



# GENESEE COUNTY PURCHASING

A Division of the Genesee County Office of Fiscal Services

COUNTY ADMINISTRATION BLDG

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FLINT, MICHIGAN 48502

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[www.geneseecountymi.gov](http://www.geneseecountymi.gov)

**Chrystal Simpson, CPA**  
**Chief Financial Officer**

February 23, 2023

## **GENESEE COUNTY REQUEST FOR PROPOSAL #23-321**

Sealed proposals will be received until **2:00 p.m. (EDT), Thursday, March 23, 2023**, at the Genesee County Purchasing Department, 1101 Beach Street, Room 361, Flint, MI, 48502 for **UNIFIED COMMUNICATION SYSTEM**.

This procurement is conducted in accordance with the Genesee County Purchasing Regulations, a copy of which is on file and available for inspection at the Genesee County Purchasing Department.

Each offeror is responsible for labeling the exterior of the sealed envelope containing the proposal response with the proposal number, proposal name, proposal due date and time, and your firm's name. The proposal request number and due date for this RFP are:

<b>DUE DATE:</b>	<b>2:00 PM (EDT), Thursday, March 23, 2023</b>
<b>DUE DATE FOR SUBMISSION OF QUESTIONS:</b>	<b>5:00 PM (EDT) Friday, March 10, 2023</b>
<b>PROPOSAL NUMBER</b>	<b>#23-321</b>

Derrick Jones, Purchasing Administrator

bid2\2023\23-321  
Attachments

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# RFP #23-321 UNIFIED COMMUNICATION SYSTEM

## SECTION 1 – INSTRUCTIONS TO PROPOSERS

1. Sealed proposals will be received until **2:00 p.m. (EDT), Thursday, March 23, 2022**, at the Genesee County Purchasing Department, 1101 Beach Street, Room 361, Flint, MI, 48502. The Genesee County Purchasing Department hours of operation are 8:00 a.m. to 5:00 p.m., closed holidays and furlough days, check website for closed days. Label the sealed envelope containing the proposal response as described on page 1. **LATE PROPOSALS AND PROPOSALS SENT BY FACSIMILE OR E-MAIL WILL NOT BE ACCEPTED.**
2. The County Building will be open for vendors to drop off their submissions. Upon entrance, please proceed to Rm. 361 to drop off your bid. Effective June 28, 2021, the County offices do not require screening or mask use in vaccinated or unvaccinated employees or visitors, except in healthcare settings where masks are required regardless.
3. Please carefully review this document. It provides information necessary to aid participating vendors in formulating a thorough response. A formal, comprehensive review period will be conducted to ensure that Genesee County selects the best possible vendor that will provide the best value and service.
4. **Submit one original, one paper copy and one electronic copy of your proposal.** All proposals submitted become the property of Genesee County. The original must include a signature on the Signature Page of a person authorized to make a binding offer. Additionally, the proposal response must consist of one copy in electronic format on a USB flash drive formatted in Adobe (.pdf), Microsoft Word, and/or Microsoft Excel. Failure to provide the required number of duplicate copies may result in rejection of your proposal. Proposals may not be submitted at the MITN site for this offering.
5. All submissions will be time stamped by an individual within the Office of Fiscal Service Department. The only acceptable evidence of the time of receipt of the submissions is that of the time clock that resides within said department. It is each Bidder's responsibility to ensure that its bid is time stamped by the Fiscal Services Department by the deadline. This responsibility rests entirely with the Bidder, regardless of delays resulting from postal handling or for any other reasons. Bids will be accepted at any time during the normal course of business only, said hours being 8:00 a.m. to 5:00 p.m. Local Time, Monday through Friday, legal holidays as exception.
6. Michigan Inter-governmental Trade Network– an alternate review of this proposal under **Proposal #23-321 UNIFIED COMMUNICATION SYSTEM** can be done at <https://www.bidnetdirect.com/mitn>.
  - i. Genesee County has partnered with BidNet as part of the Michigan Inter-governmental Trade Network (MITN) and will post their bid opportunities to this site. As a vendor, you can register with [Michigan Inter-governmental Trade Network](#) (use hyperlink or <https://www.mitn.info/Registration.asp?ID=2340>) and be sure that you see all available bids and opportunities. By selecting automatic bid notification, your company will receive emails once Genesee County has a

bid opportunity that matches your company's business. In addition, the site handles bid opportunities, RFPs, and RFQs for other member governmental agencies. If you need help registering, please call [Michigan Inter-governmental Trade Network](#) support department toll free 1-800-835-4603.

7. All communications, any modifications, clarifications, amendments, questions, responses, or any other matters related to this RFP, shall be made by and through the purchasing contact reference in this solicitation. No contact regarding this solicitation made with other County employees is permitted. Any violation of this condition may result in immediate rejection of proposal.
8. All prospective proposers shall be responsible for routinely checking Genesee County Purchasing Department's website at [Genesee County Purchasing Current Year Bids \(geneseecountymi.gov\)](#) for issued addenda and other relevant information. Genesee County shall not be responsible for the failure of a prospective proposer to obtain addenda and other information issued at any time related to this RFP.
9. A sample of a contract is attached to this RFP. After the award is made to the successful proposer, the County and the successful proposer will negotiate a final contract that substantially conforms to said contract. Any exceptions to the terms and conditions of the contract and this RFP must be clearly set forth in your bid and referenced on company letterhead. The County will not entertain negotiations to change any terms and conditions of the contract or RFP unless those changes are requested in your bid.
10. Insurance must be provided prior to the contract starting date and kept in full effect and compliance during entire contract period. Insurance requirements are provided in this document on page 14. Failure to comply with these provisions will cause termination of the agreement.

The contractor agrees to be responsible for any loss or damage to property or persons due to the performance of services herein contracted and further agrees to indemnify and defend the County of Genesee, and any local government entity being serviced under an agreement, against all claims or demands whatsoever, and to hold the County of Genesee harmless from any loss or damage resulting therefrom.

11. Proposals must be submitted in the format outlined in SECTION 8 - INFORMATION REQUIRED FROM PROPOSERS to be deemed responsive.

## **SECTION 2 – STANDARD TERMS & CONDITIONS**

See Genesee County website, Purchasing Department for Standard Terms and Conditions by going to the following link:

[Std T C SECTION 2016.pdf \(revize.com\)](#)

## SECTION 3 – ADDITIONAL TERMS & CONDITIONS

1. **Purpose:** Through this RFP, Genesee County (“the County”) is soliciting proposals from qualified firms who can replace current Mitel premise-based PBX solution as requested by the Genesee County Information Technology Department.
2. **Issuing Office:** This RFP is issued by the Genesee County Purchasing Department on behalf of the Genesee County Information Technology Department. The contact person is Derrick Jones, Purchasing Administrator, Genesee County, 1101 Beach Street, Room 361, Flint, Michigan 48502, phone: (810) 257-3851, and [djones@geneseecountymi.gov](mailto:djones@geneseecountymi.gov). Email is the preferred method of contact.
3. **Questions & Inquiries:** All questions regarding this RFP shall be submitted in writing and received no later than **Friday, March 10, 2023, before 5:00 PM (EDT)** to the Genesee County Purchasing Department as listed above. E-mail is the preferred method of contact for all inquiries concerning this RFP, and please entitle the subject line of your e-mail as follows: Question(s) for RFP #23-321. No verbal interpretation to any respondent as to the meaning of any requirement stated in this RFP shall be binding on Genesee County. All responses to questions regarding this RFP shall be issued in writing and distributed as an addendum by Genesee County.
4. **Addenda:** Genesee County reserves the right to amend and provide clarification of this RFP prior to the date for proposal submission. In such an event, an addendum will be posted on the Purchasing Department website ([Genesee County Purchasing Current Year Bids \(geneseecountymi.gov\)](http://Genesee County Purchasing Current Year Bids (geneseecountymi.gov))) Further, all proposers shall acknowledge having seen any and all addendums issued (1, 2, 3, etc.) on the Signature Page.
5. **Proposal Considerations:** All costs incurred in the preparation of a response to this RFP or any costs prior to approval of the contract by Genesee County and formal notification to the selected proposer will be the responsibility of the respondent and will not be reimbursed by Genesee County. Bids should be prepared simply and economically, providing a straightforward, concise description of the proposer’s ability to meet the requirements of this RFP.
6. **Responsive Proposals:** To ensure proper consideration, all proposers are encouraged to submit a complete response to this RFP using the format outlined in Section 8, INFORMATION REQUIRED FROM PROPOSERS. In addition, at least one of the paper proposals must be signed with an **original signature** of the official authorized to bind the proposer to its provisions.
7. **Proposal Modifications:** Clarifications, modifications, or amendments to any Proposal that has been submitted, but prior to the Proposal Opening Date, may be made only within the discretion and written approval of the Purchasing Manager.
8. **Withdrawal of Proposal:** Proposals may only be withdrawn by a proposer with written notice prior to the date and time set for the opening of proposals.

9. **Validity Period:** Any proposal submitted as a result of this Request for Proposal shall be binding on the proposer for 120 calendar days following the due date.
10. **Right to Reject:** Genesee County reserves the right to reject any and all proposals received in response to this RFP, if deemed to be in County's best interest.
11. **Disclosure:** All information in an offeror's proposal is subject to disclosure under the provisions of Public Act N. 442 of 1976 known as the "Freedom of Information Act". This Act also provides for the complete disclosure of contracts and attachments thereto. In the event that a proposer wishes to designate any portion of their submission as "confidential" or "proprietary," the proposer must contact the Purchasing Manager prior to submission of the proposal. All requests regarding disclosure and requests for confidentiality of a proposal response to this RFP shall be submitted in writing and received **no later than noon, Monday, March 20, 2023**, to the Genesee County Purchasing Department as listed above.
12. **Errors, Omissions, and Discrepancies:** If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, it shall immediately notify the Genesee County Purchasing Manager of such error in writing and request modification or clarification of the document prior to the deadline for submitting questions. Genesee County will make modifications by issuing a written addendum. The Proposer is responsible for clarifying any ambiguity, conflict, discrepancy, omission, or other error in the Request for Proposals prior to submitting a proposal or it shall be waived.
13. **Best and Final Offers:** Discussions may be undertaken with those proposers whose bid, based on the evaluation criteria stated herein, has been determined to be reasonably susceptible of being selected for award. After discussions are held, and prior to award, proposers may be allowed the opportunity to submit revisions to their bids for the purpose of obtaining best and final offers.

During the aforementioned procedures, neither the names of any of the proposers nor the contents of any bid will be disclosed until the completion of negotiations and revision of proposals (Best and Final Offers).

The contract that may be entered into will be awarded based on the bid response and, where applicable, the Best and Final Offer that is the most advantageous to Genesee County, per the evaluation criteria included in this RFP.

14. **Non-Assignability:** The contract may not be assigned, transferred or conveyed by the Contractor without the expressed written consent of Genesee County.
15. **Independent Contractor:** It is understood and agreed to, by and between the Contractor and Genesee County, that any and all acts that the Contractor or its personnel, employees, and servants perform pursuant to the terms of the Contract shall be undertaken as independent contractors and not as employees of Genesee County by or with a contract or agreement, nor imposed any liability upon Genesee County. All acts and contracts of the Contractor shall be in its own name and not in the name of Genesee County.

16. **Subcontracts**: The Contractor shall not enter into subcontracts to this Agreement with additional parties without obtaining prior written approval of Genesee County. A condition of granting such approval is that such subcontractors shall be subject to all conditions and provisions of this contract. The Contractor shall be responsible for the performance of all subcontractors.
17. **Statement of Exceptions**: The proposer shall furnish a statement giving a complete description of all exceptions to the terms, conditions, and specifications set forth in the proposal. Failure to furnish this statement shall mean that the proposer agrees to meet all requirements set forth in this solicitation.
18. **Acceptance of Proposal Content**: It is proposed that, if a contract is entered into as a result of this RFP, the RFP will serve as the basis for the contract. The contents of the proposal of the successful offeror may become contractual obligations if a contract is issued. Failure of the successful offeror to accept these obligations will result in cancellation of contract award.
19. **Contract Award/Split Awards**: The County reserves the right to award by item and/or group of items. The Bidder to whom the award is made will be notified at the earliest possible date. Tentative acceptance of the bid, intent to recommend award of a contract and actual award of the contract will be provided by written notice sent to the Bidder at the address designated in the bid if a separate Agreement is required to be executed.

