REQUEST FOR PROPOSAL
Telecom System Replacement
Yakima Valley Farmer Workers Clinic
Project No. IS 2022-5277

GENERAL INFORMATION

Yakima Valley Farm Workers Clinic (YVFWC) is requesting proposals for complete Telecom System replacement at all fifty-four Yakima Valley Farm Workers Clinics located in both Washington and Oregon.

Quotes can be mailed, couriered, emailed or hand delivered to:
> Yakima Valley Farm Workers Clinic
> Attn: Jeremy Staab
> 603 West Fourth Ave.
> Toppenish, WA 98948
> jeremys@yvfwc.org839

__Proposals must be received no later than 4 PM PST on the 15th of November__

PROJECT DESCRIPTION, BUDGET, AND SCHEDULE

YVFWC is in need of a cloud-based Telecom System solution for all 54 +/- locations utilizing and conforming to the list of requirements contained herein. No budget has been established for the project and YVFWC reserves the right to not select any proposal due to budget or other constraints. The selected vendor must be prepared to engineer, architect, configure the cloud system, assist in provisioning all features of the system, services, users, authentication, calling, call structures, call centers, Direct Inward Dialing (DID), porting, trunk migration, and SIP provisioning.

The organization currently has a Mitel/ShoreTel telephone system using Azure SBCs to support SIP trunking and internet/WAN distribution to all locations. This includes a current 1500 +/- telephone handsets distributed throughout 50+ locations in Washington and Oregon.

It is intended that all sites be pre-provisioned and migrated in phases, (clinic-by-clinic) to the new cloud system over a 6-10 month period from the project initiation / contract signing date. This is intended to minimize disruptions to daily operations in critical medical environments.

The new system must be 100% functional for all locations on or before August 1st, 2024*.
*Pending equipment availability and delivery.

PROPOSAL REQUIREMENTS: please submit the following information

1) Vendor Contact Information
   a) Name of vendor:
   b) Business address:
   c) Vendor Contact Person for YVFWC:
   d) Telephone:
   e) Email
2) Brief description of the vendor. This section should provide YVFWC with information regarding the vendor's expertise and experience in providing large amounts of equipment smoothly and on-time.
3) Vendor's Personnel and Qualifications. This section should identify the individuals who will be participating in the YVFWC purchase process including installation, support, and maintenance, including the experience of each individual. Certification and/or proof of being an authorized vendor partner is also required by value added resellers and third parties.
4) References. This section should provide YVFWC with three references for work the vendor has performed in the past year delivering product with similar size and scope of this RFP.

SCOPE OF SERVICES

The vendor will provide a cloud-based telephony system including all necessary equipment, licensing, software, support, training, planning, scheduling, execution, accessories, onsite and/or remote installation, a 3 year and a 5-year maintenance and support contract (each must be quoted separately) to YVFWC with installation completed no later than August 1st of 2024.

This solution shall also include: all applicable project management, design review workshops, project initiation & kickoff meetings, staging & configuration of the system, assessment of current environment and current phone system dependencies, migration of all current phone system configuration, migration of all users & user accounts, integration with organization's Active Directory environment.

This includes migration from the current phone system to a cloud-based IP system and all configuration dependencies such as trunking, call centers, call center agents, user extension, hunt groups, four-digit dialing, analog supported devices, pharmacy call stations, Inactive Voice Response (IVR) and overhead paging. This migration shall include porting and moving of the corporate DID list from the current SIP service provider to new cloud-based Phone system and SIP trunk provider. Assisting YVFWC staff in the changing of all physical desktop phones, softphone clients and mobile clients from the current system to a cloud-based VoIP environment. Equipment and software must utilize the current network and WAN environment already established at Yakima Valley Farm Workers Clinic (YVFWC).

The deployment should include integration with our Hosted EPIC Solution, Azure Active Directory, O365, Outlook, Microsoft Teams, Zoom, IVR, Overhead Paging, and fax servers. The new cloud-based system will be implemented by also adhering to the current security policies and standards set by YFVWC. Any delays in delivery will result in possible cancellation of the order and award to another vendor. Proposals should be all

inclusive in regard to a full systems replacement* including service delivery, certification, taxes, and shipping to our YVFWC IS location at Toppenish Administration South at 603 W. 4th Ave, Toppenish, WA 98948.

*YVFWC shall provide the bulk of on-site resources for installations and cutovers, but selected vendor must include several site visits for initial provisioning and setup of the new system including on-site training, and project closing for best practices audit.

Only new and genuine equipment provided by authorized partner sources will be considered. All expenses must be outlined in the proposal. Any costs required outside of those listed in the proposal provided to make the solution meet the listed constraints and/or requirements to YVFWC's satisfaction will be borne by the vendor.

The proposal must include annual renewal costs YVFWC should anticipate after the initial three-year or five-year contract periods.

