

**City of Seattle**

**Request for Proposal**

**RFP No. ITD-4620**

**TITLE:** **Unified Communications and Contact Center Replacement**

**Closing Date & Time: November 28, 2018, 2:00PM PST**

**TABLE 1 – SOLICITATION SCHEDULE**

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| **Event** | **Date** |
| RFP Issued | 10/17/18 |
| Pre-Proposal Conference | November 2, 2018, 3:00PM PST  Seattle Municipal Tower, Floor 40, Rm 4050/60  Remote Skype Option (See Section 11.2) |
| Deadline for Questions | November 21, 2018 |
| Sealed Proposals Due | November 28, 2018, 2:00 PM PST |
| Interviews/Demonstrations | January 22 - 29, 2019\* |
| Best and Final Offer | February 11 – 17 2019\* |
| Optional BAFO Sealed Proposals Due | March 1, 2019, 2:00 PM PST |
| Anticipated Contract Agreement | April 5, 2019\* |

\*Estimated dates

*The City reserves the right to modify this schedule at the City’s discretion. Notification of changes in the response due date would be posted on the City website or as otherwise stated herein.*

*All times and dates are Pacific Time.*

***PROPOSALS MUST BE RECEIVED ON OR BEFORE THE DUE DATE AND TIME LISTED IN TABLE 1 SOLICITATION SCHEDULE***

***MARK THE OUTSIDE OF YOUR MAILING PACKAGE INDICATING RFP#\_4620***

***NOTE: By responding to this RFP, the Proposer agrees that he/she has read and understands the requirements and all documents within this RFP package.***

*Your proposal may be considered non-responsive if information is left blank*

# **INTRODUCTION**

# This City of Seattle (herein after referred to as “the City”) seeks to obtain competitive technical and commercial proposals from a manufacturer or a manufacturer’s certified partner(s) for all required hardware and software, professional services, implementation support and ongoing maintenance and software support for a Unified Communications (“UC”) solution including voice mail, a combined IVR, and a contact center in accordance with the requirements and specifications set forth in this RFP.

The City is hoping to contract with a single Vendor for a complete solution and encourage Vendors to bid on both UC and IVR/Contact Center, but the City will also accept proposals from vendors for only UC or only IVR/Contact Center, recognizing there may be some economies by using a single Prime Vendor UC and IVR/Contact Center. The forms within this RFP are identified as UC or IVR/Contact Center to simplify the process. In many cases these are the same forms (noted). The vendor should take care to complete the checkbox on the form for all that apply (i.e., UC and IVR/Contact Center).

The proposal pricing is structured in 3 parts:

* UC
* IVR/Contact Center
* Combined UC/IVR/Contact Center

Proposals may be submitted by a team that incorporates more than one vendor and/or that leverages the resources of multiple firms or manufacturers, provided there is a single “prime” contractor responsible for the contract. The City reserves the right to award all of portions of any proposal to one or multiple vendors.

The City is open to considering solutions that are Hosted, On-Premises or Hybrid and reserves the right to award to the highest ranked solution and application(s) that best meets the City’s needs. In either case, the proposals must meet the City’s business and financial requirements, which will include a seven-year life cycle cost analysis.

*See Exhibit A - “Glossary*” for an explanation of the terms and acronyms used throughout this document.



# **PURPOSE**

The City of Seattle conducted an analysis to determine the best solution to replace the City’s multiple aging Nortel / Avaya Private Branch Exchange (PBXs). The analysis consisted of several steps including:

* Gathering business and technical requirements
* Identifying key design goals
* Defining critical solution requirements and design options

This analysis included contact center and Interactive Voice Response (IVR) requirements as part of the future solution to replace agents on the Nortel / Avaya Aura Contact Center and the Genesys PureConnect Contact Center (previously known as the Interactive Intelligence CIC system) currently used by Seattle Public Utilities (SPU).

The analysis identified a variety of contact center capabilities and requirements that the contact center solution must provide; from basic routing and queueing for relatively small contact centers to advanced designs, Interactive Voice Response (IVR), and Customer Relationship Management (CRM) integration for departments with complex requirements.

* The RFP requirements are divided into multiple sections, with business requirements for a UC solution including advanced messaging features located in Section 6.1, and business requirements for the IVR / CC solution located in Section 6.2. Sections 6.3 (TeleManagement Solution), Section 6.4 (Meeting Rooms), and Section 6.5 (Robotic Process Automation) are desired options the City may consider purchasing post-award.
* Any proposal may address either Section 6.1 or Section 6.2 or both. All UC solution proposals should also address Section 6.3 and Section 6.4. All IVR / CC proposals should also address Section 6.5. It is acceptable for a proposal to include two or more different manufacturers.
* The City will provide Skype for Business Unified Communications licensing, software and support if Skype for Business is proposed as part of the UC solution. However, proposers should note that the City is also accepting solution designs that leverage other UC desktop tools.

The project dates include the expectation that the planning / design / build for a new system would begin Q2 2019 and include the core build with a small joint Unified Communications (UC) and IVR / contact center pilot completed in the first six (6) months of the project. The implementation will occur over a thirty (30) month period with the last six (6) months of that period dedicated to final wrap-up and to sites or work groups that could not be completed in the primary two (2) year plan. The total implementation will extend over a period of thirty-six (36) months. The software support and hardware maintenance contract terms shall be for five (5) years beginning at system Acceptance, with a concurrent contract termination date for all covered items.

See *Exhibit B – “City of Seattle 2017 high level org chart*”

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| --- |
| **Exhibit B** |

# **BACKGROUND**

This section provides details of the voice and data networks currently installed and is intended to provide an overview of the complexity, size, and scope of this procurement.

Current PBX Network

For reference purposes, because the Nortel product line was obtained by Avaya but not fully merged with the Avaya PBX line (called Aura), the two names (Avaya and Nortel) are sometimes used interchangeably.

Also, for reference purposes, because Interactive Intelligence was purchased by Genesys, the Genesys PureConnect product that is the renamed ININ CIC system may be called by its old name.

The core PBX network spans over twenty (20) primary sites through the Seattle metropolitan area and beyond. The network is configured with High Availability (HA) and routing is done in combination with Avaya Session Managers and the PBX’s. Two (2) Session Managers are located at two (2) core locations in an active-active configuration.

The core consists of six (6) networked Nortel CS1000’s (four-1000M’s and two-1000E’s) running on version 7.65x software. Each core supports multiple satellite PBXs and Survivable Media Gateways (SMG) for a total of fourteen (14).

All sites are supported by a -48vdc power plant.

There are three (3) AudioCodes Mediant 3000 (HA) Session Border Controllers (SBCs). The SBCs support:

* Skype audio conferencing
* RightFax
* Interactive Intelligence Contact Center (CIC)
* CenturyLink Primary Rate Interface (PRI) trunks
* Level 3 PRI trunks
* PRI to Session Initiated Protocol (SIP) trunk conversion
* Special call handling (e.g., blocking calls with no caller ID)

Four (4) AudioCodes Mediant 2000 analog gateways supporting approximately 80+ MP-1xx analog gateways are distributed throughout the network including a mix of 4-port, 8-port, and 24-port combinations. These analog gateways support the following:

* Paging trunks
* FAX machines
* Loud ringing bells
* ADA audio / visual devices
* Analog phones

The current AudioCodes SBC and analog gateway hardware will need to be replaced based on the design, so proposals are expected to include replacement hardware, if necessary.

A number of ancillary servers are located throughout the City network. These servers host Call Pilot voice mail, contact center, a CXM voice recording solution, and IVRs.

An estimated 14,750 station ports consist of these quantities:

* Analog – 2,747
* Digital end points – 8,520
* VoIP end points – 3,433 (7 are SIP)
* Contact Center Softphones – 55

See Exhibit C – “PBX Network Diagram”



See Exhibit D – “PBX Site Configs” for additional details. This exhibit also includes rolled up station counts and locations where dial tone is located for analog trunks, Off Premise Extensions (OPXs), T1s and PRI T1s, and LEC engineered 2-way ringdown circuits.



SONET - Synchronous Optical Network

The City owns and manages a Fujitsu SONET network comprised of three (3) OC-3 rings (Optical Carrier) and one (1) OC-12 (Optical Carrier) ring, built with Unidirectional Path Switched Rings (UPSR) architecture. The core hardware was updated in the first quarter of 2017. SONET carries the voice, data network, and radio traffic. This SONET configuration is built on City owned fiber.

Seattle City Light also has a dedicated voice network, referred to as PAX, that operates on a separate SONET ring. City Light manages these PBX’s that are Nortel CS1000s.

The SONET and Seattle City Light PAX PBXs are out of scope for this project, except as it relates to integration and 911 call processing with the proposed system.

Carriers

The City is not currently using SIP trunks for access to the Public Switched Telephone Network (PSTN).

Inward Dial (DID) telephone numbers, local and long-distance services are delivered by two (2) different carriers, Level 3 and CenturyLink.

Level 3 delivers twenty-one (21) incoming and outbound PRI digital carrier facility (T1s), including one (1) PRI for long distance. T1s are delivered to the City network via the City’s SONET that is located in the Level 3 Central Office co-located room.

CenturyLink delivers a variety of circuits at multiple sites around the city. PRI circuits are delivered over two (2) separate OC-3s located at Seattle Center and Seattle Municipal Tower. The circuits are delivered in the following formats:

* 83 - Analog central office trunks
* 3 - DSS (digital switched service)
* 123 - PRI T1s, some non-channelized
* 20 - Basic T1s including two denoted for long distance
* 27 - Off premise extensions
* 922 - Flat business lines
* 14 - CenturyLink engineered ringdown circuits terminated on phone sets – PVR’s

PVR’s are designed to terminate leased circuits directly onto a key on a desk telephone. They allow for the termination of 2-way central office ringdown circuits used to connect with outside county, state and federal agencies, as well as a number of other private organizations.

The count of PRI trunks provided in the RFP are for carrier services only and does not identify the number of internal SIP connections used for routing between PBX’s.

The City utilizes dedicated carrier PRI circuits with Skype for Business conferencing. Changes to these circuits are out of scope for the UC system design and are not included in the count of 123 PRI T1’s.

See Exhibit D – “PBX Site Configs” above (tab labeled Dial Tone)

Voice Network Routing

The carriers enter the City network at different core locations. Numbers are routed to the appropriate destination over SONET either on the dedicated PRI tie-trunks using Nortel’s coordinated dialing plan or via the data network by the Avaya Session Managers using SIP for internal, on network call routing. This includes calls for Skype conferencing, Seattle Public Utilities (SPU) contact center, and RightFax servers.

T1 PRI and Virtual SIP trunks are used to route on-net calls between sites.

Calls to and from phones that process credit card data route to dedicated PRI tie-trunks that connect to Time Division Multiplexing (TDM) and analog station ports for Payment Card Industry (PCI) compliance.

206-706-xxxx numbers are routed to City Light’s PAX PBX network over one dedicated PRI circuit and are not part of the Nortel dial plan. Calls to the PAX system are placed by dialing a trunk steering code plus the extension number from all PBXs.

Dial Plan

The City’s dialing plan incorporates numbers using eight (8) different prefixes in the 206 area codes. DID numbers are not grouped in clean ranges within the North American Numbering Plan Office Codes (NXX) by carrier. DID numbers are provided from two (2) different carriers for diversity.

The City has approximately 16,171DIDs and 15 toll free numbers.

Voice Mail

Three (3) Nortel CallPilot voice mail systems provide standard voice mailboxes, call center messaging, menus, announcements, and remote notification

* One server is primarily used for employee voice mail and contingency applications.
* The second is primarily used for applications.
* A third server is used strictly for onetime events.

Menus generally done in Spanish and English are currently in use although there are CallPilot menu applications currently configured with up to a dozen languages.

The capability to manually failover some voicemail applications between voicemail systems is limited today and requires a Telecommunications technician and an analyst to complete the process.

IVR (Interactive Voice Response)

Three (3) Nortel MPS500 IVR systems are comprised of:

* A primary production system that has (120) analog Automatic Call Distribution (ACD) ports.
* A hot standby is a secondary production system with (96) analog ACD ports. The hot standby system is used for over flow and also when maintenance is done so that one IVR is always active.
* The third system with (24) analog ACD ports is dedicated for development and testing.

All IVR ports are configured as networked ACD on the Nortel to automatically and/or manually route IVR phone traffic between sites based on defined use cases (for example, PBX failure, overflow for additional port capacity, etc.)

Speech recognition is not currently in use for any IVR applications.

There are currently six (6) public facing applications in addition to six (6) administrative applications. The administrative applications are for internal use to manage the public facing applications (manage broadcast message, business/holiday hours changes, etc.). Each public facing application has dedicated ports to guarantee a defined level of service. The remaining ports are pooled as shared resources. The IVR port capacity is designed to handle volumes based on traffic forecasting to maximize port efficiency and minimize per port licensing costs. Historically, the existing number of IVR ports are sufficient to handle all inbound traffic.

The MPS500 IVRs are not utilized for outbound calling campaigns or automated outbound dialing applications although they have the capability.

Menus are generally done in one language and occasionally two. Spanish and English are currently in use although additional languages could be added in the future.

A summary of key existing IVR / contact center applications are as follows:

*DNIS Driver* - The Dialed Number Identification Service (DNIS) Driver answers the phone, collects Automatic Number Identification (ANI) and DNIS information. If DNIS is not recognized by the application, or the application failed to receive DNIS information, it plays the menu list of all City department IVR applications and directs the caller to the requested application.

*SPU/SCL - ONE STOP* - This application provides utilities (SCL and SPU) self-service options such as report an outage, get outage status, update account information, obtain yard waste services, open/close utilities accounts, and transfer the caller to an external vendor’s IVR payment system. The City plans to maintain the external vendor relationship rather than bring it in-house.

*SPU/SCL – One Stop Console* - This application allows contact center management staff to manage (listen, record, delete, activate & deactivate) different sets of broadcast / Caller Messaging Recording (CMR) messages for general utilities information, Seattle City Light outages, Solid Waste, payment locations, etc. Access is created through role-based permissions and a password is used for authentication. It also serves as call center IVR administration application to control the ‘front-end’ application transferring routine and other self-service feature modules.

*COURT - General Information & Payment* – This application provides Municipal Court's ticket or case information, collection agency information and court hearings, locations, and transfers callers to an external vendor’s IVR payment system.

*COURT - POT Application* - The application allows Municipal Court Probation division to track and monitor a large group of “low risk” offenders via question and answer menu prompts

*SDCI – Construction Inspection Request & Scheduling* - The application allows callers to schedule inspections, get inspection status and leave messages. Inspectors can check messages and update inspection results using a permit number.

*FAS – IVR application developed for Revenue & Consumer Affairs* - Business License & Taxes, allows any business ‘without business activities” to report that no tax is due, or to file tax return for the business that has annual taxable gross revenue less than the defined threshold.

\*\*\* All IVR applications listed above require integrations with IT business systems using a variety of integrations including access to SQL server, Oracle, Informix, and SOAP based / RESTFUL Web Services. Features includes text to speech, screen pop, Call Message Recording (CMR), and multiple language options.

Computer Telephony Integration (CTI) / Screen Pop

A CTI system (Enghouse Interactive) is used as the primary system for managing/storing incoming call data. DNIS is used for application routing, and ANI for account lookups. The PBX/ACDs are configured to send ANI/DNIS over Meridian Link (MLink) and passed to the CTI.

The CTI system is also used as an interface for the CXM call recording servers

The Utility IVR application uses screen pop features. The One Stop IVR application captures caller data and posts to Seattle Public Utilities Interactive Intelligence CIC database via stored procedures. The screen pop integration between CIC and the Utility Customer Billing system is a custom developed URL post.

Mass Communication

The City has two (2) systems for emergency and non-emergency outbound calling.

Alert Seattle is a hosted solution from RAVE and is used as a public opt-in service to receive emergency notifications. The system is also used by some City of Seattle departments as an emergency notification tool and other group notification purposes.

The second system, Motorola NXT (CNS), is an on-premises system used for non-emergency messaging. CNS is used to send credit reminders, court dates reminders, and information about utility discount programs. This system is also used for outbound calling campaigns and automated outbound dialing applications for multiple departments, Seattle City Light (SCL), Seattle Public Utilities (SPU), Human Services Department (HSD), and Municipal Courts. The system is configured to use two dedicated T1s, and two T1s directly connected to telephone service providers, Level 3 and Century Link.

Replacing or enhancing the mass communications systems are out of scope.

Contact Centers

Contact Centers are on two (2) different platforms, the Nortel AACC and an Interactive Intelligence CIC platform. The Nortel servers are located at SMT and the Justice Center.

1. The Avaya / Nortel AACC configurations for 2017:

1,174,320 - all calls including email and web chat entering the system

731,898 - skill set answered volume for calls, email and web chat

Approximately (80) queues designed with approximately (130) scripts / applications routing to approximately (140) skill sets

Approximately (130) active supervisors

(400) active agent login IDs.

Additionally, the following agent logins are built in the system, some for periodic use only:

* 200 vacant
* 180 Emergency agents
* 20 seasonal agents
* 236 Alternate agents

Alternate agent IDs are used so that a named agent can use a different login to trigger special overflow or other routing conditions. They are not additional live answering agents. Some agent logins are used as quasi routing tools during emergencies to direct traffic away from normal operations to predefined alternate routes or messaging. Supervisors have web access to historical reports and real-time displays. Some of these call centers are fronted by IVR menus or Call Pilot menus. Supervisors generally do not answer queued calls; however, they have the capability should they need to do so. Contact center agents primarily use headsets combined with a telephone set.

* 1. A third-party tool, CoNexus (which is part of CXM), is used as a desktop client to record calls in some contact centers. Screen and audio is currently captured today. Replacement of the CXM call recording servers is in scope for this project
  2. Data warehouse reports are run in SQL.
  3. A callback option has been provisioned in some contact centers.
  4. Customer Service Bureau has ten (10) offsite agents using a City owned laptop with a City provided analog line at their residences. This uses split call control / call paths with a perpetual connection to the Nortel.
  5. Some outbound messages / greetings are recorded in Spanish.
  6. Approximately 20 - 30 external reader boards are provisioned for different work groups

1. Seattle Public Utilities and Seattle City Light use the Interactive Intelligence CIC platform (now known as the Genesys PureConnect product), operating the One Stop contact center as a combined contact center serving both group’s needs. SPU has a second contact center on the CIC called UST. An Oracle engine hosts the CIC database. The system is running 2018 R-2 with a Workforce Management module and call recording applications. Two hundred (200) licenses are configured for approximately (145 One Stop + 16 UST = total 161) named agents and (30) supervisors. Approximately (70) agents are logged in on average during an average day. The platform resides in four (4) virtual servers running on Windows 2008 R2 operating systems located in the City’s data centers.
   1. Calls to the CIC call center platform route through the Nortel IVR’s via dedicated PRI to SIP trunks.
   2. The main One Stop number is answered in the IVR and provides screen pop from the account information provided by the caller. Solid Waste, Water and Public Utilities have a combined account number and City Light has a separate account number.
   3. There are currently ten (10) One Stop queues with an averaged 53,000 combined calls per month and 4205 calls per month for UST in 2017.

i. The lowest volume month was December with 43,820 One Stop and 4,502 UST calls

ii. The highest volume of calls was in August with 61,535 One Stop and 3,718 UST calls

* 1. Call center agents have historically had Avaya/Nortel 1140 VoIP phones connected to the Nortel PBX/AACC as a backup in case of a system failure with the CIC. One Stop’s conversion to softphones is underway with 55 agents converted to date and 1140 sets removed. It is anticipated that the remaining agents will be converted by 12/31/18.
  2. Eight external RMG reader boards/displays are in use in the One Stop contact center. The RMG server is being used for a new project (50% complete) to install 20 players used by the SPU Communications group (which is not part of the CIC contact centers). These new players are intended to reach employees that don’t have an office or email account per se. It provides a tool for broadcast messages to utility locations around the region, i.e., transfer stations, water facilities, etc., and to broadcast informational videos as well as being used for broadcasting traffic and weather.
  3. One Stop calls from all the queues are combined into a single group and are answered by agents who are cross trained to answer all incoming calls.
  4. Multiple One Stop email queues are configured; however, the queues are not blended.
  5. Web chat is currently in use.
  6. Logins for One Stop agents are not setup for multi-media so all incoming traffic is handled as independent media types, typically first in first out (FIFO).
  7. Skills are not currently in use.
  8. Call back queueing and email queueing are used by One Stop.
  9. One Stop callers making payments are transferred to Kubra for payments and if callers request to be transferred back from Kubra, they are transferred to a toll-free number bypassing the IVR and coming directly into the CIC and not showing in the reports as part of the same transaction as the original call.
  10. Call and screen recording is in use today, and speech analytics are also being used.
  11. The business uses cross indexing with the Oracle database, call recordings and statistics.
  12. One Stop outbound calls are primarily for customer call backs or follow up on escalated issues.
  13. Conferencing is used with outside businesses like the AT&T language line and Kubra.
  14. Post call surveys are in use now.
  15. The Work Force Management (WFM) product is currently in use however it is not providing the functionality desired.

Conferencing

*Audio*

1. The City uses multiple sources for audio conference bridges. The primary conferencing resource for the entire City uses four (4) dedicated PRIs to a premises Skype for Business server with scheduling done through Outlook.
2. In the Nortel, there are several dedicated bridges that reside in multiple nodes:
   * The Mayor’s office has a dedicated 24-port bridge
   * Finance and Administrative Services (FAS) have two (2) dedicated 24-port bridges, one (1) for executive use and one (1) for disaster recovery
   * Fire Department has a dedicated 24-port bridge
   * Seattle IT’s Operation Center (the ITOC) has a 24-port bridge
3. CenturyLink provides seven (7) ad-hoc conference bridge numbers for specific departments. One (1) bridge is dedicated as a backup for Skype conferencing.
4. Six-party conference (AO6) is provisioned on most phones for end users to create conference calls via their Nortel sets.

