

Telephony Refresh Project

Request for Proposal: Questions & Responses

August 24, 2011

The questions below include those received just before and during our vendor pre-bid conference last week. Questions have been combined and edited for brevity and clarity. Revised versions of the RFP and Attachments A, C and E will be posted on our public Business Opportunities webpage. All interested bidders should submit the revised XL forms with their proposals. Vendors may elect to use the originally posted Attachment C version (editable MS Word doc) if work has already begun on the document, provided that the material changes highlighted in red are modified and/or noted in your response for confirmation (if original Attachment C is used, please also attach a signed page one of C2 to document your acknowledgement of the changes). All future QA notices will be emailed directly to the qualified bidders who attended the mandatory pre-bid conference in San Francisco.

- 1. Sections 5.1.7 and 5.1.8 both refer to “requirements in Section 7.1”, which is Unified Messaging. Reference to Section 7.1 in the above items for VoIP does not make sense. Is this supposed to be another Section reference?**

Both references should be to Section 5.1.

- 2. Regarding section 3.1.9: Please provide the number of users for the VoIP pilot group (out of your total users) and the locations you want the pilot group, San Francisco and/or Los Angeles. Please define specifically what will be required to be evaluated during the Proof of Concept deployment. Define the length of time for the Proof of Concept Phase before the Phase 1 deployment of San Francisco users and then Phase 2 deployment of Los Angeles.**

Approximately 30-40 users should suffice across multiple business units at both locations. Duration would be 2-4 weeks as needed to test all required functionality provided by the solution as defined by the requirements of the RFP. If the Provider cannot satisfy the requirements of the RFP after the completion of the 2 weeks they will get the full 4 weeks to provide the functionality. If after 4 weeks the RFP requirements are still unfulfilled, State Bar – in its sole discretion, may decide to extend the Pilot Trial or declare the Pilot a failure, and the Provider in breach of contract.

- 3. Regarding Section 3.1.22: ACD Screen Pops for 30 agents (Logic Genie integration). The RFP language at the bottom of the following paragraph appears to contradict itself in its first sentence (perhaps it meant to say “does not”), as well as Attachment E’s Feature “ACD Agent CTI Screen Pop” with its Requirement column cell entry listed as “Should Have but Optional”. If ACD Screen Pop is meant to an option, then it would need to be added to the set of Options in Attachment A – Itemized Cost Proposal.**

It should say “does not”. The number of agents for whom Screen Pops are being considered should be increased from 30 to 50. Additionally, State Bar has decided this requirement should not be included in the base pricing, but should rather be quoted in the optional pricing portion of the Pricing Schedule. Vendors are still required to provide pricing for this element and will be judged on their ability to meet this optional requirement, the completeness of their response, and the optional cost of the solution. Section 3.1.22 will be amended to the text below and reposted.

- 4. We have a good deal of experience in this area and while the product can easily support any Web interface through HTTP commands, we have the following questions for clarification of the requirements so that we can assess the amount of service hours required as accurately as possible:**

- a) Could you please provide a list of requirements of what the Call/Contact Center is expected to provide when Logic Genie is launched?**

Screen Pop displaying a Member Record – see sample below.

- b) What is the exact sequence of events: i.e. capture ANI, interrogate the DB, extract other bits of information, concatenate an HTTP command and pass it on to the Logic Genie? Could you please explain?**

See the steps outlined below.

- c) Could you please confirm for any Agent work in progress, that the Logic Genie will automatically save the work at the agent’s desktop when a new call is received and the screen is popped with new caller information? Will the agent receive notification a new screen is about to be displayed, or do we simply overwrite whatever is displayed on the screen? (i.e. if the agent takes & completes a call, and is entering notes while going back into the Ready mode, that if a new call comes in, the screen pop will not overwrite the work in progress on the screen).**

Ideally multiple browsers would be launched.

- d) Could you please provide screen shots of what the Call/Contact Center needs to display?**

See the sample below.

- e) By the design phase, will you provide the concatenated HTTP commands that the Call/Contact Center software will need to execute on a call by call basis?**

The State Bar's Applications group will work with the vendor. Please see the following notes from the application development team at State Bar.

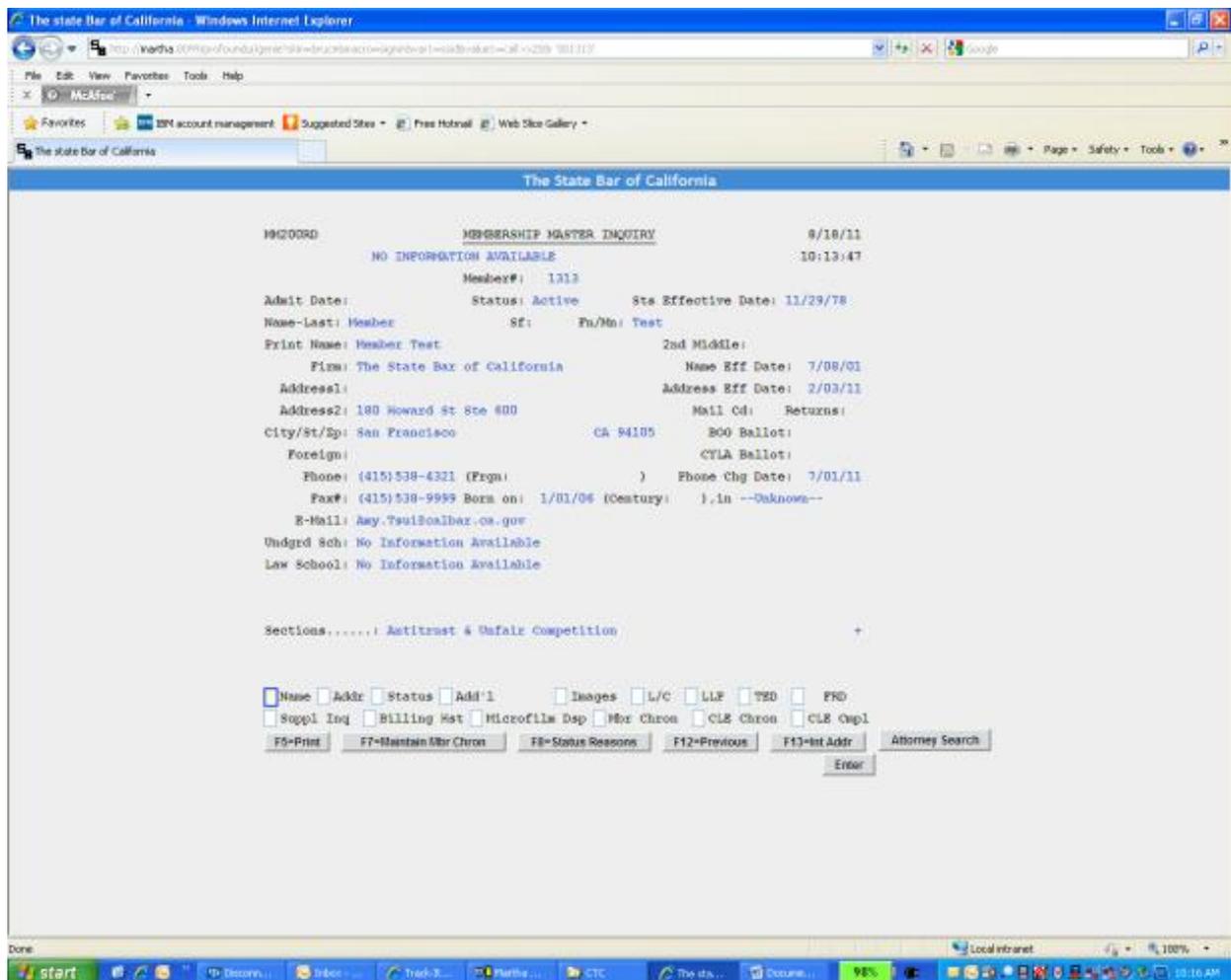
Steps for Screen Pop to Display Member Record:

- a. *Check for caller id match in any of the following (see attached list of Member Data Elements):*
Public Telephone Number
Public Foreign Telephone Number
Private Telephone Number
Private Foreign Telephone Number

- b. *If not found present error message and prompt caller for Member Bar Number*

- c. *Present attached sample screen using the member number as a variable in the following link example:*

<http://George:8090/profoundui/genie?skin=voip¯o=voip&var1=memberid&value=123456>



5. **Item 8.1.2, In the Call Center Requirements it states:** “State Bar of California’s ACD requirement are delineated in this RFP as well as in Schedule C... “
Please identify “Schedule C”

Schedule C has been revised to read ‘Attachment E System Requirements’.

6. **Item 4.1.1 Resiliency.** “As previously mentioned in the Critical Considerations section, Hot Standby Redundancy with Branch Survivability is the minimum compliant solution to this RFP. However, State Bar of California is interested to know whether the vendor would be able to provide the following additional redundancy and the optional cost for the upgrade. Pricing should be quoted in the optional section of Schedule A.”

The Attachment E states: “Cold servers are placed into a remote DR facility and a back-up is restored (or active synchronization) in the case of a catastrophic failure of HQ. Requires manual intervention. (Geographic redundancy also meets this requirement.)”

We are assuming that HA – Active-Active is the preferred configuration. Please advise.

Are cold servers even considered as an option?

HA Active/Active servers would require 2 servers that are each built to be highly available and provide load sharing in some way – this is NOT a requirement of the RFP. Our preference is Geographically Separated Hot Standby servers with Branch Survivability. However, if Vendor decides (based on capabilities or pricing or whatever other factor) to not bid Geographically Separated Hot Standby Servers, then Single Site Hot Standby servers is the minimum acceptable solution. Where a single site Hot Standby solution is quoted, then a Cold Standby (as defined by Attachment E) should be placed in the LA location that can be recovered to from a backup.

7. **Section 8.1.3.2** Automated Attendant options while waiting – caller should be able to listen to IVR, automated attendant menus or Music-on-Hold while waiting in queue.

Please provide a description or example of a caller listening to automated attendant menus while in queue.

8.1.3.2 will change from a requirement to a question. Please specify if your solution will be able to provide the capability to listen to and navigate information menus or automated attendants while waiting in queue.

8. **What is the breakdown of the 30 agents between MSC and Intake?**
Example: 15 MSC and 15 Intake or 20 MSC and 10 Intake.

3.1.22 was not updated for an expanded agent count in the final RFP requirements. Screen Pops should be provided for 50 agents. Existing call center sizing information is provided in the confidential information package, available upon submission of the non-disclosure agreement. These three groups consist of 24 agents in Intake, 18 agents in Member Services and 8 agents in Member Billing for a total of 50.

- 9. Will the two groups of agents be pushed the same screen information or will the screen pop data be different for each group at each location?**

There will be three groups of agents – Intake, Member Services, and Member Billing, for a total of 50 agents. Initially, the data popped to each would be the same (Member Record Display, described in # 4 above

- 10. How many ACD skills should be set up for each agent at each location (SF and LA) on day one of cutover?**

This would need to be determined in the design phase of the project. There will be a pilot phase prior to full implementation. However, it should not exceed 3-4 skills per average agent.

- 11. How many ACD groups (CSQ's) will be set up for each location (SF and LA) on day one of cutover?**

This would need to be determined in the design phase of the project. ACD groups are expected to closely resemble current group breakdown available in the NDA information provided.

- 12. How many call flows (menuing and route points) will be set up for each location on day one of the cutover?**

This would need to be determined in the design phase of the project. However, call flows are expected to closely resemble current breakdown available in the NDA information provided.

