

**Request for Proposal for Telephone System  
Hosted VoIP System  
On-Premise VoIP System  
Hybrid IP System  
#RFP PHONE SYSTEM  
18-0328**

**Submitted by  
Caldwell County Government**

**Date  
March 28, 2018**

**Inquiries Should Be Directed To:**

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Information Technology Director  
Caldwell County Government**

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**Proposals Should Be Directed To:**

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Purchasing Director  
Caldwell County Government**

**905 West Ave. NW/P.O. Box 2200  
Lenoir, NC 28645**

**Phone: 828-757-1304  
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# I. GENERAL INFORMATION

## A. Caldwell County Government

### **Mission**

The mission of Caldwell County Government is to provide our citizens the highest quality service in a timely, efficient, and courteous manner.

This delivery of services will be provided through the proficient competence of our employees and in partnership with our citizens.

To totally achieve this goal, this government must be operated in an open and accessible atmosphere, be based on comprehensive and strategic long-term and short-term planning, and have an appropriate managerial organization of fiscal responsibility.

## B. Purpose

Caldwell County Government is looking to replace its current, outdated Department of Health and Human Services (DHHS) phone system with a new and improved one. Caldwell County seeks proposals on the type of system that best suites its needs. Systems under consideration include a hosted VoIP system, an on-premise VoIP system and a hybrid system. Caldwell County seeks a system that is functional in terms of our current needs, but that can easily and inexpensively be updated/ upgraded to address future needs.

The selected Vendor will be our primary source for the following:

- Business telephone system hardware, software and voice mail equipment
- Installation and configuration services for this equipment
- Training of users and administrators
- Maintenance of purchased and installed equipment and software
- Upgrades to the installed systems as necessary
- Coordination between System and Services
- Ensuring there are no other ancillary costs other than those specified in the proposal

## C. Instructions on Proposal Submission

### 1. Written Questions and Inquiries

All requests for information should be directed to:

Lucas Bentley, Information Technology Director

Caldwell County Government

P.O. Box 2200

Lenoir, NC 28645

828-757-1355

[lbentley@caldwellcountync.org](mailto:lbentley@caldwellcountync.org)

**Deadline for questions is March 20, 2018 @ 5:00 PM.**

### 2. Closing Submission Date

Proposals must be submitted and received no later than **4:00 p.m. on March 28, 2018.**

**Faxed or emailed proposals will not be considered.**

### 3. Condition of Proposal

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Vendor. During the evaluation process, the Caldwell County Government reserves the right to request additional information or clarification from the Vendor to allow for correction of errors and omissions.

### 4. Instruction to Prospective Contractors

#### a. Proposal Instructions

Submit one original and three (3) copies of the response. Each prepared response shall be submitted in a sealed envelope. The envelope must be addressed to the following and must include the label as indicated below.

Name: Lucas Bentley

Information Technology Director

Caldwell County Government

905 West Ave. NW/P.O. Box 2200

Lenoir, NC 28645

It is important that the Vendor's proposal be submitted and clearly marked in the lower left-hand corner with the following information:

Proposal – for DHHS phone system

It is the responsibility of the Vendor to ensure that the proposal is received by the date and time specified above. Late proposals will not be considered.

#### **5. Contract Overview**

The proposal should include a contract for all proposed equipment and services including coordination between the system and the available services. The contract must include all costs for the proposal, and there shall not be any additional ancillary costs. If the Vendor does not wish to submit an actual contract with the proposal, due to different alternatives proposed and pending choices from those alternatives, a sample contract should be submitted with the proposal. The Contract shall include all insurance provided, surety bonds and costs, etc. The contract must state that the vendor provides its own worker's compensation insurance or is not required to provide same.

#### **6. Contract Term and Cost of Ownership**

All equipment, software, licensing and maintenance pricing and negotiations or variations must be clearly stated. All pricing and negotiations must include both a five (5) and seven (7) year analysis of the Total Cost of Ownership. It shall include the costs of any necessary upgrades at DHHS to make the system operational. There shall be no additional costs associated with the purchase, installation and/or operation of the proposal.

#### **7. Right to Reject**

Caldwell County Government

- Proposal

For phone system --#RFP DHHS PHONE SYSTEM 1

Due: March 28, 2018

Caldwell County Government reserves the right to reject any and all proposals received in response to the RFP. A contract for the accepted proposal will be based upon the factors described in this RFP.