## **SECTION 4 – QUALIFICATIONS OF PROPOSERS**

In order to qualify for award, a vendor shall have the capability in all respects to perform the work with integrity and reliability, which will assure good faith performance. This requirement shall include, but is not limited to, the availability of the appropriate financial, material, equipment, facility, personnel, ability, expertise and experience necessary to meet all procurement requirements.

A vendor must have the capability, qualifications and the necessary experience to provide services of a character similar to that required in this solicitation. If a vendor does not convince Genesee County that it possesses the above minimum qualifications with the proposal submission, Genesee County shall not consider its proposal for award.

## **SECTION 5 – INFORMATION**

### **INFORMATION**

Genesee County is Michigan's fifth largest county. The County has an outstanding transportation infrastructure, and a great network of higher education institutions to help drive innovation and support workforce development. Our quality-of-life amenities include having Michigan's largest county park system, a national-caliber arts and culture district, and many great neighborhoods. Additional information can be found on Genesee County's website at [Genesee County Michigan](http://Genesee County Michigan).

Genesee County Information Technology (GCIT) is a centralized service bureau that provides IT services to all County Departments. This department is where People, Process and Technology combine to serve our citizens by delivering an exceptional and secure IT service

experience for all technology consumers. While Information Technology is not a profit center, nearly all County business is completed through the use of Information Technology systems. GCIT is organized in the following focus areas:

- Cybersecurity and Technical Architecture
- Network and Telecommunications Administration
- Data Center Technology Administration
- End User Computing
- Service Desk and Customer Support
- Enterprise Application Support

## **OBJECTIVE**

The County is issuing this Request for Proposal (RFP) to invite interested, qualified vendors to submit proposals to replace the current Mitel premise based PBX solution.

The goal of this project is for the County to have a fully available cloud hosted Unified Communications-as-a-Service (UcaaS) and Contact Center-as-a-Service (CcaaS) solution in 2023. Gen County requires contact center and unified communications availability 24x7x365, communications/collaboration tools, and availability of all services necessary to support the County's business and member communication needs.

The County is looking for a robust, reliable, and reputable voice platform. The County plans on porting existing phone numbers and not necessarily using hardware / phone endpoints for all users moving forward.

For any call center needs, the County needs are fairly minimal. County is seeking to implement a solution to support all contact center functionality that is in existence today in addition to features/services they may need in the future.

The possibility of integrating with certain Microsoft programs and services is of major interest.

The County will be accepting proposals for only the UCaaS AND CCaaS portions of this RFP to ensure they are selecting the best solutions provider/vendor for both pieces of the overall solution.

## **CURRENT ENVIRONMENT**

The County is currently using the following telephony equipment and services. These components, along with other services, may be upgraded and/or replaced by the proposed solution as part of this RFP:

Current Environment

- Locations: 33 (all County based, in Michigan)

SIP Trunking via At&t

- Toll Free Numbers: 5
- Local Numbers: 2,000
- Additional Local Numbers: TBD
- Mitel/User Licenses: 1,525
- Auto Attendants: 70, Ring Groups: 100; Call Queues: 5
- Physical Devices:



Device	Active	Total
Mitel 5300 series	1,500	1,500
Mitel 6900 series	40	40

- Headsets: Plantronics-CS540 Convertible Wireless Headset (with App-51 adapter) Paging System. Mitel DECT wireless headsets.
  - Three (3) paging systems, Friend of the Court (FOC), McCree, Administration, type TBD
- VPN Environment
- PaloAlto Global protect
- Contact Center – Mitel
- Number of Licenses: 100
    - Mixture of in-office and remote with scale
    - Mixture of several Call Center departments
    - Five Lead Supervisors
    - Contact center calls are recorded
  - Usage: (January through May 2022)
    - Overall Minutes
      - Average 78,871 (?)
    - Inbound Minutes
      - DID: Average 28,182
      - Toll Free 39,178
    - Outbound Minutes
      - Average 20,425

County has provided equipment hardware that is currently being used by all personnel. If your company’s solution is not compatible to said hardware, vendor must provide hardware requirements along with total cost to procure equipment in order to will meet this specification. Cost information must.

## **SECTION 6 – SCOPE OF SERVICES**

Requirements:

- Proposer must have a Unified Communication as a Service (UCaaS) and Contact Center as a Service (CCaaS) solution commercially available to all customers.
- Proposer must have a minimum of (5) five years’ experience in successful implementation of their cloud hosted UCaaS and CCaaS solutions
- Proposer must provide at least 3 references for work completed with similar requirements as to those described in this RFP.
- Proposer must complete this RFP’s “UCaaS, CCaaS Requirements matrix” and provide appropriate responses to the questions proposed in the RFP.
- Proposer will be responsible for a turnkey solution of all components of the total solution. Proposer should include an implementation timeline, describe implementation resources and an overall Statement of Work (with professional services costs)

assuming the County will select a provider in late Q1 of 2023.

- Proposer Account team must work business hours within the United States Eastern or Central Time Zone.

Proposals that do not clearly exhibit the requirements or otherwise comply with material requirements of this RFP will be deemed non-responsive and will not be further evaluated.

## SECTION 7 – EVALUATION PROCESS AND SELECTION

It is the intent of Genesee County to conduct a fair and comprehensive evaluation of all proposals received. The RFP/Contract will be awarded to the offeror who submitted a proposal that is most advantageous to Genesee County and other locals. All proposals will be evaluated based on the evaluation criteria as seen below. **Each criterion will be scored based upon the points indicated. Further, each proposal will be scored with a possible total of 100 points, and ranked by score.**

The submissions will be evaluated based on the criterion listed in the table below:

<b>Evaluation Criteria</b>	<b>Possible Points</b>
Capability of vendor to meet or exceed requirements set forth in Scope of Work	30
Vendor stability, reputation, product history	25
Overall approach and experience for implementation of managed services offerings for other similarly sized organizations and industry (Local Government)	20
Cost proposal	15
Detailed implementation plan for both hardware (handsets, etc.), software (wherever relevant) and system provisioning; include associated costs for implementation, maintenance, security, upgrades and patching	10
<b>TOTAL</b>	<b>100</b>

Genesee County IT staff will review proposals by evaluating each proposal subject to the above referenced criteria.

All proposals will be evaluated by an Evaluation Committee. The Evaluation Committee may request interviews with potential candidate(s) and may solicit Best and Final Offers (BAFOs).

The IT Department will make a recommendation to the most qualified vendor and forward said recommendation to the Genesee County Board of Commissioners for final approval. The Genesee County Board of Commissioners will make the final decision on contract award.

If the Evaluation Committee cannot negotiate a reasonable contract with the top candidate, Evaluation Committee members will stop negotiations, disqualify the candidate, and begin negotiations with the next responsive candidate.

## SECTION 8 – INFORMATION REQUIRED FROM PROPOSERS

All proposals are firm, binding, and irrevocable for one hundred-twenty (120) days after the opening of the proposal. No proposals will be considered that fail to contain fully completed documents or any other documentation required by the instructions and materials herein. The successful Proposer will be required to submit:

1. Signed Signature Page (Page 27).
2. Fully executed Insurance Checklist (Page 28).
3. Reference Form (Page 29): Prior experience with similar requests is essential for any firm to provide the services required in this solicitation. This section shall consist of a minimum of three (3) references with project descriptions. In addition, contact information for each reference shall be provided with the name, address, phone number and email address. The contacts for each reference must be knowledgeable of the offeror's performance on the referenced project and the scope of services performed by the proposer.
4. Statement of Exceptions: Furnish a statement on company letterhead giving a complete description of all exceptions to the terms, conditions, and specifications set forth in the Standard Proposed Contract and this RFP.
5. Complete UCaaS, CCaaS Requirements Matrix Response (Page 13-22).
6. Complete Cost Proposal Form (Page 23-26)
7. Executive Summary: This part of the response should be limited to a brief narrative, not to exceed two pages, describing the proposed solution. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. No costs should be included.
8. Organizational Chart: Provide an organizational chart identifying key members of the employees who will be assigned to perform the work. The chart should clearly delineate roles and responsibilities of the various team members. Identify key individuals by name and title.
9. Current Work Assignments & Contractual Obligations: Indicate current and projected work assignments of key personnel identified in the proposal, and for each key personnel, identify current percentage of completion and expected completion date.
10. Demonstration of Financial Stability: Submit with the proposal your organization's most recent financial audit, annual compiled financial statements or annual consolidated financial statements.
11. Statement of the Project: State in precise terms your understanding of the project as presented by this RFP. Include in this section a detailed summary of the Vendor's approach to providing services required by this RFP.

12. Litigation: Please describe any lawsuits that were filed against your company in the last five (5) years and the results of those lawsuits. Please describe any mediation or arbitrations your company has been involved with in the last five (5) years and the results of those arbitrations/mediations.
12. One (1) original, one (1) paper copy and one (1) electronic copy of the proposal shall be received and date and time stamped by Office of Fiscal Services prior to bid closing. No proposal received after Close Deadline shall be considered.

## UCaaS, CCaaS Requirements Matrix Response

**PROJECT: #23-321 UNIFIED COMMUNICATIONS SYSTEM**

Vendors are required to provide responses to specific questions in each section of this form.

Providers Background, Platform & Stability

<p>Please indicate whether you will be proposing a UCaaS-only, CCaaS-only or a solution for both.</p>	
<p>Provide the organizations' legal name, address, phone number, and URL. Provide the date and state of incorporation.</p> <p>Legal Name:          Address:          Phone Number:          URL:          Date &amp; State of Incorporation:          Number of Employees:          Ownership Structure:</p>	
<p>Please describe your organizations financial position.</p>	
<p>Please provide a link to your annual report and any major organizational/financial changes that may have taken place over the last 5 years.</p>	
<p>Please describe your feature/product update cadence and process. Is there any system downtime involved?</p>	
<p>How long has your organization been providing the services (UCaaS &amp; CCaaS) proposed in this RFP?</p>	
<p>What are your top 3 competitive advantages as a company and for the service(s) proposed in this RFP?</p>	
<p>Please name 3 of your top competitors in your space.</p>	

<p>Please describe your current standing in the Gartner Magic Quadrant or any alternative industry standard rankings.</p>	
<p>What is your overall system availability and response time SLA? How is it measured? Describe the types of real-time performance and availability monitoring, and how you monitor and manage SLA results?</p>	
<p>Do you provide a Voice Quality SLA?</p> <p>Please explain and provide at least six months of history including global MOS, Jitter, Latency, and Packet Loss. Please include any reported outages.</p>	
<p>Where is the platform hosted? Is it centrally hosted or geographically distributed? Please provide a map or list of data center hosting locations.</p>	
<p>Do you have a status page where Gen County can see the current state of the service and any service degradations or outages?</p>	

Innovation

<p>Please provide a brief highlight all products, capabilities, and services you've released in the last 6 months</p>	
<p>Please provide a brief highlight your roadmap for the next 6 months for both UC &amp; Contact Center solutions.</p>	

