Attachment C: Audio and Web Conferencing Services Detail

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| **Instructions**: Vendor should provide inline responses to each section below and submit in native MSWord format with their bid packages. Please note your compliance in **BOLD** and explain only as necessary on the next line in blue text. For example:**Response: COMPLY, OPTIONAL COMPLY, PARTIAL COMPLY, or DO NOT COMPLY** Response text – You may describe your compliance here. |

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#  EXECUTIVE SUMMARY

**1.1** Describe the key elements of your proposal. Highlight any major features, functions, or areas of support that differentiate your service offering from your competitors’ offerings. Specify whether there will be any Minimum Annual or Monthly Revenue Commitment required to meet the pricing provided (State Bar prefers no such minimum commitment). Please limit your response to a maximum of 2-pages.

Response:

**1.2** Describe how State Bar is to work with your company in terms of ordering new services, coordinating installations, billing problems, etc. One point of contact is optimal. If multiple contacts are necessary, please provide a detailed contact list with job responsibilities outlined.

Response:

# AUDIO CONFERENCING SERVICES

**2.1** Do you provide a Web portal, accessible by the client, which will allow the following functionality? Provide a screen shot of the web portal.

* Control the audio portion – mute, un-mute, dismiss individual participants
* See the names and numbers of participants, and when they joined or left the conference
* Have the system call out to participants as an outbound call to add them to a conference
* Block participants based on caller ID

Response:

**2.2** Do you provide an Administrator’s Web portal, accessible only by certain personnel, which will provide detailed billing information/usage metrics? If so, what is the cost for this service? Can personnel be restricted to only view information for their own department or cost center?

Response:

**2.3** Is the conference service based on TDM or IP based technology? In either case, how is sound quality and echo cancellation attained.

Response:

1.

## Operator Assisted Services

**2.4.1** How are Operator Assisted audio conference calls scheduled or arranged; and how does one ensure that there will always be an operator available to assist?

Response:

Can operator assistance be added to a regular audio conference call, and what is the process to do so?

Response:

**2.4.2** If an operator is added to a conference call, and it incurs an extra charge for operator assistance, does the additional charge apply to the full duration of the conference call or just the operator assisted portion?

Response:

**2.4.3** Does an operator remain on the line for the duration of the call?

Response:

**2.4.4** Does your operator assisted service include Question and Answer management services? Is Q&A activity manageable via an onscreen interface? Is Q&A activity reportable?

Response:

## Archiving / Playback

**2.5.1** Can conference calls be recorded? How does a participant access a recorded session? Are industry standard or proprietary players required to play back the files?

Response:

**2.5.2** Are recorded conference calls centrally archived and made available to a broad audience for convenient and easy retrieval? Can the meeting organizer download and save the conference call file?

Response:

**2.5.3** Can audio and web conferencing calls both be recorded with a single media stream containing both?

Response:

## Public Board Meetings

**2.6.1** Due to new public access to information laws, the State Bar publishes the bridge for their monthly board meeting so that the public can participate. There are portions of Board meetings that are public, while other parts are closed sessions that are confidential. State Bar is currently using Adobe Connect through PGI to manage the audio conference call participants from a web portal. This portal allows the moderator to identify and tag certain callers as board members. When a “closed session” occurs during the conference call meeting, State Bar segregates all public callers into a breakout room, where they cannot hear the closed session portion of the conference call. When the closed session is completed, the public callers are reconnected to the conference call in order to continue the public portion of the meeting.

This process is unacceptable because it is very difficult to positively distinguish the board member participants from the public participants with only a phone number. Staff has utilized user groups in order to associate phone numbers with board members; however, this has not always worked as board members may call from previously unidentified numbers and or telephone exchanges that show up as generic numbers. Additionally, it is staff intensive and burdensome, as it usually takes 2 technical personnel to manage the process during a board conference call meeting. Additionally, there may be substantial disruption to the call when staff attempts to identify callers by asking them to confirm their identity, e.g., “Will the person with phone number 555-236-1234 please identify themselves?”