- 13. How many different call flows will be associated with “Prompting and Collecting” Member ID number from the caller to engage a screen pop to the agent?**

If Screen Pop applications are used, it will be used in no more than 4 call flows and would include the MSC, Billing and Intake groups.

- 14. Will State Bar of California be setting up the training area with live phones and PC's for end user training or is this the responsibility of the vendor?**

State Bar will work with the vendor to ensure all staff receives end user training in existing training room environments. However, Vendor will be responsible for providing, programming, configuring, and deploying the training room phones on State Bar provided data network infrastructure.

15. **Currently State Bar of California is using a Telecorp Inc. LED 4120 Readerboard in the Intake ACD area, what is State Bar’s preference as to the type of reader board desired?**
- LED (Similar to current LED)**
 - LCD (solution with additional features)**
 - Digital Signage (Solution with wide array of features)**

We would prefer a state of the art solution that provides the greatest features, functionality and user friendly interface.

16. **Will you be providing call flow diagrams for each existing call flow/application currently in production within your IVR platform to provide an accurate solution design. See table below:**

Request	Please provide detailed information/call flows that will be required as part of your initial design.						
	Site	Existing Call-flows		Back-end Integration	Database Type	Automatic Speech Recognition	Text-to-Speech
		Yes	No				
Site	Primary Site:						
	2 nd Site:						
	3 rd Site:						

This information is already provided in the RFP. There is no current Database integration, ASR or TTS. Database integration has been moved to an optional requirement.

17. **What languages will be needed to support the IVR applications?**

Primarily English but we do have some Spanish voicemail tree/IVR applications which will need to be replicated in the new systems. Being able to play Automated Attendant system prompts in Spanish are not a requirement of the RFP, but would be preferred if provided by Vendor.

18. **What terminal emulation mode will be used with the DB2/ AS400 environment (Example: 3270, 5250, other)?**

5250 or web browser.

19. **Is the “Member ID” numeric only or will alpha characters also be collected from the caller?**

Numeric.

- 20. Attachment E:** “System should track inbound, outbound, internal (intercom) and transferred ACD calls with similar reporting functionality for each type.” **Please define or provide an example of “intercom” calls which is listed in Attachment E line item number 205 for ACD agent.**

‘Intercom’ should not be part of this sentence – it should be ‘internal and transferred’.

- 21. Per Section 4.1.3, Do you require your “Basic or Courtesy Telephones” to be GigE capable as well?**

Common area phones do not need to support GigE, but need to meet all other requirements of the RFP and generally resemble the style of the other phones.

- 22. “3.1.8.1: The T1 card used to integrate with the existing State Bar of California voice network will only be required through the implementation period and will no longer be required once the final location is cutover... Alternately, if the same T1 card can support T1 or PRI, the spare PRI card being purchased could support integration to the Siemens Rolm system in LA... “**

Is the spare PRI card referring to one of the PRI cards required to support the VOIP system? In other words stating, the PRI card will first be used for integration with existing Siemens PBX in the LA office and then will be used for the VOIP solution during cutover. Also, can we assume that the current Siemens system has available PRI ports for the integration?

The RFP calls for a PRI card as “spare”. The PRI cards in the SF and LA columns will be required for PSTN connectivity. The Siemens Rolm 9751’s currently installed do not have PRI capability but do have T1 cards.

- 23. Per Section 7.5.1, are you saying is that you do NOT want Microsoft Lync at this time as part of this solution?**

We will consider bids proposing Microsoft Lync as long as it fulfills the stated RFP requirements. However, there are no current plans to deploy Lync as a standalone server for Instant Messaging and Presence outside of this telephone system RFP.

- 24. We deliver Unified Communications as a Service. We can meet your requirements but will the Bar consider a hosted solution?**

We will consider bids proposing a hosted solution. However we will need to make changes to the pricing schedule specifically to accommodate the Monthly Recurring

Changes and no upfront purchase price of a hosted solution and still provide a direct comparison to the 5 year Total Cost of Ownership that will be evaluated across all vendors. Any hosted Providers that are serious about quoting should notify the Bar so that this pricing document can be created. However the Bar will wait until a hosted vendor will be bidding in order to save time and effort.