Support & Account Management

<p>Please describe your support offerings for post deployment.</p> <p>Please provide all resources that County users (both administrative and end-users) will have access to for technical, billing or account management (moves, adds, changes) needs.</p>	
<p>Fast turnaround on changes will be essential to Genesee County.</p> <p>#1 How will changes be requested?  #2 What is your SLA for changes?  Specifically for business hour changes, call queue/ring group, call flows or IVR changes.  #3 Are there any delay with changes? For instance, if a Ring group is edited is the change immediate or would it take time to process?</p>	
<p>Ideally Genesee County would like to select a supplier that can offer light assistance/daily support and/or training to their end user environment (i.e., moves/adds/deletes, business hour changes, call queue/ring group changes, IVR changes, reporting needs, everyday account support). Please describe what your organization can offer Genesee County and their user community.</p>	

Security

<p>Please list all certification and regulatory compliance supported by your organization.</p>	
<p>Describe the security and data integrity features of the system.</p>	

General

<p>Is US Toll Free &amp; Toll usage included in your solution and if so, please describe any costs/usage that would be an additional cost to Genesee County</p>													
<table border="1"> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </table>													
<p>Please briefly list any advanced UC/Voice features available on the platform.</p>													

**Voicemail Requirements**

<p>Does the solution allow for Voicemail to be played back within an email? If so what type of file is attached? (.wav, .mp3)</p>	
<p>Will the solution also transcribe voicemail? Can the transcription be emailed with the audio file? If not, where would the end user find the transcription?</p>	

**Telephone Number Management**

<p>Describe how your solution manages primary numbers, porting and how any additional numbers can be added. Including how/where Genesee County can access non-active/assigned numbers.</p>	
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**Mobility**

<p>Does your mobile application present any call quality indication to the user?</p>	
<p>Please describe any advanced/significant features with your mobile application</p>	



## Integrations

Describe any 'out-of-the-box' integrations does your platform provide to other business applications?	
Does your solution integrate with Microsoft? If so, please describe the integration.	

## Basic System Administration

Describe the call detail reports that are available from the administration interface.	
Can reports be scheduled to run automatically?	
Can moves and changes be batched: that is, can changes be made to several subscribers or classes of service simultaneously?	

## Call Center Administration

Does the system provide configurable, role-based access?	
Describe how many levels of access your system can provide, such as manager, supervisor, agents, etc. and provide what the capabilities of each level are in detail.	
Can a supervisor log-in, log-out, change an agents status or take the agent off queue?	
Can a supervisor listen, whisper, barge into a live voice call?	
Are there any system limits? What is the maximum number of: Agents, Supervisors, Queues, Routing Steps, Announcements? Etc.	

What is the process to increase licensing if Gen County needs to expand capacity beyond what is purchased or contracted?	
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IVR – Interactive Voice Response

How does an admin user make changes to IVR flows and configurations?	
How often is Professional Services needed to help with IVR configuration changes? How long does this typically take? What is the cost of supporting these changes?	
Please provide an explanation of how the IVR solution will integrate and perform screen-pop functionality (if integrated into a patient management solution)	
Please explain details of your current voice biometrics capabilities and any future roadmap items as it relates to IVR.	

Omnichannel Functionality (Mark, What does this mean?)

Please list all available digital channels and any that will be available by Q4 2023. Please indicate if they are already in production or on the roadmap with a release date.	
Is it possible to elevate a chat to a phone call?	
Can messages from customers be escalated	

automatically when they are not responded to in a timely manner?	
Is it possible to view team trends of digital channels traffic and performance metrics via real-time dashboard?	
If SMS is supported, do you also support MMS?	

Call Recording, Monitoring & Quality Management

Please provide an explanation on how your product would provide screen recording.	
Please describe if call recording can be transcribed and if certain 'terms' or 'sentiment' can be flagged	
Can the call recording and screen recording be easily sent to other users? If so, what options are there? Is the call and screen recording downloadable and able to be sent within the same file?	
Where are the calls stored? How long can Genesee County retain our call recordings? Please distinguish between audio only and screen recordings.  Are there any fees associated with call recording storage?	
Does your platform offer voice analytics for call quality monitoring and coaching purposes?	

Speech/Non-Speech Analytics

Please describe your Speech Analytics product as it pertains to all available digital channels.	
---	--

## Post-Call Surveys

What type of post-call survey functionality do you offer through your platform?	
Can Genesee County set up triggers to alert management when poor survey results are submitted for follow-up? Please explain.	

## Reporting (Real-Time & Historical)

Please provide a list of real time dashboards/reports.	
Are the dashboards configurable?	
Can non-administrators customize dashboards?	
Are these dashboards showing real time or delayed data? If delayed, how long is the delay?	
Are triggers/alerts available for live dashboards? If so, are they customizable? What communication types are supported?	
<p>Genesee County has requirements around real-time metrics. Please describe if these metrics can be viewed real-time.</p> <ul style="list-style-type: none"> <li>• Active Waiting Calls</li> <li>• Hold Time – Shortest, Average, Longest</li> <li>• Peak Hour Traffic</li> <li>• Agents Logged In, Calls under 5 mins, Total Calls Today, Calls Waiting, Agents Ready, Average Call Length, ASA, Longest Call Waiting</li> </ul> <p>Please list any other real-time metric available on your platform.</p>	

How far back can historical data be accessed both daily, weekly and monthly reports? How long is the data stored for reporting purposes? What charges are associated with this storage?	
Can reports be scheduled and distributed? Please describe how/what methods?	

Billing

Does your system allow Cost Centers to be added when an account is created? Please describe how Genesee County will ensure a Cost Center is attached to every user and how Cost Centers are updated.	
Please describe how Genesee County will be able to pull reporting by Cost Center.	

Implementation & Training

Provide a brief overview of a typical implementation including the expected timeline, dedicated management & support personnel.	
Describe your process of assessing the Genesee county network prior to rollout.  Please include how would you ensure that all County remote locations will have exceptional quality/service etc.	
Please describe the typical staffing model for post-go-live operational support and maintenance.	
Do you have your own Professional Service (PS) practice and Technical Service (TS) to implement your technology, or do you use PS/TS partners to implement? If partners are leveraged, please provide names and contact	

information.	
Describe training programs offerings for both implementation and post deployment.	
Please describe any/all training offerings (both for County administration/supervisors and County end user community)	

End of Response Matrix

# COST PROPOSAL FORM

Please itemize charges by categories.