*Video*

The City has some video systems in place however they are not part of the current voice systems or network. Skype for Business is used for desktop video requirements. The City has approximately 20 Microsoft Surface Hub devices within conference rooms and some offices.

PBX Adjuncts

*Overhead Paging*

Paging is utilized at approximately 71 sites – primarily libraries, fire stations, community centers, and police precincts. Most sites require either 90-volt AC or a loop start trunk, depending on the paging system. Some sites dial a trunk access code and others have a key programmed on their sets to access the paging. There is a mix of analog Valcom, Valcom IP, and Bogen amplifiers in use. One and two-way talk paths are in use today.

Paging at some Fire Stations is handled by an analog PBX connection to a Location Emergency Alerting system.

The City’s main Central Library is using a SIP trunk to access the IP paging solution by Avidex called Q-SYS.

There are some library branches designated as Carnegie sites that do not allow external paging hardware to be installed. These branches use intercom group paging to activate the set speakerphones. This allows the ability to group page or broadcast an announcement through the speakers on the phones.

*Call Detail Recording*

Call Detail Recording is collected from each PBX using a TeleBoss 850 Alarm and buffer box. The telecom expense management system polls the TeleBoss devices every ten (10) minutes. CDR records are used for public disclosure requests, digital investigations and to research malicious call reports and are retained for 18 months. Records are collected on inbound / outbound calls only, no internal station to station calls.

*Telecom Expense Management*

Telecom is currently using PINNACLE, a Calero product, for PBX provisioning, inventory, order processing and billing. PINNACLE is integrated with the “Activity Billing Data” (ABD) warehouse that also interfaces with several applications including Facility Center for project and work order processing, Accounts Receivable, reporting and interfaces with Summit, the new Oracle financial system. ABD pulls data from PINNACLE for month end reports for telephony activity by department. Employees are identified in PINNACLE by their employee ID number provided from HR’s Oracle system. The City intends to use Active Directory (AD) for identity management.

PINNACLE has a Service Order module used to:

* Provision Move/Add/Change/Delete orders for services and subscribers
* Transmit programming changes to PBXs
* Track service orders
* Time stamp order activities
* Import station data from the PBXs

The system is also used to track:

* Station details, including features and numbers on phone keys, class of service (COS)
* Location, telephone numbers and type of phone sets
* Departments
* Subscribers or users
* Building codes, which are represented by a two-digit alphanumeric designation

PINNACLE provides a variety of other functions including:

* Warehousing raw CDR records
* A repository for EDI uploads and reconciliation from carriers including wireless carriers
* PBX provisioning
* DID number management
* Other telephone number management for Plain Old Telephone Service (POTS) lines and circuit IDs
* Interfaces with the 911 ALIPro database, reconciling phone numbers and locations on a daily basis.

The system is accessed by Telecommunications Analysts, PBX Engineers, the wireless team, and approximately one hundred (100) Telephone Coordinators across the City.

*Enhanced 911 (E911)*

E911 calls are routed to a custom designed application, ALIPro, using one (1) central Tone Commander appliance. This appliance houses a database for all City telephone numbers and their street address (denoted by a two-digit alpha code, i.e.– HO) and floor number (two digits – 06). The Tone Commander uses a dedicated PRI to route calls to the local PSTN.

The tone commander converts a 5-digit number to a 10-digit number. ALIPro offers the definition by processing the PBX database and then pushing it to the Tone Commander appliance. When 911 gets the call, they look at the West® database that tells them what building and what floor the call came from. ALIPro performs a daily comparison to the last poll and sends updates to West®. ALIPro sends the City daily exception reports that are used to manually correct or update the data.

Some sites are campus type environments where the address is the same for all buildings. There are other campus environments with multiple buildings that send out a unique telephone number for each building on site.

Security is notified of 911 calls from specific sites but not all.

Port security is turned on to stop users from independently moving their desktops or VoIP phones.

*Analog*

The City has a large number of PBX analog ports installed to meet a wide range of use cases. Analog ports are commonly used for FAX machines, bells or ringers, modems and automated dialers. Eighty (80) remote locations use a combination of AudioCodes gateways for conversion of IP to analog and flat business lines. Other remote locations use a combination of OPX circuits and flat business lines.

*FAX*

DID numbers for the RightFax are delivered on dedicated PRI T1’s and then routed through internal SIP trunks to FAX servers. RightFax service is stand-alone will not be routed through the UC system*.*

The City has three (3) servers, one (1) is used primarily by Seattle Public Utilities, one (1) is dedicated to Seattle Municipal Court, and one (1) is dedicated to Seattle City Light. The system set up by Seattle Public Utilities has allowed other departments to share this server in an informal support arrangement. These systems are IP based. Outbound calls from these servers are routed over internal SIP trunks and then out to the PSTN via PRI circuits.

Most departments use an analog line terminating into a combination printer/FAX machine.

*Customer Relationship Management (CRM)*

The City is using Motorola’s PremierOne Customer Service Request (CSR) data management system. CSR is accessed via a web-based interface. This system is used primarily by the Customer Service Bureau (CSB) to track service requests, requests for information, suggestions and complaints or correspondence with residents.

“Find It Fix It”, for example, is a mobile app developed to provide residents another method to place requests or make reports from their mobile devices. The Customer Service Bureau also manages responses to mobile app inquiries.

Microsoft Dynamics 365 is also used by the City. There are projects underway to design integrations with their existing databases (i.e., Department of Neighborhoods).

*Cell Phones*

Total count as of January 2018:

Smart Phones 4,716

Standard cell phones 1,369

Other wireless 1,342 (includes carrier connected iPads, Tablets, Modems)

Total 7,427

Tablets are deployed for mobile business applications, industrial field applications and as standard office devices. Both HP 1012 and Microsoft Surface are on the Standard Tablet list. iPads and Chrome book devices are also supported; however, the City does not allow or support Android tablets.

Smartphones are deployed to over 1/3 of city employees. Both iOS (iPhone 7/8) and Android (Samsung Galaxy S6/S7/S8 series) phones are approved standard devices. There is an initiative to implement Microsoft Intune as the MDM solution to manage these devices. Currently there are about 1400 devices enrolled and managed.

Business Continuity

*Backup Power*

Nineteen (19) locations have dedicated -48v DC power plants that support the PBXs, SONET, radio and in some cases, the data network hardware. Runtime for each of the nineteen (19) sites is calculated at about eight (8) hours per site.

Smart UPS units are located at approximately two hundred (200) sites. Run times vary based on loads and criticality of the site. The batteries supporting these UPS have been changed out per the manufacturer’s replacement specifications about every five (5) years.

Approximately fifty-six (56) sites have dedicated generators with a mix of manufacturers including Cummins, Onan and Kohler.

*POTS*

There are approximately one thousand (1,000) POTS lines installed for a variety of reasons at a large number of sites. Common applications are for fire or alarm lines, elevator lines, sprinklers, and dial out applications for HVAC systems. A minimum of one (1) POTS line is installed per VoIP site, typically Community Centers, Neighborhood Customer Service Centers, and Parks sites. Around seventy-five (75) POTS lines are installed to meet PCI compliance policy.

*CenturyLink Business Continuity Routing*

Public Utilities and other departments have the ability to route calls away from the City’s network to an offsite independent call center. This process is done by placing a call to CenturyLink who then activate routing changes in the central office. This service is set up in advance of any event with a flat monthly cost and an operational cost when services are activated.

*Mayor’s Backup Sites*

There are five (5) sites around the City that have been set up to support the Mayor in the event the Mayor’s office at City Hall becomes uninhabitable. These sites consist of ((20) analog PBX lines and phones. The lines are supported via the PBX or a Survivable Gateway at each of these sites.

Data Network

See Exhibit E – “Data Sites with Bandwidth”



At the end of 2016, the City completed a reorganization of multiple IT organizations that are now centrally managed. Department of IT (DoIT) is the legacy umbrella organization that is now combined with the IT organization from Seattle City Light, Seattle Public Utilities and the Seattle Police Department and is now known as Seattle IT (ITD). Unique details that pertain to each of these departments are identified below.

* The core is primarily Cisco with a layer 3 routed backbone with a collapsed core and aggregate points. There is a combination of layer 2 and layer 3 to sites.
* The data network extends to approximately two hundred fifteen (215) locations
* F5 Networks BIG-IP load balancers are in place
* Active Directory Federation Services (ADFS) is used to support Single Sign-on (SSO) via token-based Security Assertion Markup Language (SAML) authentication
* As a general rule, PoE switches are in place in most locations
* QoS is deployed only at legacy DoIT sites where VoIP exists, not at all locations
* City Light, Public Utilities and the Police Department all have firewalls at their edge, and are connected to the main City network using Border Gateway Protocol (BGP)
* Firewalls are Palo Alto and Checkpoint. Firewalls are becoming centralized with the goal to move where business requirements exist and collapse where possible.
* Legacy data networking groups ran their own Dynamic Host Configuration Protocol (DHCP) servers so there are a mix of these in use today
* There is no overlap with IP address assignments as a rule
* Over two thousand (2,000) VLANs are set aside for future VoIP configurations with separate VLANs for the current VoIP network
* 802.1x is currently deployed on the wireless network using certificates on PCs. The network team is currently deploying 802.1x on the wired network. Any WIFI UC devices will need to be configured using 802.1x.
* A Canopy 4.9 GHz wireless network is used at some locations

*Data Centers*

A 10G Fiber WAN connects the City’s data centers denoted as NGDC West (Tukwila, WA) and NGDC East (Liberty Lake, WA). These data centers are comprised of mostly virtual machines using VMware version 6. Server hardware preference is Dell with Dell Compellant storage. New installed systems require WIN 2012 R2 or higher. Red Hat Enterprise Linux is the preferred Linux OS. The backup tool for servers is CommVault and Trend Micro is the antivirus tool. The core network hardware is all Cisco Nexus.

*Microsoft Products*

The City currently has approximately seventeen thousand five hundred (17,500) active user accounts and about fourteen thousand two hundred (14,200) users with O365 licensing [Skype, Exchange accounts].  Users exist across three (3) active directory domains in addition to a primary resource forest.

The authorization mechanism used for O365 and third-party federation is Active Directory Federation Services (AD FS), leveraging Forefront Identity Manager (FIM) for Azure / Active Directory synchronization.

The City is currently in the process of migrating users and computers from three (3) account domains into the single (1) resource forest – completion is planned for Q1 2019.

The City currently has Microsoft Office 365 licensed at G3 (Office 365 U.S. Government Community G3) subscription level.  There are no plans to move to Microsoft Office 365 G5 subscription level.

The City is currently using Exchange Online for email.  The supported email client used for on-premise clients is Outlook 2016 (Office 365 ProPlus).

Skype for Business 2016 (Office 365 ProPlus) is deployed City-wide for PC-PC collaboration and conferencing purposes.  Lync 2013 servers are on-premise and federated with Skype for Business Online.

*Routing Protocols*

The City uses a combination of these protocols throughout the entire organization:

* EIGRP
* OSPF
* iBGP
* eBGP
* TCP/IP

*Wiring Infrastructure*

The City has an extensive inside and outside fiber and copper cable plant. It is estimated that at least ninety eight percent (98%) of the City’s buildings have (category 5e) and above cable installed. Standards call for three (3) cables per station however, there is an initiative underway today to reduce the number of cables per station to two (2).

The City’s fiber optic network is extensive and is maintained by City employees and contractors. The fiber is owned in partnership with a number of public agencies. There is approximately five hundred fifty-three (553) miles of fiber installed within the City and another one hundred seven (107) miles outside City limits. The City’s data and telecommunications backbones are supported via this fiber.

*Multicast*

Currently, multicast is only used for Avaya Aura Contact Center (AACC) to deliver data to multiple external contact center displays. Due to the amount of bandwidth available on the WAN and the complexity of administering the network, the City prefers to use Unicast wherever possible. The use of multicast must be kept to a minimum in any proposed configuration.

*800 MHz radios*

The City has an 800 MHz radio system that is used in the event that all other communications are down. This is the primary backup for multiple emergency operations centers operated by numerous departments.

*Operating Systems*

*Windows 7 Enterprise is on approximately 87% of computing devices. The remaining OS is a mix of Windows 7 Professional, and Windows 10 Enterprise. The project to install Windows 10 is scheduled to begin in Q4 of 2018 with an anticipated finish in Q4 2019.* Windows 10 enterprise is the standard OS for new machines.

Virtualized Desktops are in the environment but do not currently make up a significant percentage of user population. There is a desire for this platform to be expanded over the next 2 years.

Thin clients are not in significant use.

*Connectivity*

The data backbone consists of a 10G fiber core with a variety of connection options to remote sites, including: fiber, canopy, point to multi-point wireless and leased T1 and Metro Over Ethernet (MOE) circuits.

*Wireless*

The City uses 802.11n and newer Aruba and Cisco wireless access points and controllers

NOTE: The City provides voice services only for the Seattle Public Library (SPL) system and approximately two (2) dozen other agencies. These entities provide and manage their own data networks.

Out of Scope

* Upgrades or changes to the legacy SONET network
* Replacing emergency management systems: AlertSeattle (RAVE) & CNS
* Upgrades to or replacement of the City Light PAX PBX’s
* Changes to the current RightFax routing or PSTN connections

**Note: Integration of the new UC system with the existing PAX PBX’s, via multiple ISDN-PRIs, *is in scope*.**

# **OBJECTIVES**

The installation of a UC Solution with an advanced unified messaging voice mail, IVR, and a contact center solution. These proposed systems will provide several technology benefits including:

1. High availability / redundant system components.
2. Stable, reliable uptime and elimination of single points of failure; with a 99.999% availability design.
3. Replacing multiple PBX systems with a single database and a single tool for administration.
4. Collapsing two (2) different contact center platforms into a single solution with integration into the PBX and UC system.
5. Intuitive tools for ease of administration that include role-based permissions for changes or viewing capabilities.
6. Additional layers of security for voice traffic traversing the IP network with end-to-end encryption for all calls, including encryption of all stored data (at rest).
7. Cradle-to-grave reporting delivered for all calls with intuitive methods for accessing call details necessary to provide records for Public Disclosure Requests (PDRs) and for other purposes.
8. Additional call capacity and improved survivable Public Switched Telephone Network (PSTN) connectivity at a lower cost by using SIP trunks.
9. Unified Messaging integrated with MS-Outlook and O365.
10. A common UC client experience for all users.
11. Location identification for 911 calls, with ALI information delivered to identify the floor quadrant, at a minimum, with the option to identify individual rooms or workstations.
12. Retain a single coordinated dialing plan with 5-digit dialing.
13. Unified Communications to include instant messaging, presence, desktop sharing, video/audio conferencing, and click to call.
14. Contact Center objectives include:
    1. Ease of use and administration
    2. Increased functionality including speech recognition, text to speech, multiple languages, speech analytics, robotic process automation
    3. Cradle-to-grave reporting

# **MINIMUM QUALIFICATIONS (See Section 12 – Response Form)**

The following are minimum qualifications that the Proposer must meet in order for their proposal submittal to be eligible for evaluation. The City provides a form in Section 12 that allows Proposers to explain compliance with these minimum qualifications. The RFP Coordinator may choose to determine minimum qualifications by reading that single document alone, so the submittal should be sufficiently detailed to clearly show how the Proposer meets the minimum qualifications without looking at any other material. Minimum qualifications are scored on a pass/fail basis. Although the City reserves the option to request clarification, those that are not clearly responsive to these minimum qualifications will be rejected by the City without further consideration.

**5.1** **Minimum Qualifications for UC Proposers**

1. The Proposer must have completed at least two (2) Unified Communications (UC) projects on the same platform as proposed to the City with multiple-site deployments, a minimum of 6,000 UC endpoints, similar complexity to the City environment as described in the RFP, and at least one (1) year of active use of the solution by the customer. The referenced systems must be currently in full production (for example, not a trial, or partially implemented, etc.)
2. The Proposer must have deployed at least one (1) UC solution on the same platform as proposed to the City and similar scale (6,000 UC endpoints) that was integrated with Microsoft services (i.e. Exchange, Office, etc.) This UC solution must have deployed a single client for a seamless end user experience delivering UC capabilities including: Instant Messaging, Presence, Voice Calls, Audio & Video Conferencing, Desktop Sharing, and Click to Call. The client must support mobile devices (i.e., Android, Apple, Microsoft, etc.)
3. The Proposer must have completed one (1) project within the last three (3) years which included all the following functionality on the same UC platform as proposed:
   1. Multi-site deployments
   2. Enterprise E911
   3. Unified Messaging
   4. Auto-attendant menus
   5. Analog gateways
   6. Mobility
   7. Multi-line telephones

**5.2** **Minimum Qualifications Contact Center / IVR Solution**

1. The Proposer must have completed at least three (3) similar, Contact Center solution implementations of the same core platform as proposed to the City with a minimum of one hundred and fifty (150) named agents within the last four (4) years, with similar complexity to the City environment as described in the RFP, that has at least one (1) year of active use by the customer. The sub-components, listed below, can be proposed as “best of breed” (i.e., workforce management and recording). The referenced systems must be currently in full production (for example, not a trial, or partially implemented, etc.)

Two of the three implementations must have included all the following:

1. Multi-channel queuing: voice, webchat, and email
2. Call-back queueing
3. Workforce management
4. Voice and screen recording
5. The Proposer must have deployed at least one (1) Contact Center solution of the same platform and similar scale (150 agents) as proposed to the City that was integrated with Microsoft services (i.e. Exchange, Office, etc.)
6. The Proposer must have completed at least two (2) self-service IVR deployments implemented on the same platform as proposed to the City with similar complexity to the City environment as described in the RFP. The referenced systems must be currently in full production (for example, not a trial, or partially implemented, etc.)

Deployments must have included at least four (4) of the following:

* 1. Self-service functionality
  2. Web service or database direct integrations (i.e. MS Dynamics, MS SQL or Oracle)
  3. Computer Telephony Integration (i.e., screen pop)
  4. Text to Speech (TTS)
  5. Speech Recognition
  6. Multiple languages

1. Manufacturer Authorized Distributor

The Proposer, if other than the manufacturer, must submit with the proposal a current, dated, and signed authorization from the manufacturer that the Vendor is an authorized distributor, dealer or service representative and is authorized to sell the manufacturer's products. The distributor, dealer or service representative must have manufacturer certified technicians for the equipment it proposes. This includes the certification to license the product and offer in-house service, maintenance, technical training, and warranty services, including available spare parts and replacement units if applicable.

# **FUNCTIONAL/****SYSTEM TECHNICAL REQUIREMENTS**

NOTE – IT IS THE CITY’S EXPECTATION THAT ALL PROPOSERS WILL WORK CLOSELY WITH THE MANUFACTURERS TO ENSURE THE PROPOSED DESIGN WILL MEET THE CITY’S REQUIREMENTS SET FORTH IN THE RFP. THEREFORE, ALL DESIGNS SUBMITTED BY PROPOSER MUST INCLUDE A LETTER FROM THE MANUFACTURER STATING THEY HAVE REVIEWED PROPOSER’S DESIGN, RELATED TO THE MANUFACTURER’S EQUIPMENT FOR FUNCTIONALITY AND COMPLIANCE TO REQUIREMENTS SET FORTH IN THE RFP.

6.1 UC TECHNICAL REQUIREMENTS

Vendors will have the option to propose a premises-based solution, a hosted solution, or a hybrid solution. If the solution design impacts the ability or method of meeting a requirement, the proposal must identify why it is an issue and how the solution addresses the requirement.

Proposers should note that the City will consider two different approaches to the UC desktop tools: a solution leveraging the City’s Skype for Business investment, or proposers may leverage other manufacturer’s UC desktop tools.

Listed “Functional/System” requirements are critical and should be addressed as part of Vendor’s response unless specifically noted as “Desired” or “Optional”.

**Functional/System** **Requirements** are critical to the deployment and considered a necessary function or system component required to successfully deliver the solution to the City. If a bidder is not able to meet a Functional/System requirement, the proposal may be eliminated from consideration if the City determines that the clarifying explanation, alternate solution or method proposed does not meet the requirement.

**Desired Requirements** are important to the City and will be factored into the scoring of the proposal but are NOT considered a “must have”. The inability to meet a Desired requirement may be a factor during proposal evaluation and scoring and may result in other vendors being selected as finalists.

**Optional Requirements** are not critical to the successful delivery of the proposed solution but could impact future deployments and may have some influence on the evaluation. The City may consider purchasing optional solutions post contract award.

* + 1. Architecture and Design
       1. The design proposed must provide high availability (HA) and be capable of surviving the loss of any critical component or network failure. The system must be designed to avoid a “single point of failure”, with redundant core components in an “active/active” configuration that includes duplicated switch ports, power supplies, and other required elements to eliminate system outages.
       2. The proposed design must include geographically redundant sites. The Vendor will identify where the core systems will reside and include all the hardware and software components at each location.

The City’s primary core data center is located in the Seattle area and the secondary data center is located in the Spokane area. The Spokane data center is connected via a layer 2 network with dual routes and a high availability (H/A) design.