Please describe any solution you have that allows the user to distinguish public and private callers positively on a conference call and which allows the user to easily move groups in and out of closed sessions.

Response:

# WEB CONFERENCING SERVICES

**3.1** Describe the web conferencing service and provide a screen shot of the host and user applications. Is the web conferencing service built on standard applications such as Live Meeting, Lync, WebEx, etc., or a custom built application?

Response:

**3.2** Who hosts the service, and where is the conferencing service physically hosted (by the company quoting the service or is it sourced from another party)?

Response:

**3.3** Is web conferencing priced by the minute/participant or by named users? Can a department or a group of users share a single login when any one of them may be responsible for initiating calls on behalf of a standing committee?

Response:

**3.4** What are the minimum system requirements for hosting or viewing a meeting session? Operating systems? Browsers? What minimum bandwidth is required?

Response:

**3.5** Are there any plug-ins or client installs required to attend a session? How long does the download and installation typically take over a 3Mb DSL line with a moderately configured Windows Vista or Windows 7 machine? Does the installation require administrator access?

Response:

**3.6** Can the service be accessed from Mac’s, smartphones, and other devices; if so, how?

Response:

1.

## Online Collaboration

**3.7.1** List the various types of presentation tools available – i.e. Application sharing, desktop sharing, white-boarding, web tours, slide pushing etc.?

Response:

**3.7.2** Can you preview the individual PowerPoint slides prior to displaying them? Can your service support PowerPoint animations and transitions?

Response:

**3.7.3** Can your service support multiple presenters? How can the meeting organizer retain control over the meeting? Can a participant be promoted to ‘presenter’ status in the midst of a live session?

Response:

**3.7.4** What participant tools are available? Do you have annotation tools – colors, pens, shapes, highlighting? Can users share and exchange documents and files?

Response:

**3.7.5** Can participants ‘chat’ with one another? Can the chat be conducted in private or in groups?

Response:

**3.7.6** Do you offer audio streaming?

Response:

**3.7.7** Describe any other features or functionality not questioned above.

Response:

## Video Conferencing Services and Functionality

**3.8.1** Does the service allow integrated web cam video streaming? Describe the functionality available and any additional costs.

Response:

**3.8.2** Does the service automatically allow connection of multiple types of cameras and Codec into a bridge, or is a specific software application required?

Response:

# IMPLEMENTATION

**4.1** Describe implementation and transition services typical for the services that you are quoting. How long do you expect the transition to take? Who will coordinate the implementation from the Vendor perspective? What is the normal implementation process?

Response:

**4.2** What information will you expect the customer to provide and what time commitment is expected of State Bar personnel?

Response:

**4.3** What live end user training, documentation, web based training, administrator training, and other transition services are offered? Are there additional costs for such services, and/or are they included in the price quoted, please describe?

Response:

**4.4** Describe how a new user, additional toll-free line, or additional passcode would be added after the initial implementation; and the Service Level Agreement time for completing a request to add/change each of these.

Response:

**4.5** What is the cost for adding a user, a toll-free number, or account code; and are there any limitations in adding such after the initial installation.

Response:

**4.6** Can administration of the system be “locked down” so that only certain personnel are allowed to add features, especially extra cost features?

Response:

# SUPPORT

**5.1** Describe your policy and operations procedures regarding security.

Response:

**5.2** Describe the account team members that will be available to support State Bar, as well as on-call customer service and support staff.

Response:

**5.3** How are trouble tickets reported by end users? Can the end-user submit trouble-tickets in the web portal? Can the user call a help desk to report outages and get updates?

Response:

**5.4** What is the Service Level Agreement for uptime, Mean Time to Repair, and Reason for Outage? Describe any additional SLAs available.

Response:

**5.5** How is customer service and assistance provided 24x7, and where will the call center that answers calls at that time be located.

Response:

# OTHER SERVICES

**6.1** What other services does your company offer that may be relevant to State Bar, especially if adding additional services in the future may increase volume discounts and reduce the overall pricing for services?

