



**RSCD**

**Retirement System City of Detroit**

**Request for Proposal:  
VOIP Services for ERP System**

**Issued by: Kamal I. Cheeks (IT Liaison)**

**Issue Date: 2/03/2017**

**Respond Date: on or before 3/06/2017**

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## Section I General Information

### I.1 Purpose

The purpose of this Request for Proposal is to gain insight on an enhanced voice over internet protocol (VOIP) system to integrate with a state of the art Enterprise Resource Planning (ERP) system.

Retirement System City of Detroit (RSCD) is issuing your company this Request for Proposal (RFP) as an invitation for you to compete for a VOIP System implementation. We have gathered a list of requirements and look forward to learning the degree to which your company satisfies these requirements.

We intend to obtain information from your company that will ultimately lead to the selection of a VOIP system that best meets the core business and functional requirements within this RFP. Respondents who are selected for further examination will be notified.

### I.2 Issuing Office

This RFP is being issued by the Retirement System, City of Detroit. The RSCD Point of Contact is the sole point of contact from the issue date of this RFP until a successful vendor is selected and the selection is announced. Vendors are not allowed to communicate with any RSCD employee regarding this particular procurement, except through the RFP point of contact named herein. The issuing office point of contact is:

Kamal I. Cheeks  
IT Liaison/ Project Manager  
Retirement System of the City of Detroit  
500 Woodward Avenue Suite 3000  
Phone 313.224.3362 ext. 265  
Fax 313.224.3522  
Email [kcheeks@rscd.org](mailto:kcheeks@rscd.org)

### I.3 Pertinent Dates:

Questions prior to submission – March 3, 2017

Submission Deadline – March 6, 2017

Date	February 3, 2017
Written Questions Due By	March 3, 2017
Proposal Due Date	March 6, 2017
Proposal Due Time	5:00 PM EST
Date of Bid Opening	January 30, 2017
Time of Bid Opening	12:00 PM EST
Location of Bid Opening	City of Detroit, Retirement System 500 Woodward Avenue Suite 3000 Detroit, MI 48226

### I.4 Scope

With the current development of the Retirement System new ERP software, it is imperative that RSCD match the technology with a phone system to integrate. Currently, RSCD is considering two advance products that allow integration with a comprehensive phone system that has technology to allow employees to access member's information before speaking to a live representative.

## Section II Bid Instructions

**What to Submit with your Proposal:**

- Answer Request for Proposal (RFP) items.
- Attach a zipped folder/file containing the RFP documents.

**How to submit your Proposal:** Send your document(s) to [kcheeks@rscd.org](mailto:kcheeks@rscd.org)  
**Contact the issuing office for assistance, if needed.**

**Verifying that your Proposal was submitted** - If submitted properly, you will receive an email acknowledgement.

**Withdrawing Your Proposal** - You may withdraw your proposal at any time up to proposal due date and time by simply indicating through email.

All vendors are hereby notified that bids must be submitted electronically no later than 3/06/2017 5:00 PM EST. Vendors are encouraged to confirm receipt of their bid with RSCD email via delivery confirmation. Bids will only be accepted in electronic format. Any questions regarding requirements must be emailed to Kamal Cheeks the RFP Point of Contact at [KCHEEKS@RSCD.ORG](mailto:KCHEEKS@RSCD.ORG). Phone calls or other methods of contact will not be valid for this bid.

**Attempts by vendors to communicate with any other party, including RSCD, may result in the rejection of their proposal.**

RSCD may, for cause, change the date and/or time of the bid opening. If a change is made, all parties will be notified via email.

This form must be completed and submitted as part of the response for the bid to be considered valid.

The undersigned has read, understood and accepted all provisions, terms and conditions of this request for proposal.	
Quotation Valid through Date	
Telephone Number	
Company Name	
Federal Identification Number	
Contact Name	
Contact Email Address	
Name Authorizing Proposal	
Proposal Signature	

## II.1 Procurement Information

Responses are to be straightforward, clear, concise and specific to the information requested. In order for submissions to be considered complete, suppliers must provide the following information:

1. Transmittal Letter; include a statement of any proprietary information if applicable.
2. Response to Section IV-1 & 2, General and Functional Supplier Information.
3. Other: any comments, observations or suggestions which may assist RSCD in drafting a procurement solicitation.