Proposal must include training for YVFWC Unified Communication Analysts to be fully certified to administrate the overall system and configuration- 3 seat, on-site (preferred) or virtual training. Also training for additional Help Desk and/or other support staff for basic administration -10 seat, on-site or virtual training. Additional training resources for site-support staff via virtual delivery are also highly preferred.

YVFWC pays invoices within 45 days after receipt of product. Purchase order/s will be provided to the selected vendor. All communication, documentation, and/or invoices must include appropriate purchase order number/s. Invoices not including the appropriate information may not be paid.

SELECTION CRITERIA

Based on the proposal's ability to meet the requirements/constraints, the vendor's reputation and competency, and other factors contained herein, one proposal will be chosen. YVFWC reserves the right, however, to choose not to make a purchase if the proposals do not meet our needs or we are unable to secure the funding required. All vendors, including selected if one is chosen, will be notified by December 8th, 2023.

OTHER INFORMATION

A. Costs for the product must include all necessary fees, shipping, taxes, etc. No other costs will be considered.

B. Cost of preparation of proposals will be borne by the applicant and the proposals shall become the property of Yakima Valley Farm Workers Clinic, whether accepted or rejected.

C. This request for proposals does not constitute an offer of employment nor to contract for services. Yakima Valley Farm Workers reserves the right to reject all proposals and to waive any informality, technical defect or clerical errors in any proposal.

D. All proposals shall remain valid for sixty (60) Calendar Days following the last day to receive proposals.

E. Proposals shall be signed by an authorized individual or officer of the vendor submitting the proposal.

F. Proposals may be withdrawn by the vendor submitting the proposal at any time prior to the closing date and time for receipt of proposals.

G. Federal funding requirements for this project may require the selected vendor to allow access to YVFWC, the HHS awarding agency, the U.S. Comptroller General, or any of their duly authorized representatives, to any books, documents, papers and records which are directly pertinent to a specific program for the purpose of making audits, examinations, excerpts and transcriptions.

H. Per the Federal Funding Accountability and Transparency Act of 2006 (Pub. L. 109–282), as amended by section 6202 of Public Law 110–252, selected vendor must provide required information to be posted at www.hrsa.gov/grants/ffata.html.

I. Recipients and sub-recipients of Federal funds are subject to the structures of the Medicare and Medicaid anti-kickback statute (42 U.S.C. 1320a - 7b(b) and should be cognizant of the risk of criminal and administrative liability under this statute, specifically under 42 U.S.C. 1320 7b(b) Illegal remunerations which states, in part, that whoever knowingly and willfully:

     (A) Solicits or receives (or offers or pays) any remuneration (including kickback, bribe, or rebate) directly or indirectly, overtly or covertly, in cash or in kind, in return for referring (or to induce such person to refer) an individual to a person for the furnishing or arranging for the furnishing of any item or service, OR

     (B) In return for purchasing, leasing, ordering, or recommending purchasing, leasing, or ordering, or to purchase, lease, or order, any goods, facility, services, or item...For which payment may be made in whole or in part under subchapter XIII of this chapter or a State health care program, shall be guilty of a felony and upon conviction thereof, shall be fined not more than $25,000 or imprisoned for not more than five years, or both.

J. This award is subject to the requirements of Section 106 (g) of the Trafficking Victims Protection Act of 2000, as amended (22 U.S.C. 7104). For the full text of the award term, go to http://www.hrsa.gov/grants/trafficking.htm.

K. Vendors identified on the U.S. General Services Administration Lists of Parties Excluded from Federal Procurement or Non-Procurement Programs (debarred list) shall not be allowed to contract for services on this project.

Please provide a quote for the Telecom System Replacement. (See Below). Remember to include installation, certification, testing, training, all associated parts, shipping and taxes.

Scope of Services:

The Vendor Shall Provide:
- Procure, provide, setup, support, tune, update, maintain, and fully manage* a cloud-based telephony replacement solution including procurement, delivery, configuration, installation, & cutover of:
  - 54 clinic locations in two states: Washington & Oregon, and 1500x IP phones.
    - Site cutover will be phased over the next 6-10 months after project initiation.
    - Includes replacement of all telephone handsets across the organization at all locations.

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- - - Includes cloud-based telephony service including licensing, provisioning, setup, support, and cutover such as DID, POTs, ISDN, or any current service to the cloud-based solution.
  - o *Day-to-day administration will be performed by YVFWC staff after go-live of all locations.
    - - Estimates of ongoing staffing needs in terms of FTE YVFWC should expect/need to sustain the system

- Cloud-Based Telephony SaaS – Shall Include:
  - o Ensure user provisioning and migration to the cloud-based portal including AD integration of all users and groups.
  - o Centralized authentication (e.g. SAML), Multi-Factor Authentication w/ DUO (preferred), event collection, event parsing, event storage and retention, system maintenance, health, performance, and tuning.