* + - 1. The selected Vendor must test, configure and install all hardware and software as defined in their proposal. The City prefers Dell for physical on-site servers. The City’s hyper converged networks use Nutanix with VMware however, Vendors may propose any manufacturer that meets the design specifications.
      2. The current AudioCodes SBC’s must be replaced. It is preferred that the SBC administration is part of the integrated toolset used for the new UC solution.
      3. For a premises design, the Vendor must provide a separate standalone virtual system software as part of their solution. The City will not install the UC system on its existing virtual environment.
      4. The proposed design must include carrier geographic redundancy and failover options to reduce single points of failure within the voice network.
      5. Software-only solutions that run on off-the shelf hardware must be bundled with Vendor provided hardware such that they are supported by the Vendor as a total solution.
      6. For hosted or hybrid solutions, the system must be designed for local or backup services in case of a network or central system failure. The City requires local survivability for two sites, the West Police Precinct and EOC. Each must be equipped with capacity for 30 simultaneous sessions.
      7. The core telephony system must be based on a single telecommunications database running on dispersed, survivable hardware.
      8. The proposed design must identify how the solution will integrate a number of systems in a phased approach, including the current Avaya/Nortel, the new proposed voice mail / UM system; the new IVR / contact center (CC) platform and Microsoft O365 services.
      9. For premises & hybrid solutions, the UC Session Border Controllers must provide the gateway functions for routing internal calls from the old Nortel PBX system/users to the new UC Solution users.
      10. The system must use end-to-end encryption for all voice traffic in transit and secure encryption for all data at rest.
      11. The design proposed must be capable of delivering Single Sign On utilizing the City’s Active Directory environment as the authentication credential repository.  This authentication can be accomplished using either Windows Integrated Authentication (NOTE: if used must be capable of supporting multiple Active Directory Domains for user population) or via Active Directory Federation Services (preferred), which allows for SAML authentication and provides independence from the City’s Active Directory architecture (i.e. Multi-Forest, Multi-Domain AD).
      12. The system must support multiple methods of integration with systems utilized within the City. Systems may include Microsoft Dynamics 365, Motorola’s Citizen Service Request (CSR) system, Oracle Finance system, PeopleSoft 9.2 and Ivanti (previously known as HEAT Service Up) a Service Desk/Help Desk system used throughout the City, plus web services or API’s.
      13. With the exception of mobile devices, the proposed solution must have a single client for a seamless end user experience delivering UC capabilities. The City is requesting details on two different options for the proposed UC system:

1. The City may elect to use the Skype for Business (SfB) client at the user endpoints, either natively or utilizing a plug in.
2. The City will also consider proposals that leverage the manufacturer’s embedded UC client.
   * + 1. The solution must provide interfaces for the CenturyLink engineered ring down circuits denoted as PVR’s. These are 2-way central office ringdown circuits used to connect with outside County, State and Federal agencies, as well as a number of other private organizations. These circuits are currently programmed as extension line appearances.
       2. Off premise extensions (27) must be integrated in the UC solution design. These extensions are in locations where there is no PoE or data cabling in place.
       3. The City requires a test environment to be used to test all new software releases and upgrades, new hardware, new features / functionality, mobile integration, soft client, new system integrations, etc. The test environment must have no impact to the production systems but mimics the complete production environment for development and testing purposes.
       4. **Note:**  Rack space will be made available in the City’s data centers and Telecommunications Rooms (TR) if required in the proposed design.

**DESIRED**

* + - 1. The City desires to limit the number of 3rd party adjuncts and peripheral equipment. Solutions based upon multiple manufacturers are acceptable however, the implementation must be managed and contracted through a single Vendor.
      2. The City desires to have the installed solution able to support SNMP version 3 in SolarWinds Orion.
      3. The City envisions using SIP trunks to route calls between the UC solution and Nortel PBX network. If the Vendor wishes to propose PRI tie-trunks as an option instead, it ok to do so and include an explanation of the advantages in the response form.  For capacity purposes, provide a quote for 115 tie-trunks or five (5) PRIs; actual usage will fluctuate during the course of the project dependent upon the migration of users.  The City will provide any necessary equipment and service for the Nortel side.
    1. Specialized Security Requirements

In addition to end-to-end station encryption, the system must meet Criminal Justice Information Services (CJIS), CMR, PCI, and North America Electric Reliability Corporation (NERC) / Federal Energy Regulatory Commission (FERC) security standards. Departments who require this specialized security are listed below.

1. CJIS - Seattle Police Department; Seattle Municipal Courts; Law Department
2. PCI - Seattle Public Utilities & Seattle City Light; Parks; Seattle Municipal Courts; FAS Animal Shelter
3. NERC/FERC - Seattle City Light; Seattle Public Utilities
   * 1. System Features
        1. The proposed system must provide all standard telephony features including hold, transfer, conference and the ability to answer multiple calls on one number.
        2. The proposed system must include a software client that supports all features associated with Unified Communications features: Presence, Instant Messaging, Unified Messaging, “one click to dial”, advanced conferencing additional call and participant controls, video, soft phones, mobility, and collaboration tools that include file and desktop sharing. The solution must integrate with Office 365 / Exchange Online for calendaring/scheduling of meetings.

The proposed system must include a mobile app that mimics the look and operation of the desktop software client as closely as possible, allowing employees to utilize a mobile device as their primary phone for the system.

This mobile app must present the callers office number on outbound calls or may be blocked or suppressed, based on the individual use case.

**Note**: The City, at their discretion, will consider the option of using a different client on a mobile device versus the proposed UC desktop app.

* + - 1. The system must integrate assistive technology solutions to ensure customers and employees with disabilities have equal access to all the features and functions of the unified communications system. The requirements for accessibility are based on Title II of the Americans with Disabilities Act of 1990 (28 FR Part 35).

Additional information is provided here: <https://www.w3.org/WAI/standards-guidelines/>

* + - 1. Access to system administration tools must be available 7x24x365, use secure authentication, and with all data transport encrypted.
      2. System tools must measure and report on a variety of data including voice quality and performance, including jitter, packet loss, and latency, QoS, MOS or equivalent, network impact, and application performance.
      3. The solution must allow the ability to define a minimum of five (5) levels of access for administration by providing granular, role-based permissions. Up to 25 staff will require varying levels of permissions to access the system.
      4. The solution must allow simultaneous access for administration and provisioning all services.
      5. The solution must support pre-programming of set provisioning tasks and be capable of scheduled execution at a designated time, for example Friday, January 12, 2019 at 12:15 PM PST. This includes the ability to schedule dates and times for orders to be completed.
      6. The solution must allow an automated activation process for new users with a telephone set as their primary device. After a new user is added to the system, the user can activate their service by plugging in a phone set and log in using their SSO credentials.
      7. Solution must include the ability to produce a report that shows a list of all user categories defined in the system, including the telephone number and device type or a brief description of how the number is used (i.e. mailbox only). If this can only be provided through an external system, such as a telemanagement solution, identify how this is accomplished in the response form.
      8. The solution must provide cradle-to-grave call reporting, regardless of the path call takes into the system.
      9. Presence status from the desktop client software shall integrate with the status of the telephone set. This includes displaying the call status on the UC client software.
      10. The system must allow for the ability to record, play & load a standard file format (.wav or MP3) for recordings that are done by 3rd party professional services.
      11. The City requires five separate dedicated conference bridges that are in addition to any conferencing capability that is inherent with the proposed system configuration. These bridges will be for audio use only. These bridges must be available 24x7 with perpetual connections that will not be scheduled. These services will be used by 5 different departments within the City and must have the ability to support 24 connections per bridge (no overflow). The solution may be located on premises or in the cloud.
      12. The system must allow the assignment of DID and non-DID numbers as “software only” or “virtual” numbers, preferably without requiring a user license. This is for use as informational mailbox, pilot numbers, paging access, special access, etc.
      13. The City’s 5-digit dial plan shall be supported between the current Nortel PBX network and the UC platform. The UC system must support routing that is transparent to the caller, regardless of the programming or manipulation that may be required to accomplish a seamless experience for end users.
      14. Should the City opt to use a new dial plan, the system must provide the ability to retain and route current phone numbers to new phone numbers where needed.
      15. The system must be capable of blocking incoming calls based on caller ID. For example, incoming junk Faxes or other spam type phone calls received from external outbound dialer campaigns.
      16. The system must allow the ability to provision a specific user with any of these options or to combine all these options for any single user:

1. Block caller ID for any inbound calls from the Public Switched Telephone Network (PSTN)
2. Block caller ID for any internal calls received from another system user (3)
3. Block outbound caller ID for calls made to a number outside of the system
4. Block caller ID for an outgoing call placed to another system user
5. Block caller ID when calls are placed to a specific internal number only and on the receiving set only.
   * + 1. The system must not use multicast for common channel communications unless no other solution is available.
       2. The City requires the ability to design sets with shared line appearances. All lines and set features must appear on all sets in the same duplicate configuration. If an extension is placed on hold, anyone must be able to access that call on hold from any other phone without using call park. Secondary line appearances may be added to a set for department shared-use main numbers or boss/admin designs.
       3. The system must provide abbreviated dialing with two or three-digit codes for internal calls, allowing abbreviated dialing between sets
       4. The system must provide the ability to group page or broadcast across a set’s speaker in lieu of external paging speakers.
       5. The solution must support call recording on demand, providing call tracking and reporting used to document discussions between external callers and City employees.
6. Call recording must use a buffering technique that provides a recording of the entire call, rather than beginning the recording only at the moment of feature activation during the call.
7. The system must include the option for recording all calls on designated lines within a group, including analog extensions.
   * + 1. The solution must include a “malicious call trace” feature that allows the ability to track and report on threatening calls.
       2. Music on hold must be able to be muted or not activated during a conference call if a participant places the call on hold.
       3. The solution must be capable of playing different sources of music or messages for different lines of business concurrently.
       4. Employees and teleworkers authorized to work remotely must have the same set of features and functionality as those working in City locations.
       5. The solution must include receptionist /answering position hardware (add on module or busy field status indicators) that provides a user with:
8. The ability to see if a specific user is on a call
9. The ability to one touch transfer a caller to a user’s extension
   * + 1. The solution must provide interfaces with overhead paging systems for announcements and broadcasting supporting 4-digit paging access code.

**DESIRED**

* + - 1. A receptionist /answering position hardware (add on module or busy field status indicators) that provides a user with these features:

1. The ability to one touch forward the user’s calls to the receptionist
2. The ability to see if the user has forwarded their line but are on an active call
   * + 1. The City desires to display UC presence information on a telephone set.
       2. The City desires the ability to remotely record a call (on-demand) to a City provided smartphone using the mobile client, with the recording centrally stored in the City’s call recording system.
       3. End user self-management features desired include: time-of-day routing; ability to reset passwords/pin; and to remotely change time of day routing and forwarding.
     1. Dial tone / SIP trunks
        1. Integration with the Nortel / Avaya PBX must be supported throughout the implementation until it can be removed from operation as part of the project plan. The City will continue to manage the current voice network and will also be responsible for routing the appropriate DID’s from the Nortel / Avaya to the new UC solution and IVR/Contact Center as numbers migrate to the new platform.
        2. The estimated number of SIP trunks is eight hundred eighty (880) with the capacity for a failover of eight hundred eighty (880) at the secondary data center.
        3. The City estimates 880 carrier-side SIP trunk licenses at any one time.  However, the same capacity level needs to be provisioned at the alternate / second data center.  For those SBC's that allow for a no-cost failover license or base the license on maximum concurrent usage, then 880 would be appropriate.  For products that require both sites to be fully licensed regardless of maximum concurrent usage, then 880 licenses are needed at each site for a total of 1760. These numbers are inclusive for all the various applications that will be integrated with the UC solution and IVR / CC.
        4. The Proposer must assist the City migrating its Public Switched Telephone Network connections from PRI and individual trunks to SIP as necessary, based on the proposed design. Session Border Controllers (SBCs) will be the primary interface for on-premises PSTN connections including PRIs and SIP trunks.
        5. The use of SIP redirect functionality to dynamically route calls on a call by call basis must be supported by the system.
        6. The solution must be able to accept Automatic Number Identification (ANI) or Caller ID digits as passed by either local or inter-exchange carriers and display the information at the individual telephone sets. ANI data must also be available to peripheral devices, including UM systems and analog extensions.
        7. The City will be responsible for disconnecting all decommissioned circuits.

See *Exhibit D – “PBX Site Configs” (*tab labeled Dial Tone)



* + 1. Unified Messaging and Voice Mail
       1. The proposed system may be part of a manufacturer’s suite of products or may be provided by a 3rd party manufacturer. Either must meet all the requirements in this section.
       2. Any proposed solution must include a totally integrated voice/unified messaging system. “Integrated” includes several capabilities:

1. Solution must integrate with Microsoft Office 365 / Exchange Online.
2. The solution will attach a .wav file of a voice mail message when it is delivered in email.
3. All calls forwarded to a mailbox go directly to the mailbox without caller intervention or requiring additional digits.
4. Caller must be able to opt out of voice mail and reach a live person.
5. Message waiting indication (MWI) is provided for all user devices, either visually or audibly.
6. Message waiting indicator is visual or audible and is available on every line appearance on a telephone or desktop device.
   * + 1. Calls directed to voice mail must be uncompressed for high quality message storage.
       2. The system must integrate with contact center users that may potentially reside on a separate manufacturer’s platform, providing Unified Messaging (UM) and standard voice mail features.
       3. Solution must support the following:
7. All voice mail messages are accessible via a telephony user interface (TUI)
8. Text-to-speech (TTS) translations for email pick-up via TUI or voice command
9. Speech-to-text (STT) to translate voice messages into text format and emailed to end-user
10. Graphical user interface (GUI) with frequently used commands
    * + 1. The system must support Transport Layer Security (TLS) for message encryption or a similar strong solution and secure Real-time Transport Protocol (RTP.)
        2. The solution must support client-based users leveraging the City’s Microsoft Exchange and MS-Outlook for unified messaging access, allowing the City to consistently apply policies and procedures to one platform.  The initial voice mail message storage may be in the voice mail system server/storage device or may leverage the Microsoft components for native voice messages.
        3. The solution must provide the required voice mail functionality described below as well as advanced and/or departmental applications:
11. System provides the ability for an answered call (by receptionist, for example) to be transferred directly into the voice mail system and combined with the user’s mailbox number, the call will bypass the user’s extension (does not ring the phone).
12. Confirmation of action or change provided by the system
13. Greeting & prompts override/bypass by pressing a pre-defined key on the dial pad
14. Ability to administer mailboxes used to provide information only with no opportunity to leave message
15. Personal and system distribution lists
16. System provides directory access / dial by name
17. Automated attendant
18. Out-calling capabilities and message notification to a pager, cell phone, email address, or other internal or external telephone number
19. User ability to speed up or slow down a voice message recording
20. User ability to skip a message, saving it automatically and bringing up the next message.
21. User ability to delete a message without listening to the whole message.
22. Ability to replay ‘envelope’ information with date/time/ANI of call
23. Multiple personal greetings to include a temporary greeting with ability for user to set expiration date/time.
    * + 1. In depth, extensive reporting / metrics must be available for all applications including numbers that are provisioned as auto attendants or basic mailboxes. Reporting to include at a minimum:
24. The count of calls transferred out of a mailbox when callers choose dial zero option
25. Ability to view the number of messages in a mailbox
26. List mailboxes exceeding storage limit
27. List mailboxes with unread messages not accessed in x-number of days
28. List mailboxes that have not been not initialized
29. Ability to provide peg counts for voicemail applications totaling the number of incoming calls and counts for each option of the menu
30. The system must provide automated notifications or alerts to a system administrator for unread / unheard voicemail messages when mailbox parameters are exceeded
    * + 1. Pre-set control of start and stop of alternate outgoing message must be part of system configuration to allow the ability to set day of week, date and time to control outgoing messages.
        2. The system must provide the ability to alert multiple users for shared or department mailboxes through either notice in email, alphanumeric paging, cell phones or message waiting indicators set on multiple telephone sets.
        3. The system must not allow forwarding of messages marked as private.
        4. The system must have strong password enforcement capabilities.

**DESIRED**

* + - 1. The greetings listed below are desired:

1. Multiple personal greetings to include greetings for internal or external callers.
   * + 1. The City desires ability to provide an automated escalation of message notification or some other mechanism where if on-call personnel do not answer, the call can then be directed to a backup on-call staff member.
       2. The City desires these features as part of the voice mail solution:
2. Allows the end user to choose an action that forces incoming calls directly to voicemail
3. Speech enabled commands such as “Call John Smith” or “Get new email”.
4. Call routing is based on calendar, presence, location (Geofencing and Wi-Fi) or user schedule
5. Presence integration with calendar / IM to play specific personal greetings informing caller of users’ status.
   * + 1. The City would like to consider migrating all Nortel Call Pilot users to the new voicemail system following the successful pilot.  Voicemail training would be separate from the set training under these circumstances.
     1. E911
        1. The solution must provide advanced E911 capabilities such that the location of all devices, (IP phones, soft phones, analog, etc.) that are associated with either a switch port, an IP address, or some other controlled location identifier. This identifier will then be linked to a specific number for location information.
        2. The solution must at a minimum support a zone-based system. The zones being used to potentially identify quadrants of floors in high rise locations to facilitate more accurate dispatching of emergency services.
        3. When a device is moved, the telephone number and address information must be automatically updated with the new location.
        4. Returned calls from the PSAP dispatchers must be directed to the originating device / user that dialed 911.
        5. When a 911 call is placed, the solution must have the ability to notify local building Security with the emergency caller’s name, extension and location.

**DESIRED**

* + - 1. The City desires to have the new E911 solution integrate with and support the Nortel/Avaya environment from the beginning of the project implementation.
    1. Analog Integrations

The solution must support existing analog extensions and sets for business purposes. Analog extensions are also used to meet ADA set feature options.

The City currently has AudioCodes gateways with approximately two thousand four hundred, thirty-four (2,434) analog ports distributed over two hundred sixty-seven (267) sites. This count includes analog Fax machines.

|  |  |
| --- | --- |
| **Current AudioCodes Model** | **Quantity** |
| MK2000 | 5 |
| MP-114 | 85 |
| MP-118 | 9 |
| MP-124 | 1 |

*See Exhibit D* *– “Station Types”* for an additional recap of analog ports.



The matrix below is a recap of the total number of sites estimated to require a specific port count, providing some room for future growth. Use these quantities for proposal purposes, even if the eventual implementation plan is adjusted.

|  |  |
| --- | --- |
| Number of sites requiring 1 port only | 70 |
| Number of sites requiring 2 ports | 93 |
| Number of sites requiring 4 ports | 43 |
| Number of sites requiring 8 ports | 27 |
| Number of sites requiring 16 ports | 12 |
| Number of sites requiring 24 ports | 4 |
| Number of sites requiring 48 ports | 4 |
| Number of sites requiring 96 ports | 9 |
| Site requiring 274 ports | 1 |
| Site requiring 993 ports | 1 |

See *Exhibit F – “AudioCodes by Site*”



* + 1. Set Standards
       1. Sets proposed must be capable of being programmed from a centralized system administration interface and not require programming that is done only at the set level.
       2. Most locations will use a single IP transport to the desktop that supports both voice services and desktop computing (PC) services via a single Ethernet channel. The desktop interface device must support Layer 2 switching for the PC’s network card as well as the telephone instrument.
       3. All proposed sets must have hearing-aid compatible (HAC) handsets that meet American Disability Act (ADA) requirements and HAC compliance for magnetic coupling to approved HAC hearing aids.
       4. The proposal must include the following types of VoIP sets, with the minimum requirements indicated below.

1) Type-1: Standard Multi-Line Instrument with display, equipped with an internal 2-port 10/100/1000 switch to connect a PC, capacity for a minimum of two extension lines, and a hands-free full-duplex speakerphone.

2) Type-2: Larger Multi-Line Instrument with display, equipped with an internal 2-port 10/100/1000 switch to connect a PC, capacity for a minimum of five (5) extension lines or shared telephone lines plus a hands-free full-duplex speaker phone. Ability to attach a multi-button add on module.

3) Type-3: Wall mountable smaller IP Instrument with small display for use in common areas such as break rooms or lobbies. These units should not be equipped with an internal data switch; if the set has an internal data switch, it must be capable of disabling the port intended for the PC.

4) Type-4: Wired base conference phone – Full duplex IP conference phones with optional microphones that are suited for large rooms.

* + - 1. Sets must be compatible with the 802.3af (Power over Ethernet) Industry Standard.
      2. The sets must be designed so that the users have the option to answer multiple calls to their personal extension number before the call routes to alternate answering points, such as voice mail. The sets must also allow the user to place a second call from their personal number without impact to a call on-hold or the forwarding treatment of other calls.
      3. VoIP phone sets must utilize the display for all programmable telephone set buttons (i.e., without the use of paper labels). “Context-sensitive” soft-keys may be utilized to provide access to specific features instead of a fixed (permanent) button.
      4. Proposed phone sets must have intercom capability such that an individual user can be “paged” through the telephone speaker and answer via the set microphone.
      5. The solution must allow multiple extensions to be programmed to a single set. It must also support extensions that can appear on two or more phones and answered by any of them. With these capabilities combined, the solution must support a configuration that allows a square key system design where multiple line appearances are duplicated on multiple sets in the same order of appearance.
      6. The sets must have built-in headset jacks or support wireless headsets such that external amplifiers and/or manual lifters are not required when using headsets.
      7. Type-1 and Type-2 sets must support the optional addition of add-on modules or side cars that display presence status, user status, call status or other features.
      8. Sets must generate or pass-through Dual Tone Multi Frequency (DTMF) tones for post-connection signaling.
      9. Sets must have the ability to set distinctive rings for different lines.

Use the counts provided below for pricing in *Attachment B - “UC Pricing Worksheets*”.

|  |  |
| --- | --- |
| **Type** | **Estimated**  **Quantity** |
| Single line VoIP sets – common area phones | 10 |
| Type – 1 | 6000 |
| Type – 2 | 3000 |
| Type – 3 | 10 |
| Type – 4 | 10 |
| Type – 5 | 10 |
| Add-on modules | 100 |
| Video phone sets | 10 |

DESIRED

* + - 1. As a 5th type of VoIP set, the City desires video phones with video capabilities for use in Community Centers and Parks sites for public use and ADA compliance.
    1. Call Detail Records (CDR Output)
       1. The solution must produce industry standard call detail records for Public Disclosure Request responses, internal billing processes and investigative or forensic reasons.
       2. The City must have access to the raw data.
    2. License Quantities for Proposal Purposes

|  |  |
| --- | --- |
| Type | Quantity |
| Analog / Single line | 2,500 |
| Paging access ports | 71 |
| Basic/Device License | 2,200 |
| Standard User License | 8,800 |
| Advanced or Premium User License | 2000 |
| Software-only extensions / virtual numbers | 1000 |
| Basic mailbox used for announcements  / message purposes only | 2,000 |
| UM mailboxes | 8,000 |
| SIP trunks | 880 |
| LEC engineered 2-way ringdown circuits | 23 |

*Definitions for licenses are provided to explain how the quantities were determined. The City understands each manufacturer has unique license models and Proposers are asked to align their models to the best of their abilities to these definitions. Proposers will also be asked to provide a copy or matrix of their model in the response form.*

**Basic** license used to provide dial tone to a device, includes basic telephony features, call forwarding, conferencing, missed calls, message waiting indicator for basic voice mailbox, or users at sites with limited requirements.