### REQUESTS FOR CLARIFICATION

Upon receipt and review of proposals submitted by vendors, RSCD may submit to vendors written questions and requests for clarification relating to their technical and/or cost proposals. Bidders will be provided a reasonable period of time in which to submit written responses to RSCD's requests.

### CLARIFICATION OF TERMINOLOGY

All references in this RFP to features or functions, that "should," "must," "will," "has ability to," etc. be provided by the bidder are to be construed as mandatory.

In reviewing vendors' technical proposals, RSCD will assume that all features and functionality described therein will be delivered for the quoted not-to-exceed cost presented in the vendors' cost proposals. Statements such as "... [functionality n] can be provided ..." or "... [functionality n] may be provided ..." or other similar sentence constructions will be interpreted to mean that functionality will be provided at no additional cost. If vendors wish to discuss functionality that is feasible but not included in their cost bid, they must explicitly state as much in every applicable case.

### PERFORMANCE BOND

A performance bond in the amount of eighty percent (80%) of the total cost of the proposal (including all selected options) will be required for the contract to be awarded. The performance bond shall be delivered at the same time the contract is awarded. Vendors are to include in their proposals a letter of intent from the bond underwriter.

### PRESENTATIONS AND PRODUCT DEMONSTRATIONS

At RSCD's discretion, vendors who receive high scores after the initial review of proposals may be required to provide presentations and/or product demonstrations at our location. If presentations and/or demonstrations are required, vendors will be offered multiple dates from which to select from. Vendors may be provided with scripted product demonstration scenarios on which to base their demonstrations in order to assure an objective comparison among

vendors' proposed solutions. Additionally, submitting to a Web Application Security Assessment (WASA) and visits to existing vendor customer sites may be required.

RSCD reserves the right not to conduct vendor presentations, product demonstrations, Web Application Security Assessment and/or customer site visits.

## II.2 Nature of Procurement

RSCD is soliciting proposals from firms having recent experience in the implementation of integrated VOIP solutions in the public sector. This section sets forth high-level information about the procurement.

### **RFP EVALUATION CRITERIA**

Vendor responses will be evaluated based on the vendor's ability to:

- Meet the functional and technical requirements described in this RFP as evidenced by the RFP response and demonstration of the software and hardware
- Provide a cost-effective solution that meets the financial goals of the organization
- Ability to provide timely program modifications and upgrades in response to changing industry needs, security threats, regulatory requirements, and advancing technology.
- Demonstrate expertise and functionality as evidenced by client references and site visits
- Provide a superior level of service and support to clients as evidenced by references

### **FINALIST SELECTION AND CONTRACT AWARD**

Finalists will be notified of their status via email per the Schedule of Events.

RSCD reserves the right to conduct a Web Application Security Assessment, conduct site visits with references provided by the vendor, and/or to require vendors to provide a live demonstration of their VOIP System solution as part of the finalist evaluation process. Upon notification that the vendor is a finalist, the vendor will also be notified of onsite demonstration assignments/guidelines as well as of any planned Web Application Security Assessment and client site visits.

A written notice of the contract award will be sent to all vendors immediately following the execution of the written contract.

### **FINALIST SELECTION AND CONTRACT AWARD**

Finalists will be notified of their status via email per the Schedule of Events. RSCD reserves the right to modify or make corrections to the Schedule of Events without prior notice.

## II.3 Suppliers Presentations

RSCD may request suppliers to provide a presentation of some of the functionality described in this RFP. All costs associated by such presentations will be borne by the supplier. Promotional items shall not be provided at these presentations. Vendor questions relating to this RFP and/or procurement may be submitted to the point of contact named in above in writing through 3/03/2017. E-mail is the only approved method of communication. All written questions must include the name of the firm and the person submitting the questions. RSCD reserves the right not to conduct vendor presentations, product demonstrations, Web Application Security Assessment and/or customer site visits.



