening hours.

Response:

2) Describe your training capabilities and ability to provide in-depth training, tailored to user roles, preferably provided virtually and on-demand, for all users. The training shall 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, forwarding, transferring and holding a call. All training materials will be turned over to HCPSS for distribution to staff.

Response:

3) HCPSS requires that designated HCPSS personnel will be trained in a "Train the Trainer" curriculum to provide remedial and subsequent training for new employees. Trainers will be trained during each HCPSS location implementation and materials will be included with the end user training.

Response:

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.

Response:

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.

Response:

Company Name:

8.2.1 Management Administration & Operations Training (PREMISES)

1. The selected Provide manufacturer certification-level system management/operations training for up to six HCPSS personnel. This includes training classes for administering the new system, messaging system, and automated attendant capabilities, and performing first echelon maintenance. Offeror will include recommended courses and pricing in its response (Travel-related expenses need to be included if outside a 50 miles' radius of HCPSS).

Response:

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2. The selected Provide CAS (call accounting) training for up to three HCPSS personnel.

Response:

--

3. Selected Provide dynamic web links for all system level manuals to HCPSS upon acceptance of the new system.

Response:

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FOR REFERENCE ONLY

Company Name:

8.3 Post-Cutover Support (PREMISES)
<p>This section deals with how the selected vendor will provide post-cutover/conversion support and maintenance to HCPSS. HCPSS 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.” Offeror will clearly indicate its compliance and identify how it will maintain and repair the new Solution’s components and at what intervals.</p>
<p>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 HCPSS, all equipment provided will be new.</p> <p>Response:</p> <div data-bbox="181 611 1565 793" style="border: 1px solid black; height: 87px;"></div>
<p>2. Provide and maintain a complete equipment and system inventory and maintenance record in Microsoft Excel.</p> <p>Response:</p> <div data-bbox="181 856 1565 1041" style="border: 1px solid black; height: 88px;"></div>

FOR REFERENCE ONLY

Company Name:

8.4 Single Point of Contact (SPOC)
Indicate compliance and a brief description of how it complies with the requirements below.
<p>1) HCPSS requires that the successful Offeror provide an SPOC. The SPOC will be responsible for specific activities including, but not limited to, the following:</p> <ul style="list-style-type: none">a) Coordinating all solution-related activitiesb) 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 HCPSS staffd) Acting as general liaison and advocate for HCPSS in discussions and dealings with other vendors and /or subcontractorse) Working with the other vendor-partner(s)' /subcontractor(s)' Service Manager(s) to address and resolve solution-related issues <p>Response:</p>
<p>2) Identify its SPOC and an alternate for HCPSS.</p> <p>Response:</p>
<p>3) Provide internal SLAs or escalation to ensure prompt response and resolution by partners.</p> <p>Response:</p>

FOR REFERENCE ONLY

Company Name:

8.5 Post-Cutover Traffic Studies
Indicate compliance and a brief description of how it complies with the requirements below.
1. The Offeror shall perform a trunking traffic study of no less than one (1) normal business week in duration within 10 days of HCPSS's cutover. Response:
2. The Offeror is expected to recommend trunking configuration changes appropriate to industry standard grades of service (GOS) based on specific findings from the study. Any changes agreed to by HCPSS will be accomplished at pre-cutover pricing. Response:

FOR REFERENCE ONLY

Company Name:

8.6 Post-Cutover Maintenance and Support (PREMISES)

Indicate compliance and a brief description of how it complies with the requirements below.

Provide written confirmation from an authorized senior level executive that Provide contract maintenance, parts, and engineering support for the new Solution for at least seven years following HCPSS's signed acceptance of the systems.

Response:

2. Provide information on maintenance pricing and coverage if HCPSS opts to sign a multi-year maintenance agreement.

Provide any escalation factors for Years 3-7.

Response:

FOR REFERENCE ONLY

Company Name:

8.7 Local Inventory (PREMISES)
Indicate compliance and a brief description of how it complies with the requirements below
For maintenance purposes, the Offeror shall warehouse locally (in Howard County area) at least one of every part proposed for the new solution. Offeror shall discuss its plans and requirements to maintain on-site spares for critical components.
Response:
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FOR REFERENCE ONLY

Company Name:

8.8 Guaranteed Hardware/Software Upgrades (PREMISES)

1. 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 will be scheduled with and approved by HCPSS 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.

Response:

2. Include details cost on any "investment protection" programs for hardware, software, and/or applications available to HCPSS.

Response:

3. Briefly summarize the conditions and coverage of the proposed upgrade program.

Response:

FOR REFERENCE ONLY

Company Name:

8.9 Maintenance Organization and Guidelines

Describe its organization that will support its proposed solution. Indicate compliance and a brief description of how it complies with the requirements below.

1) Provide an operational support chart.

Response:

[Empty response box for question 1]

2) Provide the number of certified engineers in the Howard County area with experience and credentials to service the new Solution's components.

Response:

[Empty response box for question 2]

3) 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

Response:

[Empty response box for question 3a]

b) Time intervals for escalation

Response:

[Empty response box for question 3b]

c) Escalation paths for different types of issues or alarms

Response:

[Empty response box for question 3c]

d) Contact lists for each step of escalation

Response:

[Empty response box for question 3d]

FOR REFERENCE ONLY

Company Name:

8.9 Maintenance Organization and Guidelines

e) Resolution/progress update contact schedule for HCPSS & internal vendor personnel

Response:

f) Names and phone numbers of escalation path members

Response:

g) Name and proposed duties of service manager dedicated to HCPSS

Response:

4) Offeror will briefly describe its notification and resolution process for afterhours service calls to a standby technician/engineer.