  - o Mobility
    - - Softphone Clients for Laptops, PC and Tablets (All Users)
    - - Mobile Client for Android and IOS (All Users)
      - □ Support for Existing Bluetooth Headsets capable (Desk phones, Softphones, and Mobile clients)
    - - Simultaneous User registration on multiple devices (All Users)
    - - Multi-factor authentication – MFA w/ DUO (preferred)*,
      - □ *other options included with system quote will also be considered.
    - - Video calling

  - o Voicemail
    - - Standard voicemail access through phones
    - - Voicemail via Email (Wav. attachment or speech to text) (All Users)
    - - Voicemail greetings and announcements
    - - Voicemail distribution lists
    - - Voicemail to Email to multiple email recipients at once

  - o 3rd Party Applications Support & Integrations*
    - - *See itemized list for mandatory or desirable integration requirements. O365
    - - Microsoft Outlook
    - - Microsoft Teams
    - - Active Directory
    - - Zoom
  - o MFA – (DUO Preferred) Specialty Voice Applications
    - - 15 Paging Groups (Using Phones)
      - □ 100 Maximum Members
    - - 15 Pickup Groups
      - □ 20 Maximum Members
    - - 40 Overhead Paging

- - - ▫ Valcom V-2001A & V-2006A,
        - ▫ Bogen TPU250
    - 230 Hunt Groups
    - 839 Hunt Group Members
    - Analog Extensions
    - Pharmacy Drive-through Windows and Callboxes
        - ▫ 7 - Diebold 816 PBX Interface (Dry Pair)
        - ▫ 2 - CyberData SIP Outdoor Intercom
        - ▫ 1 - 2N Helios IP Force
    - 258 Auto Attendant
    - 606 Route Point (internal & external call redirect)
    - Equivalent or Replacement to Mitel Connect Workgroup
        - ▫ 37 Total
        - ▫ 35 Only purpose is to provide a shared mailbox where multiple members have access to voice messages and status (unheard/heard) via a client.
        - ▫ 2 Water downed Contact Center
    - 2 Security Gate Entries
        - ▫ Analog Extensions directed to a Hunt Group (Hot Dial)
    - E911
    - Enterprise Conference bridge
  - Emergency Notification
    - o System Requirements
      - Admin Portal for Administration & Troubleshooting
      - 400 Redundant Simultaneous SIP trunks
      - 2316 Direct Inward Dial (DID)
      - Class of Restrictions/ Class of Services
      - Real time System monitoring
      - Directory Listing
      - User templates
      - Dial by Name Directory
      - Multi-site Management
      - Multi-user administration access levels
      - System reporting, analytics, and uptime
      - Distribution lists
- Cloud-Based, VoIP Handsets – Shall Include:
  - o Purchase, procurement, provide, licensing, and delivery, of 1500x IP phones*,**:
    - * Current # of users/phones = 1500 + 2% overage for error, growth, & stock
    - ** Vendors are encouraged to provide several options for handset types and models that conform to these requirements.
    - Models
      - ▫ 50 Small Form Factor –Enterprise phones

- o Minimum 4-line keys (Support assignments for lines, contacts, and features)
        - o Speaker key
        - o Headset Key
        - o Color display
        - o 2 Ethernet ports (Phone and PC ports)
    - ▫ 1400 Mid-Range Enterprise Phones
        - o Minimum 8-line keys (Supports assignments for lines, contacts, and features)
        - o Blue Tooth Capable
        - o Color Display
        - o 1 USB Port
        - o Headset Key
        - o 2 Ethernet ports (Phone and PC ports)
    - ▫ 50 VoIP cordless phones
        - o Secure DECT Encryption
        - o Bluetooth Headset compatible
        - o Rugged and Drop proof
        - o Caller ID
        - o Minimum 16 hours talk time
        - o Charging station
        - o Speed Dial
        - o Belt Clip
    - ▫ 35 Conference IP phones (with PoE)
        - o SIP conference phone
        - o POE connected
        - o Microphone pickup range minimum 12ft
        - o Supports Small to Mid-size conference rooms
    - ▫ Wall Mount Brackets*
        - o *ability to return extras:
            - 100 Small multi-line phone
            - 250 Large multi-line phone
- o Phone Features Must Include (at a minimum):
    - ▪ Group Pickup
    - ▪ Automatic Call-Back
    - ▪ Presence and head-up Display
    - ▪ Call delegation
    - ▪ Call Screening
    - ▪ Call Flip
    - ▪ Call Park
    - ▪ Call Delegation
    - ▪ Caller ID
    - ▪ Intercom
    - ▪ Call Hold
    - ▪ Multiline appearance
    - ▪ Speed Dials
    - ▪ Conferencing
    - ▪ Call Monitoring
    - ▪ Call Routing
    - ▪ Call Transfer
    - ▪ Paging- (Thru phone and overhead paging)
    - ▪ International, Domestic and Local Calling
    - ▪ Toll restrictions/ Class of Service