A sample, but not complete list of items for pricing may include:

- UC – UcaaS User Costs – Per User
- Pricing for Auto attendant, Call Queues, IVR, Custom reporting, Quality management, Survey tool, Courtesy Call Back
- SSO Integration

Please include OPTIONS for Professional Services fees related to the implementation.

Implementation & Professional Services pricing must be included, but may not be selected by County.

- Implementation
- Training
- Support (Include any extra support options)

Please include pricing for three year and five-year options with monthly and annual billing options.

We have summarized each requirement category below and it also detailed in Appendix B, UCaaS, CCaaS Requirements matrix. The proposer should place an “X” in the appropriate box that describes when the capability is/will be available.

UCaaS – Unified Communications			
Feature	Current Available	Not Available	Comments
SLA (Uptime)			
Softphone			
Caller ID & Blocking			
Call Forwarding; Simultaneous Ring; Find Me/Follow Me			
Presence/Messaging/Group Chat			
Hunt Groups, Ring Groups, Call Queues			
Auto-Attendant			
Business Voicemail			

Voicemail to Email (Playback within email)			
Transcribed Voicemail in Email			
Single-Sign On			
Call Recording			
Business Hours			
Call Transcription – Real Time			
Device Compatibility (See RFP for Device Models)			
CCaaS - Contact Center as a Service			
Skills Based Routing			
Interactive Voice Response (IVR)			
Digital Channels Voice/Email/Text/SMS/Social Media			
Omnichannel			
Call Recording			
Call Transcriptions – Real Time			
Call Transcriptions – Historical			
Ability to flag/prioritize by customer sentiment			
Screen Recording			
Quality Management Controls			
Agent Whisper			
Call Monitoring			
Courtesy Call Back			
After Call Survey			
Workforce Management			
Integration & Advanced Options			
Trinity (Patient Management) Integration			
Ceridian			
IOS & Android Mobility App			



Account Support/Billing/Reporting			
Dedicated Account Team – Post Implementation			
Dedicated Technical POC			
Priority Support Option			
Managed Service Option			
US Based Support			
Spanish-speaking support			
Cost-Center billing/breakout reporting			

Provider A				
License	Qty	Rate/User	Monthly	One-Time Fee
UCaaS – Standard User				
UCaaS – Common Area				
CCaaS – Standard User				
CCaaS – Admin License				
CCaaS – Toll Free Minutes				
Fees & Recovery Costs				
Conference Room Phones				
Microsoft Teams Integration				
Monthly Sub Total				
Optional Pricing				
Desk Phones				
Additional Support Options (please list & describe offerings)				
Include any on-site offerings				
Integration to Third Party CCaaS				
Monthly Sub Total				
Total				
Professional Services (One-Time Fees)				
Description	Qty	Rate/User		One-Time Fee
Implementation Services				
Training				
Incentives/Additional Offers				

NAME OF BIDDER: \_\_\_\_\_

SERVICE ADDRESS: \_\_\_\_\_

CITY, STATE, ZIP: \_\_\_\_\_

CONTACT PHONE: \_\_\_\_\_

CONTACT EMAIL: \_\_\_\_\_

**SIGNATURE PAGE**  
**GENESEE COUNTY RFP #23-321**  
**UNIFIED COMMUNICATION SYSTEM**

The undersigned represents that he or she:

1. is duly authorized to make binding offers on behalf of the company,
2. has read and understands all information, terms, and conditions in the RFP,
3. has not engaged in any collusive actions with any other potential proposers for this RFP,
4. hereby offers to enter into a binding contract with Genesee County for the products and services herein offered, if selected by Genesee County within 120 days from proposal due date,
5. certify that it, its principals, and its key employees are not "Iran linked businesses," as that term is described in the Iran Economic Sanctions Act, P.A. 2012, No. 517, codified as MCL 129.311, et seq.
6. acknowledges the following addenda \_\_\_\_\_ issued as part of the RFP:

**Conflict of Interest:**

\_\_\_\_ To the best of our knowledge, the undersigned firm has no potential conflict of interest due to any other County contracts, or property interest for this proposal.

OR

\_\_\_\_ The undersigned firm by attachment to this form, submits information which may be a potential conflict of interest due to other County contracts, or property interest for this Proposal.

**Exceptions** to Solicitation and/or Standard Contract: NO \_\_\_\_\_ YES \_\_\_\_\_ (include attached statement)

Name (typed): \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Date: \_\_\_\_\_

Company: \_\_\_\_\_

Federal Employee Identification Number (FEIN): \_\_\_\_\_

DUNS Number: \_\_\_\_\_

**Contact Person of company representative for matters regarding this RFP**

\_\_\_\_\_  
CONTACT NAME POSITION

\_\_\_\_\_  
MAILING ADDRESS CITY STATE ZIP CODE

\_\_\_\_\_  
PHONE FAX E-MAIL



## REFERENCES

List 3 references of similar projects

Submitted by: \_\_\_\_\_

<b>Company/Client:</b>	<b>Contacts:</b>
	Name:
	Title:
	Phone:
Dates of Service:	Email:
	Address:
	City, State:

<b>Company/Client:</b>	<b>Contacts:</b>
	Name:
	Title:
	Phone:
Dates of Service:	Email:
	Address:
	City, State:

<b>Company/Client:</b>	<b>Contacts:</b>
	Name:
	Title:
	Phone:
Dates of Service:	Email:
	Address:
	City, State:

## PROFESSIONAL SERVICES CONTRACT

This Contract for Professional Services (the "Contract") is by and between the County of Genesee, a Michigan Municipal Corporation, whose principal place of business is located at 1101 Beach Street, Flint, Michigan 48502 (the "County"), and [Contractor Name], a [State] [Entity Type], whose principal place of business is located at [Contractor Address] (the "Contractor") (the County and the Contractor together, the "Parties").

### 1. Term

#### 1.1 Initial Term

The initial term of this Contract commences on [TBD], and shall be effective through [May 2023] (the "Initial Term").

#### 1.2 Extension Terms

The County has the option to extend this Contract for up to three (3) additional one year terms (the "Extension Terms").

### 2. Scope of Work

The Contractor agrees to perform the services described on Exhibit A (the "Services").

### 3. Compensation

The County will reimburse the Contractor for approved expenses incurred by the Contractor in the performance of this Contract. The total amount paid to the Contractor under this Contract shall not exceed \$ [REDACTED]. The Contractor's projected budget for the Initial Term of this Contract is attached as Exhibit C (the "Budget"). If this Contract is extended, the County and the Contractor will agree in writing on a projected Budget for each Extension Term.

3.1 If requested in writing by the Contractor, and supported by good cause, the Contract Administrator may authorize a transfer between Budget line items of up to 10% of the total annual Budget for a Contract Term. No such transfer is authorized until approved in writing by the Contract Administrator.

3.2 The County will not approve any expense not identified in the Budget, and the County will not approve any expenses in excess of the amounts identified in the Budget.

3.3 The Contractor must provide to the County monthly invoices in a form acceptable to the County, along with any supporting documentation such as time sheets and receipts for incurred expenses. The County will pay the Contractor within sixty (60) days of the County's acceptance of the invoice and supporting documentation.

*Flat Fee.* The Contractor shall be paid a flat fee of \$ [REDACTED] for the performance of the Services. Upon completion of the Services, the Contractor must

provide to the County an invoice in a form acceptable to the County, along with any necessary supporting documentation. The County will pay the Contractor within sixty (60) days of the County's acceptance of the invoice and supporting documentation.

4. **Taxes.** The County is a Michigan Municipal Corporation. The Contractor acknowledges that the County is exempt from Federal Excise Tax and Michigan Sales Tax.

5. **Contract Administrator**

The contract administrator for this Contract is TBA (the "Contract Administrator"). The Contractor acknowledges that the Contract Administrator is the primary County contact for notices and instructions related to this Contract. The Contractor agrees to provide a copy of all notices related to this Contract to the Contract Administrator.

6. **Warranties**

The Contractor warrants that:

- 6.1 The Services will be performed in a good and workmanlike manner and in accordance with generally acceptable practices in the industry.
- 6.2 The Contractor will comply with all federal, state, and local laws in the performance of the Services.
- 6.3 The Contractor will comply with the requirements of any federal or state grants used to fund or support this Contract.
- 6.4 The Contractor will obtain and maintain all applicable licenses and permits necessary to provide the Services for the entire term of this Contract.

The Contractor agrees to indemnify, defend, and hold harmless the County, its officials, officers, agents, and employees from any and all claims, damages, or liability, including defense costs, arising out of the Contractor's breach of these warranties.

7. **Suspension of Work**

- 7.1 Order to Suspend Performance

Upon written order of the Contract Administrator, the Contractor agrees to immediately suspend performance of the Services. The Contractor shall not be entitled to compensation for any Services performed during any period in which the Contract Administrator has directed that the Services be suspended.

- 7.2 Necessary Actions Before Suspension

If immediate suspension of the Services would cause harm, injury, or damage to persons or property, the Contractor must immediately notify the Contract Administrator of the nature of such harm, injury, or damage, and obtain written authorization from the Contract Administrator to take such necessary action as to

prevent or minimize such harm, injury or damage. Actions authorized by the Contract Administrator pursuant to this paragraph are compensable.

## **8. Termination**

### **8.1 Termination for Cause**

If the Contractor is in breach of any provision of this Contract, and such breach continues for fourteen (14) days after written notice is issued to the Contractor by the County of the breach, the County may terminate this Contract. Such termination for cause is effective upon receipt of the notice of termination by the Contractor.

In addition to any other remedies provided by law or this Contract, the Contractor shall be responsible for all costs incurred by the County as a result of the Contractor's breach and termination, including any costs to obtain substitute performance.

### **8.2 Immediate Termination**

If the County, in its discretion, determines that the Contractor's breach of this Contract constitutes a threat to public health, safety, or welfare, the County may terminate this Contract immediately upon notice to the Contractor.

In addition to any other remedies provided by law or this Contract, the Contractor shall be responsible for all costs incurred by the County as a result of the Contractor's breach and termination, including any costs to obtain substitute performance.

### **8.3 Termination for Convenience**

If the County determines that it is in the County's best interests, the County may terminate this Contract upon thirty (30) days written notice to the Contractor.

The County shall pay for all work properly performed up to the effective date of the notice of termination.

### **8.4 Termination for Lack of Funding**

If this Contract is funded by public funds or a grant from a public or private entity, and the funds are not appropriated or the grant is discontinued, the County may terminate this Contract by written notice specifying the date of termination.

The County shall pay for all work properly performed up to the effective date of the notice of termination.



## **9. Equipment Purchased with County Funds**

9.1 The Contractor shall not purchase Equipment for the performance of this contract using funds provided by the County unless such purchase is clearly identified in a line item in Contractor's Budget.

### **9.2 Reporting**

The Contractor agrees that any Equipment purchased for the performance of the Services with funds supplied by the County under this Contract must be reported to the Contract Administrator upon purchase. For the purposes of this paragraph, Equipment is defined as tangible, non-expendable, personal property having useful life of more than 1 year and an acquisition cost of \$5,000 or more per unit.

### **9.3 Conveyance to the County**

Upon the County's request at the termination of this Contract for any reason, the Contractor agrees to convey to the County all title in any Equipment purchased for the performance of the Services with funds supplied by the County under this Contract.

## **10. Nondiscrimination**

The Contractor covenants that it will not discriminate against an employee or applicant of employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, marital status or a disability that is unrelated to the individual's ability to perform the duties of a particular job or position, and that it will require the same non-discrimination assurances from any subcontractor who may be used to carry out duties described in this contract. Contractor covenants that it will not discriminate against businesses that are owned by women, minorities or persons with disabilities in providing services covered by this Contract, and that it shall require the same assurances from subcontractors. Breach of this covenant shall be regarded as a material breach of this contract.