**Standard** license applies to the majority of users and includes all common UC features including UM, single number reach / twinning or similar feature, softphone / teleworker; and the ability use the UC software client with at least two devices.

**Advanced** license includes all standard features and includes a mobile application client that works on smartphones or tablets.

**Software-only** extensions are virtual or phantom numbers that may be used for internal routing purposes and are not affiliated with a specific user or a specific endpoint.  For example, pilot (hunt group) numbers, informational mailbox-only DID numbers.

For IVR and contact center licenses, see Section 6.2

6.2 IVR AND CONTACT CENTER TECHNICAL REQUIREMENTS

Vendors will have the option to propose a premises-based solution, a hosted solution, or a hybrid solution. If the solution design impacts the ability or method of meeting a requirement, the proposal must identify why it is an issue and how the solution addresses the requirement.

Proposers should note that the City will consider two different approaches to the UC desktop client: a solution leveraging the City’s Skype for Business investment, or proposers may leverage another manufacturer’s UC desktop client.

Listed requirements are all “Functional/System” requirements unless specifically noted as “Desired” or “Optional”.

**Functional/System Requirements** are critical to the deployment and considered a necessary function or system component required to successfully deliver the solution to the City. If a bidder is not able to meet a Functional/System requirement, the proposal may be eliminated from consideration if the City determines that the clarifying explanation, alternate solution or method proposed does not meet the requirement.

**Desired Requirements** are important to the City and will be factored into the scoring of the proposal but are NOT considered a “must have”. The inability to meet a Desired requirement may be a factor during proposal evaluation and scoring and may result in other vendors being selected as finalists.

**Optional Requirements** are not critical to the successful delivery of the proposed solution but could impact future deployments and may have some influence on the evaluation. The City may consider purchasing optional solutions post contract award.

* + 1. Architecture and Design
       1. The design proposed must provide high availability (HA) and be capable of surviving the loss of any critical component or network failure. The system must be designed to avoid a “single point of failure”, with redundant core components in an “active/active” configuration that includes duplicated switch ports, power supplies, and other required elements to eliminate system outages.
       2. The proposed design must include geographically redundant sites. The Vendor will identify where the core systems will reside and include all the hardware and software components at each location.

The City’s primary core data center is located in the Seattle area and the secondary data center is located in the Spokane area. The Spokane data center is connected via a layer 2 network with dual routes and a high availability (H/A) design.

* + - 1. The selected vendor must test, configure and install all hardware and software as defined in their proposal. The City prefers Dell for physical on-site servers. The City’s hyper converged networks use Nutanix with VMware however, vendors may propose any manufacturer that meets the design specifications.
      2. For a premises design, the Vendor must provide a separate standalone virtual system software as part of their solution. The City will not install the IVR / contact center system on its existing virtual environment.
      3. For hosted or hybrid solutions, the proposed design must include carrier geographic redundancy and failover options to reduce single points of failure within the voice network
      4. Software-only solutions that run on off-the shelf hardware must be bundled with Vendor provided hardware such that they are supported by the Vendor as a total solution.
      5. The proposed design must consider how the solution will integrate with a number of systems including the current Avaya/Nortel, the new proposed voice mail / UM system; the new UC solution and Microsoft O365 services. The default design for the IVR / CC solution may leverage the UC SBC’s for connectivity to the legacy system and UC solution.  Alternate design options are acceptable and must be detailed in the Response Form.
      6. The system must use end-to-end encryption for all voice traffic in transit, secure encryption for all data at rest.
      7. The design proposed must be capable of delivering Single Sign On utilizing the City’s Active Directory environment as the authentication credential repository.  This authentication can be accomplished using either Windows Integrated Authentication (NOTE: if used must be capable of supporting multiple Active Directory Domains for user population) or via Active Directory Federation Services (preferred), which allows for SAML authentication and provides independence from the City’s Active Directory architecture (i.e. Multi-Forest, Multi-Domain AD).
      8. DNIS and ANI or equivalent data received directly by the call center / IVR platform must be passed on when transferred and made available as caller-ID to the UC solution end devices including the UM system.
      9. The system must support multiple methods of integration with systems utilized within the City. Systems may include Microsoft Dynamics 365, Motorola’s Citizen Service Request (CSR) system, Customer Care Billing (CIS) Oracle database for utilities, Oracle Finance system, PeopleSoft 9.2 and Ivanti (previously known as HEAT Service Up) a Service Desk/Help Desk system used throughout the City, plus web services or API’s.
      10. The proposed solution must provide a robust intuitive easy to use contact center agent client.
      11. The City must have a test environment designed without impact to the production environment or network which would be used to test all new software releases and upgrades, new hardware, new features / functionality, mobile integration, soft client, new system integration, etc. For hosted solutions, a separate instance(s) for the systems is acceptable.
      12. NOTE: Rack space will be made available in the City’s data centers and TRs if required in the proposed design.

**DESIRED**

* + - 1. The City wishes to limit the number of 3rd party adjuncts and peripheral equipment. Solutions based upon multiple manufacturers are acceptable however, the implementation will be managed and contracted through a single vendor.
      2. The City desires to have the installed solution able to support SNMP version 3 in SolarWinds Orion.
      3. The system must not use multicast for common channel communications, unless no other solution is available.
    1. Specialized Security Requirements

In addition to end-to-end station encryption, the system must meet Criminal Justice Information Services (CJIS), CMR, PCI, and North America Electric Reliability Corporation (NERC) / Federal Energy Regulatory Commission (FERC) security standards. Departments who require this specialized security are listed below.

1. CJIS - Seattle Police Department; Seattle Municipal Courts; Law Department
2. PCI - Seattle Public Utilities & Seattle City Light; Parks; Seattle Municipal Courts; FAS Animal Shelter
3. NERC/FERC - Seattle City Light; Seattle Public Utilities
   * 1. System and Call Routing Features
        1. Multiple forms of communication including voice, email, voicemail, Fax, text (SMS), web and video chat, and social media, must be combined into a single route, eliminating the necessity for a unique queue per media type.
        2. The system must be able to send automatic or pre-scripted written replies (i.e. email, text or web chats) to frequently asked questions or other common requests.
        3. The system must be able to provide information about the caller on screen (screen pop) prior to the agent answering the call.
        4. The system must support the ability for DNIS / ANI routing decisions to be done in an automated fashion for lookups.
        5. The system must have these features:
4. ability to notify callers of their position in queue
5. provide estimated wait time
6. route a caller based on time in queue to alternate destinations
7. raise or lower the caller’s priority based on time in queue
   * + 1. The solution must support the ability to broadcast messages to agents via the desktop client or to external monitors on a departmental basis.
       2. The solution must support advanced call routing features that allow calls to route to specific agents
       3. Callers in queue must be able to be offered the option of leaving a voice mail message.
       4. Contact types for reporting metrics using wrap up or reason codes must be available.
       5. The system must support a variety of media for music on hold or for use with various types of announcements. The system must provide multiple channel music on hold capability, allowing individual and unique messages and music on hold by queue.
       6. Programming tools for call flows and design must include logic capability to integrate with a variety of data sources / databases including SQL, Oracle Informix and web services.
       7. Programming tools may include a GUI however the tool must allow the administrators an expanded view and the ability to program all options within the tool. The system must have the ability to write call flow scripts with full use of intrinsic variables and flexible values (scripting written in code vs drop and drag).
       8. System tools must be intuitive and include history files/logs for auditing changes.
       9. Message recording tools must be of high quality for recording menus, announcements and all messaging used in the IVR and contact centers.
       10. Messages and recordings can be pre-recorded allowing administrators or supervisors the ability to easily change announcements in call flows without IT assistance or resources.
       11. The system must extend common system resources including agent and supervisor dashboard to teleworkers / remote agents allowing them to function with the same capabilities as if on-site.
       12. The system must include whisper transfer that announces a call through the agent’s headset or handset.
       13. Agents must have the ability to record a personal greeting that answers a call and plays before connecting to the agent.
       14. PC clients must display at a minimum:
8. Real-time agent status
9. Queue status
10. Alerts and alarms when queue thresholds are exceeded
    * + 1. Agent display capabilities must be flexibly assigned to limit the view to the agents’ own statistics or allow other agents’ statistics within the work group to display.
        2. Agents can display their statistics on screen or on the phone, on demand.
        3. Agents must be able to login from any phone or with softphone from anywhere in the network.
        4. Administrators or Supervisors with the proper permissions, are allowed to make administrative changes through remote access.
        5. Supervisors must have the ability to:
11. Manage skillsets and agent logins in real time
12. Push or send messages to a group via a dashboard or marquee feature to the individual agents and to external displays
13. Change agent status based on business needs including log out an agent
14. Change agent skills in real time
15. Assume control of a call from an agent (barge-in)
16. Live, anonymous monitoring of an agent call.
17. Conduct chairside training for the phone or the PC client using a dual headset configuration
18. Dashboards showing agent and queue statistics must be configurable by each supervisor
19. View agents in multiple partitions.
20. Dashboards may be embedded in web pages for external viewing
21. Change announcements and recordings
22. Activate an emergency or spare or contingency queue
23. Run, customize and schedule reports
    * + 1. Existing externally mounted reader boards (using TV monitors) must display queue statistics or announcements as defined by work group.
        2. Supervisors must be able to assign tasks to agents for completion using system tools with reporting related to the task assignments.
        3. Predefined (canned) responses must be available for web or email chat, providing agents the ability to provide consistent information to customers.
        4. The system must offer two different options for call back:
24. Instead of waiting on hold in queue, callers may select an option to have the system return the call without losing their place in queue.
25. The call back feature may also be scheduled so that the system calls out at a specific date and time requested by the caller, within City’s defined hours, by department.

**DESIRED**

* + - 1. Using video for customer interactions is desired on select calls so that agents can verify ID with customers before providing information.
      2. Desire to use desktop or document sharing with customers to sign forms for applications or to assist with use of web features or co-browsing.
      3. The ability to use CRM integration or embedded transaction history with routing rules, so that callers can route to a specific agent or queue.
      4. The solution has the ability to flag a previous transaction, such as a call or an email, and deliver that information simultaneously to the agent when common identifying characteristics (such as unique caller-ID, account number, etc.) exist.
      5. System can provide a display or visual representation of call flows.
      6. System tools provide reporting that allow system administrators to search for specific variables or key words in scripts or call flow designs.
      7. Calls transferred to a third-party provider for payment processing that are transferred back to customer service by the third-party provider, show as one single call record or transaction for reporting purposes.
      8. The system supports a browser-based client for agent and supervisor teleworkers.
      9. Supervisors have the ability to monitor and manage contact centers from any smart phone using mobile application software.
      10. The City is interested in the Vendors ability to assist with process or journey mapping, enabling departments to provide a more effective and improved customer experience.
      11. The system has a developable knowledge base for agent use.
    1. IVR
       1. The proposed IVR must fully integrate with the contact center solution. For example, the system may be tasked to trigger the screen pop based on caller-ID or customer account number, etc.
       2. The system must support integrations with a number of systems including Microsoft Dynamics, Motorola CSR and SQL Server / Oracle application/databases including web services.
       3. The system must include intelligent routing that allows for the application of business rules or design strategies that are capable of certain actions before the contact is handled by an agent. This could include sending the agent information collected from the contact prior to the agent receiving the call or this could result in a determination of which agent, extension or service is most suitable for the contact.
       4. System must allow all industry standard transfer types, such as blind transfers, consultative transfers, etc.
       5. Administrators or Supervisors who have the correct permissions, must be able to make administrative changes to announcements and recordings without IT support.
       6. All changes, additions or deletions should be logged in the system for tracking and reporting.
       7. The system must be capable of natural language speech recognition. This feature requires the true conversational natural speech abilities to assist callers. This includes the ability to process voice commands for simple data. For example, speaking an account number.
       8. The system must support the ability to offer multiple languages by allowing callers to select language options at the beginning of menus for self-service or for advanced call routing options.
       9. The system must be capable of text to speech translations.
       10. The system must have the ability to track the caller’s spoken commands and input (using DTMF tones) when interacting with the voice response system for reporting purposes.
       11. The system must include outbound capabilities used for system generated calls like post call surveys.

**DESIRED**

* + - 1. The system includes outbound capabilities to send broadcast messages, reminder notices or similar announcements to external customers.
      2. The system has the ability to provide reporting for outbound messaging and reminder notices and provide confirmation that the messages and reminders were sent.
      3. The system provides the option to provision chat bots or virtual assistants as part of the IVR solution for digital channels.
      4. The system is capable of speech to text, allowing a spoken script to be heard and captured/stored creating the ability to design a structured document (IVR forms) from dictation. For example, a field inspection report can be dictated and translated into a system record.
    1. Reports
       1. The system must provide a browser-based tool for easy access to historical reporting and real time metrics for all contact types without requiring client software.
       2. Reports must provide detail from the entry point of the call into the IVR or contact center until the caller hangs up; or cradle-to-grave call detail.
       3. Reporting must include real time and historical data
       4. Access to raw data must be allowed based on permissions.
       5. Reporting must include the ability to customize exported data into formats such as .xlsx, .csv, .pdf or SQL, etc.
       6. The system must allow the ability to create custom reports, schedule and automate delivery of reports via email.
       7. System reporting, including real time statistics and metrics, must be partitioned so that views are not global and are limited to pre-defined work groups or departments.
       8. Automatically generated reports must be delivered to a shared network drive to pre-defined folders
       9. For troubleshooting purposes, call reporting must show keystroke entries made by the caller to track valid or erroneous entries in the IVR.
       10. Must have the ability to search on the ANI within a specified time frame / date selection for both contact center and IVR reports.
       11. System must report on speech analytics.
       12. System must report on scorecard and surveys.
    2. Call Recording
       1. The proposed solution must be a single system that provides a full suite of quality monitoring and voice / screen recording functionality.
       2. The proposed system must be able to record on-site and teleworking employees.
       3. The proposed system must provide encryption for all stored recordings (at rest).
       4. The contact center and quality monitoring capability of the system must provide a synchronized screen capture /screen scrape of the agent’s desktop activity over multiple monitors with voice calls.
       5. Playback of voice and screen scrape must be fully synchronized and automatically linked in playback through a single supervisor / review tool.
       6. The system must provide the ability to search for contacts by user defined parameters such as ANI, email address, agent, time of day/day of week or queue.
       7. The system must be capable of automatically pausing recording when the agent is entering credit card information to comply with PCI Data Security Standard.
       8. The system must provide embedded controls for access to call recording play back within the supervisor tool.
       9. Supervisors must have the ability to conduct live monitoring or quality monitoring on demand or scheduled.
       10. Agents must have access to their own recorded contacts to review and validate the information and facts from the contact.
       11. System must support partitioned recordings by department.
       12. Administrators/Supervisors must have the ability to evaluate contacts within the system using configurable score cards.
       13. Agents must be able to view evaluations and listen to calls/see contact real time.
       14. System must provide post contact surveys using multiple media types, i.e. voice, email, web chat, etc.) and on-demand surveys that relate to the agent who last handled the contact. The survey creation tools must be intuitive and easy to use.
       15. System must support traditional survey methods (true/false, yes/no, rank 1, 2, 3…) as well as verbatim (customer wording).

**OPTIONAL**

* + - 1. The City is interested in a system capable of real-time speech analytics, providing flags and notifications when certain criteria have been detected. This is required for English only although the number of languages could expand at a future date.
    1. Work Force Management
       1. The system must forecast the number of agents required during normal work hours or on an emergency basis, based on a variety of factors used to estimate resources for all interaction channels.
       2. The system must track and report attendance.
       3. The system must track and report agent schedules and measure adherence to that schedule.
       4. The system must allow system administrators to define work days and hours for scheduling such that holidays, non-working days and hours are not included in forecasting formulas.
       5. System must be able to be partitioned so that views are not global and are limited to pre-defined work groups or departments.

**DESIRED**

* + - 1. The system allows agents to request days and hours of availability. This same application could be used or authorized to provide notice of sick or a delay in arriving to work on time.
      2. The system provides a smart phone app to access the system features and tools for both supervisors and agents.
      3. Agents can message a supervisor or the scheduler through a WFM smart phone app.
      4. Supervisors or the scheduler can message an agent through the smart phone app.
      5. The tool includes short term daily forecasting that would depict the best time for team meetings or training.
      6. The tool forecasts how many agents can take vacation days, based on a projected volume of offered contacts.
      7. The tool includes the ability to schedule shifts, defining when breaks and lunches should occur and how many shifts are needed based on other criteria such as daily work hours and other input.
      8. System is capable of providing automated graphs and reporting that summarizes headcount and forecasted volume of contacts.
      9. The tool includes “shrinkage”, defined as daily labor loss – vacations, sick, personal time etc. to include in forecasting.
      10. Creating schedules and shifts includes the ability to insert “what if” scenarios to assist with minimum and maximum number of agents needed to reach specific service levels.
      11. The system allows agents to bid for shifts, overtime, time off or vacations using automated, interactive tools.
      12. The system is capable of sending texts or emails to notify staff of schedule changes.
      13. The system is capable of sending texts or emails to offer agents options for overtime or voluntary paid time off based on ranking or seniority.
      14. Where scheduling is based on seniority, the system tracks ranking of staff used to bid for shifts or to prioritize vacations and other requests.
      15. The system provides a web portal for agents to access schedules and place bid shifts.
      16. The system is capable of sending reminders for scheduled time off or overtime via the agent client, email or text.
      17. The system is capable of providing a calendar view of schedules.
      18. The system is capable of agent surveys.
      19. The system is capable of sending messages to individuals, groups, staff at specific sites, by department or to all enterprise users.
      20. These messages can be tracked to ensure effective delivery.
    1. Contact Center / IVR Quantities for Proposal Purposes

|  |  |  |  |
| --- | --- | --- | --- |
| Type | Existing  AACC | Existing  CIC | For Proposal  Purposes |
| Number of queues | 80 | 10 | 125 |
| Basic agents | 400 | 0 | 500 |
| Multi-media | 50 | 161 | 250 |
| Remote agents/Remote Supervisors  (this # is a sub-set of basic agent counts for use during emergency scenarios) | 14 | 1 | 75 |
| Supervisors | 130 | 30 | 200 |
| Supervisors mobile app for cell phone/tablet |  |  | 200 |
| IVR ports / Automatic speech recognition (216 IVR ports distributing traffic to AACC and CIC) |  |  | 216 |
| Outgoing CC add-on |  |  | 150 |
| Call Recording | 37 | 125 | 200 |
| Queued / scheduled call back | 16 | 40 | 150 |
| Quality Management | 0 | 0 | 250 |
| Work Force Management |  | 125 | 125 |
| Database integration / CTI |  |  | 250 |
| Real Time Speech Analytics |  |  | 200 |

NOTE: 750 agents will take voice calls. An estimated subset of 250 will require multi-media licenses. The type and use of multi-media agents will vary by contact center. Details will be determined during the data gathering phase of implementation.

Quantities listed for Outgoing CC add-on are intended for use with outbound IVR or for queued call back purposes. The intent is to identify if there is an impact to cost or licenses for this functionality.

The City currently has 240 IVR ports across 3 systems. (216 = Prod & 24 = Dev). Speech ports are currently much smaller as speech is not currently deployed (a total of 24 simultaneous ports for speech and TTS).

6.3 Telemanagement Software (TMS)

This project may replace Calero’s PINNACLE system with a new product. The City wishes to expand their knowledge of other products that provide similar capabilities with additional reporting, integrations and potentially other modules or packages that may provide additional management tools the City may consider advantageous. This solution is a Desired option the City may consider purchasing post-award.

The City seeks a product (which may be from third-party manufacturer) that provides the following functionality:

6.3.1 The solution will process monthly telecom billing.

6.3.2 The solution will need to integrate with Active Directory for identity attributes such as: employee names, telephone number, locations, and departments or other data as required.

6.3.3 The solution may need to be capable of integrating with the Service Desk ticketing system, “Ivanti”, to track caller’s phone number, name and other information within trouble tickets related to all Telecom inventory. The City is currently in the process of moving Ivanti from a premises solution to SaaS.

6.3.4 System integrates with a City application called the Activity Billing Database (ABD) warehouse to produce consolidated reporting for Telecom costs to departments.

6.3.5 System integrates with both the UC solution to provide detailed information regarding users, devices and telephone numbers and locations provisioned within each system.

6.3.6 System includes expense management capability that is intuitive with easy and flexible access to reports and tracks department business unit and financial hierarchy.

6.3.7 System can process Electronic Data Interchange (EDI) imports from carriers providing flexibility and reducing custom translations that are currently required.

6.3.8 Service tracking and management includes:

a) POTS numbers

b) Mobile phone numbers, data cards and other mobile billing

c) Data and voice circuits

d) Assigned / unassigned DID numbers and any virtual, software or phantom numbers used within the dial plan including system monitoring unused numbers to keep them out of circulation for a pre-determined period of time

e) All potential data fields available from the UC and IVR / CC systems to provide detailed reporting for feature use or other criteria

6.3.9 The system can provide a variety of pre-defined reports of services by users, departments, business units, device types and building locations.

6.3.10 Custom reports can be generated using standard reporting tools like Sequel Server Reporting Services (SSRS).

6.3.11 Reports may be generated in real time as requested.

6.3.12 The system provides browser-based access to user reports that can be run from any authorized location or by any user within the City’s network, as long as they are logged in and authenticated.