## D. Evaluation Criteria

All responses to this RFP will be evaluated based on, but not limited to, the following factors:

- Cost
- Functionality of standard equipment and features to meet our specific needs
- Availability of additional capabilities to add as needed
- System growth and expansion
- Ability to save communications costs by using Internet Technologies
- Ease of use
- Product quality, reliability, and warranty plan
- Vendor qualifications
- Overall reputation in the industry
- Experience and expertise with the product being offered
- Service and support resources, including training by vendor for the installation and maintenance
- Certified vendor relationship with product manufacturer
- References where similar systems have been installed
- Points will be established to each of the above at a later date prior to the evaluation to ensure equal competition between vendors.

## E. Proposal Content

Proposals should include the following information:

- Vendor Overview
- Vendor Qualifications
- Vendor Partners for the solution proposed
- Vendor Experience in implementing similar proposed systems
- Vendor References (include a minimum of 3)
- Overview of Vendor IT staff, qualifications and certifications
- Software and Hardware:
  - Clearly specify each piece of hardware (server, switches, proprietary hardware) with model numbers and software with version numbers. List must be complete and include all costs.
  - Planned/warranted lifespan (based on the manufacturer or creator’s intention to support) of hardware
  - All quantities of equipment (hardware, software, licenses)
  - Licenses with costs
  - Implementation plan and costs
  - Risk assessment
  - Failover option or plan
  - Maintenance or support contracts, etc.
  - Maintenance requirements and size of windows to perform maintenance
  - Migration path of upgrades or updates and their respective impact to operations
  - Skill sets recommended to support proposed hardware and software
  - Readiness Statement as to the state of DHHS’s data network
  - Assumed infrastructure needed based on the manufacturer or creator’s recommendations

## F. System Requirements and Implementation

Caldwell County Government staff and the Vendor will work toward implementing a VOIP/hybrid solution system under the following:

- Caldwell County will consider all Vendor hardware proposals, but purchase of equipment for future replacement of phones must not be limited to a single vendor resource.
- All equipment will include all necessary power cords and cables that may be needed.

- Proposal shall include all costs associated with the purchase, installation, connection and/or maintenance of the proposal. No additional equipment, infrastructure or costs may be added at a later date. The proposal must be complete.
- Any company submitting a proposal is responsible for doing its due diligence to anticipate all costs associated with the proposal.
- Caldwell County Government, at its own discretion, has the right to accept or reject any proposal that does not meet the requirements of this RFP.

## II. SCOPE AND SPECIFICATIONS

### A. Scope of Future Telephone System

The purpose of the RFP is to obtain the installation and maintenance of a unified communications system. Caldwell County is looking to purchase/lease a new VoIP/hybrid system to replace our existing EON system. Caldwell County wants a system that is current and functional for a business of our size and type, but further a system that can quickly and inexpensively be updated to accommodate changes in technology and needs. Caldwell County seeks a system that can be used in the office, on softphones, potentially from one's home and in other locations.

### B. Description of Current Telephone System

Caldwell County Government currently utilizes a seventeen (17) year old EON Millennium, analog/digital system with two (2) PRIs. We currently have approx. 475 digital and analog phones, as well as 40 analog fax lines. We have a PC based Voicemail System as well as 5 Automated Attendants.

### C. Description of Network

Each office has at least one 2-port wall panel that is used to connect Ethernet PC(black) and Phone(white). All of the offices are connected thru Ethernet (CAT6) back into the 6 wiring closets (2 on each floor). The wiring closets are connected by fiber to the server room. All the ethernet cables are connected into either HP 2610-24-PWR POE or HP 2810-48G Unmanaged Switches in the closets. Those are connected to a HP 5406R z12 Core Managed Switch. (A schematic is available upon request) Upgrading to POE switches for the IP phone system is expected unless POE injectors are used.

### III. VENDOR BACKGROUND

#### A. Company Information

1. List your company's legal name, address, and telephone number.
2. How long has your company been in business?
3. How long has your company or division been providing business telephone systems and related equipment?
4. Indicate whether your company is the manufacturer or the distributor of the proposed equipment. If you are a distributor, describe the terms of your agreement with the manufacturer, the manufacturer's level of support, and what contingencies they have in place should your company fail to continue to support the product or service for any reason.
5. Do you install the product or use business partners?
6. Do you maintain the product or use business partners?
7. How many employees do you have?
8. How many technicians are certified on the proposed equipment?
9. If this is a hosted off-premise system, describe your sites and alternate site locations used for redundancy.
10. Provide a financial statement for your organization.
11. Describe your plans for future product development and support.
12. Explain why your solution is a best fit for our company.

## B. Vendor References

Provide a minimum of three (3) references for customers with operations similar to ours that use the equipment being proposed. Include contact names, telephone numbers, and addresses.

## IV. BUSINESS TELEPHONE SYSTEM PRODUCT REQUIREMENTS

### A. General Requirements

1. Please provide product descriptions and brochures for the proposed business telephone system, voice mail system, telephone sets, attendant consoles, and other related equipment.

### B. System Requirements

1. System Capacities – The VoIP/ hybrid-IP telephone system must be scalable via different versions that are applicable to different business needs. Describe the scalable capacities available on the proposed hybrid-IP telephone system.
2. Station Configuration Flexibility – Confirm the proposed VoIP/hybrid-IP telephone system's support for all of the following types of telephones: IP, digital, analog, wireless, and SIP endpoints.
3. Trunk Flexibility – The proposed VoIP/hybrid-IP telephone system must provide support for SIP trunking.
4. Hearing Aid Compatible – All proposed station equipment must comply with rules adopted by the Federal Communications Commission that specify all telephones in workplaces of 20 employees or more must be hearing aid compatible. Describe the attributes of the proposed system and telephone sets as it relates to this.

## C. System Architecture

### 1. Infrastructure Review

It will be the responsibility of the Vendor to assure that they have performed adequate network performance reviews, assessments, or a site visit, in order to make assurances that the proposed VoIP/hybrid-IP telephone system will function at optimal performance under the current network structure.

It is expected that the Vendor “Shall Provide” a readiness statement as to the capabilities of the current data network readiness to provide the support necessary for the proposed system.

**Provide readiness statement here.**

### 2. System Architecture and Design

Describe the proposed VoIP/hybrid-IP telephone system design and space required.

What is the maximum user capacity of the proposed IP communications system?

## D. System Administration

### 1. Administration

Provide a detailed description of the configuration and management tools available on the proposed VoIP/ hybrid-IP telephone system.

### 2. Remote Monitoring

The proposed VoIP/hybrid-IP telephone system must be capable of remote monitoring.

### 3. Centralized Licensing

The proposed VoIP/ hybrid-IP telephone system should include the ability to assign certain user solutions to certain users within the network.

#### **4. Long Distance Tracing and Reporting**

Can the proposed telephone system track long distance calls and provide reporting for individual extensions?

#### **5. Security**

How is security provided to prevent unauthorized access to the administration application? Can some administrators be defined with “view-only” permissions?

### **E. Voice over Internet Protocol (VoIP) Features**

#### **1. Voice Communication Features**

Provide an overview list of voice communication features available on the proposed VoIP/hybrid-IP telephone system. The list should include at a minimum PBX functionality, number of extensions supported, types of telephones supported, conferencing capacities, call routing, support for H.323 and SIP, trunk interfaces, and networking.

#### **2. Data Communication Features**

Provide an overview list of data communication features available on the proposed VoIP/hybrid-IP telephone system. The list should include a minimum firewall capability, routing and addressing protocols, remote access, Ethernet ports, and LDAP support.

#### **3. Virtual Private Network (VPN)**

Is a VPN required to support remote IP telephone communication via the private IP network or the Internet? What is gained/lost by using a VPN?

#### **4. IP Protocols Supported**

Which IP protocols does the proposed system use with its IP telephones (MEGACO, MGCP, H.323, SIP, SCCP, etc.)? What are the advantages/disadvantages?

#### **5. Softphone Capabilities**

The proposed VoIP/hybrid-IP telephone system should have the ability to provide softphone extensions that reside on our employees' personal computers. These extensions should provide an equal or better level of functionality as the proposed hardware station equipment.

#### **6. Smartphone & Tablet Capabilities**

The proposed VoIP/hybrid-IP telephone system should have the ability to be used/accessed from a smartphone and/or a tablet device.

#### **7. VOIP Network Readiness Assessment**

Describe any network readiness assessment required or recommended to make sure our network will handle the addition of voice traffic over the IP data network. Do you provide this service?

#### **F. Session Initiated Protocol**

1. Does the proposed VoIP/ hybrid-IP telephone system support SIP?
2. Does the proposed VoIP/hybrid-IP telephone system require SIP gateways?
3. Does the proposed VoIP/ hybrid-IP telephone system support standard SIP-enabled hardware?

#### **G. Call Handling**

1. The proposed VoIP/hybrid-IP telephone system must permit station users to forward incoming calls to another phone of their choice based on busy, no answer, and all calls conditions.
2. Any station in the proposed VoIP/ hybrid-IP telephone system must be able to park a call for retrieval at another station.
3. The proposed VoIP/hybrid-IP telephone system must allow station users to answer calls intended for other stations within a common call pickup group.
4. Station users of the proposed VoIP/hybrid-IP telephone system must be able to transfer a call in progress to an internal extension or external number without attendant intervention.
5. Can queues be configured on demand while calls are in queue?
6. Can the proposed VoIP/hybrid-IP telephone system announce the estimated wait time?
7. Can the proposed VoIP/hybrid-IP telephone system announce the user's position in the queue?

8. Does the proposed VoIP/hybrid-IP telephone system allow the users to leave a message rather than wait in the queue?

9. Does the proposed VoIP/hybrid-IP telephone system support real-time monitoring?

10. Does the proposed VoIP/hybrid-IP telephone system offer real-time graphs and statistics?

#### H. Integration and Customization

1. Does the proposed VoIP/hybrid IP telephones system support integration with email?

2. Does the proposed VoIP/hybrid-IP telephone system support integration of the phone system with other business applications?

3. Does the proposed VoIP/hybrid-IP telephone system offer database options for IVR applications?

4. Does the proposed VoIP/hybrid-IP telephone system provide integration to emergency communication software?

5. The proposed VoIP/hybrid-IP telephone system must support voice paging via paging equipment. If management permits, station users may dial an access code for a connection to the paging equipment.

#### I. Messaging and Voice Mail Systems

1. Does your solution provide a single-user interface for email, voicemail and fax messages? 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. Can users have their phone calls forwarded to other numbers when they are not available?

4. How are users notified of new voicemail messages or faxes?

5. Does your solution offer a mobile access?

6. How many users are supported by the proposed voice mail system?

#### J. Reporting

1. Does your solution provide basic call reporting for billing and accounting purposes?

2. Does your solution provide a more robust call reporting system?

#### K. Station Hardware

1. Describe the supported station IP/digital phones for your system.
2. Specify the power requirements for each station IP phone and analog/digital phone.
3. Are headsets available?
4. Does the proposed VoIP/hybrid-IP telephone system support the use of phones other than IP (i.e., digital and/or analog)?

## L. Functionality

- 1. Conference** – The proposed VoIP/hybrid-IP telephone system must provide the ability to initiate a conference call with a minimum of five (5) additional parties. Please indicate the maximum number of simultaneous parties that may be included in a conference call with a minimum loss of audio call quality.
- 2. Stored Numbers** – The proposed VoIP/hybrid-IP telephone system must have the ability to store a list of frequently called numbers and make those available on a system wide basis to station users.
- 3. Call on Hold** – Describe the proposed VoIP/hybrid-IP telephone system’s ability to provide waiting callers’ music-on-hold.
- 4. Status/Availability Indication (presence)** – Describe the proposed VoIP/hybrid-IP telephone system’s status/availability feature.
- 5. Direct Dialing** – The proposed VoIP/ hybrid-IP telephone system must support direct dialing to extensions from outside callers.
- 6. User Mobility** – Does the proposed VoIP/hybrid-IP telephone system have the ability to allow users to log in as their designated extension from any telephone?
- 7. Single Number Reach** – Does your solution have the ability to simultaneously ring a user’s IP desk phone, mobile phone, and other user-defined devices? Describe the capability.

## M. System Reliability

1. How does the system provide reliability for voice services? Explain how it avoids any single point of failure (single site as well as multi-site).
2. For redundancy purposes, where are copies of the firmware and configurations stored on the proposed VoIP/ hybrid-IP telephone system?

## N. E911 Services

1. Is the proposed system in compliance? Does it provide E911 reporting capabilities?

## V. INSTALLATION SERVICE AND MAINTENANCE

### A. Installation Service

1. Explain in detail the installation plan.

### B. Warranty Service

1. Maintenance and Warranty: A complete maintenance and warranty agreement, as well as quote, must be included as part of the bidder's proposal.
2. Defective Parts
3. Service Calls – What are your response times for:
  - Complete system failure. Please define system failure.
  - Major service malfunction. Please define a major failure.
  - Minor service malfunction. Please define a minor malfunction.
  - Station outages. Please define a station outage.

## VI. REQUIRED DOCUMENTATION

By submitting this proposal, the potential contractor certifies the following:

1. This proposal is signed by an authorized representative of the firm.
2. The cost and availability of all equipment, materials, and supplies associated with performing the services described herein have been determined and are included in the proposed cost.
3. All labor costs, direct and indirect, have been determined and are included in the proposed cost.
4. The potential contractor has read and understands the conditions set forth in this RFP, and agrees to them with no exceptions.

Therefore, in compliance with this Request for Proposals, and subject to all conditions herein, the undersigned offers and agrees, if this proposal is accepted within 90 days from the date of the opening, to furnish the subject services.

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

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

EMAIL Address \_\_\_\_\_

Federal Employer Identification Number: \_\_\_\_\_

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

Typed Name: \_\_\_\_\_ Date: \_\_\_\_\_

**THIS PAGE MUST BE SIGNED AND INCLUDED IN YOUR PROPOSAL.**

**UNSIGNED PROPOSALS WILL NOT BE CONSIDERED.**

**NON-COLLUSION AFFIDAVIT OF PRIME BIDDER**

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

\_\_\_\_\_, of \_\_\_\_\_, being  
(Name) (Bidder)

Duly sworn, deposes and say that:

1. He is \_\_\_\_\_  
(owner, partner, officer, representative, agent)  
of \_\_\_\_\_, the Bidder that has submitted the  
Attached Bid Proposal;
2. He is fully informed respecting the preparation and contents of the attached Bid  
Proposal and of all pertinent circumstances respecting such Bid Proposal;
3. Such Bid Proposal is genuine and is not a collusive or sham Bid Proposal;
4. Neither the said Bidder nor any of its officers, partners, owners, agents, representatives,  
employees, or parties in interest including this affiant, has in  
any way colluded, conspired, connived or agreed, directly or indirectly with  
any other Bidder, firm or person to submit a collusive or sham Bid Proposal in  
connection with the Contract for which the attached Bid Proposal has been  
submitted or to refrain from bidding inn connection with such Contract, or has in any  
manner, directly or indirectly sought by agreement or collusion or communication or  
conference with any other Bidder, firm or person to fix the price or prices in the  
attached Bid Proposal or of any other Bidder, or to fix the overhead, profit or cost  
element of the Bid price or the Bid price of any other Bidder, or to secure through any  
collusion, conspiracy, connivance or unlawful agreement any advantage against Caldwell  
County, or any person interested in the proposed Contract; and
5. The price or prices quoted in the attached Bid Proposal are fair and proper and are not  
tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of  
the Bidder or any of its agents, representatives, owner, employees, or parties of interest  
including this affiant.

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Title

SWORN TO AND SUBSCRIBED before me on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_

Notary Public

My Commission Expires: \_\_\_\_\_

STATE OF NORTH CAROLINA  
AFFIDAVIT  
COUNTY OF CALDWELL

\*\*\*\*\*

I, \_\_\_\_\_ (the individual attesting below), being duly authorized by and on behalf of \_\_\_\_\_ (the entity bidding on project hereinafter "Employer") after first being duly sworn hereby swears or affirms as follows:

1. Employer understands that E-Verify is the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law in accordance with NCGS §64-25(5).
2. Employer understands that Employers Must Use E-Verify. Each employer, after hiring an employee to work in the United States, shall verify the work authorization of the employee through E-Verify in accordance with NCGS§64-26(a).
3. Employer is a person, business entity, or other organization that transacts business in this State and that employs 25 or more employees in this State. (mark Yes or No)
  - a. YES \_\_\_\_\_, or
  - b. NO \_\_\_\_\_
4. Employer's subcontractors comply with E-Verify, and if Employer is the winning bidder on this project Employer will ensure compliance with E-Verify by any subcontractors subsequently hired by Employer.

This \_\_\_\_ day of \_\_\_\_\_, 2016.

\_\_\_\_\_  
Signature of Affiant

Print or Type Name: \_\_\_\_\_

State of \_\_\_\_\_

County of \_\_\_\_\_

Signed and sworn to (or affirmed) before me, this the \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Notary Public

Print Name: \_\_\_\_\_

My commission Expires: \_\_\_\_\_

(Affix Official/Notarial Seal)