## Section III Schedule of Events

This section presents information relating to the project schedule and required deliverables.

### **PROJECT SCHEDULE AND MILESTONES**

The dates provided below are approximate and are for the period up to the project start date following contract award.

<b>Action</b>	<b>Date</b>
Issue RFP	02/03/2017
Written Questions Due	03/03/2017
Answers to Written Questions Published	03/03/2017
<b>RFP Responses Due By</b>	<b>03/06/2017</b>
Finalists Selected/Vendor Notification	03/21/2017
On-Site Vendor Demonstration (Finalists)	03/23-25/2017
<b>Final Evaluation and Selection</b>	<b>04/14/2017</b>
Site Visit and Web Application Security Assessment	04/19-30/2017
Contract Negotiations Completed	04/30/2017
Contract Signed	05/15/2017
Commence Installation	05/17/2016

## Section IV

### General Requirements

This section is a list of general questions on a variety of areas. The content in these sections is representative of areas under consideration, but is not meant to be all-inclusive.

Please provide information regarding what your product and services will offer relative to these defined areas. Also, provide any additional product information for which specific information is not requested but which you think is essential, provides a benefit, or is a product differentiator.

#### ARCHITECTURE

A primary objective for any system implementation is to deliver a set of capabilities and characteristics not constrained by the organizational structure or configuration. With this in mind, please discuss the strengths of your products and services as follows:

RSCD is asking interested suppliers to submit a response containing, at a minimum, the following information:

1. Description of the reason for your interest in possibly providing the *[services/supplies]*.
2. Brief history of your firm.
3. Brief description of past experience providing similar services/supplies.
4. Your best estimated price range to provide the services/supplies as stated herein, lowest estimate to highest estimate.
5. Your best estimated time frame for completing the project.
6. Company brochure/literature if available.

#### Professional Services

1. What types of professional services does your company provide?
2. Does your company provide a “quick start” of packaged professional services? If so, please describe.
3. Describe the typical professional services engagement for a new customer.
4. Submit a proposed schedule, including project milestones and deliverables that cover the scope of work requested.
5. Describe your implementation methodology. Why the company feels it is the best approach to implementation of a VOIP System?
6. Describe the data conversion activities for converting data from the existing systems into the vendor solution.
7. Do these engagements typically provide knowledge transfer to the customer organization? Please explain how this is done.
8. Does your company usually provide professional services itself or through partners?
9. Describe any outsourcing services that your company provides.
10. Describe your User Acceptance Testing (UAT).

## Training

1. How much and what type of training is typically required for different roles?
2. What types of training does your company provide (classroom, online, tutorials, etc.)?
3. Are there alternative methods of training available (onsite, internet-based, etc.)?
4. What type of training documentation is provided to be retained by the Client?

## COSTS

Please provide your cost model showing list prices and how you configure your products and arrive at a price for the public sector. Include **all** licenses, implementation, support, and annual maintenance fees, being sure to exclude process optimization and overall project management.

## VENDOR INFORMATION

Please provide your most recent annual report including financial data. Please provide the following information if it is not included in your annual report:

1. A short history of your company, its products and services (length of time in business, major products, extent of services, etc.).
2. Your market position; in what sectors are you most strong?
3. Independent research about your company from Meta, Gartner, Forrester, etc.
4. Description of formal partnerships with other companies.
5. Reference accounts, major public sector clients.
6. Number of employees currently and one year ago.

## IV.2 Functional System Requirements

RSCD has gathered the VOIP System requirements, and looks forward to learning the degree to which your company satisfies these requirements.

### FUNCTIONAL REQUIREMENTS OVERVIEW

Functional requirements documented in this RFP are fully encompassing of our needs and represent a broad spectrum of functional areas. **Vendors who are unable to satisfy all the requirements outlined in this RFP are still encouraged to respond.**

Requirements for the system are broken down into subcategories. Each requirement will be documented in a table format. Requirements with an asterisk (\*) will have a narrative format provided underneath the table. The narrative format is used to provide additional clarity regarding the requirement by providing a scenario based narrative. Vendors are required to complete the table format response codes and notes if applicable.