6.3.13 The system supports the ability to schedule reports for export to any defined shared drive with email notification of completed report processing.

6.3.14 The system supports multiple user logins (100 or greater) with the ability to establish granular permissions that will be defined to include system administrators, Telecom Analysts, and department telecom coordinators.

6.3.15 The system may need to store 18 months of CDR records with the ability to automatically purge records daily based on defined date parameters.

6.4 Meeting Room Technology (OPTIONAL TO BID - NOT SCORED)

Over the years, departments within the City of Seattle have been allowed some flexibility in their deployments of audio/video solutions to meet their specific requirements for collaboration within meeting rooms. The City is seeking to deliver a ubiquitous end user collaboration experience within the meeting rooms across the City.

“Meeting rooms” in the City range from **focus rooms** seating between 2-4 people, **small rooms** seating between 4-8 people, **medium rooms** (8-12 people) to **larger meeting rooms** seating up to 40 people. The City also has some **extra-large specialty rooms** that can host 200+ people. Pricing for the specialty rooms will be requested at a later date, if desired.

Current meeting room solutions range from basic configurations (speakerphone with a small form factor PC hooked up to an LCD panel) to more advanced configurations involving Logitech/Polycom devices and up through more premium Microsoft Surface Room / Surface Hub devices.

The requirements for an advanced meeting room experience include:

1. Flexible Quality of Service / Performance Tuning capabilities within the platform. This includes the ability to scale up quality to HD audio and video. The system should minimize problems with distortion, audio feedback, and video lag. Bandwidth requirements must be defined that ensure optimal operations.
2. Easy and intuitive user operation. This includes the concept of the “one-button” approach to starting a meeting (total room controller) and the “one-click” approach to joining a meeting.
3. Scalable and adaptable to various meeting room sizes, including multiple screens and various A/V equipment. Specific details on the options for interactive screens and remote collaboration tools should be described.
4. Wireless connectivity (i.e. Wi-Fi, Miracast, Bluetooth) to the Meeting Room should be considered the primary desired connection type with wired connections being available as a backup. Flexible device connectivity for participants, with ability to switch presenters. This should include various physical connection options such as HDMI, mini display port, SVGA, and USB, along with wireless (Wi-Fi and/or Bluetooth) connectivity.
5. Room / resource scheduling from within Outlook. The solution should describe the options for a network connected room status and schedule display mounted outside the conference room. Also looking at what potential integration may be possible with larger scale digital signage / corporate communications (e.g. RMG signage.)
6. Interactive Whiteboard capability
7. Content sharing
8. System management and diagnostic tools, including the ability to track the quality performance of collaboration sessions (voice and video).
9. Capability to measure, track and report on the true utilization of meeting room resources. (i.e. Meeting rooms that are scheduled but not utilized for their time period, # of attendees in a meeting room for a given meeting).
10. Methods for recording and sharing post all aspects/elements of a collaborative session.
11. Broadcast Streaming – How would we stage a meeting room as a broadcast streaming room? (i.e. Staging a room to run a Skype Meeting Broadcast)
12. IP TV streaming capabilities within the solution
13. Any enhancements that fit the above requirements and improves the overall reliability, performance, and user experience. This may include proximity detection, audio tracking cameras, etc.

Any proposed solution should address which, if any, of the current equipment can be reused and/or interconnected within the proposed solution to help reduce capital investment costs.

The solution proposed may be provided by a third-party manufacturer, but the proposer must address how it interacts with the standard UC desktop client proposed.

6.5 Robotic Process Automation (RPA) (OPTIONAL TO BID - NOT SCORED)

The City may implement Robotic Process Automation (RPA) or similar technologies to guide, assist and/or automate workflows that are performed by Customer Information Service (CIS) users who use the Oracle Customer Care and Billing (CCB) application at the City’s two public utilities. (The City is aware of Cases and Business Process Automation functionality in CCB).

The City’s current Oracle CCB suite consists of the following:

|  |  |
| --- | --- |
| Component | Version |
| Customer Care and Billing (CCB) | 2.6 |
| Meter Data Management (MDM) | 2.2 |
| Smart Grid Gateway (SGG) | 2.2 |
| Customer Self Service (OUCSS) | 2.2 |
| SOA Suite | 12c |
| WebLogic Server | 12c |
| Database | 12c |
| Server | T7 |

Two high level workflows provided below illustrate the types of activities being considered for automation or assistance.

**USE CASE 1 – Change Solid Waste Garbage Bin Size**

A solid waste customer calls the Contact Center.

The Utility Account Representative (UAR) opens the Account tab of CCB application to validate the customer or prospective customer is who they say they are. This is completed by validating the name, service address, account number or other set of identifiable details.

After the customer and account have been validated, the UAR opens the Premise tab and confirms that the Utility provides solid waste service at that premise by looking on a physical map. If the premise is a single-family building, continue.

The UAR opens the Service Point tab to validate that the premise has an active service point within CCB (e.g. has garbage service set up already). On the Service Point tab, the UAR confirms the customers current bin size and ask the customer which bin they would like to change to (recycling, organic waste, and garbage bins can be changed simultaneously or individually) and confirms their willingness to pay to change the bin size if applicable.

The UAR opens the Field Activities tab, performs a search to determine how many bin changes have happened within the current calendar year. Customers must pay if 2 or more bin size changes exist in current calendar year.

The UAR clicks on the “Create new Field Activity” button and creates a new Field Activity. If the bin change is free, the UAR creates a SSLCHNGE field activity or a SLCHNGE if the customer must pay for the change.

At the completion of the call, the UAR opens the Notes tab to enter any contact notes.

Hourly, all bin size changes made to CCB are batched together and sent through the Dispatch system via file exchange to solid waste contractors. The solid waste contractor collects the customers’ old bin and drops off their new one within six business days. The solid waste vendor updates their systems to reflect these changes. Their system then sends files to CCB with these updates. Those files are automatically processed hourly to update in CCB the status of open bin size changes (closed, canceled, completed, etc.). Errors do occur and must be analyzed and reconciled by CIS users after the fact.

The customer does not receive any notification other than seeing their new bin(s) at their premise.

**USE CASE 2 – Start New Electrical Service**

The Start Service process can begin with either the Premise Validation or the Customer Verification.

The UAR validates the physical address the customer is moving into.

* The UAR User opens the CCB Premise tab and confirms the address is in our service area, has appropriate Service Points, and meters for the service points. If the premise does not have an electric service point, the representative submits a manual form to the North or South Completion desk to update CCB.
* The UAR opens the Field Activity tab, performs a search and checks the premise for updated owner, severance notices, pending Start/Stop Field Activities, To Dos, and Customer Contacts that may impact the start of the service.

Customer verification confirms the customer is who they say they are according to the FactAct. The FactAct states, “Under a 2009 federal law, if you are opening a new residential utility account, the City of Seattle will verify your identity. Several forms of government-issued photo identification are acceptable, and you can complete your verification via fax, U.S. mail or in person at several locations throughout Seattle.”

A customer’s identity can be verified by locating the customer in CCB. The UAR opens the Customer tab in CCB, performs a search and attempts to verify their identity within CCB. If this is a completely new account, the options include:

* Equifax – customer is asked by the UAR a series of financial or premise related questions that only the customer should know.
* Residential Electric Service Application signed by Owner/Landlord (for tenants only)
* Show approved, government-issued photo ID to one of the Neighborhood Service Centers, or
* King County Records (for owners only),
* Escrow Notes of CCB (for owners only).

If the customer is starting service because of a property purchase then the UAR must verify that they are the owner. There are two methods for verifying this:

* UAR opens the King County parcel information website and performs a search for the premise physical address. The customer must be listed as the owner in that King County Record, or
* UAR opens the Notes tab in CCB and performs a search for the customer under Escrow Notes.

The UAR next obtains a meter read. The meter read can be provided by the customer, prorated by the UAR if customer accepts, or submitted by a Meter Reader if the customer agrees to pay for cost to obtain that meter read.

* If the customer provides the meter read the UAR verifies that the meter read looks appropriate by opening the Meter Data Management (MDM) application and performing a search for that customer. “Appropriate” is based on UAR experience.
  + If the customer approves, the UAR can prorate the read. This can only be offered if the previous two reads were not estimated reads. That is verified by opening the MDM application and performing a search based on the meter ID of the customer.
* If a customer requests a meter read, the UAR clicks on the Create New Field Activity button and creates a Field activity for the meter reader to go to the field and capture the read.

After the UAR has validated the premise and verified the customer’s identity, the UAR begins the start service process in CCB which consists of:

* The UAR opens the Service Point tab in CBB and reviews the Move-In/Start Service Date. If the Move-In Date is greater than 10 days in the future, the UAR asks the customer to call back closer to the move date.
* If the customer is a new account holder then the UAR opens the Person tab in CCB and clicks the Create New Person button. If the customer is an existing or prior customer then the UAR will perform a search for that customer’s Person record and use the customer’s existing Person in CCB.
* The UAR opens the Service Agreements tab in CCB and reviews the customer’s account to determine if it is an Active or Non-Active. A Non-Active account is one with a Service Agreement = Stop or Service Agreement = Pending Stop. If the customer’s account is Non-Active, then the Person is attached to the existing account. If the customer’s account is Active, then the UAR creates a new account in CCB. An Active Account is if the Service Agreement = Active or the Service Agreement = Pending Start.
* To initiate the Start Service in CCB the UAR selects the “Start Service” button or clicks “Save” on the Person page. The “Pending Start/Stop” Field Activity for the person moving in and person moving out are created automatically in CCB. As part of the process one is automatically canceled, and both are attached to the Service Agreement on one premise.
* The UAR opens the Field Activity tab, performs a search for the customer ID and enters the move date, the meter read, and address of starting service in Field Activity Upload Staging. Once this is completed the open “Pending Start/Stop” field activity is closed automatically and will show complete. The meter read is automatically uploaded into MDM from CCB.
* The UAR verifies the read uploaded correctly into MDM by opening the MDM application and performing a search for the customers meter ID.
* UAR opens the Service Point tab in CCB and adds a Set-Up Fee in CCB.

The UAR opens the Account tab in CCB and updates the customer’s billing mailing address or phone number.

The UAR opens the Customer tab in CCB and creates a Move-In Customer Contact Note. This automatically creates a Move-In Letter which is sent to the customer.

# **MINIMUM LICENSING AND BUSINESS TAX REQUIREMENTS**

This solicitation and resultant contract may require additional licensing as listed below. The Proposer needs to meet all licensing requirements that apply to their business immediately after contract award or the City may reject the Proposer.

Companies shall license, report and pay revenue taxes for the Washington State Business License (UBI#) and Seattle Business License, if they are required to hold such a license by the laws of those jurisdictions. The Proposer should carefully consider those costs prior to submitting their offer, as the City shall not separately pay or reimburse those costs to the Proposer.

**7.1 Seattle Business Licensing and associated taxes.**

1. If you have a “physical nexus” in the city, you shall obtain a Seattle Business license and pay all taxes due before the Contract can be signed.
2. A “physical nexus” means that you have physical presence, such as: a building/facility located in Seattle, you make sales trips into Seattle, your own company drives into Seattle for product deliveries, and/or you conduct service work in Seattle (repair, installation, service, maintenance work, on-site consulting, etc.).
3. We provide a Vendor Questionnaire Form in our submittal package items later in this RFP, and it shall ask you to specify if you have “physical nexus”.
4. All costs for any licenses, permits and Seattle Business License taxes owed shall be borne by the Proposer and not charged separately to the City.
5. The apparent successful Proposer shall immediately obtain the license and ensure all City taxes are current, unless exempted by City Code due to reasons such as no physical nexus. Failure to do so shall result in rejection of the bid/proposal.
6. Self-Filing You can pay your license and taxes on-line using a credit card <https://dea.seattle.gov/self/>
7. For Questions and Assistance, call the Revenue and Consumer Affairs (RCA) office which issues business licenses and enforces licensing requirements. The general e-mail is [rca@seattle.gov](mailto:rca@seattle.gov). The main phone is 206-684-8484, or call RCA staff for assistance (Anna Pedroso at 206-615-1611, Wendy Valadez at 206-684-8509 or Brenda Strickland at 206 684-8404).
8. The licensing website is <http://www.seattle.gov/rca/taxes/taxmain.htm>.
9. The City of Seattle website allows you to apply and pay on-line with a Credit Card if you choose.
10. If a business has extraordinary balances due on their account that would cause undue hardship to the business, the business can contact our office to request additional assistance. A cover-sheet providing further explanation, along with the application and instructions for a Seattle Business License is provided below for your convenience.
11. Those holding a City of Seattle Business license may be required to report and pay revenue taxes to the City. Such costs should be carefully considered by the Proposer prior to submitting your offer. When allowed by City ordinance, the City shall have the right to retain amounts due at the conclusion of a contract by withholding from final invoice payments.



**7.2 Mandatory State Business Licensing and associated taxes.**

Before the contract is signed, you shall provide the City with your State of Washington “Unified Business Identifier” (known as UBI #) and a Contractor License if required. If the State of Washington has exempted your business from State licensing (for example, some foreign companies are exempt, and in some cases, the State waives licensing because the company does not have a physical or economic presence in the State), then submit proof of that exemption to the City. All costs for any licenses, permits and associated tax payments due to the State as a result of licensing shall be borne by the Proposer and not charged separately to the City. Instructions and applications are at <http://bls.dor.wa.gov/file.aspx>

**7.3 Permits**: All permits required to perform work are to be supplied by the Proposer at no additional cost to the City.

# **STATEMENT OF WORK AND SPECIFICATIONS**

Proposer shall design, develop, install and implement a fully operable, comprehensive solution to meet all of the requirements set forth in the RFP for all services proposed.  Proposer shall provide professional services and labor necessary, in concert with the City’s project team resources, to implement the solution for the City.  Pricing shall include all supervision, labor, materials, equipment, and testing instrumentation required for the work associated with this RFP, as well as any overtime for pre-installation, installation, and cutover work that may occur.

This Statement of Work (SOW) applies equally to Vendors who propose a UC solution or an IVR / CC solution or both.

* One Statement of Work must be submitted for all proposed UC sections.
* A separate Statement of Work must be submitted for all IVR / contact center sections.

Vendors who are proposing both sections are encouraged to note within the SOW where synergies and reduced project costs may be realized. Projected savings if applicable, should be noted in the pricing section. The SOW must consider the coordination of all project activities as defined in this RFP.

Proposals may be submitted by a team that incorporates more than one Vendor and/or that leverages the resources of multiple firms or the manufacturers.

Should the City split the award for the UC and IVR / contact center, each Vendor shall approach the project with the goal of partnering with the City and the other vendor(s) in a collaborative and cooperative manner, ensuring the successful completion of this project.

The City prefers a face-to-face approach to project management including the design process kickoff.

**8.1 Project Management**

The awarded Proposer(s) (herein after referred to as “Vendor”) shall provide a Project Manager (PM) for the duration of the project, expected to last thirty-six (36) months. The PM shall participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the City to coordinate project and professional services activities. Working in partnership with the City Project Manager, each PM shall coordinate project and professional services activities within their respective organizations throughout all phases of the project. The PM shall also maintain the Project Plan/Schedule, track dependencies between Vendor tasks and City tasks, maintain the Risk Management Plan, and escalate to both project teams any delays with impact to the project schedule. The PM, with support from the City Project Manager, shall be responsible for the development of the following project plans.

Provide a brief sample document for each of the items listed below.

* Project plan and schedule
* Detailed cutover plan including a sample Work Breakdown Structure (WBS)
* Roles & Responsibilities for all Vendor and City project team members \*
* Tasks that must be performed by City staff
* Risk management plan
* Project tracking to identify risks, actions, issues and decisions (RAID) log
* Communications plan and escalation path
* Change control process
* Project status reporting requirements
* Training plans
* Testing plan
* System Acceptance criteria

**\*NOTE**: In order to gain a better understanding of how a hosted or hybrid deployment and support model would integrate within the existing City department structure that provides day to day support today, Vendor(s) are asked to provide a RACI (Responsible, Accountable, Consulted, Informed) chart with their project plan. This chart will identify high-level tasks associated with this implementation and include roles and responsibilities for both the Vendor(s) and City staff, clearly defining who is responsible and accountable plus address the areas when either party is to be informed and consulted for these tasks. Include all support and maintenance tasks that would remain after the project is complete and what tasks the City would be allowed to perform as opposed to the tasks that would remain with the Vendor(s).

* 1. **Project Planning and Design**

During the design and planning phase, the City expects the Vendor(s) to provide subject matter experts (SMEs) for each component identified in the proposer’s solution. These experts will partner with IT resources from the City’s project team to build and support a network that will meet the agreed upon design standards and deliver the best technical, functional and cost-effective solution for the City.

Each Vendor shall implement a phased approach to deploying the new UC system and IVR / contact center with a focus on efforts to minimize operational risk to end users. The matrix below outlines the project phases over the estimated thirty-six (36) month timeline. This outline is supplied as a guide for the Vendor to determine the appropriate level of professional services required to implement new services during each phase of the project including the large IVR applications identified in Section 3 Background. The overall project approach will be jointly developed in detail with the City during Phase A and will define in which phase these large IVR applications will be scheduled to migrate.

The City proposes the following progression to complete Phase A:

* The City assumes final planning/design/installation for the core solutions will take approximately ninety (90) days. A detailed test plan will be provided by the Vendor and developed jointly with the City’s project team as part of the approach to Phase A during the initial planning stages.
* After the core installation is complete, a mix of 200 IT users incorporating both platforms will be deployed in a 30-day pilot in preparation for subsequent phases of the project. The pilot is intended to demonstrate the integration and functionality of all solution elements. The pilot will include two queues with approximately 20 multi-media agents using speech recognition and potentially multiple languages in the IVR / CC. All identified issues will be corrected during the 30-day pilot prior to adding additional users.
* Following successful completion of the pilot period, 500 additional UC users within the IT Department plus one small contact center with an estimated ten (10) agents, will be cutover in the final sixty (60) days of Phase A.

The City expects planning and design for the migration of the complex Public Utilities CIC to the new IVR / CC system will take approximately six (6) months allowing for deployment at the earliest in Phase C.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Phase A** | **Phase B** | **Phase C** | **Phase D** | **Phase E** | **Phase F** |
|  | **6 months** | **6 months** | **6 months** | **6 months** | **6 months** | **6 months** |
| **Analog** | *Analog=50*  *Softphone=200*  *Sets=500*  *Queues=3*  *Agents= 30* | **600** | **600** | **600** | **550** | **Project wrap up and final cutovers.**  *Analog=50*  *Softphones=100*  *Sets=400*  *No contact center in Phase* |
| **Softphones** | **675** | **675** | **675** | **675** |
| **Sets** | **2025** | **2025** | **2025** | **2025** |
| **Call Center**  **# Queues**  **# Agents** | **Q=5**  **Agents=**  **225** | **Q=25**  **Agents=**  **225** | **Q=20**  **Agents=**  **225** | **Q=3**  **Agents=**  **50** |

* 1. **Data Gathering**

The City plans to actively engage with the Vendors to provide direction and begin the knowledge transfer process during the data gathering phases. The City will assist the Vendor’s team with data gathering when conducting on-site reviews with business analysts and/or business representatives for all UC telephony and IVR / contact center requirements. The City’s team will provide as-is design packages for the current configurations and include floor plans, where available, to assist in this effort.

Data gathering shall to consist of, but is not limited to, the following activities related to all Vendor(s) proposal(s):

* + 1. The Vendor shall provide guidance and recommendations to IT based on best practices and assist in developing use cases that include features and set designs that can be used throughout the City.
    2. Data collection shall include validating current users and phone numbers, determining the quantity and type of telephone sets, analog ports and UC clients or mobile apps and UM required for users. Telephony needs not affiliated with specific users shall also be identified in this process.
    3. Data collection for the UC system shall include identifying features and functionality for paging, hunt groups, intercom groups, overhead paging, shared lines, square key system configurations or other unique requirements such as ringdowns or shared voice mailbox configurations.
    4. Specialized needs for items like call recording on-demand, language lines, non-contact center menuing, and other features shall be included in reviews for the UC system.
    5. The IVR / Contact Center Vendor shall participate in meetings with designated contact center representative(s) to gather requirements for contact centers to include agents, skill sets, routing, supervisors, standard and custom reporting, real time displays and other functions. Enhanced feature requirements such as multimedia, call/screen recording, Workforce Management (WFM) and speech recognition will also be reviewed with user groups.
    6. The IVR / Contact Center Vendor shall participate in meetings with designated contact center representative(s) to gather requirements for IVR designs.

The City expects this project to result in changes to the current environment for the six large applications that are defined in Section 3 Background and does not wish to duplicate the current state. IT staff from the City will assist the Vendor in developing a detailed understanding of the current routing during implementation planning.

The City expects the Vendors professional services to meet with the business and IT to define business requirements for the scope and design / build during a discovery process as part of the overall implementation.  This will allow departments to take advantage of new features and functionality that they do not have currently, like speech recognition.

The Vendors professional services will submit a design document for review by the customer and the City’s IVR team. When an agreement is reached that the design meets the customers’ requirements, the City will sign off and begin the process to implement the design.

The City understands the time invested in discovery and designing call routing will not be a fixed bid for the six large applications identified in Section 3 Background. Vendors shall include caveats that identify variables that could affect cost or design.

Requests from departments that the City (at their discretion) considers a separate project or that exceed the expansion of the IVR beyond the capabilities of the new IVR, will be considered additional work and out of scope.  It is expected that the contract will allow the flexibility to expand the IVR at a later time.