Response:

5) Describe its remote monitoring capabilities, including location of its operations center(s), hours of operation, staff on duty during "off hours," and how HCPSS issues will be prioritized.

Response:

Company Name:

9. OPERATIONAL SUPPORT	
<p>“Operations” are defined as the daily activities focused on providing or improving service to HCPSS’s users, such as MACs, trouble resolution, improved applications, management of resources to meet HCPSS’ service level metrics and daily telephony needs.</p>	
<p>Three levels of operational support are defined for this document:</p>	
<p>8.9.1 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.</p>	<p>Response:</p>
<p>8.9.2 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.</p>	
<p>8.9.3 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.</p>	<p>Response:</p>

FOR REFERENCE ONLY

Company Name:

10.2	All Inclusive Pricing
<p>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.</p>	
<p>Offeror should confirm that the NRCs reflect all hardware, software, licensing, and professional services necessary to ensure that HCPSS will have a fully functional solution. Pricing detail provided by Offeror should including shipping, installation, programming, and whatever else is required to “make the system work” – to install and provide support for the proposed hardware and software according to HCPSS-approved system design.</p>	
<p>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 HCPSS’s discretion.</p>	
<p>Offeror shall also provide an “auto quote” for its solution. The auto quote will include the following:</p>	
<ul style="list-style-type: none">• 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, so that HCPSS Evaluation committee will understand its purpose	
<p>Response:</p> <div style="border: 1px solid black; padding: 5px;"><p><i>Proposer shall attach a spreadsheet and electronically save to excel and to pdf formats.</i></p></div>	

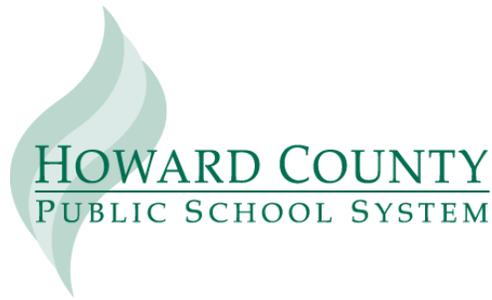
Company Name:

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, HCPSS retains the right to purchase the equipment at the fair market value at that time.~~ If terminated, HCPSS retains the right to exercise all its rights and remedies under any resulting agreement and/or under the Uniform Commercial Code (UCC) Article 2A – Leases. Offeror will propose phased payments with regards to phased installation.

Response:
Proposer shall attach a spreadsheet and electronically save to excel and to pdf formats.

FOR REFERENCE ONLY



ADDENDUM NO. 6

July 18, 2017

RE: RFP No. 041.17.B5, Telecommunications Replacement Solution

FROM: Purchasing Office
Howard County Public
Schools 10910 Clarksville
Pike
Ellicott City, MD 21042
(410) 313-5644
(410) 313-6789 fax

TO: PROSPECTIVE BIDDERS

This addendum modifies the Original Bidding Documents as noted below. Acknowledge receipt of this Addendum in your Proposal. Failure to do so may subject the Bidder to disqualification.

1. **CHANGE**
Pg. 82, 8.4 Single Point of Contact (SPOC) to:

Single Point of Contact (SPOC)
HCPSS requires that the successful Offeror provide an SPOC who functions the Project Manager. It is expected that this named individual be on-site 2-3 day/week. HCPSS can provide an office for this individual through the duration of the project.

2. **CHANGE**
Bid Due Date to: July 27, 2017 at 2:30 PM

END OF ADDENDUM

The Howard County Public School System

Pre-Bid SIGN IN SHEET

Bid/RFP: Request for Proposal No. 018.19.B5 Telecommunications Consulting Services

Meeting Date: October 10, 2018

Name	Company	Primary/ Sub	Phone	E-Mail
Lynn Ho	HCPSS			Lynn Ho <Lynn_Ho@hcpss.org>
Ted Ludicke	HCPSS			Ted Ludicke <Ted_Ludicke@hcpss.org>
John LeMay	HCPSS			John LeMay <John_LeMay@hcpss.org>
Justin Benedict	HCPSS			Justin Benedict <Justin_Benedict@hcpss.org>
<i>Rick Hewitt</i>	<i>DSI</i>	<i>✓</i>		<i>rick.hewitt@dsitech.com</i>
<i>Greg Hennen</i>	<i>virtucom</i>	<i>✓</i>	<i>443-243-3221</i>	<i>ghennen@virtucom.com</i>
<i>Mark Lance</i>	<i>HCGI</i>	<i>✓</i>		<i>mlance@hcg1.com</i>
<i>Byron BATTLES</i>	<i>TECHNOLOGY TRENDS GROUP (TTG)</i>	<i>✓</i>	<i>301-381-7422</i>	<i>bbattles@tg-it.com</i>
<i>Tom Napoli</i>	<i>Noovis</i>		<i>240.205.1588</i>	<i>tnapoli@noovis.com</i>
<i>Steve Bolney</i>	<i>HCPSS</i>			<i>Stephen_bolney@hcpss.org</i>
<i>LAURA GROSS</i>	<i>TTG</i>	<i>✓</i>	<i>403-980-1323</i>	<i>lgross@tg-it.com</i>
<i>THOMAS KING</i>	<i>ITSAVVY</i>	<i>✓</i>	<i>301.383.8653</i>	<i>tking@itsavvy.com</i>
<i>Teach Asher</i>	<i>Eylat solutions</i>	<i>✓</i>	<i>410.961.2591</i>	<i>Teach.Asher@EylatSolutions.com</i>
<i>ROBIN CORNISH</i>	<i>PANIAQUA'S ENTERPRISES</i>	<i>PRIMEY ✓</i>	<i>443-831-6908</i>	<i>robin.cornish@paniaquas.net</i>

SUB