25. Where can I find the various Attachments referenced in the RFP?

*All Attachments are posted on the State Bar website:
<http://www.calbar.ca.gov/AboutUs/BusinessOpportunities.aspx>*

26. When would software upgrades occur, during business hours, weekday nights, weekends?

It would depend on the upgrade--if disruptive, during non-business hours.

27. Can you describe the acceptance period process and preferred payment schedule?

The acceptance items are detailed in section 10 of Attachment C. Final acceptance details, critical milestones and payment schedules will be negotiated in the contracting phase. Please include your preferred payment schedule in your initial proposals, detailed by deliverable event and percentage due at each.

28. Is the contract negotiable?

The RFP contains the State Bar's standard Terms & Conditions used for a project of this complexity. We do understand that many organizations also have standard T&Cs they prefer to use. In a word, yes, the contract is negotiable, but each vendor should review the posted Terms and Conditions and confirm whether they accept each one as-is, reserve specific terms for later negotiation, or provide alternate language for each item. Please do not merely attach your unedited boiler-plated language as your only response to this requirement.

29. During the Proof of Concept phase, will it be acceptable to have the telephones onsite but the system located elsewhere?

No. We must be able to pilot test the actual components and connectivity within our existing environment, live.

30. Is there any interest in Social Networking or Multi-media?

No, but vendors are welcome to include information in their responses as it may be something the Bar becomes interested in, in the future.

31. Would you consider SIP trunking?

Although we believe that a PRI solution will best serve our needs, we will consider alternatives to PRI if it meets or exceeds the system specifications posted, and allows the system to carry the same or more calls per location.

32. Vendor has the ability to meet the Main Number answering requirements with a custom Attendant Queue, instead of ACD functionality.

If the vendor elects to use an Attendant Queue for the Main Number Operators, Vendor should deduct the equivalent number of ACD agents from the ACD counts. The Attendant Queue should fulfill the requirements for queueing, messages in queue, and reporting as required by the RFP.

33. What is the preferred URL format to the AS400?

<http://George:8090/profoundui/genie?skin=voip¯o=voip&var1=memberid&value=123456>

34. Attachment E, why do various rows show the value as “none”.

Although the feature may be included standard with some systems and State Bar has some interest in the feature, we do not anticipate using the feature immediately and have not allotted any of the weighted scoring towards the specific feature. Vendors should answer these lines with Comply if included at no additional cost, Optional if available at additional cost, etc.

35. Attachment E, Row 193 (ACD call recording), why is value “none”?

Automatic ACD call recording as defined by Row 193 is not a requirement. On demand recording for ACD agents is required (see Row 192).

36. Attachment E, regarding rows 11 and 12:

a. Is there a co-location?

No. The Los Angeles office would be the DR site.

b. Will there be extra points for geo-redundancy?

Yes. Geo-redundancy for the phone system, ACD, voicemail and auto attendant is preferred but not required. All other systems can be proposed as cold-stand-by.

- 37. How many agents will be using the screen pop application such as in Attachment C, Section 3.1.22?**

The count in the posted RFP has been increased from 30 users to 50 agents.

- 38. Should we quote VM Ware licenses?**

Yes, if the quoted solution will require VMware, then the vendor should provide add-on licenses for the processors and servers, as well as the required host servers for the VMware (do not assume that you will be able to load your applications onto State Bar servers). In the text of your response for 4.1.2.2, you may delineate the savings that will be produced if State Bar is able to use their existing servers to host your application. A final determination will be made on preferred strategy before final contract award.