* 1. **Implementation**
     1. In the planning and design phase the Vendor will vet their high-level designs with the City’s project team. The Vendor shall then collaborate jointly with City’s technical staff to finalize the design detail to include all system configurations including the proposed dial plan, routing and restrictions, alternate routing, integration with other related systems, and Enhanced 911 (E911) for both the UC and IVR / CC solution.
     2. The Vendor shall provide all the necessary equipment, all tools including those used to load test and services to implement the final design, including system integration, testing, and Acceptance.
     3. During all phases of the implementation, Vendor shall provide knowledge transfer to City IT staff.
     4. The Vendor shall develop a detailed Project Design Workbook (PDW) with a set of detailed system diagrams depicting logical and physical designs for all proposed system components. Documentation shall include system parameters established during joint planning / design meetings to be held prior to the installation of the core system. The PDW shall be updated throughout the project and include documentation of the pilot phase. The PDW including the final as-builts shall be delivered to the City as part of the final acceptance process.
     5. The UC Vendor shall conduct a VoIP readiness assessment at the beginning of the project. The City has a high number of sites that are fiber connected so bandwidth in general is not expected to be a concern however the scope of the assessment will be jointly developed during the planning stages of the project. The Vendor shall deliver a written report stating the results and identify all areas that require upgrades in order to meet industry best practices.

The assessment shall be done early enough in the project to allow the City time to purchase and install any required hardware/software in advance of the proposed implementation schedule for affected sites.

* + 1. The Vendor shall be responsible for complying with the City’s change management process during production implementation.
    2. The Vendor shall provide a phased cutover plan that describes the sequence of events that occur prior to, during and immediately after the cutover process, including proceed-or-abort decision points, task assignments, back-out criteria, and a transition plan to operations.
    3. The project plan will address the ordering and addition of new PSTN SIP trunks and the disconnect of existing PRI PSTN connections throughout the project.
    4. The pilot shall be subject to an acceptance period of thirty (30) consecutive calendar days of normal traffic load without major component failures or major alarms. In the event of failure of any product, feature, function, configuration, or integration, the Vendor will receive sufficient time to remediate the failed item prior to retesting and starting a new thirty (30) consecutive calendar day trial.
    5. Following successful completion of the pilot, a joint lessons-learned session shall be scheduled with Vendor project teams and the City. Improvements to the implementation processes shall be reviewed and adopted as needed, prior to completing phase A and the roll out of future phases.
    6. The City’s team shall be responsible for placing and installing new telephone sets. The City’s team will detach the station network cable and plug it into the phone switch port and connect the PC to the new phone switch port for all City sites. The Vendor shall provide direction and troubleshooting assistance as requested by the City.
    7. Joint Vendor and City implementation teams shall be responsible for testing the connectivity, registration, and programming accuracy for every endpoint.
    8. The City’s IT staff shall be responsible for removing the existing telephone sets.
    9. The City’s IT staff shall be responsible for disconnecting and removing City owned Nortel / Avaya PBX core hardware and related peripheral systems.
    10. The Vendor implementation teams shall be responsible for providing resources for up to one (1) business day of post-cutover user support for UC and basic contact center cutovers.
    11. The Vendor implementation teams shall be responsible for providing resources for up to three (3) business days of post cutover support for complex contact center cutovers and complex IVR implementations.
    12. Support for the large utility contact center/IVR implementation will require additional resources and strategies.
    13. IVR / Contact Center Vendor shall be responsible for testing and verifying contact center applications, including, for example, call flow scripting, variables, messaging, routing, real time and historical reporting, agent design, quality monitoring, etc.
    14. IVR / Contact Center Vendor shall be responsible for testing and verifying IVR applications, including, for example, call flows, messaging, integrations, inbound/outbound dialing, etc.
    15. The Vendor will provide a Help Desk to support post cutover activities for this project.
    16. The Vendor and City implementation teams will also assist the City’s Service Desk with operations support to include troubleshooting basics after cutovers begin in the early stages of the project. The method of support and the process of hand off to Operations will be jointly determined between the Vendor implementation team and the City’s project team during the planning and design phase.
  1. **Storage, Staging, and Testing** 
     1. Vendor shall assume responsibility for delivery, staging, and testing of all manufacturer-supplied core hardware, including all gateways, and software until formally accepted by the City. The City will assist in coordinating efforts for these tasks during the initial project planning.
     2. The City will provide asset tags that the Vendor shall place on all hardware as defined by the City’s internal policy. Documentation of that policy will be provided by the project team.
     3. Vendor shall perform system inspection of core telephony components including a visual inspection for damage, perform power-on test and burn in, and run system diagnostics to ensure components are operating per manufacturer’s specifications. Equipment that does not pass initial inspection and testing shall be Return Material Authorization (“RMA’d”) to the manufacturer at Vendor expense.
     4. For all hardware installed at City locations, the Vendor shall document core telephony component serial numbers, upgrade firmware, and configure all components as defined in the PDW including asset tag numbers. After successful staging, the Vendor shall repackage the equipment and label packages for delivery and deployment to the City’s data centers.
  2. **Training**

The Vendor shall provide training, complying with the following requirements:

* + 1. Training shall include detailed informal “knowledge transfer” on all elements of the proposed solution during the course of the project, allowing IT staff the ability to gain product knowledge.
    2. For premises proposals for both UC and IVR / contact center, the manufacturer shall provide the training required for City staff to become certified in order to assume full responsibility for all components of the proposed solution. Training must cover all aspects of the proposed design, hardware, and software and system administration, including any 3rd party components that do not utilize the manufacturers administrative tools.

IVR / contact center training shall cover elements including but not limited to, speech recognition, analytics, multiple languages, scripting, database integration and design, call flows, agent provisioning, call recording and quality management, reports and Workforce Management.

* + 1. For hosted proposals, the Vendor shall provide system administration training required for IT staff to become proficient with software programming and feature assignments, plus ordering or provisioning services such as licenses, as allowed or negotiated with the Vendor. Training must cover all aspects of the proposed design, hardware, and software and system administration including any components that do not utilize the manufacturer’s administrative tools as allowed or negotiated with the vendor.
    2. System administrative training for City IT shall be conducted through any combination of onsite classes, virtual instructor led classes or training conducted at the manufacturer or Vendor training center.
    3. System administrative training for City IT shall be provided for all 3rd party components that utilize a tool separate from the primary core services.
    4. Trainers leading end user classes shall be certified on the proposed equipment with at least two (2) years of field training experience.
    5. The Vendor shall provide custom interactive end user computer-based training with attendance reporting.
    6. Vendor shall provide the City with recordings of live training sessions delivered for all end users for both UC and contact center. Recordings shall also be provided for all administrative training provided for various applications covering call recording, quality monitoring, reporting and WFM for contact center administrators and supervisors.
    7. The Vendor shall provide end user training material uniquely designed for the City. Material shall include printed guides for basic and softphone users plus printed Quick Reference Guides for all.
    8. Access to other standard resources shall be provided so the City may include these user guides on the intranet.
    9. Additional training material shall include any interactive training developed by the manufacturer.
    10. Employee On-Site Training for UC: The Vendor shall provide hands-on instructor-led classes for employees on live system equipment at City sites or designated remote sites with the Vendor responsible for providing and setting up phones for training.

Classes shall be ninety (90) minutes per class with up to fifteen (15) employees per class, up to four (4) classes per day per trainer. Classes are to be provided no more than three (3) calendar days in advance of a scheduled cutover and if feasible, shall be scheduled for the day before the cutover.

Training shall cover use of basic telephone set features, UM and the UC client telephony features. It is estimated that sixty percent (60%) of the twelve thousand (12,000) licensed users shall attend hands-on training and pricing for the Vendors professional services shall reflect that quantity.

* + 1. Super User Training for UC: The Vendor shall provide approximately forty (40) instructor-led “train-the-trainer” classes. Training shall be provided with the intent that Super Users will actively assist in the project by providing department level support for end users and to the project team.

These classes and the train-the-trainer concept will not be considered a substitute for the on-site user training or the other tools and methods of providing user knowledge transfer.

These classes shall be for approximately eight (8) students at a time and shall be scheduled over the course of the project. The course content and length of these classes shall be determined during the planning phase as part of the training plan.

* + 1. Contact Center Agent Training: The Vendor shall provide hands-on, on-site instructor-led classes for agents. Classes shall be ninety (90) minutes minimum per class with up to 15 employees per class, up to three (3) classes per day, per trainer. Training shall be provided for the following topics, based on the features and functionality requested by each work group:
* Contact center and telephone features
* Use of agent desktop functionality
* Use of after call work codes and transaction codes
* Access to individual metrics
* Multimedia (where appropriate)
* Remote agent functionality (where appropriate)
* Workforce Management tools (where appropriate)
* Call/screen recording access (where appropriate)
  + 1. Contact Center Supervisor Training: The Vendor shall provide hands-on, on-site instructor-led classes for Supervisors. Classes shall haveup to fifteen (15) employees per class per trainer. Training shall be provided for the following topics, based on the features and functionality requested by each work group:
* Use of Supervisor desktop functionality
* Use of supervisor client mobile application
* Assigning and changing agent attributes
* Access, view and modify real-time displays
* Historical reports including creating custom reports
* Changing messaging or routing for operational requirements as needed.
* Call and/or screen recording and quality monitoring procedures, (when appropriate)
* Workforce Management tools (when appropriate)
  + 1. Workforce Management administration: Vendor shall provide on-site instruction for three (3) classes with up to six (6) employees per class. Classes may be a combination of IT staff and contact center administrators or supervisors.
    2. Follow up contact center supervisor training shall be provided 30 days post cutover with an emphasis on historical reporting metrics, real time displays, WFM, and call/screen recording if applicable. This follow up shall include a call flow review for their contact center configurations to ensure the reported metrics are aligned with the design.
  1. **Deliverables** 
     1. Prior to City final Acceptance, Vendor shall provide a final updated electronic copy of Project Design Workbook to include:
* A Solution Architecture Design document that captures the logical and physical system as-built configuration for the final solution, incorporating any updates made throughout the project
* Network diagrams to identify integrations with 3rd party Application Programming Interfaces (API) or other City databases
* IVR / contact center to include electronic documentation for all system configuration settings, call flows, and variables, including messaging and routing for all applications/scripts. Exported documentation from the system that contains this same level of detail shall be acceptable.
* Backup and restore process and procedures
* Details and information from data gathering, to include cutsheets, floor plans, call flow designs, customer design meeting notes, etc.
* Additional documentation shall include

1. Help desk logs
2. Knowledge base created from lessons learned throughout the implementation to assist in trouble shooting
3. Operational instructions

* Report of all serial numbers and asset tag numbers recorded for all core hardware including all gateways installed at City sites
  + 1. The Project Design Workbook should also include the following project artifacts in workbook format:
* Narrative project plan
* Implementation schedule including critical path activities and milestones and tasks
* Definition of roles and responsibilities
* Risk Management / Mitigation Plan
* Risk/Action/Issues/Decisions (RAID) log
* Project Team, including City resources
* Testing and Acceptance process/plan for the core solution
* Testing and Acceptance process/plan for each cutover phase
* Training Plan
* Change Control Plan
* Communication Plan
  1. **Final Acceptance** 
     1. Delivery of system as-builts and deliverables
     2. Closure of all open trouble tickets and issues at all sites.
  2. **Maintenance and Support** 
     1. Hardware and software maintenance shall include all software updates, upgrades, firmware upgrades/updates, and security patches. Any software update or major upgrades that materially changes how the City personnel conduct administration, or provide maintenance and support, shall include any system administration training necessary for the City to continue supporting the systems.
     2. The Vendor or manufacturer’s trouble ticketing and reporting system shall be available to IT to access the details of open or closed tickets (via a web portal or similar tool).
     3. The Vendor shall be capable of responding to a critical issue within fifteen (15) minutes, a major alarm condition within one (1) hour and to minor alarm conditions within twenty-four (24) hours. An acceptable response shall be either dispatch of a technician to the site or remote access by a qualified technician via a City approved connection to the system.
     4. A change management process and approach shall be mutually stated and agreed to with the intent of preventing issues arising from changes made by the City or the Vendor. Both parties are equally responsible for sharing information that affects the operation of the systems.
     5. For purposes of acceptance and maintenance support, major alarms shall be defined as:
* Any core server, appliance or gateway processing failure or power supply failure
* IVR / contact center core not functioning properly
* 1% of incoming / outgoing trunks are inoperable
* 1% of stations are inoperable
* 1% of voice mail system users are inoperable
* Any issue defined as a priority by the City
  + 1. For proposed maintenance and support activities, place an X in the cell(s) depicting the possible options for different support (there may be more than one per category).

Insert additional lines if needed for additional categories for the response, including other 3rd party categories not covered with those listed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Category | Hosted Provider  “As a Service” | Manufacturer  Maintains | Distributor  Maintains | Customer  Maintains |
| Core |  |  |  |  |
| SBC |  |  |  |  |
| 911 solution |  |  |  |  |
| Analog gateways |  |  |  |  |
| IVR |  |  |  |  |
| Contact Center |  |  |  |  |
| Telemanagement system |  |  |  |  |
| Sets |  |  |  |  |

* + 1. The City desires to assume the responsibility for operational support for all proposed systems in an eighteen (18) to twenty-four (24) month time frame. Based on the proposal and solution, IT staff shall become certified on the system prior to transitioning support of the system from the Vendor to IT.
    2. The Proposer shall provide a standard hardware and software support agreement, including free software upgrades. Based on the responses to 8.9.6, provide a description of services and support to cover a three (3) year window from the start of implementation.
    3. After the initial term, the City of Seattle will contract for the manufacturers’ software support and software assurance (including upgrades) for three consecutive one-year terms. The City will not pre-pay for all three years as a single amount – each year shall be invoiced individually for the appropriate amount for that year, however, the City may consider pre-payment for a one (1) year term only.
    4. Support shall be provided eight (8) business hours per day, five (5) business days per week Pacific Time, with Next Business Day (NBD) parts replacement (8x5xNBD for all components including 3rd party Proposer shall include a standard hardware and software support agreement, including free software upgrades for any third-party products or components,
    5. Provide an optional quote, including all 3rd party components, to provide support 24x7x365 in Attachment B Summary tab for UC and in Attachment C Summary tab for IVR / contact center.
    6. Provide an optional quote, including all 3rd party components, to provide out-of-hours support (8x5), per occurrence, in Attachment B Summary tab for UC and in Attachment C Summary tab for IVR / contact center.
    7. The City has the exclusive right to place a hold on any scheduled maintenance activities as the needs of the business dictate.
    8. The City has the exclusive right to roll back to previous versions if an upgrade or configuration change introduces a bug or operational problem

For hosted proposals:

* + 1. Vendor will monitor the carrier local loop in addition to the Vendor provided SIP trunks.
    2. Vendor is responsible for monitoring all on-premises equipment supplied by the hosted vendor
    3. Vendor will conduct an annual equipment inspection addressing wear & tear and maintenance requirements and report the results to IT in a written document every 12 months after Phase A is complete.
    4. Vendor is responsible for system management tasks such as capacity planning.
    5. The system will generate electronic notifications upon receipt of a customer impacting alarm on a 7x24x365 basis to a City email distribution list or some other form of external notice.
    6. Integration with Solar Winds is desired.
  1. **Proposed Milestone Payments**
     1. Washington State law does not allow the City to provide a down-payment on projects; all payments must be tied to the delivery of products or services. For the monthly progress payments covering the thirty (30) month implementation window, sixty percent (60%) of the total contract value will be allocated and paid according to the percentage of stations cutover and accepted during the month.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Milestone / Deliverable | Estimated Duration | % of Contract |
| A | Final Design complete | 60 days | 10 |
| B | Core complete & tested | 60 days | 10 |
| C | Pilot complete and accepted | 60 days | 10 |
| D | Progress payments based upon confirmed stations cutover and accepted by the City. | Monthly over 2.5 years | 60 |
| F | Project Closure / Final Acceptance |  | 10 |

* + 1. Acceptance for Contact Center and IVR design and implementation shall be subject to an acceptance period of thirty (30) consecutive calendar days of normal traffic and routing as established in the design. In the event problems related to the feature, function, configuration, or integration occur, the Vendor will receive sufficient time to remediate the failed item prior to retesting and begin a new thirty (30) consecutive calendar day acceptance period.

After a successful thirty (30) day acceptance period, the Vendor shall submit time and material invoices for IVR development and implementation for each of the six defined applications in Section 3 Background.

# **INDEPENDENT CONTRACTOR AND CITY SPACE REQUIREMENTS**

The Vendor is working as an independent contractor. Although the City provides responsible contract and project management, such as managing deliverables, schedules, tasks and contract compliance, this is distinguished from a traditional employer-employee function. This contract prohibits vendor workers from supervising City employees and prohibits vendor workers from supervision by a City employee. Prohibited supervision tasks include conducting a City of Seattle Employee Performance Evaluation, preparing and/or approving a City of Seattle timesheet, administering employee discipline, and similar supervisory actions.

Contract workers shall not be given City office space unless expressly provided for below, and in no case shall such space be made available for more than thirty-six (36) months without specific authorization from the City Project Manager.

The City expects that at least some portion of the project shall require the Vendor workers to be on-site at City offices. This benefits the City to assure access, communications, efficiency, and coordination. Any vendor worker who is on-site remains, however, a vendor worker and not a City employee. The vendor shall ensure no vendor worker is on-site at a City office for more than thirty-six (36) months, without specific written authorization from the Project Manager. The Vendor shall notify the City Project Manager if any worker is within ninety (90) days of a thirty-six (36) month on-site placement in a City office.

The City shall not charge rent. The Proposer is not asked to itemize this cost. Instead, the Proposer should absorb and incorporate the expectation of such office space within the Proposer’s plan for the work and costs as appropriate. City workspace is exclusively for the project and not for any other vendor purpose. The City Project Manager shall decide if a City computer, software and/or telephone is needed, and the worker can use basic office equipment such as copy machines. If the selected Vendor worker does not occupy City workspace as expected, this does not change the contract costs.

# **BACKGROUND CHECKS**

**Background Checks and Immigrant Status**

Background checks shall be required for workers that shall be performing any site work under this contract. The City has strict policies regarding the use of Background checks, criminal checks and immigrant status for contract workers. The policies are incorporated into the contract and available for viewing on-line at: <http://www.seattle.gov/city-purchasing-and-contracting/social-equity/background-checks>

# **INSTRUCTIONS TO PROPOSERS**

# **Proposal Procedures and Process.**

This section details City procedures for directing the RFP process. The City reserves the right in its sole discretion to reject the proposal of any Proposer that fails to comply with any procedure in this section.

**Communications with the City**

All Proposer communications concerning this acquisition shall be directed to the RFP Coordinator. The RFP Coordinator is:

**Presley Palmer**

**Procurement Strategic Advisor**

**The City, Purchasing & Contracting Services**

**206-233-7158**

[**Presley.Palmer@seattle.gov**](mailto:Presley.Palmer@seattle.gov)

Unless authorized by the RFP Coordinator, no other City official or City employee is empowered to speak for the City with respect to this acquisition. Any Proposer seeking to obtain information, clarification, or interpretations from any other City official or City employee other than the RFP Coordinator is advised that such material is used at the Proposer’s own risk. The City shall not be bound by any such information, clarification, or interpretation.

Following the Proposal submittal deadline, Proposers shall not contact the City RFP Coordinator or any other City employee except to respond to a request by the City RFP Coordinator.

Contact by a Proposer regarding this acquisition with a City employee other than the RFP Coordinator or an individual specifically approved by the RFP Coordinator in writing, may be grounds for rejection of the Proposer’s proposal.

# **Pre-Proposal Conference.**

A Pre-Proposal Conference will be conducted to provide an overview of the project scope as well as procurement process procedures. A “Proposal Development” workshop\* will also be conducted following the Pre-Proposal to provide vendors with a simulated proposal scenario based upon the specific evaluation criteria listed in this RFP.

**November 2, 2018**

|  |
| --- |
| **Pre-Proposal Conference** |
| **3:00PM – 5:00PM Pacific Time Zone**  **Seattle Municipal Tower**  **Room #4050/4060 (publicly accessible floor)**  **700 5th Avenue**  **Seattle, WA 98104** |

Though the City will attempt to answer all questions raised during the pre-proposal conference, Vendors are encouraged to submit questions they would like addressed at the pre-proposal conference to the RFP Coordinator, preferably no later than three (3) days in advance of the pre-proposal conference. This will allow time to research and prepare helpful answers, and better enable the City to have appropriate representatives in attendance.

**Vendors are strongly encouraged to send lead members of their project team that would be assigned to the project if awarded (in lieu of business development or sales personnel).**

Those unable to attend in person may participate by skype or telephone via the link and/or number(s) below.

[Join Skype Meeting](https://meet.seattle.gov/presley.palmer/CS138S3C)       

Trouble Joining? [Try Skype Web App](https://meet.seattle.gov/presley.palmer/CS138S3C?sl=1)

Join by phone

206-386-1200,,9183906# (US)                        English (United States)

844-386-1200,,9183906# (US)                        English (United States)

[Find a local number](https://dialin.seattle.gov?id=9183906)

Conference ID: 9183906

[Forgot your dial-in PIN?](https://dialin.seattle.gov) |[Help](https://o15.officeredir.microsoft.com/r/rlidLync15?clid=1033&p1=5&p2=2009)

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Proposers are not required to attend in order to be eligible to submit a proposal. The purpose of the meeting is to answer questions potential Proposers may have regarding the solicitation document and to discuss and clarify any issues. This is an opportunity for Proposers to raise concerns regarding specifications, terms, conditions, and any requirements of this solicitation. Failure to raise concerns over any issues at this opportunity shall be a consideration in any protest filed regarding such items that were known as of this pre-proposal conference.

# **Questions.**

Questions are to be submitted tothe Buyer no later than the date and time on page 1, in order to allow sufficient time for the City Buyer to consider the question before the bids or proposals are due. The City prefers such questions to be through e-mail directed to the City Buyer e-mail address. Failure to request clarification of any inadequacy, omission, or conflict shall not relieve the Proposer of any responsibilities under this solicitation or any subsequent contract. It is the responsibility of the interested Proposer to assure that they received responses to questions if any are issued.