## RESPONSE CODES

Please use the following matrix as a key for responding to the functionality tables in the RFP.

Response Code	Description
Y - Existing	Feature is delivered as standard functionality in the proposed version of the software and can be demonstrated by the vendor.
F - Future	Feature is not currently included but will be available in a future release. Please indicate time frame (e.g., 12 months).
C - Customer Customization	Not included. Tools are provided for customization at no additional cost.
V - Vendor Customization	Not included. Vendor provides customization at an additional cost.
T - Third Party	Feature is provided by a third-party partnering arrangement. Indicate any preferred partner agreements.
N - Not Available	Requirement cannot be met.

For example:

### Sample Requirements Table

ID	Requirement	Response Code	Notes
1	Automated workflow functionality for audit compliance including notifications*	To be completed by vendor using Response Codes below	To be completed as required

### Software

ID	Requirement	Response Code	Notes
	<b>Basic Call Features (Phone and Computer)</b>		
<b>1</b>	Ability to port currently registered numbers		
	Ability to transfer calls internally		
<b>2</b>	Ability to conduct conference calls and 3 way calls		
<b>3</b>	Ability to black list certain phone numbers		
<b>4</b>	Ability to forward calls, notifications and voicemails internally and to external devices		
<b>5</b>	Ability to mask all outgoing calls as our main number (313)224-3362 and our name as Retirement Systems		
<b>6</b>	Ability to provide Caller ID on phone		

7	Ability to enable/restrict international calling per user Incoming Caller ID capabilities		
8	Ability to support different ring patterns or tones based on the nature of the call.  For example: an internally originating call may ring with a different pattern opposed to a call originating from an external source.		
9	Ability to use Instant Messaging amongst users		
	<b>Call Center Features</b>		
10	Ability to record voice prompts for call tree menus and voicemails. Indicate if recording services are available to produce audio files.		
11	Ability to change hold music / instructions		
12	Ability to support IVR based customer service surveys		
13	Ability to support call pooling where multiple phones ring at the same time until a representative answers.		
14	Ability to provide callers with an estimated wait times to speak with a representative		
15	Ability to allow automatic call backs if caller does not wish to hold for a representative		
16	Ability to support IVR verification of identity required to access ERP system information		
17	Ability to support various greetings such as an afterhours notification		
18	Ability for agents/users to customize their graphical user interface.		
	<b>Configuration / Integration Features</b>		
19	Ability to support call workflow rules and hierarchy of call routing as required. Be specific with regards to configuration options to support business logic.		
20	Ability to support integration with ERP/CRM system		
21	Ability to support integration with Microsoft Outlook, Exchange and/or Office 365		
22	Ability to define user groups, call queues,		