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- User Groups
- Hunt groups
- Conferencing

- Extension Reassignment
- Redial

- o Contact Center
    - 120 +/- Contact Centers Groups
    - 175 +/- Simultaneous Contact Center Agents
    - 80 +/- Supervisors
    - Web Clients (All Call Center Agents)
    - Multi-line phones
    - Softphones compatible
    - Real-time Queue Monitoring
    - Real-Time Agent Monitoring
    - Contact center Reporting/analytics

    - Multi-Channel
    - Busy Status indicators
    - IVR (Interactive Voice Response)
    - Auto attendants/ Menus
    - Time of Day controller with override
    - Skill based routing
    - Scheduled Callbacks
    - Wrap-Up
    - Overflow/Interflow Routing
    - Outbound Campaigns
    - Queue Callback

- **System Support, Service Level Agreement (SLA), Maintenance, Monitoring, & Warranty:**
    - o **Support**
        - Provide, manage, support, and operate a 24x7x365, US-based, datacenter and fully monitor and manage the solution including:
            - Response and YVFWC Staff Augmentation:
                - o Serve as an extension to YVFWC I.S. staff to provide troubleshooting & assistance when needed, assist with any triage & analysis, data/traffic collection, etc.
                - o Provide a timely response to all events and issues with minimal average incident and response detections times, minimal average time from incident to remediation.
    - o **SLA**
        - Provide a contract stipulated Service Level Agreement(s) (SLA) guarantee to include immediate assistance to YVFWC UC Analysts of:
            - < 1hr – Critical Response
            - < 4hr – General Incidents
            - < 8hrs – Configuration Assistance
    - o **Monitoring**:
        - Provide automated, round-the-clock monitoring of endpoints/handsets, logs, alarms, events, integration, and compliance reporting
    - o **Maintenance**
        - Vendors are encouraged to bid and share their respective maintenance agreement tiers.*

- ▪ *YVFWC prefers maintenance agreements to include:
  - • Solution shall include 24x7x365 maintenance and support for all solutions.
  - • Vendor shall provide YVFWC at least 14 days advance notice for all system upgrades, critical maintenance, and/or service-impacting events.
  - o **Warranty**
    - ▪ Vendor shall provide at least a 1-year warranty on all physical hardware*
      - • * Advance-replacement warranty highly preferred.
      - • * No refurbished devices shall be used for warranty returns.

- **Systems Reporting**
  - o Provide regular (monthly) reports & metrics including events, analytics, Key Performance Indicators (KPIs) for assessment of technology effectiveness and efficiency, and recommendations for systems tuning and refinement.
  - o Vendor shall assist YVFWC UC Analysts in the creation of custom user-reports including call queues, call numbers, call flow, user summaries, user detail summaries, time spent on calls, logins/logouts, all call center reporting and statistics, trunk analysis, call data recording, etc.
  - o Provide annual organizational configuration reviews, audit the environment for industry and security best practices, provide audit & response reports, and make support and configuration recommendations.
  - o Provide periodic, annual configuration & security review of the environment to offer performance improvements of the platform and executive level overviews of the services performance.
    - ▪ Provide regular guidance and recommendations to enhance the organization's overall security posture.

- **Systems Security**
  - o Provide regular security attestation of HIPAA compliance, and any other applicable documents such as SOC 2, Type II attestations, HITRUST attestations, etc.
  - o Submit to initial, and regular periodic (annual) YVFWC Security Risk Assessments (SRAs) including completion of security questionnaires and ensuring proper industry best practices in-line with HITRUST and NIST frameworks.
  - o Notify YVFWC Security Operations staff within 30 days of any potential or realized security incidents.
  - o Security Architecture Workshop
    - ▪ Meet with key stakeholders including YVFWC I.S. Security staff, independent contractors, to identify key areas for the system/service, and to ensure maximum effectiveness of the deployment to meet customer needs.

- **Provide Vendor Reference Documents to Include:**
  - o Network QoS requirements for internal network traffic shaping.
  - o Firewall requirements:
    - ▪ Access-list requirement including IPs, ports, services, etc.

- ▪ Public IP requirements.
  - o System requirements for softphone

- **General**
  - o Vendor shall organize and conduct kickoff meetings including all stakeholders to:
    - ▪ Identify & schedule.
    - ▪ Review service offerings and deliverables.
    - ▪ Review onboarding strategy and methodology.
    - ▪ Review timelines
    - ▪ Scheduling
    - ▪ Review any applicable network, security, application, server, and third-party integrations and/or related systems documentation to ensure hardened security, and maximum visibility.