# **Changes to the RFP/Addenda.**

A change may be made by the City if, in the sole judgment of the City, the change shall not compromise the City’s objectives in this acquisition. A change to this RFP shall be made by formal written addendum issued by the City’s RFP Coordinator Addenda issued by the City shall become part of this RFP and included as part of the Contract. It is the responsibility of the interested Proposer to assure that they have received Addenda if any are issued.

# **Bid Blog.**

The City Purchasing website offers a place to register for a Blog related to the solicitation. The Blog shall provide you automatic announcements and updates when new materials, addenda, or information is posted regarding the solicitation you are interested in. <http://www.seattle.gov/city-purchasing-and-contracting/city-purchasing>

# **Receiving Addenda and/or Question and Answers.**

The City shall make efforts to provide courtesy notices, reminders, addendums and similar announcements directly to interested vendors. The City makes this available on the City website and offers an associated bid blog: [http://www.seattle.gov/purchasing](http://www.seattle.gov/purchasing/default.htm)

Notwithstanding efforts by the City to provide such notice to known vendors, it remains the obligation and responsibility of the Proposer to learn of any addendums, responses, or notices issued by the City. Such efforts by the City to provide notice or to make it available on the website do not relieve the Proposer from the sole obligation for learning of such material.

Note that some third-party services decide to independently post City of Seattle bids on their websites as well. The City does not, however, guarantee that such services have accurately provided bidders with all the information published by the City, particularly Addendums or changes to bid date/time.

All Proposals sent to the City shall be considered compliant to all Addendums, with or without specific confirmation from the Proposer that the Addendum was received and incorporated. However, the Buyer can reject the Bid if it does not reasonably appear to have incorporated the Addendum. The Buyer could decide that the Proposer did incorporate the Addendum information, or could determine that the Proposer failed to incorporate the Addendum changes and that the changes were material so that the Buyer shall reject the Offer, or the Buyer may determine that the Proposer failed to incorporate the Addendum changes but that the changes were not material and therefore the Bid may continue to be accepted by the Buyer.

# **Proposal Submittal Instructions.**

* Proposals shall be received no later than the date and time specified on the Solicitation Schedule or as otherwise amended.
* Fax, e-mail and CD copies **shall not** be an alternative to the hard copy. If a CD, fax or e-mail version is delivered to the City, the hard copy shall be the only official version accepted by the City.

# **Proposal Delivery Instructions.**

The Submittal may be hand-delivered or shall otherwise be received by the Buyer at the address provided below, **on November 28, 2018, no later than 2:00PM PST***.* Please note that delivery errors may result without careful attention to the proper address.

**TABLE 2 –PROPOSAL DELIVERY ADDRESS**

|  |  |
| --- | --- |
| **Physical Address (courier)** | **Mailing Address (For U.S. Postal Service mail)** |
| City Purchasing and Contracting Services Div.  Seattle Municipal Tower  700 Fifth Ave Ste 4112  Seattle, WA 98104-5042  Attention: Presley Palmer  **RFP-ITD-4620** | City Purchasing and Contracting Services Div.  Seattle Municipal Tower  P.O. Box 94687  Seattle, WA 98124-4687  Attention: Presley Palmer  **RFP-ITD--4620** |

1. Hard-copy responses should be in a sealed box or envelope clearly marked and addressed with the PCSD Buyer Name, RFP title and number. Submittals and their packaging (boxes or envelopes) should be clearly marked with the name and address of the Proposer.
2. If packages are not clearly marked, the Proposer has all risks of the package being misplaced and not properly delivered*.*

Late Submittals*:*

*The submitter has full responsibility to ensure the response arrives at City Purchasing within the deadline. A submittal after the time fixed for receipt shall not be accepted unless the lateness is waived by the City as immaterial based upon a specific fact-based review. Responses arriving after the deadline may be returned unopened to the Proposer, or the City may accept the package and make a determination as to lateness.*

# **No Reading of Prices.**

The City of Seattle does not conduct a bid opening for RFP responses. The City requests that companies refrain from requesting proposal information concerning other respondents until an intention to award is announced, as a measure to best protect the solicitation process, particularly in the event of a cancellation or re-solicitation. With this preference stated, the City shall continue to properly fulfill all public disclosure requests for such information, as required by State Law.

# **Offer and Proposal Form.**

Proposer shall provide the response in the format required herein and on any forms provided by the City herein. Provide unit prices if appropriate and requested by the City and attach pages if needed. In the case of difference between the unit pricing and the extended price, the City shall use the unit pricing. The City may correct the extended price accordingly. Proposer shall quote prices with freight prepaid and allowed. Proposer shall quote prices FOB Destination. All prices shall be in US dollars.

# **No Best and Final Offer.**

The City reserves the right to make an award without further discussion of the responses submitted; i.e. there shall be no best and final offer procedure associated with selecting the Apparently Successful Proposer. Therefore, Proposer’s Response should be submitted on the most favorable terms that Proposer can offer.

# **Contract Terms and Conditions.**

The contract that has been adopted for the City Technology projects is attached and embedded on the last page of this RFP Solicitation. Proposers are responsible to review all specifications, requirements, Terms and Conditions, insurance requirements, and other requirements herein. To be responsive, Proposers shall be prepared to enter into a Contract substantially the same as the attached Contract. The Proposer’s failure to execute a Contract substantially the same as the attached Contract may result in disqualification for future solicitations for this same or similar products/services.

Submittal of a proposal is agreement to this condition. Proposers are to price and submit proposals to reflect all the specifications, requirements, in this RFP and terms and conditions substantially the same as those included in this RFP.

Any specific areas of dispute with the attached Contract shall be identified in Proposer’s Response and may, at the sole discretion of the City, be grounds for disqualification from further consideration in award of a contract.

Under no circumstances shall a Proposer submit its own standard contract terms and conditions as a response to this solicitation. Instead, Proposer shall review and identify the language in the City’s attached Contract – “Attachment 2”, that Proposer finds problematic, state the issue, and propose the language or contract modifications Proposer is requesting. Proposer should keep in mind, when requesting such modifications, that the City is not obligated to accept the requested areas of dispute.

The City may, for informational purposes. request Proposer to submit its licensing and maintenance agreement with Proposer’s response. However, this should not be construed as the City’s willingness to sign a licensing or maintenance agreement supplied by the Proposer. If the Proposer requires the City to consider otherwise, the Proposer is also to supply this as a requested exception to the Contract and it shall be considered in the same manner as other exceptions.

The City may consider and may choose to accept some, none, or all contract modifications that the Proposer has submitted with the Proposer’s proposal.

Nothing herein prohibits the City, at its sole option, from introducing or modifying contract terms and conditions and negotiating with the highest ranked apparent successful Proposer to align the proposal to City needs, within the objectives of the RFP. The City has significant and critical time frames which frame this initiative, therefore, should such negotiations with the highest ranked, apparent successful Proposer fail to reach agreement in a timely manner as deemed by the City, the City, at its sole discretion, retains the option to terminate negotiations and continue to the next-highest ranked proposal.

# **Prohibition on Advance Payments.**

No request for early payment, down payment or partial payment shall be honored except for products or services already received. Maintenance subscriptions may be paid in advance provided that should the City terminate early, the amount paid shall be reimbursed to the City on a prorated basis; all other expenses are payable net 30 days after receipt and acceptance of satisfactory compliance.

# **Partial and Multiple Awards.**

Unless stated to the contrary in the Statement of Work, the City reserves the right to name a partial and/or multiple award, in the best interest of the City. Proposers are to prepare proposals given the City’s right to partial or multiple awards. Further, the City may eliminate an individual line item when calculating award, in order to best meet the needs of the City, if a particular line item is not routinely available or is a cost that exceeds the City funds.

# **Prime Contractor.**

The City intends to award to the highest ranked Proposer that shall assume financial and legal responsibility for the contract. Proposals that include multiple vendors shall clearly identify one vendor as the “prime contractor” and all others as subcontractors.

If a Proposer’s response includes equipment, hardware, software, or services to be supplied by entities other than the Proposer, it is mandatory that all such subcontractors be clearly identified to include the name of the subcontractor, the services and equipment it shall be supplying, and the history and relationship the Proposer has with the subcontractor. The Proposer shall serve as prime contractor for the procurement of all products and services proposed to meet this RFP. The Proposer, acting as the prime contractor, shall be the sole point of contact with regard to contract stipulations including payment of any and all charges resulting from the purchase of the proposed equipment, hardware, software, and/or services. The Proposer, acting as the prime contractor, shall take full responsibility for the demonstration, delivery, installation, and acceptance testing of the items proposed to be supplied by its subcontractor. The Proposer shall also serve as the responsible party in identifying and correcting any deficiencies from a subcontractor’s services or equipment.

# **Seattle Business Tax Revenue Consideration.**

SMC 20.60.106 (H) authorizes that in determining the lowest and best bid, the City shall consider the tax revenues derived by the City from its business and occupation, utility, sales and use taxes from the proposed purchase. The City of Seattle’s Business and Occupation Tax rate varies according to business classification. Typically, the rate for services such as consulting and professional services is .00415% and for retail or wholesale sales and associated services, the rate is .00215%. Only vendors that have a City of Seattle Business License and have an annual gross taxable Seattle income of $100,000 or greater are required to pay Business and Occupation Tax. The City shall apply SMC 20.60.106(H) and calculate as necessary to determine the lowest bid price proposal.

# **Taxes.**

The City is exempt from Federal Excise Tax (Certificate of Registry #9173 0099K exempts the City). Washington state and local sales tax shall be an added line item although not considered in cost evaluations.

# **Inter-local Purchasing Agreements.**

This is for information and consent only, and shall not be used for evaluation. The City has entered into Interlocal Purchasing Agreements with other governmental agencies, pursuant to RCW 39.34. The seller agrees to sell additional items at the offer prices, terms and conditions, to other eligible governmental agencies that have such agreements with the City. The City of Seattle accepts no responsibility for the payment of the purchase price by other governmental agencies. Should the Proposer require additional pricing for such purchases, the Proposer is to name such additional pricing upon Offer to the City.

# **Equal Benefits.**

Seattle Municipal Code Chapter 20.45 (SMC 20.45) requires consideration of whether bidders provide health and benefits that are the same or equivalent to the domestic partners of employees as to spouses of employees, and of their dependents and family members. The bid package includes a “Vendor Questionnaire” which is the mandatory form on which you make a designation about the status of such benefits. If your company does not comply with Equal Benefits and does not intend to do so, you shall still supply the information on the Vendor Questionnaire. Instructions are provided at the back of the Questionnaire.

# **Women and Minority Opportunities.**

The City intends to provide the maximum practicable opportunity for successful participation of minority and women owned firms, given that such businesses are underrepresented. The City requires all Proposers agree to SMC Chapter 20.42, and shall require proposals with meaningful subcontracting opportunities to also supply a plan for including minority and women owned firms.

# **Paid Sick Time and Safe Time Ordinance.**

Be aware that the City has a Paid Sick Time and Safe Time ordinance that requires companies to provide employees who work more than 240 hours within a year inside Seattle, with accrued paid sick and paid safe time for use when an employee or a family member needs time off from work due to illness or a critical safety issue. The ordinance applies to employers, regardless of where they are located, with more than four full-time equivalent employees. This is in addition and additive to benefits a worker receives under prevailing wages per WAC 296-127-014(4). City contract specialists may audit payroll records or interview workers as needed to ensure compliance to the ordinance. Please see [http://www.sattle.gov/laborstandards](http://www.seattle.gov/laborstandards), or may call the Office of Labor Standards at 206.684.4500 with questions.

# **Insurance Requirements.**

Insurance requirements presented in the Contract shall prevail. If formal proof of insurance is required to be submitted to the City before execution of the Contract, the City shall remind the apparent successful Proposer in the Intent to Award letter. The apparent successful Proposer shall promptly provide such proof of insurance to the City in reply to the Intent to Award Letter. Contracts shall not be executed until all required proof of insurance has been received and approved by the City.

Proposers are encouraged to immediately contact their Broker to begin preparation of the required insurance documents, in the event that the Proposer is selected as a finalist. Proposers may elect to provide the requested insurance documents within their Proposal.

# **Effective Dates of Offer.**

Proposer submittal shall remain valid until City completes award. Should any Proposer object to this condition, the Proposer shall provide objection through a question and/or complaint to the RFP Coordinator prior to the proposal due date.

# **Proprietary Materials.**

The State of Washington’s Public Records Act (Release/Disclosure of Public Records) Under Washington State Law (reference RCW Chapter 42.56, the Public Records Act) all materials received or created by the City of Seattle are considered public records. These records include but are not limited to bid or proposal submittals, agreement documents, contract work product, or other bid material.

The State of Washington’s Public Records Act requires that public records shall be promptly disclosed by the City upon request unless that RCW or another Washington State statute specifically exempts records from disclosure. Exemptions are narrow and explicit and are listed in Washington State Law (Reference RCW 42.56 and RCW 19.108).

Proposers shall be familiar with the Washington State Public Records Act and the limits of record disclosure exemptions. For more information, visit the Washington State Legislature’s website at <http://www1.leg.wa.gov/LawsAndAgencyRules>).

If you have any questions about disclosure of the records you submit with your bid, please contact City Purchasing at (206) 684-0444.

**Marking Your Records Exempt from Disclosure (Protected, Confidential, or Proprietary)**

As mentioned above, all City of Seattle offices (“the City”) are required to promptly make public records available upon request. However, under Washington State Law some records or portions of records are considered legally exempt from disclosure and can be withheld. A list and description of records identified as exempt can be found in RCW 42.56 and RCW 19.108.

If you believe any of the records you are submitting to the City as part of your bid/proposal or contract work products, are exempt from disclosure you can request that they not be released before you receive notification. To do so you shall complete the City Non-Disclosure Request Form (“the Form”) provided by City Purchasing (see attached Form as part of Vendor Questionnaire), very clearly and specifically identify each record and the exemption(s) that may apply, and submit a copy of your records with the specified exemptions redacted. (If you are awarded a City contract, the same exemption designation shall carry forward to the contract records.)

The City shall not withhold materials from disclosure simply because you mark them with a document header or footer, page stamp, or a generic statement that a document is non-disclosable, exempt, confidential, proprietary, or protected. Do not identify an entire page as exempt unless each sentence is within the exemption scope; instead, identify paragraphs or sentences that meet the specific exemption criteria you cite on the Form. Only the specific records or portions of records properly listed on the Form shall be protected and withheld for notice. All other records shall be considered fully disclosable upon request.

If the City receives a public disclosure request for any records you have properly and specifically listed on the Form, the City shall notify you in writing of the request and shall postpone disclosure. While it is not a legal obligation, the City, as a courtesy, shall allow you up to ten business days to file a court injunction to prevent the City from releasing the records (reference RCW 42.56.540). If you fail to obtain a Court order within the ten days, the City may release the documents.

The City shall not assert an exemption from disclosure on your behalf. If you believe a record(s) is exempt from disclosure you are obligated to clearly identify it as such on the Form and submit it with your solicitation. Should a public record request be submitted to City Purchasing for that record(s), you can then seek an injunction under RCW 42.56 to prevent release. By submitting a bid document, the bidder acknowledges this obligation; the Proposer also acknowledges that the City shall have no obligation or liability to the Proposer if the records are disclosed.

**Requesting Disclosure of Public Records**

The City asks bidders and their companies to refrain from requesting public disclosure of bids until an intention to award is announced. This measure is intended to protect the integrity of the solicitation process particularly during the evaluation and selection process or in the event of a cancellation or re-solicitation. With this preference stated, the City shall continue to be responsive to all requests for disclosure of public records as required by State Law. If you do wish to make a request for records, please file a request using the City of Seattle’s Public Records Request Center at <http://www.seattle.gov/public-records/public-records-request-center>.

# **Cost of Preparing Proposals.**

The City shall not be liable for any costs incurred by the Proposer in the preparation and presentation of proposals submitted in response to this RFP including, but not limited to, costs incurred in connection with the Proposer’s participation in demonstrations and the pre-proposal conference.

# **Readability.**

Proposers are advised that the City’s ability to evaluate proposals is dependent in part on the Proposer’s ability and willingness to submit proposals which are well ordered, detailed, comprehensive, and readable. Clarity of language and adequate, accessible documentation is essential.

# **Proposer Responsibility.**

It is the Proposer responsibility to examine all specifications and conditions thoroughly, and comply fully with specifications and all attached terms and conditions. Proposers shall comply with all Federal, State, and City laws, ordinances and rules, and meet any and all registration requirements where required for Proposers as set forth in the Washington Revised Statutes.

# **Changes in Proposals.**

Prior to the Proposal submittal closing date and time established for this RFP, a Proposer may make changes to its Proposal provided the change is initialed and dated by the Proposer. No change to a Proposal shall be made after the Proposal closing date and time.

# **Proposer Responsibility to Provide Full Response.**

It is the Proposer’s responsibility to provide a full and complete written response, which does not require interpretation or clarification by the RFP Coordinator. The Proposer is to provide all requested materials, forms and information. The Proposer is responsible to ensure the materials submitted shall properly and accurately reflects the Proposer specifications and offering. During scoring and evaluation (prior to interviews if any), the City shall rely upon the submitted materials and shall not accept materials from the Proposer after the RFP deadline; however, this does not limit the right of the City to consider additional information (such as references that are not provided by the Proposer but are known to the City, or past experience by the City in assessing responsibility), or to seek clarifications as needed by the City.

# **Errors in Proposals.**

Proposers are responsible for errors and omissions in their proposals. No such error or omission shall diminish the Proposer’s obligations to the City.

# **Withdrawal of Proposal.**

A submittal may be withdrawn by written request of the submitter, prior to the quotation closing date and time. After the closing date and time, the submittal may be withdrawn only with permission by the City.

# **Rejection of Proposals, Right to Cancel.**

The City reserves the right to reject any or all proposals at any time with no penalty. The City also has the right to waive immaterial defects and minor irregularities in any submitted proposal.

# **Incorporation of RFP and Proposal in Contract.**

This RFP and the Proposer’s response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding and incorporated by reference in the City’s contract with the Proposer.

# **Non-Endorsement and Publicity.**

In selecting a Proposer to supply to the City, the City is not endorsing the Proposers products and services or suggesting that they are the best or only solution to the City’s needs. Proposer agrees to make no references to the City or the Department making the purchase, in any literature, promotional materials, brochures, news releases, sales presentation or the like, regardless of method of distribution, without prior review and express written consent of the City RFP Coordinator.

The City may use Proposer’s name and logo in promotion of the Contract and other publicity matters relating to the Contract, without royalty. Any such use of Proposer’s logo shall inure to the benefit of Proposer.

# **Proposal Disposition.**

All material submitted in response to this RFP shall become the property of the City upon delivery to the RFP Coordinator.

# **Ethics Code.**

Please familiarize yourself with the new code:

<http://www.seattle.gov/ethics/etpub/et_home.htm>. Attached is a pamphlet for Vendors, Customers and Clients. Specific question should be addressed to the staff of the Seattle Ethics and Elections Commission at 206-684-8500.



**No Gifts and Gratuities**. Proposers shall not directly or indirectly offer anything of value (such as retainers, loans, entertainment, favors, gifts, tickets, trips, favors, bonuses, donations, special discounts, work, or meals) to any City employee, volunteer or official, if it is intended or may appear to a reasonable person to be intended to obtain or give special consideration to the Proposer. An example is giving tickets to a City employee that was on the evaluation team of a bid you plan to submit. The definition of what a “benefit” would be is very broad and could include not only awarding a contract but also the administration of the contract or the evaluation of contract performance. The rule works both ways, as it also prohibits City employees from soliciting items of value from vendors. Promotional items worth less than $25 may be distributed by the vendor to City employees if the Proposer uses the items as routine and standard promotions for the business.

**Involvement of Current and Former City Employees**

If a Proposer has any current or former City employees, official or volunteer, working or assisting on solicitation of City business or on completion of an awarded contract, you **shall** provide written notice to City Purchasing of the current or former City official, employee or volunteer’s name. The Proposer Questionnaire within your bid documents prompts you to answer that question. You shall continue to update that information to City Purchasing during the full course of the contract. The Proposer is to be aware and familiar with the Ethics Code, and educate vendor workers accordingly.

**Contract Workers with more than 1,000 Hours**

The Ethics Code has been amended to apply to vendor company workers that perform more than 1,000 cumulative hours on any City contract during any 12-month period. Any such vendor company employee covered by the Ethics Code shall abide by the City Ethics Code. The Proposer is to be aware and familiar with the Ethics Code, and educate vendor workers accordingly.

**No Conflict of Interest.**

Proposer (including officer, director, trustee, partner or employee) shall not have a business interest or a close family or domestic relationship with any City official, officer or employee who was, is, or shall be involved in selection, negotiation, drafting, signing, administration or evaluating Proposer performance. The City shall make sole determination as to compliance.

**Campaign Contributions (Initiative Measure No. 122)**

Elected officials and candidates are prohibited from accepting or soliciting campaign contributions from anyone having at least $250,000 in contracts with the City in the last two years or who has paid at least $5,000 in the last 12 months to lobby the City. Please see Initiative 122 or call the Ethics Director with questions. For questions about this measure, contact: Polly Grow, Seattle Ethics and Elections, 206-615-1248 or [polly.grow@seattle.gov](mailto:polly.grow@seattle.gov)

# **Registration into City On-line Business Directory.**

If you have not previously completed a one-time registration into the City On-line Business Directory, we request you register at: <http://www.seattle.gov/html/business/contracting.htm>. The City On-line Business Directory is used by City staff to locate your contract(s) and identify companies for bid lists on future purchases.  Bids are not rejected for failure to register, however, if you are awarded a contract and have not registered, you shall be required to register, or you shall be added into the system. Women and minority owned firms are asked to self-identify.  If you need assistance, please call 206-684-0444.