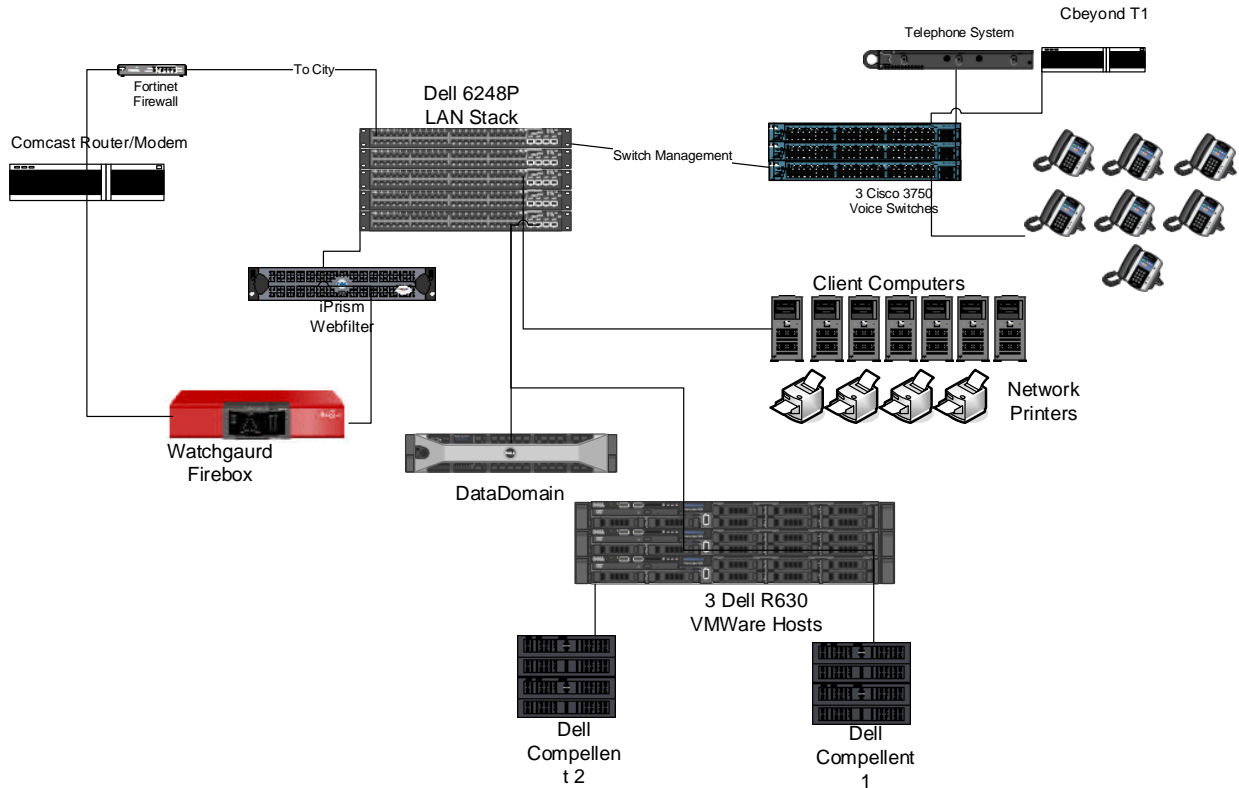
	and representative pools.		
	<b>Tracking and Recording Features</b>		
<b>23</b>	Ability to automatically or on demand record calls		
<b>24</b>	Ability to replay recordings of calls within system		
<b>25</b>	Ability to support IVR based customer service surveys		
<b>26</b>	Ability to run both canned reports and ad hoc reports with drill down capabilities		
<b>27</b>	Ability to transfer calls internally		
<b>28</b>	Ability to conduct conference calls and 3 way calls		
<b>29</b>	Ability to support call pooling where multiple phones ring at the same time until a representative answers.		
<b>30</b>	Ability to allow automatic call backs if caller does not wish to hold for a representative		
<b>31</b>	Ability to port currently registered numbers		
<b>32</b>	Ability to support IVR verification of identity required to access ERP system information		
<b>33</b>	<p>Ability to support various greetings such as an afterhours notification</p> <p>Ability to provide reporting on various performance indicators such as:</p> <ul style="list-style-type: none"> <li>○ Average call hold time</li> <li>○ Call abandonment rate</li> <li>○ Representative performance</li> <li>○ Volume, frequency and durations</li> </ul>		
	<b>Support Features</b>		
<b>34</b>	<p>Ability to provide an up time of 99.9%</p> <p>Ability to perform full disaster recover in 4 hours</p>		
<b>35</b>	Ability to remotely support solution		
<b>36</b>	Ability to support extension portability		

37	Ability to forward notifications and voicemails to external devices		
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Hardware

ID	Requirement	Response Code	Notes
1	Cloud based solution		
2	Ability to integrate with Polycom XXX Phones		
3	Ability to support all functionality on Polycom XX phones <ul style="list-style-type: none"> <li>• Voicemail indication</li> <li>• Speaker Phone</li> <li>• Hands free</li> </ul>		
4	Headsets – Specify brands and models that are compatible with desktop phones and/or computers, include cost		
5	Desktop phones - Specify brands and models that are compatible include cost		

Retirement System manages annuity and pension funds for the public sector. RSCD is currently utilizing legacy systems that were designed internally using technologies such as Cobalt, .Net C Sharp, SQL, and other various languages. RSCD intends to replace the legacy system with an integrative system that streamlines processing and increases stability of the system.