SOLUTION REQUIREMENTS AND CONSTRAINTS*:

*Itemized Responses to Each Required. All vendors must provide an itemized response indicating how the solution addresses Mandatory items below in addition to addressing any Desired or Preferred functionality/integration if applicable.

Technology Features

Feature	Category	Requirements Criteria	Level of Desirability
GENERAL FEATURES			
Identify general feature being evaluated for the technology		Clarify the performance and functional requirement associated with the feature.	
Cloud-Based Telephony	Cloud System	Ability to support cloud-based telephony solutions without on-premise hardware.	Mandatory
Call Blocking	Trunks	Ability to support and manage call blocking for robo calling and etc.	Desirable
Local Numbers	Local	Ability to support local numbers from more than 200 available area codes.	Mandatory
Automatic Dialers	General	Ability to support automatic dialers including speed dial, distribution lists, and pre-defined phone numbers.	Mandatory
Single Platform	General	A holistic UCaaS and CCaaS platform with unified reporting and analytics	Mandatory
Multi-Line Call Appearances	General	Ability for the system to support phones with multi-lines	Mandatory
On-Hold Features			

Music On-Hold	On-Hold	Ability to support customizable music on-hold	Mandatory
On Hold Announcements - Multi Department/Tenant	On-Hold	Ability to support numerous different announcements and greetings depending on call queues, departments	Mandatory
Call Monitoring / Recording Features			
Call Recording	Monitoring	Ability to support on-demand and full time call recording including archive & transcription.	Desirable
Call Monitoring / Listening	Monitoring	Ability to support call monitoring / management functions that refers to the process of listening to calls with the goal of improving customer interactions.	Mandatory
Call Barge	Monitoring	Ability to allow a supervisor to enter a call with current calling parties	Desirable
Phone Features			
Group Call Pickup	Phone	Ability to support any member of a designated group to be notified when a group member receives an incoming call, and they can answer if the intended recipient is unavailable	Mandatory
Automatic Call-Back	Phone	Automatic callback feature is a computer telephony function that allows callers to request a callback if the line is busy, if there are no available	Desirable
Presence and Head-up Display	Phone	Ability to support desk phone, the mobile app, or a softphone, so colleagues can easily see your presence status—Available, Invisible or Do Not Disturb.	Desirable
Call Delegation	Phone	Ability to support a visual, easy way for admin assistants who are placing calls on behalf of executives to manage a high volume of call transfers. It also simplifies the call experience for executives.	Desirable
Call Screening	Phone	Ability to support taking calls from particular callers, and send others directly to voicemail.	Mandatory
Call Flip	Phone	Ability to support moving of ongoing calls between desk phones, mobile phone, or softphones.	Desirable
Call Transfer	Phone	Ability to transfer calls internally and externally	Mandatory
Call Park	Phone	Ability to support hold calls in a virtual location and retrieve them from any desk phone in the system.	Mandatory
Software Phone	Phone	Support for software-based phones (soft-phones). Indicate applications, features, reliability, & support.	Mandatory
Caller ID	Phone	Ability to support caller ID (incoming & outgoing)	Mandatory

Third-Party Applications Support			
Zoom Mobile & Desktop Application	Zoom	Ability to integrate and support Zoom Mobile & desktop application	Desirable
Microsoft Teams Mobile & Desktop Application	Microsoft	Ability to integrate and support MS Teams Mobile & desktop application	Desirable
Microsoft Outlook Mobile & Desktop Application	Microsoft	Ability to integrate and support MS Outlook Mobile & desktop application	Desirable
Elevate to Meeting	Zoom	Ability to seamlessly elevate a phone call to a full Zoom meeting without requiring participants to join	Desirable
RightFax	Opentext	Ability to send and receive faxes to and from Right Fax server via SIP trunks	Desirable
Active Directory	Microsoft	Ability to connect Active Directory and users together in support of login credentials on phones and mobile clients	Mandatory
Dial A Script / IVR	AIS	Interactive Voice Response (IVR) system for Pharmacy and prescriptions via SIP trunks to AIS server	Desirable
Elevate to Meeting	Microsoft	Ability to seamlessly elevate a phone call to a full MS Teams meeting without requiring participants to join	Desirable
Healthcare Application Integration	EPIC	Interface with Epic EHR and/or Epic MyChart	Mandatory
Healthcare Application Integration	EPIC	All the ways in which your platform interfaces with Epic EMR for "Inbound" functionality	Mandatory
Healthcare Application Integration	EPIC	All the ways in which your platform interfaces with Epic EMR for "outbound" functionality	Mandatory
Healthcare Application Integration	EPIC	Explain how your online chat is tailored towards best practices in healthcare	Mandatory
Healthcare Application Integration	EPIC	Have you previously done an EPIC integration? Please give example/case study customer reference	Mandatory
Cloud Features			
Multi Site Management	Cloud System	Ability to support management of all site assets in all locations within a single account.	Mandatory
Granular User Account Management	Cloud System	Ability to support customizable admiration accounts with granular features & delegated controls.	Mandatory
Multi-Language Speech Recognition	Cloud System	Ability to support Multi-Language Speech Recognition	Desirable
SIP Phone Support	Cloud System	Ability to support connection of VoIP phone service without extra hardware or servers	Mandatory