- 39. Attachment C, section 4.1.3 as it relates to the Operator Position and is described as the PC Attendant Console, Backup Receptionist or Departmental Answering Point:**

- a. Can this be handled as an agent position?**
- b. How many busy lamp fields?**
- c. Can soft phones be used for the agents?**

We would like to clarify the Operator position counts. SF has 2 main operators as well as 3 backup people that provide coverage when the main operators need to step away. LA has 3 main operators as well as 1 backup person that provide coverage when the main operators need to step away. The main and backup operators are already counted in the Programmed and Concurrent Agent counts in Attachment D. Vendor can assume that the total number of logged in Operators will not surpass 2 Operators in SF and 3 Operators in LA. All operators should handle the voice portion of the call through a physical telephone, although call control may be handled through a PC application as long as the Operator can also handle incoming calls if their PC is inoperable. The operator functionality can be provided by an ACD agent, an Attendant queue, or other solution that meets the requirements of the RFP.

- 40. Attachment C, section 4.1.6 :Where should pricing for Call Accounting be listed?**

A row has been added to Attachment A – Itemized Cost Proposal

- 41. Does the Bar have a formal Change Management process?**

Yes. Information Technology follows basic ITIL standards for Change Management.

- 42. Do you currently use Voice Forms i.e., mailboxes that ask a series of questions, record the answer, then put all the answers together in a single message)?**

The State Bar has about 4 applications that use this feature and will require the same functionality in a new system.

43. Is it important to be able to carry messages and recordings over to the new voicemail system?

No, we would prefer to start fresh.

44. Are there loading docks in each site?

There is a loading dock in our Los Angeles office tower. There is no formal loading dock in our San Francisco building, but since we own the building we can easily arrange for deliveries through our street-level side entrance on Main Street.

45. Are there any union issues we need to be aware of? Can non-union deliverymen make deliveries? Can the team working on implementation be non-union? Any special considerations for engineers?

Deliveries and onsite installation does not need to be performed by union personnel. The State Bar is not subject to the San Francisco living wage requirements for contractors, but each vendor will need to comply with their own local laws and requirements.

46. Will funding for this project carry over to 2012?

Yes.

47. What is the State Bar seeking in terms of a maintenance agreement?

All hardware, software and installation must include a minimum of a 1 year replacement warranty including onsite labor, if needed. Maintenance should be calculated on the fully installed solution (not including optional items that are presented below the total line) and should reflect any combination of Manufacturer and Vendor maintenance required to meet the requirements of this RFP. The State Bar prefers to enter into a three-year maintenance agreement with 2 each, 1-year renewal options for years four and five. The total 5-year calculated cost will be used for proposal scoring purposes. The annual maintenance fee would be due each year on the contract's anniversary date for the upcoming year's service.

48. What sort of support will be required during the Proof-of-Concept pilot testing?

The 30-40 participants (selected from numerous departments in both locations) will need to maintain 4-digit dialing capabilities during this phase. Vendor should be prepared to participate in User Acceptance Testing and application validation during the Pilot Trial period.

- 49. Can you please verify 3.1.6 (fully functional ACD) is required in the event of a WAN failure. This would mean for most vendors that two completely functional Call Centers must be provisioned, one at each location.**

Vendor should configure the system to ensure that there will be full ACD functionality for call answering, routing, and apology messages during a WAN outage. Reports do not need to be retained during an outage, and data can be lost, although the preference would be that ACD data would synchronize and be available to the reporting package upon WAN restoration.

- 50. Will you also be providing a copy of the bidders conference sign in sheets? There may be opportunities for vendors to partner, etc.**

The master vendor roster is for our evaluation team use to manage the information flow and bidder notices only. We would prefer that vendors not partner, other than through their previous and ongoing inter-company relationships.

- 51. For reuse of the existing Cat 3 analog wiring (Section 2.5.3.3 & 4), are all the analog devices terminated in the main telephone room or are they terminated on IDF's?**

In both the San Francisco and Los Angeles offices, the Cat 3 station cables terminate in an IDF on the respective floors, and are then routed to the MDF. Analog circuits should be cross-connected to the server room where the common telephone equipment will be installed for the new system over existing house cable by the vendor.