## **11. Freedom of Information Act**

This Contract and all attachments, as well as any other information submitted by the Contractor to the County, are subject to disclosure under the provisions of MCL 15.231, *et seq.*, known as the "Freedom of Information Act".

## **12. Intellectual Property**

Any intellectual property created by the Contractor in the performance of the Services shall be considered a work made for hire, and any and all rights in such intellectual property shall belong solely to the County. Upon the County's request, the Contractor agrees to execute any documents necessary to convey ownership of such intellectual property to the County.

## **13. Audit Rights**

### **13.1 Certification of Accurate Information**

Contractor certifies that all information provided to the County by the Contractor relating to the award or modification of this Contract, or any payment or dispute related to this Contract, is true and correct. The Contractor further certifies that its accounting system conforms to generally accepted accounting principles.

### **13.2 Inspection**

The Contractor agrees that the County may inspect the Contractor's plant, place of business, or worksite to ensure compliance with the terms of this Contract. If this Contract is funded or supported with any state or federal grant funds, the state or federal agencies responsible for administering the applicable grants may examine the Contractor's plant, place of business, or worksite to ensure compliance with the terms of this Contract and the terms of the applicable grant.

### **13.3 Audit**

The Contractor agrees that the County may examine the Contractor's records to ensure compliance with the terms of this Contract. If this Contract is funded or supported with any state or federal grant funds, the state or federal agencies responsible for administering the applicable grants may examine the Contractor's records to ensure compliance with the terms of this Contract and the terms of the applicable grant.

### **13.4 Records Retention**

The Contractor agrees to maintain any business records related to this Contract or the Contractor's performance under this Contract for a period of at least three (3) years after final payment.

## **14. Identity Theft Prevention**

14.1 In the event that the Contractor will obtain identifying information during the performance of the Services, the Contractor must take reasonable precautions to ensure that such identifying information is protected from unauthorized disclosure and is used only for the purpose of performing the Services.

14.2 For the purposes of this Paragraph, "identifying information" means any name or number that may be used, alone or in conjunction with any other information, to identify a specific person, including but not limited to name, address, telephone number, social security number, date of birth, driver's license number, taxpayer identification number, or routing code.

## **15. Insurance Requirements and Indemnification**

The Contractor agrees to obtain insurance coverage of the types and amounts required as set forth in the Insurance Checklist attached as Exhibit B and keep such insurance coverage in force throughout the life of this Contract.

#### 15.1 Insurance Certificate and Additional Insured Coverage

The Contractor further agrees to provide certificates of insurance to the County evidencing the coverages specified in the Insurance Checklist, and including the County as an additional insured. Additional insured coverage is to be by proof of blanket additional insured coverage within the general liability policy or as provided by an endorsement specifying the County as an additional insured to the policy. Contractor's agent must provide a copy of the endorsement or language from the policy with the certificate of insurance.

#### 15.2 Indemnification

The Contractor agrees to indemnify, defend, and hold harmless the County, its officials, officers, agents, and employees from any and all claims, damages, or liability, including defense costs, arising out of the Contractor's performance of the Services or presence on the County's property or worksite.

### 16. Independent Contractor

The Contractor and its agents and employees are independent contractors and are not the employees of the County.

### 17. General Provisions

#### 17.1 Entire Contract

This Contract, consisting of the following documents and Exhibits, embodies the entire Contract between the Parties.

17.1.1. The Contract – This Professional Services Contract

17.1.2. Exhibit A – The Scope of Work

17.1.3. Exhibit B – The Insurance Checklist

17.1.4. Exhibit C – The Contractor's Budget

There are no promises, terms, conditions, or obligations relating to the Services other than those contained herein. In the event of a conflict between this Contract and any Exhibit, the terms of this Contract shall control.

#### 17.2 No Assignment

The Contractor may not assign or subcontract this Contract without the express written consent of the County.

### 17.3 Modification

This Contract may be modified only in writing executed with the same formalities as this Contract.

### 17.4 Binding Effect

The provisions of this Contract shall apply to and bind the heirs, executors, administrators, and assigns all of the parties hereto.

### 17.5 Headings

The paragraph headings in this Contract are used only for ease of reference, and do not limit, modify, construe, and or interpret any provision of this Contract.

### 17.6 Governing Law and Venue

This Contract is entered into under the laws of the State of Michigan. Any litigation between the Parties arising out of this Contract must be initiated within two years of the cause of action accruing and must be brought in a court of competent jurisdiction in Genesee County, Michigan.

### 17.7 Subpoena Power

The Contractor acknowledges and understands that the Chairperson of the Genesee County Board of Commissioners, pursuant to MCL 46.3(5), as amended, has the power to administer oaths, issue subpoenas, and compel a person's attendance in the same manner as a court of law. The Contractor agrees to submit to this power with respect to this Contract.

### 17.8 Severability and Survival

In the event that any provision of this Contract is deemed by any court of competent jurisdiction to be legally ineffective, such decision shall have no effect on the remaining provisions of this Contract.

### 17.9 Interpretation

Each Party has had opportunity to have this Contract reviewed by legal counsel and has had equal opportunity to contribute to its contents. In the event of any dispute concerning the interpretation of this Contract, there shall be no presumption in favor of any interpretation solely because the form of this Contract was prepared by the County.

### 17.10 Remedies

All remedies specified in this Contract are non-exclusive. The County reserves the right to seek any and all remedies available under this Contract and applicable law in the event that the Contractor fails to abide by the terms of this Contract.

IN WITNESS WHEREOF, the Parties have caused this Contract to be executed by their duly authorized agents.

**CONTRACTOR NAME**

COUNTY OF GENESEE

By: \_\_\_\_\_

**Name of Contractor Signatory**

**Title of Contractor Signatory**

Date: \_\_\_\_\_

By: \_\_\_\_\_

Ellen Ellenburg, Chairperson

Board of County Commissioners

Date: \_\_\_\_\_

DRAFT

## **EXHIBIT A – DESCRIPTION OF SERVICES**

This information will be provided upon mutual agreement between the County and selected vendor.

DRAFT