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Feature	Category	Description	Requirement
Cost-Center Accounting	Cloud System	Ability to provide granular (per-location) billing models or ability to parse bills to individual service delivery locations.	Desirable
Call Data Recording	CDR	Call break down by time of day and call volume.	Mandatory
Paging Features			
Intercom	Paging	Ability to make announcements via desk phones to colleagues across all office locations.	Desirable
Paging - Through Phones	Paging	Ability to support real-time, one-way announcements to multiple desk phones	Mandatory
Paging - Through 3rd Party Systems	Paging	Ability to support overhead paging with existing paging system (Valcom V-2006 & V-2001 & Bogen TPU250)	Mandatory
Park & Page	Paging	Ability to support call park & paging services	Desirable
Alert Notification System	Emergency Alert and Paging	Ability to send out alert notifications through all types of devices	Desirable
Call Routing Features			
Vanity Numbers	Call Routing	Ability to support vanity numbers.	Desirable
Telephone Extensions	Call Routing	Ability to support 4-6 digit extensions.	Mandatory
Number Porting	Call Routing	Ability to port existing telephone numbers.	Mandatory
Time of Day Controller	Call Routing	Ability to support flexibility to work according to any hours of operation schedule. Based on a range of options, answering rules can route calls for company's main number as well as for individual extensions and mailboxes.	Mandatory
Time of Day Controller "Override"	Call Routing	Ability to manually override time of day controller	Desirable
Call Transfer	Call Routing	Ability to support transferring of calls	Mandatory
Call Forwarding	Call Routing	Ability to support call forwarding	Mandatory
Shared Lines	Call Routing	Ability to support an extension or a DID number across multiple phones and answer calls from those phones	Mandatory
Hot Desking	Call Routing	Ability to log into any phone and assign the users extension	Desirable
Call Center Features			
Interactive Voice Response (IVR)	Call Center	Ability to support IVR without speaking to an agent to obtain information via voice commands, and be routed properly	Mandatory
Auto Attendants	Call Center	Menus, routing and options	Mandatory
Omnichannel	Call Center	Ability to Communicate with customers in many different styles such as chat, email, SMS	Mandatory
Agent multi queue answering	Call Center	Ability to answer and monitor multiples queues assigned	Mandatory

Health Care Campaign dialer	Call Center	Ability to contact patients to inform them of exams, appointments and etc.	Desirable
Queued Call back	Call Center	Allows callers waiting in a call queue to opt out of the queue and be called back when an agent becomes available.	Desirable
Graphical Call Flow	Call Center	Shows a diagram of a call start to finish	Desirable
Contact Center Artificial Intelligence	Call Center	Helps agents be more productive	Desirable
Skills base routing	Call Center	Transfer and send calls to skill based agents	Mandatory
Realtime Agent/Queue monitoring	Call Center	Real time agent monitor for login and logout and call queue monitoring	Mandatory
Call Center Reporting & Analytics		Provide agent and call queue metrics	Mandatory
Call Queues	Call Routing	Ability to support on-hold call queues including routing to an agent	Mandatory
Calling & Mobility Features			
WIFI to Cellular handoff	Mobility	Ability to take calls with softphone on Wi-Fi then transition to cellular while call is still connected	Desirable
Video Calling	Video	Capability to use video to call clients/patients	Desirable
Simultaneous Ringing	Mobility	Ability to receiving calls on multiple devices at once (soft phone, desk phone, mobile client, etc.)	Desirable
Support Mobility on multi OS platforms	Mobility	Able to support all devices and OS platforms for Mobility (Android, IOS)	Desirable
Administration Features			
Cloud PBX	Administration	All administration features are via 100% cloud-based PBX	Mandatory
Multi-Site Management	Administration	Manage branch offices independently and with unique operational needs	Desirable
Dial/Speech Name Directory	Phone	Ability to support incoming callers to route themselves to the correct person or extension by searching for the name of the call recipient on their phone's keypad	Desirable
System Directory	System	Ability to look up corporate directory	Mandatory
Directory Listing	Administration	Ability to support publishing of business details for free in local and national directories	Desirable
System Health Checks	Administration	Real time status of the system and users	Desirable

Software Troubleshooting Tools	Administration	Onboard tools for troubleshooting. Examples: Built in SIP tracing tool, packet capturing, and trace route.	Mandatory
User/Call Center Agent Training	Administration	Training Documents and visual aids	Desirable
The ability to do bulk editing	Administration	The ability to add a high volume of new users at one time or edit existing (Users/Extensions/COS/COR) users.	Desirable
Global Changes	Administration	Ability to make changes organization wide	Desirable
User Templates	Administration	Ability to standardize users accounts	Desirable
International & Long-Distance Calling Features			
Select International Free Long Distance	International	Ability to support/provide unlimited, international long-distance calling to Central America & Canada	Desirable
Select International Free Long Distance	International	Ability to support/provide unlimited, international long-distance calling. - All countries	Desirable
International Numbers	International	Ability to support international inbound numbers in other countries.	Desirable
Free Nation Wide Long Distance	National	Ability to call any number in US free or flat rate	Mandatory
Toll-Free Option	Long Distance	Ability to integrate and support toll-free number options	Mandatory
Voicemail			
Visual Voicemail	Voicemail	Ability to support Visual voicemail to easily manage voicemails in online accounts, on PC, Mac, or mobile device	Desirable
Custom Greetings	Voicemail	Ability to support creation and customization of voice greetings, main greeting messages, etc.	Mandatory
Multi-Language Voicemail Transcription	Cloud System	Ability to support services to converts audio voicemail messages into text format in multiple languages. Indicate which formats this is available for	Desirable
Voicemail Transcription	Voicemail	Services to converts audio voicemail messages into text format. Indicate which formats this is available for	Desirable
Voicemail to Email	Voicemail	Delivery of voicemail messages to email inbox. Supported email platforms, etc.	Mandatory
Voicemail	Voicemail	Ability to support voicemail.	Mandatory
Voicemail - Export & Backup	Voicemail	Ability to support voicemail exporting and backups.	Desirable
Full Unified Messaging	Voicemail	Voicemail sent to Email and copy not stored in voicemail boxes.	Mandatory
Conferencing			

Video Conferencing	Video	Ability to support reception and transmission of audio-video signals by users in different locations, for communication between people in real time	Desirable
Conferencing Bridge	Conferencing	Ability to support large groups for conferencing- (voice)	Mandatory
SMS Support & Features			
SMS/MMS Messaging	Messaging	Ability SMS, MMS refers to standard text messages that are sent using a cellular signal instead of an internet connection	Desirable
Message Alerts	Messaging	Ability to support instant notifications for voice and fax messages via email, SMS, MMS and/or mobile apps	Desirable
Fax Support & Features			
Electronic Fax	Fax	Ability to send fax documents over the internet via URL and Mobility applications.	Desirable
Right Fax support	Fax	Ability to integrate with Right Fax via SIP Trunks	Mandatory
e911 / Emergency Features & Support			
E911 Service	Emergency	Ability to provide user location to 911 dispatchers	Mandatory
E911 system notifications and logging	Emergency Alert and Paging	Ability to be notified by the system when a call has been made to 911 from a system Phone/Extension	Desirable
911 Data Base and Updates	Administration	Ability to update 911 Data Base	Mandatory
Ray Baum and Kari's Laws compliant	Emergency	Ability to show specific locations of E911 callers to the local PSAP.	Mandatory
Logs & Auditing Features & Support			
Call Logs	Logging	Maintain complete record of inbound & outbound calls and faxes including name of caller, calling number, extension dialed, time, date, and call duration	Mandatory
Audit Trail	Auditing	Ability to track changes made by users and admins including configuration changes, & account history	Desirable
Log Export	Logging	Ability to export raw logs to Excel and/or .CSV format	Mandatory
Security Features			
Secure VoIP Service	Security	Ability to support secure VoIP services	Mandatory
Single Sign-On	Security	Ability to support SSO	Mandatory
MFA	Security	Ability to support MFA - Specify Which	Mandatory
Datacenter Locations	Security	Ability to support US Only datacenters	Mandatory
Roles & Permissions	Security	Ability to support defined user roles including admins and users, & granular permissions based on roles.	Mandatory

Voice Data Encryption	Security	Ability to support SRTP or other encryption of VoIP signals, traffic, and packets.	Mandatory
Restrict Call Types	Security	Ability to support restricting of call types by user, device, time of day, and other factors	Mandatory
HIPPA	Security	HIPPA Compliant	Mandatory
Compliance	Security	Willing to sign a BAA	Mandatory
Analytics / Reporting Support & Features			
Analytics Portal	Analytics	Ability to provide a web-based portal to view reports and metrics including: QoS, live reports, call volumes & reporting metrics	Mandatory
System Reports	Analytics	Ability to support a wide variety of reports regarding system performance, call metrics, KPIs, missed calls, average speed of anser, refused calls, # of calls taken, etc.	Mandatory
Real Time Dashboard Reports	Analytics	Ability to oversee real time dashboard reports of overall system status, call volume, QoS, call quality and associated metrics.	Desirable
Holistic Reporting	Analytics	IVR statistics can be merged with the ACD reports to provide a holistic view of the customer's experience	