Response:

**6.2** Does the vendor provide services for large events or seminars with hundreds or thousands of participants? Does it include audio, video, document (presentation) sharing, and/or desktop sharing? Can these be recorded/centrally archived? Provide brief description and whether this service is hosted on the same platform as is being quoted in this proposal, and attach a pricing sheet for this service.

Response:

**6.3** Do you provide videoconferencing bridging or MCU hub services that allow for multi-party videoconferencing bridging between multiple technologies and platforms?

Response:

# INVOICE OPTIONS

**7.1** At a minimum, the following billing information is required on each invoice: telephone number of each participant, time and date of the call, length of call in minutes and seconds for each participant, total charge for each participant, and separate invoice for each location.

Response:

**7.2** Describe options offered for invoice summary data and call detail information (paper, CD-ROM, Online Billing).

Response:

**7.3** Vendor shall review call patterns and rate structure every 6 months to determine if alternative more efficient and less expensive programs are available. Customer will be informed of the findings and will suffer no penalty for restructuring the rate schedule in order to lower overall cost of the service.

Response:

**7.4** Can the services be associated to Cost-Centers by account codes or by individual conferencing number and/or password? Describe.

Response:

**7.5** Do you provide a hierarchy structure for flexibility in organizing the information presented on the invoice? If so, please describe the levels in your billing hierarchy.

Response:

**7.6** Is there an Accounts Payable batch posting included?

Response:

**7.7** Is it possible to set up user accounts or sub-accounts with individual Purchasing Card accounts (State Bar credit card accounts) for automatic billing?

Response:

1.

## Standard & Customized Reports Online

**7.8.1** How many different types of standard reports are available online? Briefly explain.

Response:

**7.8.2** Do you Provide usage and cost reports to include, but not limited to, the following:

• by type of service

• by cost center (hierarchy roll-up of cost centers)

• business or location

• by employee

Response:

**7.8.3** Do you offer an authorized online user the ability to create customized reports? Can these reports be saved as “*favorites*”?

Response:

**7.8.4** Can online reports be exported into an Excel or CSV file?

Response:

**7.8.5** Can the system run usage reports per user to help analyze overage/unnecessary conferences? (e.g. 3 party conference calls)

Response:

**7.8.6** Describe post meeting reports. What types of attendance and usage reports are available? Are there summaries available for quizzes, surveys, and polls?

Response:

# PRICING INFORMATION

1.

## Rate Structure

**8.1.1** Do you require any type of minimum revenue commitment? Will you provide the same rate for conference services regardless of number of minutes billed?

Response:

**8.1.2** Indicate if pricing is fixed, flat rate, or based on a discount off of list price or tariff rate. Fixed flat rate pricing for the duration of the term is highly recommended for the proposed rate structure.

Response:

## Inclusive Turn-key Pricing

**8.2.1** Vendor shall call out or include all costs for the initial implementation and project management of the roll-out, training of all users (portal or pre-recorded acceptable), reference documentation, administrator training, and ongoing customer support.

Response:

## Other Discounts & Fees

**8.3.1** Describe any pricing discounts that may or may not be included in the Pricing Sheet such as one-time promotional credits, refunds, etc. Also, describe any one-time installation fees, setup fees, etc. Include your offer to reimburse or waive such fees.

Response:

**8.3.2** Please outline ANY AND ALL fees that are associated with your offering (e.g. post conference email, cost recovery fee, etc.), whether they are being contracted for at this time or not.

Response:

# Contractual Terms and Conditions

**9.1** Clearly specify the pertinent terms and conditions of this proposal, including but not limited to the following: annual or monthly revenue commitment, term length, discounts, etc.

Response:

**9.2** State Bar will require contractual language that will safeguard them from a shortfall in their revenue commitments due to events outside their control, such as an economic downturn in their business or implementation of different technologies that would significantly decrease their usage. Describe any contractual clauses that your company will include to help fulfill these requirements, such as a “*Business Downturn*” clause, “*Material & Adverse Change*” clause, and “*Carry Forward or Carry Backward*” clauses.

Response: