

# ***REQUEST FOR INFORMATION***



## **Unified Communications as a Service**

**RFI # 210104-120**

Date of Issue: Monday, January 4, 2020

Questions Due: January 12, 2021 by 5:00 PM (EST)

Answers Issued via Addendum: January 14, 2021 by 5:00 PM (EST)

**Proposals Due: January 26, 2021 by 2:00 PM (EST)**

### **Issued for:**

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**SUMMARY**

Pender County is seeking information regarding replacement of our current, on-premise, Cisco Voice over IP (VoIP) system (the system) with a Cloud-Hosted Unified Communications as a Service (UCaaS) solution. The County wishes to move from a Capital Expense model to an Operating Expense model for its Unified Communications; receiving a monthly bill, per user and/or device, rather than costly expenses to maintain an on-premise system.

The current system limits County staff to communication within the internal network and provides for little redundancy. The County wishes to migrate to a cloud-hosted system that permits employees to log in anywhere on or off the company network (VoIP Handset, mobile phone or computer) and automatically receive calls without administrative intervention. In addition, a cloud-based system will allow for continuity of operations should the County be left without operating data centers after the wake of a natural or other disaster.

This Request for Information (RFI) is intended to collect information and recommendations regarding a Cloud-Hosted Unified Communications as a Service solution.

The County requests detailed responses showing how your firm would address items in the following sections of this RFI:

- Required Features
- Preferred Features & Questions
- Required Features – Handsets

In addition, the County is seeking costs for a solution that will encompass all requested needs and features at a Per User monthly rate. The County is seeking costs for three (3) options:

- **Option #1:** Cost Per User per Month – cost of all features required billed at a per user rate. This will also need to include published, shared lines such as main numbers.
- **Option #2:** Cost Per User + Cost per Handset – includes all costs for Option #1 plus cost to Rent or lease handsets. In this scenario, the handset would be provided by the vendor. The unit would come pre-programmed and ready to be connected to an internet ready network port. If a handset unit failed, the vendor would provide a replacement unit at no cost. The unit would arrive pre-programmed.
- **Option #3:** Cost Per Handset – this option would be simply the cost to purchase requested handsets models. This will allow the County to compare the total cost of purchase against the cost to lease/rent handsets.

**RFI PROCEDURES**

**TIMELINE**

|                            |  |
|----------------------------|--|
| January 4, 2021            | Request for Information issued   |
| January 12, 2021 by 5:00pm | Deadline for any questions on the RFI – email to <a href="mailto:tnewton@pendercountync.gov">tnewton@pendercountync.gov</a>  |
| January 12, 2021 by 5:00pm | Deadline to register for a time to present response – sign up at <a href="https://www.signupgenius.com/go/8050E4DABA92CA3FD0-presentation">https://www.signupgenius.com/go/8050E4DABA92CA3FD0-presentation</a> |
| January 14, 2021           | Answers will be provided to questions via an Addendum  |
| January 26, 2021 by 2:00pm | Deadline for responses to RFI – email to <a href="mailto:tnewton@pendercountync.gov">tnewton@pendercountync.gov</a>  |
| February 2, 3 and 4, 2021  | Presentations via Microsoft Teams – invite with Teams details  |

**QUESTIONS**

Clarification questions will be accepted until January 12th, as specified on the cover sheet of this RFI. All questions must be submitted via email to [tnewton@pendercountync.gov](mailto:tnewton@pendercountync.gov). An addendum containing any general clarification and answers to questions will be issued as an addendum to this RFI no later than January 14, 2021.

**PRESENTATIONS**

Respondents are invited to present their submissions via a Microsoft Teams meeting. Respondents may sign up via Sign Up Genius using the following link: <https://www.signupgenius.com/go/8050E4DABA92CA3FD0-presentation>. Time slots will be made available no later than January 6, 2021 at 5:00pm (EST). Respondents must register by 5:00pm (EST) on January 12, 2021. An invite to a Teams meeting will be sent in advance of your presentation time.

**CONTENT AND FORMAT**

The County expects concise, detailed, point-by-point responses to each of the RFI response items identified in Sections “Required Features”, “Preferred Features & Questions”, and “Required Features – Handsets of this RFI”. The County is not interested in brochures or “boilerplate” responses. Instead, responses should clearly define how the vendor’s proposed solution(s) would meet the County’s business requirements. Any issues or exceptions to the County’s requirements should also be identified and explained.

The response should define all services that would be required by the proposed solution. The response should also include:

- The vendor’s understanding of the project and services by addressing the County’s business requirements.
- Internet Bandwidth requirements, interconnect/WAN bandwidth requirements, network switch requirements, and network switch port requirements for the proposed solution.
- Software and/or Licenses required for the solution and/or Add-On Features.
- A plan to “Phase-In” the solution with an anticipated project kick-off beginning August 2021 and a 6 month expected project closure.
- All costs to include:
  - Option #1: Cost Per User per Month (see **Executive Summary**)
  - Option #2: Cost Per User + Cost per Handset (see **Executive Summary**)
  - Option #3: Cost Per Handset (see **Executive Summary**)
  - Fee(s) to port existing numbers
  - Implementation and/or service
  - Support & maintenance
  - Add-On Features NOT included in the solution
  - Add-On Licenses needed with annual support/maintenance
  - **Any additional costs not listed above**

## **CURRENT ENVIRONMENT**

The current phone system consists of three (3) virtual Cisco Unified Communications Manager (CUCM) Servers, three (3) virtual Cisco Unity Connection (CUC) server for Voicemail, one (1) IM & Presence Server for soft phone needs. The Current system includes 8 Voice Gateways, 4 PRI's, 580 DID's. The current system includes 487 VoIP handsets, and 13 Conference phones.

The Pender County network consists of 25 buildings located across the entirety of the County. In Burgaw, the County seat, most of the buildings are connected via private fiber to the Primary Data center. These connections are at minimum 1Gbps. Internet is currently served through the Primary Data Center. However, ITS is in the process of seeking a secondary internet site for redundancy. Buildings outside of the County seat are connected via WAN/Interconnect services with various bandwidths.

## **REQUIRED FEATURES**

The County has identified that the following features must be in the solution. Any required feature not available in your solution must be identified and notated. Furthermore, if any required feature is an add-on or extra cost this cost must be identified as well.

### **Fully Cloud hosted VoIP solution**

The solution must be cloud-hosted and cloud-managed. On-premise hardware will be limited only to devices used to subscribe to the system such as IP Handsets, Computers and Mobile devices.

### **Plug & Play**

The solution must allow users to connect handset to any internet connection to make outgoing calls and receive in-coming calls.

### **Call Paths**

The solution must have one-to-one call paths; oversubscribed call paths are unacceptable. The total number of call paths must be equal to the amount of user lines.

### **Existing Phone Numbers**

Hosted VoIP Service will use the current County phone numbers. The County wishes to retain the current phone numbers at all locations. Existing numbers will be ported to the new system. Cost for this service must be specified if not included in service cost.

### **Long Distance Calling**

The solution will include in-state/out-of-state long-distance service. Cost for this service must be included in the quote. Solution must include ability to make international calls. Cost for this service must be specified if not included in service cost.

### **Voicemail & Unified Messaging**

- The solution must support a minimum of 600 voicemail subscribers.
- The solution should integrate with Office 365 / Exchange Online.
- The solution must be able to automate open and closed greetings as well as holiday and other business greetings.
- The solution must allow a minimum of 30 days retention.
- Each individual voicemail box must be password protected.
- The solution must allow voicemail to be accessed remotely via phone call, mobile app or soft phone app.
- The solution must allow users to forward voicemail to another internal voice mailbox, allowing the sender to record additional comments, if needed.
- The solution must allow a voicemail message to be automatically converted to an audio file and sent to a user's email account.

### **Voice Quality**

The solution must provide high-quality voice with minimal latency.

**Call Handling**

The solution must:

- Allow County staff to dial a four-digit extension on an internal phone to reach another internal line.
- Allow external callers to dial directly to individual phone numbers without intervention by a live operator or automated attendant.
- Be capable of routing inbound, outbound, and internal calls.
- The solution must allow users to send incoming calls to another number (internal or external to the network, landline, or cellphone); all calls, when line is busy, and when call is not answered.
- Forward unanswered calls to the corresponding voice mailbox after a defined number of rings.
- Allow a call to be transferred to another internal extension or external number.
- Allow for a call menu tree to be created for lines, if desired, allowing callers to press a specified number to reach an associated phone number or user.
- Permit station users to forward incoming calls to another phone of their choice based on busy, no answer, and all calls conditions.
- The solution must allow a user to pick up an external call, internal call, or a call on-hold. The solution must allow a user to pick up a call on-hold from any internal extension.
- Allow station users to answer calls intended for other stations within a common call pickup group.
- The solution must allow any individual to handle two lines simultaneously.
- Station users of the proposed solution must be able to transfer a call in-progress to an internal extension or external number without attendant intervention.
- Allow incoming calls to ring a handset, softphone and/or mobile device.
- Have find-me/follow me, allowing users to route incoming calls to location or locations, to mobile devices, to softphone and to route multiple numbers to a single phone or answering service.

**Call waiting**

The solution must allow for a Call Waiting Queue feature to be enabled.

- Enable / Disable feature for a DID or Group of extensions.
- Announce the estimated wait time.
- Announce the user's position in the queue.
- Allow the users to leave a message rather than wait in the queue.

**Caller ID**

The solution must allow users to view the phone number and its associated staff name for all internal calls. The solution should also allow users to view the phone number of the caller of inbound calls. Additionally, outbound can be configured to announce individual DID numbers, the company's main number, the department's main number, or it can be blocked entirely.

**Auto Attendant**

The proposed solution must support auto-attendants. Auto attendants must support multiple configurations and time frames including Holiday Hours, After Hours, Business Hours. The solution must:

- Allow end-users to change an assigned auto attendant via cloud-based portal.
- Allow County staff to design a simple and easy-to-use voice menu.
- Present callers with a voice menu of options and/or a message, then route calls according to the keys the caller presses.
- Accommodate multiple language menus.
- Allow caller to dial by extension, enabling caller to reach a user by dialing his/her extension.
- Allow caller to dial by name, enabling caller to reach a user by dialing the first three letters of the last or first name.
- Allow caller to press "0" to reach the operator.
- Offer capability to set business hours and after-hours automated attendant messages for Main Lines.
- Offer capability to store multiple voicemail greeting for Direct Lines.
- Offer capability to set an auto-timed "out of the office" greeting.
- Offer capability to remotely change and/or re-record greetings.

**Conference Calls**

The proposed solution must provide the ability to initiate a conference call with a minimum of two additional parties.

- The solution must allow for unlimited conference call participants.
- The solution must allow for both internal and external (to the agency) participants.
- The solution must allow for conference bridging.
- The solution must allow for a meeting password to restrict all but intended participants.
- The solution must allow for on-demand conference calls in which a caller can dial participants and add them to the call.

**Video Conference**

The proposed solution must provide video conferencing.

- The video conference solution must offer the ability to have customers, vendors, or others outside of the organization join in a video conference.
- The video solution must be available from multiple devices (computer, smartphone, tablet, etc.).
- The video conference solution must offer the ability to display a participants list.
- The video conference solution must offer the ability to record the call.
- The video conference solution must offer the ability to join via video and a dial-in number.
- The video conference solution must offer the ability to set a password or pin to join the conference call.
- The video solution must offer the ability for the host to mute all participants.

**System Administration**

- The solution must allow multiple, designated County staff to use a web interface for phone programming, management of account creation, deletion, and changes in settings.
- Allow local administrators to assign DID lines to users as well as manipulate the Caller ID associated to each extension and/or user. The system should also allow administrators to control use of softphone and mobile apps.
- Allow assignment authorization codes to individuals, projects, and customers in order to charge expenses directly to the appropriate departments.
- Allow controlled access to long-distance facilities beyond normal class of service restrictions.
- The solution must allow multiple, designated County staff to record and manage the voice menu, business, and holiday greetings.
- Provide granular permissions allowing local administrators to assign permissions to designated staff, including read-only permission, for both full and limited system administration.
- The solution must provide documentation for multiple, designated County staff to be trained.
- Must require strong passwords and/or Multi-Factor Authentication for web-based portal access.

**Self-Service Portal**

The solution must:

- Require strong passwords and require user to change based on defined password policy. Two-Factor/Multi-factor authentication is preferred. Integration with Azure AD is preferred.
- Be accessed over an HTTPS web portal that is browser agnostic (supports multiple web browsers without losing features or requiring plug-ins).
- Allow users to manage voicemail box to include listening to messages, forwarding messages, deleting messages, downloading messages, etc.
- Allow users to make basic changes such as forwarding their extension.
- Review Call History to include date/time, call origination and destination.

**Reporting**

The solution must:

- Allow multiple, designated County staff to view basic historic call reporting for phone extensions, hunt groups, mailboxes, etc.
- Allow for granular permissions, allowing delegation of call reporting to users.
- Allow for automated delivery of reports.
- Include a Call Accounting System (CAS).
- The CAS must include Call Dialing Report (CDR) for inbound, outbound, and internal calls and usage reports for all types of inbound, outbound, and internal calls. Specifically, The County of Pender is very concerned about the metrics for call length, number of calls unanswered going to voicemail and dropped calls.
- Provide reporting for the purposes of billing and accounting purposes. This would include filtering and sorting by Department, Assigned User, Directory Number, etc.
- Provide a means of producing an electronic or printed phone number directory by department.
- Support real-time monitoring & offer real-time graphs and/or statistics, such as phone usage and peak hours.
- Vendor should also provide training for up to 3 employees in the administration, maintenance, programming, and daily operation of the Call Accounting System.

**Paging**

The proposed solution must have the ability to page all endpoints subscribed to the system including, but not limited to, handsets, soft-phone applications, mobile applications. In addition, the system must be capable of:

- Calling all endpoints or group of endpoints depending on number dialed.
- Sending SMS messages to the subscribed users.
- Integration with physical equipment such as loudspeakers, if required.
- Pre-recorded paging announcements such as the opening and closing announcements or emergency alerts.

**Softphone Capabilities**

The proposed solution must have the ability to provide softphone extensions that reside on our employees' County-provided computers. These extensions should provide an equal or better level of functionality as physical handset equipment. Access to the solution, using a softphone application, should be capable over both a VPN and when not connected to a VPN. The softphone application must be compatible with the latest Windows Operating Systems. Chrome OS/Chromebook, MacOS compatibility is not required, but desired if available.

**Smartphone & Tablet Capabilities**

The proposed solution must have the ability to be used/accessed from a smartphone and/or a tablet device; henceforth described as a Mobile device. Mobile device applications must have the ability to provide an equal or better functionality as physical handset equipment. Mobile device application(s) must be compatible with the common mobile OS platforms including Android and Apple iOS.

**Single Number Reach**

The solution must have the ability to ring a user's assigned devices at once including IP Handset, mobile phone, soft phone, etc.

**Call Recording**

The proposed solution must have the ability to record calls. In addition, the solution must:

- Allow for both full time and on-demand recording.
- Allow for a minimum of 30 days retention for recorded calls.
- Allow the retention period to be modified per user or per extension if desired.

- Allow for recorded calls to be downloaded as playable audio file.

**Hunt Groups**

Capability to create Hunt Groups for Departments with Main Phone Numbers; Assign Direct Numbers under Hunt Groups; All assigned phone numbers in Hunt Group to display Hunt Group Main Number when dialing out.

**Group Pickup**

The solution must allow each department's phone numbers to be grouped together. When a main department number is called, a primary phone will ring. Department staff can pick up the call from that primary phone or other phones in that department's group. Example, when 910-259-1221 rings in the Tax Assessor's Office, any other phone in the Tax Assessor's group must be capable of answering that call.

**Phone Directory**

The solution must allow a user to search for internal staff numbers by using Last Name, First Name or Extension.

**Music On-Hold**

The solution is required to offer or support Music On-Hold. Professionally recorded messages are played over music to market the County's services to a patron while he/she is put on hold. The County does not currently have a Music On-Hold service. Administrators must have the ability to enable/disable this feature for individual departments and/or groups.

**DND (Do Not Disturb)**

The solution must allow County staff to turn on/off the DND feature for any individual phone, as needed.

**911 and E911 Compliance**

The solution must support placing calls to 911 from any phone within County buildings, Soft Phone or Mobile application. The service must be E911 compliant. Dialing 911 from any County phone should allow a 911 dispatcher to identify the location (floor/room/area) where the call originated.

**Hand-Set Configuration Flexibility**

The solution must support all the following types of telephones: IP, Conference Phones (IP), Wireless, Cellular and SIP endpoints.

**Multiple Assigned Devices**

The solution must allow users to have multiple devices assigned such as IP handset, Softphone, Mobile Application, etc.

**PREFERRED FEATURES & QUESTIONS**

The County has identified the following preferred features. Preferred features are not required but highly desired. Any feature not available in your solution must be identified and notated. Furthermore, if any feature is an add-on or extra cost this cost must be identified as well. This section also contains questions that pertain to both required and preferred features. Please provide answers for each and any additional information that you feel may assist the County in selection of a solution. Responses should be provided on a separate document referencing each section.

**Reporting**

1. Does your solution allow for direct billing to departments based on the customers specifications? (Example: All users would have a Department name or code assigned. Department representatives would be billed directly based off numbers assigned to their respective departments).

**Contact Center**

The proposed solution should have the ability to set up and support contact call centers. Pender County does not currently have this feature.

1. Does your solution provide a software application for participating in call center, providing a drag-n-drop call route/transfer?
2. Does your solution allow for Call Center Agents to log-in/log-out of the Center?
3. Does your solution allow for Call Center Agents to send and respond to SMS messages to/from external mobile phones?
4. Does your solution allow for Call Center Agents to route calls to both internal and external numbers?
5. Does your solution allow for real-time call center manager dashboard and controls?



6. Does your solution allow for automatic call distribution?
7. Does your solution allow for Skill-Based Routing?

**Self-Service Portal**

1. Describe capabilities of your Self-Service Portal and what capabilities an end-user has.
2. Does your solution allow for Two-Factor/Multi-Factor Authentication for portal login?
3. Does your solution integrate to Azure AD for Authentication?

**Call blocking**

1. Does your solution allow an administrator to block calls from specific exchange or area code, e.g., 259 exchange or 910 area code?

**User Mobility**

1. Does your solution allow users to log in as their desired extension from any handset?

**SMS Messaging**

1. Does your solution allow end-users to send/receive SMS messages to internal/external numbers using their assigned DID number via Mobile App or Soft Phone? If so, please describe the capabilities of this feature.

**Phone Directory**

1. Does this solution integrate with Azure AD and/or allow for photos to be uploaded/used within the directory?

**Voicemail**

1. Does your solution provide a single-user interface for both phone, SMS, Chat and voicemail? Describe the solution or unified communication capabilities of the system.
2. Describe the architecture of the proposed voicemail solution, including how voicemail is accessed by users from their extension remotely, from their mobile devices and from their desktop computer.
3. What are the available retention periods for received voicemail?
4. What is the maximum time a voicemail can reside in the system?
5. What is the maximum voice mailbox size?
6. For users that require unlimited retention of voicemail messages, is this an option? If so, what is the additional cost if any?
7. Does your solution have voicemail transcription in which voice messages are transcribed to text and emailed to the user along with a WAV file or other formats, such as MP3.

**Call Recording**

The proposed solution must have the ability to record calls. Please respond to the questions below.

1. What is the maximum retention for a recorded call?
2. Can the maximum or standard retention be modified per user or per extension if desired?
3. Is there a limit to the amount of time a recorded call can be?
4. Is there a limit to the number of recordings our agency can have?
5. Does your solution allow for recorded calls to be downloaded for archiving?
6. Can a recorded call be shared with another individual, such as providing a link to the call? Can such a link be shared with external users?
7. Does your solution allow the end-user to "flag" a recording for retaining a recording longer than the default retention period? What is the maximum length of time flagged recordings can be kept on the system.

**Integration**

1. Does the proposed solution support integration with Azure AD or On-Prem AD?
2. Does the proposed solution provide integration to emergency communication software?
3. Does the proposed solution provide integration with Microsoft Teams?

**Video Conference**

1. Does your video conference solution allow the organizer to share the recorded conference call? Can the recorded call be made available via Microsoft O365 SharePoint Online, One Drive for business and/or Microsoft Stream?

**Security**

1. Describe the security measures in place for you solution to include Administration Portal, Self-Service Portal and End-To-End security for subscriber units to your cloud service.
2. Does your solution meet CJIS, HIPPA and PII compliance? Does this also include your data center, employees with access to your data center/systems and any 3<sup>rd</sup> party vendors?

**Data Centers & Redundancy**

1. How many data centers host the proposed solutions?
2. Where are your data centers located? For security, only provide the general area (ex. Western North Carolina).
3. What Disaster Recovery measures are in place ensure your solution remains available to customers?
4. Describe your data center sites and alternate data center site locations used for redundancy.
5. Would the County's data reside in data centers outside of the United States?
6. What is your uptime in percentage?

**REQUIRED FEATURES – HANDSETS**

**Capability of Handling Two Lines on Any Individual Phone**

The solution must allow any individual phone to handle two or more lines simultaneously. For example, while County staff puts a call on hold on Line 1, he/she can use Line 2 to place another call to get more information for the caller waiting on Line 1.

**Phone Display**

The phone must display date, time, extension name, and extension number in idle state. The phones must provide visual display of most incoming call numbers/extensions and activated features such as DND (Do Not Disturb), Call Forward.

**Multiple Lines per Phone**

Phone handsets must be capable of having multiple lines assigned, dependent on the number of phone buttons on the phone. For example, a 2-button phone must be cable of having 2 different lines assigned, if needed.

**Support for Headsets**

Phone handsets must be capable of supporting many different wireless headsets, to include both wired, wireless and Bluetooth devices.

**Wireless Handsets**

Wireless (cordless) handsets are desired in locations that require employees to leave their station, walk to another room, and answer the phone up to 30 feet away. Such devices may use wireless internet or require a base station for network access.

**Standard Phone Buttons**

Transfer/Conference, Hold, Speaker, and Redial functions need to have their own designated buttons on all phones.

**Distinctive Ringtone**

The solution must allow County staff to distinguish calls with different ringtones when more than one phone is located in the same area.

**Flexible Ring Options**

Phone handsets must allow users to change phone audible ringer/tone.

**Volume Control**

The solution must allow County staff to adjust the volume level on individual phones.

**Speakerphone**

The solution must provide the speakerphone feature on all phones.

**Caller ID**

The solution must allow users to view the phone number and its associated staff name for all internal calls. The solution should also allow users to view the phone number of the caller regarding most inbound calls.

**Speed dial**

The solution must allow user ability to program internal or external numbers as two-digit speed dials accessed using a feature code, or as programmed buttons.

**Conference Phones**

Conference phone stations must allow for external microphones, including accessories such as Bluetooth microphones and speakers. Conference phone stations must be Power Over Ethernet (PoE) but also capable of being powered via external power supply.

**CLOSING**

The County recognizes the considerable effort that will be required in preparing a response to this Request for Information. However, this RFI does not commit Pender County to award a contract, pay any costs incurred in preparation, or travel to Pender County to present a demonstration, or to procure or contract for services.

All responses submitted become the property of the Pender County Government. Pender County reserves the right to cancel this Request for Proposal in part or in its entirety.

Pender County looks forward to receiving your proposals in response to the Request for Information. Your time is sincerely appreciated.