Architecture

Feature	Requirements Criteria	Level of Desirability
Deployment	Cloud deployment; minimal on-prem assets	Mandatory
Platform delivery	SaaS first, appliance/VM/hybrid based if needed.	Mandatory
Cloud Datacenters	US-Based datacenters	Mandatory
Required infrastructure	Necessary aggregators to upload on-prem logs/data to the cloud instance(s).	Mandatory

Required licenses	Full breakdown of all licensing both annualized for a 3-year and a 5-year terms on two separate quotes.	Mandatory
Required supporting devices	Reporting is included in the solution.	Mandatory
System scalability	Ability to scale to new message load of new sites, new technologies, etc.	Mandatory
Flexible User Licensing	Ability to change user account level when needed.	Desirable

Telephone Support (Support for Physical Hardware Devices)

Support

Feature	Requirements Criteria	Level of Desirability
Customer Support	Provides toll-free customer support 24 hours, seven days per week. 24x7x365	Mandatory
Customer Support - Chat	Provides customer support via chat 24 hours, seven days per week. 24x7x365	Mandatory
Case Management - Web	Ability to open customer support cases via web portal	Mandatory
Case Management - Phone	Ability to open customer support cases via telephone	Mandatory
Case Management - Email	Ability to open customer support cases via email	Desirable
Service Level Targets (SLT)	Ability to provide predefined Service Level Targets including tiered levels of response times depending on customer level impacts	Mandatory
Defined Escalation Paths	Ability to provide a tiered escalation path and pre-determined intervals	Mandatory
Geographic and Language Support	Provide support in locations needed and in the languages that are spoken by employees.	Mandatory
Customer Support	Provide CSM & or TAM resources	Mandatory
User Manuals	Provides a complete set of user manuals for all software applications to document and explain system features and functions.	Mandatory

Implementation Support	Provides complete turnkey onsite implementation and project management support.	Mandatory
Training	Provides onsite and/or virtual training to telecom administrators, supervisors, agents.	Mandatory
Training Library	Provide access to online training library for all users	Mandatory
Software Updates	Provides future software releases and updates to all applications as part of regular software maintenance fees.	Mandatory
Technical Documentation	Provides technical documentation for support staff including system overviews, design, flowcharts, and file layouts.	Mandatory
Performance Monitoring	(If applicable) Provides remote software monitoring to identify anomalies and provide automatic upgrades.	Mandatory
Implementation and Configuration	Describe the process by which the collectors, devices, and reporting tools, along with their associated licenses, are deployed and initially configured.	Mandatory
Ongoing Operations	Describe how, after the initial configuration, the solution is maintained and updated.	Mandatory
Dedicated Customer Support Representative	Provides a dedicated customer support representative	Desirable
SLA for Incidents	Provide a guaranteed SLA for incident response and support	Mandatory
SLA for Outages	Provide a guaranteed SLA for outages	Mandatory

Cost*

> *All vendors should itemize estimates according to the following criteria, if applicable.
>
> * Vendor to give pricing based on user counts below
>
> ** All vendors should provide separate 3 and 5 year quotes.

Name	Description
Hardware	Cost of each piece of hardware that is required to optimally run the software.
Software Licensing (Annualized) - 1	Application licensing fees associated with the proposed software.
Software Licensing (Annualized) - 2	Application licensing fees associated with the proposed software.
Third-Party Software	Any third-party software fees associated with the proposed software.
Documentation & Training	Any documentation and/or training fees associated with the proposed software.
Maintenance	Maintenance fees associated with the proposed software.
Installation	Installation costs associated with the proposed solution.
Integration	Any integration fees associated with the proposed software.
Legacy Data Loading	Any labor, equipment, or other costs associated with importing legacy data from current systems into the proposed solution.

Project Management	Any project management fees associated with the proposed software.
24x7x365 Support	
Engineering & Onboarding (One-Time)	
TAX	
TOTAL - 3 year	
TOTAL - 5 year	

User Counts –

User Type	User Counts	Description
Standard User	1240	Unified Communications tool & Unlimited Calling US only
Contact Center User + UC	200	Contact Center & UC license. QM/QA, Skilled based routing, digital channels
Outbound Dialer User	60	Additional dialer product
Toll Free Inbound LD	188,000 Min Per Month (Average)	Inbound US Minutes
Teams Add On	1500	Microsoft Teams direct routing integration
Compliance Fee	1500	Regulation or cost recovery
E911 Regulatory	1500	Emergency services
Desk Phones	1500	Desk phone integration (Phone model must support: Jabra Engage, Pro 920 or 9450 wireless headset)