## Section V Contract

The Retirement System wishes to have ample time to review the contractual terms of any agreement. RSCD is requesting that a sample copy of the vendor's traditional terms in a master Service Agreement (MSA) and Statement of Work (SOW) be included with the submitted proposal. Please include a sample of your contracts in a Microsoft Word format with your initial response.

## Section VI Non-Disclosure Agreements

RSCD NDA will need to be executed prior to any system functionality demonstrations.



## Confidentiality and RFP Ownership

This RFP is both confidential and proprietary to RSCD and RSCD reserves the right to recall the RFP in its entirety or in part. Suppliers agree that they will not duplicate, distribute or otherwise disseminate or make available this document or the information contained in it without the express written consent of RSCD's issuing office.

Suppliers shall not include or reference this RFP in any publicity without prior written approval from RSCD, which, if granted, shall be granted by the issuing office. Suppliers must accept all of the foregoing terms and conditions without exception. All responses to the RFP will become the property of RSCD and will not be returned.

## Non-Disclosure Agreement

This Agreement serves to facilitate the disclosure and exchange of information between the parties with respect to the \_\_\_\_\_ Agreement entered on or about \_\_\_\_ , 2016 (the "Vendor Agreement") wherein VENDOR will perform certain professional services for the RETIREMENT SYSTEM as agreed-upon between VENDOR and the Retirement

Systems in that Professional Services Agreement, and establishes conditions under which the RETIREMENT SYSTEM agree to disclose confidential information to the VENDOR to facilitate the VENDOR's performance of its obligations pursuant to the Professional Services Agreement. Any confidential information exchanged between the RETIREMENT SYSTEM and VENDOR will be used only to the extent necessary for the VENDOR to perform its obligations with respect to the RETIREMENT SYSTEM and the Professional Services Agreement.

The RETIREMENT SYSTEM and VENDOR agree that all information exchanged under this agreement will be kept confidential in accordance with the confidentiality provisions of applicable state and federal law including, but not limited to the Social Security Number Privacy.

Confidential information obtained under this agreement will not be disclosed except as required by state or federal law, or in the proper administration of applicable laws, promulgated rules and procedures. No employee, agent, authorized representative or legal representative of the VENDOR will disclose any information obtained by virtue of this Agreement to any governmental agency whether local, state, federal or foreign, department or unit within such governmental agency, or any unauthorized third party. Any willful and/or intentional violation of this Agreement will entitle RETIREMENT SYSTEM to an injunction to

prevent such unauthorized disclosure, and may entitle the RETIREMENT SYSTEM to other legal remedies, including, but not limited to attorney's fees and costs. **Confidential information** includes, but is not limited to, social security numbers, pension identification numbers, dates of birth, identities of pension beneficiaries, pension benefit options elected by the RETIREMENT SYSTEMS' members, retirees, survivors, or beneficiaries.

**This Agreement will become effective upon signing of both VENDOR and RETIREMENT SYSTEM authorized officials. It is further agreed that this Agreement may be rescinded, for sufficient reason, by either entity upon written notice to the other party. Notwithstanding any rescission, any confidential information exchanged during the term of this Agreement or the term of the Professional Services Agreement, whichever term is longer, will remain subject to the confidentiality provisions of this Agreement. In accordance with the RSCD Code of Conduct Policy, an evaluation period is immediately in effect which applies to any firm providing service to the Systems. During the evaluation period, staff, Investment Committee members and trustees shall not accept meals or other types of gifts from the type of service provider in question. All communication must be directed to Kamal I. Cheeks.**

**If any part of this Agreement is deemed invalid, illegal or unenforceable, the remaining parts shall not be affected and shall remain in full force and effect.**

**This Agreement may be executed in counterparts, each of which shall be considered as an original.**

RSCD: \_\_\_\_\_

Vendor: \_\_\_\_\_