# **Prohibited Contacts.**

Proposers shall not interfere in any way to discourage other potential and/or prospective Proposers from proposing or considering a proposal process.  Prohibited contacts includes but is not limited to any contact, whether direct or indirect (i.e. in writing, by phone, email or other, and by the Proposer or another person acting on behalf of the Proposer) to a likely firm or individual that may discourage or limit competition.  If such activity is evidenced to the satisfaction and in sole discretion of the City Purchasing Manager, the Proposer that initiates such contacts may be rejected from the process.

# **Proposal Format and Organization** **and Submittal**

Proposals may be submitted for a UC solution, or an IVR / Contact Center (CC) solution, or a combined proposal for a UC solution and an IVR / Contact Center solution. Proposals may be submitted by a team that incorporates more than one vendor and/or that leverages the resources of multiple firms or manufacturers, provided there is a single “prime” contractor responsible for the contract.

All UC proposals should include a response to sections 6.1 (UC Technical Requirements), 6.3 (TeleManagement Software) and 6.4 (Meeting Room Technology.)

All IVR / CC proposals should include a response to section 6.2 (CC/IVR Technical Requirements) and 6.5 (Robotics Process Automation.)

All documents are to be filled out by the proposer. Proposers are not prohibited from enlisting aid from the manufacturer if they choose.

Submit all responses by filling in the requested information in this RFP Response Form Attachment A.

1. All responses to questions shall be entered directly on the RFP Response Form – do not use URLs or hyperlinks to web sites or references to attachments.
2. To make the proposal review process easier, Vendors **shall use any font other than Arial 11** within the response form.
3. Proposals shall be submitted according to the schedule listed on page 1 of the RFP.
4. Proposers should recognize that the focus of the City’s evaluation will be based on a Vendors solution that best meets the City of Seattle’s - requirements as stated in this RFP. If the solution design impacts the ability or method of meeting a requirement, the proposal must identify why it is an issue and how the Vendor’s solution addresses the requirement.

# **General Instructions**

1. Number all pages sequentially. The format should follow closely that requested in this RFP
2. The City requires the following when responding to the RFP:

* **One (1**) original complete with pricing
* **Five (5)** copies without pricing
* **One (1)** copy of pricing in separate envelope (clearly marked)
* **One (1)** Electronic (flash drive, etc., No CD)
* **One (1)** additional flash drive containing a redacted copy if you believe your proposal contains records that are exempt under the State of Washington’s Public Records Act.

1. All pricing is to be in United States dollars.
2. If the City has designated page limits for certain sections of the response. Any pages that exceed the page limit will be excised from the document for purposes of evaluation.
3. Please double-side your submittal
4. The City will consider supplemental brochures and materials. Proposers are invited to attach any brochures or materials that will assist the City in evaluation. The City would prefer electronic version if these supplemental brochures and materials.

# **Preferred Paper and Binding**

The City requests a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The City also has an environmentally-preferable purchasing commitment and seeks a package format to support the green expectations and initiatives of the City.

1. City seeks and prefers submittals on 100% PCF paper, consistent with City policy and City environmental practices. Such paper is available from Keeney’s Office Supply at 425-285-0541 or Complete Office Solutions at 206-650-9195.
2. Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your submission, they are to be fully 100% recycled stock. Such binders are also available from Keeney’s Office Supply or Complete Office Solutions.

# **12.3 Proposal Submittal**

Submit your proposal in the following format and attachments as follows:

**12.3.1 Cover letter.** (**optional***)*

**12.3.2 Legal Name Verification**: (**Optional**)

Submit a certificate, copy of web-page, or other documentation from the Secretary of State in which you incorporated that shows your legal name as a company. Many companies use a “Doing Business As” name, or a nickname in their daily business. However, the City requires the legal name of your company, as it is legally registered. When preparing all forms below, be sure to use the proper company legal name. Your company’s legal name can be verified through the State Corporation Commission in the state in which you were established, which is often located within the Secretary of State’s Office for each state.

<http://www.coordinatedlegal.com/SecretaryOfState.html>

**12.3.3 Vendor Questionnaire:** Submittal of the Vendor Questionnaire is **mandatory**. The Vendor Questionnaire includes the Equal Benefits Compliance Declaration and the City Non-Disclosure Request that shall allow you to identify any items that you intend to mark as confidential



**12.3.4 Acceptance & Exceptions to City Contract**: (**Optional**)

Provide a one-page statement that confirms acceptance of the City Contract (including Terms & Conditions), and represents complete review as needed by the Proposer. If the Proposer has a legal office that shall review contract prior to signature, the Proposer shall clearly confirm that such review is complete.

If Proposer desires exceptions to the City Contract, attach the City Contract that shows the alternative contract language (print out a version with your suggested new language clearly displayed in a track changes mode). You shall provide the alternative language, and not simply list an exception you wish to discuss. You may attach a narrative of why each change is to the benefit of the City and any financial impact. Also attach any licensing or maintenance agreement supplements.

The City shall review the proposed language and shall thereupon either accept or reject the language. The City shall then, if the Proposer is the winning bidder, issue a contract for signature reflecting the City’s decisions. Any exceptions or licensing and maintenance agreements that are unacceptable to the City may be grounds for rejection of the proposal.

**12.3.5 RFP Response From**: This response is **mandatory** for the solution(s) you are providing. This form (Attachment A) consists of the following:

* **Section A** – Proposer Background Information (Pass/Fail)
  + Company Background
  + Key Personnel
* **Section B** - Minimum Qualifications/Reference/ Manufacturer Authorized Distributor (Pass/Fail)
  + UC Minimum Qualifications
  + IVR Minimum Qualifications
* **Section C** – Technical Requirements (Weighted/Scored)
  + UC Functional/System/Technical
  + IVR Functional/System/Technical
  + Telemangement Software
  + Meeting Room Technology (Optional)
  + Robotic Process Automation (Optional)



**12.3.7 Statement of Work:** This response is **mandatory**. The quality of the response defining the implementation support and services will be part of the evaluation criteria.

Using all of Section 8 from the RFP, provide a detailed Statement of Work document and Implementation Plan. The RFP outline is not intended to be a substitute for the Proposer’s Implementation Plan or a restrictive format. It is important that the Proposer propose a plan that is both comprehensive and suitable for the proposed project.

Provide a narrative or description of how your proposal envisions accomplishing the planning, design, and implementation for two (2) separate and distinct platforms that will be managed as a single project by the City. Provide a diagram that illustrates the Proposer’s project organization. Include the names of key project staff and any subcontractors. Identify all internal and external communication paths, including within the Proposer’s project staff and between the Proposer and City project staff. Please be specific in describing the number of positions required, roles, responsibilities, and prerequisite skills of all staff members.

Based on experience with projects of this size and scope, please describe the level of staffing support required of the City during the following project phases and post-implementation:

• Development of the Detailed Design Document

• Project implementation

• Warranty

• Post-warranty

Attach a proposed schedule and list of deliverables. Include dates, time and acceptance periods.

The Proposer shall address specifically how it intends to provide knowledge transfer in addition to the certifications the IT staff will obtain, in order to enable the gradual transition of support responsibilities, and the City’s participation in implementation activities. Include a matrix of the classes required for certification and provide a brief overview of the material covered in each course.   The City will have a combination of Telecommunications Engineers and Telecommunications Analysts who will become certified on all the products.   Include training costs in the professional services tab with enough detail to identify if the costs are per student or for a maximum number of users.

The Proposer’s Statement of Work shall become the basis for the contract scope of work.

For section 8.9 Maintenance and Support, submit a separate document with details regarding the proposed basic support and maintenance plan.

For section 8.10, (proposed) Milestone Payments, the Proposer may propose an alternate payment schedule that includes a detailed approach that defines when a milestone is complete, what the process will be to confirm the milestone is complete and include what the Acceptance criteria is. Alternate plans may be considered by the City. This payment schedule will become part of contract negotiations with the successful Proposer.

**12.3.9 Pricing Response:** These responses are **mandatory**.

Vendor should submit separate pricing response for all proposed solutions (UC, IVR/Contact Center, and combined UC/IVR/Contact Center).

\*Note: If proposing a combined solution (attachment C), Vendor is required to complete separate and combined responses as the City reserves the right to award any combination of the proposed solutions.

Vendors must complete the pricing worksheet attachments as noted below.



**Attachment B - UC Pricing Sheet - Unified Communications**

1. Complete the pre-formatted MS-Excel worksheets in Attachment B “Unified Communications Pricing Worksheets” and submit as an unlocked spreadsheet.

2. All formulas and calculations must be shown, including extended cost (multiply quantity times line item price), and summation totals for various categories. DO NOT CUT AND PASTE VALUES IN PLACE OF FORMULAS ON THE PRICING TABS.

3. The total firm fixed price must include all charges (installation, hardware, software, training, Professional Services and labor) to deliver the proposed solution and services. If the vendor has any travel costs associated with the project, they must be included in the quote as a fixed amount and will not be reimbursed separately.



**Attachment C - IVR/Contact Center Pricing - IVR and Contact Center**

1. Complete the pre-formatted MS-Excel worksheets in Attachment C “IVR and contact center Pricing Worksheets” and submit as an unlocked spreadsheet.

2. All formulas and calculations must be shown, including extended cost (multiply quantity times line item price), and summation totals for various categories. DO NOT CUT AND PASTE VALUES IN PLACE OF FORMULAS ON THE PRICING TABS.

The total firm fixed price must include all charges (installation, hardware, software, training, Professional Services and labor) to deliver the proposed solution and services. If the vendor has any travel costs associated with the project, they must be included in the quote as a fixed amount and will not be reimbursed separately.



**Attachment D – UC & IVR/Contact Center Combined Pricing - IVR and Contact Center**

1. Complete the pre-formatted MS-Excel worksheets in Attachment D “UC\_CC COMBINED Pricing Worksheets” and submit as an unlocked spreadsheet.

2. All formulas and calculations must be shown, including extended cost (multiply quantity times line item price), and summation totals for various categories. DO NOT CUT AND PASTE VALUES IN PLACE OF FORMULAS ON THE PRICING TABS.

The total firm fixed price must include all charges (installation, hardware, software, training, Professional Services and labor) to deliver the proposed solution and services. If the vendor has any travel costs associated with the project, they must be included in the quote as a fixed amount and will not be reimbursed separately.

**12.3.10** **Proposed Basic Maintenance Support Agreement (Optional).**

Proposer shall provide their basic maintenance support agreement that support the requirements outlined in Section 8.10, Maintenance and Support.

**12.3.11** **Inclusion Plan: This form is mandatory**

****

**TABLE 3 – SUBMITTAL CHECKLIST**

Each complete proposal submittal to the City shall contain the following mandatory documents:

|  |  |
| --- | --- |
| Cover Letter | Optional |
| Legal Name Verification | Optional |
| Vendor Questionnaire | Mandatory |
| Management Response | Mandatory |
| City Contract Acceptance & Exceptions | Mandatory |
| Response Form which includes: | Mandatory |
| * Minimum Qualifications | Mandatory |
| * UC Functional/System/Technical Requirements | Mandatory (If applicable) |
| * IVR/CC Functional/System/Technical Requirements | Mandatory (If applicable) |
| * Telemanagement System (6.3) | Mandatory, if applicable |
| * Meeting Room (6.4) | Optional |
| * Robotics Process Automation (6.5) | Optional |
| Statement of Work | Mandatory |
| UC Pricing Response | Mandatory (If applicable) |
| IVR / CC Pricing Response | Mandatory (If applicable) |
| Combined UC/IVR/CC Pricing Response | Mandatory (If applicable) |
| Proposed Basic Maintenance Support Agreement | Optional |
| Inclusion Plan | Mandatory |

# **EVALUATION PROCESS**

The evaluation shall be conducted in a multi-tiered approach. Proposals shall pass through each step to proceed forward to the next step. Those found to be outside the competitive range, in the opinion of the evaluation team, may not continue forward to the next evaluation round. Those that are not at least within a competitive range for any single element (Pricing, Technical Specifications, or Management Proposal) as determined by the City or that have significant gaps may be found uncompetitive. The City reserves the right to remove the uncompetitive Vendor from the evaluation process.

**Round 1 – Responsiveness, Responsibility, and Minimum Qualifications**

City Purchasing shall first review submittals for initial decisions on responsiveness and responsibility.  The Vendor Questionnaire, Equal Benefits will be screened.  Then, City Purchasing and the Evaluation Team shall review the minimum qualification for responsiveness.  Those found responsive based on this initial review shall proceed to Round 2. (**Pass/Fail)**

**Round 2 – Proposal Evaluation (1000 Points)**

The City will evaluate proposals that successfully pass through the previous round. Responses will be evaluated and scored using the scoring listed below. The City will select one or more proposals that are within a competitive range to proceed forward with further evaluation, unless all proposals are rejected.  The City will determine which proposals are within a competitive range.  Proposals will be placed into the competitive range in the order in which they scored, unless a proposal is so deficient in a particular component, with high associated risks and a low probability of making it acceptable, as to preclude meaningful negotiations.  The City reserves the right to view each solution (i.e., hosted, on-premises, hybrid) independently in determining which Vendors proceed to the next round. Those Vendors that the City deems to be within a competitive range will proceed to Round 3, Interviews / Demonstrations. The scores from Round 2 will not be carried forward to Round 3. **(Weighted/Scored)**

**13.1 Table - Round 2 Scoring**

|  |  |
| --- | --- |
| **Proposal Scoring** | **POINTS** |
| Response: Proposer’s Qualifications and Experience | 250 |
| Response: Functional/System/Technical Requirements | 300 |
| Response: Scope of Work and Project Plan | 200 |
| Response: Pricing and Cost Effectiveness | 150 |
| Inclusion Plan | 100 |
| **Total** | **1000** |

**Round 3 – Demonstrations/Interviews (450 Points)**

The City, at its sole option, may require that Proposers who remain active and competitive attend an interview and/or demonstration at the City of Seattle. Should only a single Proposer remain active and eligible to provide an interview and/or demonstration, the City shall retain the option to proceed or may waive this Round. Proposers shall be provided a list of questions and/or Use Cases prior to the Interview process. A script and instructions will be provided prior to the demonstration and then be scheduled by the City. If the Interview and/or Demonstration score is not within the competitive range, the City may eliminate the Proposer and discontinue scoring the Proposer for purposes of award.

The Proposer will submit to the Buyer a list of names and company affiliations who will be attending the interview and demonstration. Proposers invited are to bring the assigned Project Manager that has been named by the Proposer in the Proposal and should bring other key personnel named in the Proposal. The Proposer shall not, in any event, bring an individual who does not work for the Proposer or for the Proposer as a subcontractor on this project, without specific advance authorization by the City Buyer.

The Proposer should plan for up to two days on site with one day for demonstrations and another day for interviews with key members of the team. This is an estimated timeline which the City reserves the right to modify if it is determined that a longer or shorter time is necessary. Vendors will be provided the final timeline when notified to attend.

Proposals will be evaluated and scored and may determine the award. The City will decide whether to move forward with Hosted Solutions, Non-Hosted Solutions, or both, as determined to be in the best interest of the City. The City will either issue an intent to award or invite proposers in a competitive range for and of the proposed solutions as determined as the best interest of the City. **(Weighted/Scored)**

**13.2 Table - Round 3 Scoring**

|  |  |
| --- | --- |
| Demo / Interview Scoring | POINTS |
| Round 3 Interview/Demonstration | 450 |
| **Total** | **450** |

**Round 4 - BAFO: Best and Final Offer (Optional). (1000 Points)**

The City, at its sole option, may conduct a round of Best and Final Offers. The purpose of the BAFO process is to provide the Proposer an opportunity to discuss the City’s existing systems, processes and procedures, and for the City to discuss the proposer’s methodology and approach to the project.  This round will be used to assess the Proposers design methodology and project implementation and approach. It is understood that Proposers that participate in the BAFO/Discussion round may have the option to update their proposals based on the discussions that take place during the interview. It is solely up to the Proposer(s) to determine if there is any information that would warrant an update of their proposal. Each Proposer’s BAFO, containing a revised Pricing Response and revised Functional Objectives Response, would be due ten (10) business days from the BAFO announcement. The updated proposals would be ranked based on the scoring listed below and the highest ranked proposer would be awarded the contract unless the City elects to forego the BAFO round.

Scoring for Round 4 – If the optional BAFO is conducted, unless resubmitted, Round 2 - Proposer’s Qualifications and Experience will be adjusted to meet the revised scoring and carried forward to Round 4. Round 3 – Interview and Demonstrations will be carried over to Round 4 (BAFO) without adjustments. All other weighted scored items will be re-scored if resubmitted or adjusted to meet the revised scoring if no changes are made as indicated below:

**13.3 Table - Round 4 Scoring**

|  |  |
| --- | --- |
| **BAFO Scoring** | **POINTS** |
| Response: Proposer’s Qualifications and Experience  (Carry Over from Round 2, unless re-submitted) | 100 |
| Response: Functional/System/Technical Requirements | 150 |
| Response: Scope of Work and Project Plan | 100 |
| Response: Pricing and Cost Effectiveness | 100 |
| Interview/Demonstration  (Carry Over from Round 3) | 450 |
| Inclusion Plan (Carry Over from Round 2, unless re-submitted) | 100 |
| **Total** | **1000** |

**Round 5 - Site Visits, Reference Checks (Optional).**

**Site Visit:**  At the City’s option, City staff may travel to the location of references provided by selected Proposer(s) for an on-site visit. The City may elect to conduct site visits for all top ranked candidates, or only those as needed to obtain additional understanding of the Proposer proposal. The Proposer will not be present on these site visits.  Transportation costs for City staff shall be at the City cost.  Site Visits are pass/fail.  Those Proposers receiving a failed site visit may be disqualified from consideration.  Pass/Fail

**References:** The City may contact clients of the Proposer’s services for references. References will be used on a pass/fail basis. Those Proposers receiving a failed reference may be disqualified from consideration.  The City may use any former client, whether or not they have been submitted by the Proposer as references, and the City may choose to serve as a reference if the City has had former work or current work performed by the Proposer. Although the City anticipates completing reference checks at this point in the process, the evaluation committee may contact the client references of the Proposers or other sources in addition to those specifically provided by the Proposer, at any time to assist the City in understanding the services. Pass/Fail

**General Evaluation Notes**

**Repeat of Evaluation Steps**: If no Proposer is selected at the conclusion of all the steps, the City may return to any step in the process to repeat the evaluation with those proposals that were active at that step in the process.  In such event, the City shall then sequentially step through all remaining steps as if conducting a new evaluation process. The City reserves the right to terminate the process if it decides no proposals meet its requirements.

**Points of Clarification**:  Throughout the evaluation process, the City reserves the right to seek clarifications from any Proposer.

**Award Criteria in the Event of a Tie**:  In the event that two (2) or more Proposers receive the same Total Score, the contract will be awarded to that Proposer whose response indicates the ability to provide the best overall service and benefit to the City.

# **AWARD AND CONTRACT EXECUTION INSTRUCTIONS**

The City RFP Coordinator intends to provide written notice of the intention to award in a timely manner and to all Proposers responding to the Solicitation.  Please note, however, that there are time limits on protests to bid results, and Proposers have final responsibility to learn of results in sufficient time for such protests to be filed in a timely manner.

**Protests and Complaints**

The City has rules to govern the rights and obligations of interested parties that desire to submit a complaint or protest to this RFP process.  Please see the City website at <http://www.seattle.gov/city-purchasing-and-contracting> for these rules.  Interested parties have the obligation to be aware of and understand these rules, and to seek clarification as necessary from the City.

**No Debriefs to Proposers**

The City issues results and award decisions to all Proposers, and does not otherwise provide debriefs of the evaluation of their respective proposals.

**Instructions to the Apparently Successful Proposer(s)**

The Apparently Successful Proposer(s) will receive an Intention to Award Letter from the RFP Coordinator after award decisions are made by the City.  The Letter will include instructions for final submittals that are due prior to execution of the contract or Purchase Order.

If the Proposer requested City Contract exceptions per the instructions (Section 12), the City will review and select those the City is willing to accept.  There will be no discussion on exceptions.

After the City reviews any Exceptions, the City may identify proposal elements that require further discussion in order to align the proposal and contract fully with City business needs before finalizing the agreement.  If so, the City will initiate the discussion and the Proposer is to be prepared to respond quickly in City discussions.  The City has provided no more than fifteen (15) calendar days to finalize such discussions. If mutual agreement requires more than fifteen (15) calendar days, the City may terminate negotiations, reject the Proposer and may disqualify the Proposer from future submittals for these same products/services, and continue to the next highest ranked Proposal, at the sole discretion of the City.  The City will send a final agreement package to the Proposer for signature.

Once the City has finalized and issued the contract for signature, the Proposer must execute the contract and provide all requested documents within ten (10) business days.  This includes attaining a Seattle Business License, payment of associated taxes due, and providing proof of insurance.  If the Proposer fails to execute the contract with all documents within the ten (10) day time frame, the City may cancel the award and proceed to the next ranked Proposer, or cancel or reissue this solicitation.

Cancellation of an award for failure to execute the Contract as attached may result in Proposer disqualification for future solicitations for this same or similar product/service.

**Checklist of Final Submittals Prior to Award**

The Proposer(s) should anticipate that the Letter will require at least the following.  Proposers are encouraged to prepare these documents as soon as possible, to eliminate risks of late compliance.

* Ensure Seattle Business License is current and all taxes due have been paid.
* Ensure the company has a current State of Washington Business License.
* Supply Evidence of Insurance to the City Insurance Broker if applicable
* Special Licenses (if any)
* Proof of certified reseller status (if applicable)
* Contract Bond (if applicable)
* Supply a Taxpayer Identification Number and W-9 Form

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**Attachments**

For convenience, the following documents have been embedded in Icon form within this document. To open, simply double click on Icon.

**Attachment #1: Insurance Requirements**

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| **Attachment #1** |

**Attachment #2: Sample Terms and Conditions**

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|  |
| **Attachment #2** |

**-=END OF RFP--**