Request for Proposal for VoIP System

Vermont Energy Investment Corporation

4/15/2011
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RFP Definition

Organizational Background
The Vermont Energy Investment Corporation (VEIC) is a mission-driven nonprofit organization, founded in 1986, that is dedicated to reducing the economic, social, and environmental costs of energy consumption through cost-effective energy efficiency and renewable energy technologies.

VEIC operates a number of major energy efficiency programs, including Efficiency Vermont, the nation's first statewide energy efficiency utility; Efficiency Smart, which serves numerous municipal utilities in the United States mid-west; and the DC Sustainable Energy Utility, which serves the District of Columbia.

In addition to implementation services, VEIC consults nationally and internationally to design energy efficiency and renewable energy programs; develops energy policy; and advocates for its passage in local, regional, national, and international forums.

VEIC has been experiencing a period of rapid organizational growth. We currently have 215 employees in all locations and expect this number to increase to approximately 240 by year’s end. This increase in size will require VEIC to relocate its primary office in Burlington, Vermont to a larger building after spending the past 13 years in the same location. VEIC has also been growing regionally. In addition to our primary office in Vermont, VEIC has established offices in Ohio, Massachusetts, and New Jersey, and expects to establish a fourth office in the District of Columbia shortly.

Description
VEIC’s Infrastructure team is leading an organizational effort to replace our existing telecommunication systems. Additionally, VEIC expects to replace our existing network switching infrastructure as a part of the move to our new central office in Burlington, Vermont.

Objectives
VEIC seeks to acquire the services of a qualified vendor who will design, procure, install, and provide ongoing support for a VoIP telecommunication and switching solution that will meet our functionality, scalability, reliability, and manageability requirements, and include a robust disaster recovery capability.

Eligible Systems and Solutions
VEIC intends to install a VoIP solution manufactured by one of the following companies:

- ShoreTel
- Cisco Systems
- Avaya
VEIC will not restrict vendors from recommending any switching solution.

**Project Goals**
VEIC’s primary goal is to replace our existing Mitel 3300 and main office switching systems with an eligible VoIP solution designed to meet existing and future growth needs. Additional goals for the solution include:

- Solution will support the communication needs of staff working within VEIC offices as well as additional remote staff.
- Solution will be scalable to support an increase of 300% in staff size and the addition of several new physical locations.
- Replacement system shall be installed and functional within the timeline defined in this RFP.
- Solution should support our existing call center needs, including routing of calls and call center reporting.
- Support structure will be clearly defined, with training and resources available to support basic system administration by IT, and basic end user training for all VEIC staff.

**Budget**
VEIC has a proposed budget of $400,000 for this project, which is expected to satisfy both phone and switching requirements. These include hardware, software, and consulting services costs required to successfully complete this effort. This budget does not include VEIC labor which will be used to participate in any phases of this effort.

**Scope and Guidelines**
The scope of this project is to create a fully functional, scalable VoIP solution for VEIC which meets the overall objectives of this effort as defined in this RFP.

Proposals should assume that the vendor will provide the labor to design, procure, install, and provide administrative and end user training for this effort. Proposals should also include details.

VEIC will provide all respondents with any information required to successfully prepare a proposal which will meet our needs.

Responses should address all the specific questions included in the sections General System Design and Costs, System Information and Functions Capabilities, and Functionality Checklists.

**RFP Schedule**
Electronic copies of your proposal must be received by **5:00 PM EST on Thursday, May 5th, 2011**.

Proposals delivered after the due date will not be given consideration.
<table>
<thead>
<tr>
<th>RFP Phase</th>
<th>Finish By Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP issued</td>
<td>Friday 4/15/11</td>
</tr>
<tr>
<td>Questions due</td>
<td>Wednesday 4/27/11</td>
</tr>
<tr>
<td>Answers to declared respondents</td>
<td>Thursday 4/28/11</td>
</tr>
<tr>
<td>RFPs due</td>
<td>Thursday 5/5/11</td>
</tr>
<tr>
<td>Final candidate selection</td>
<td>Tuesday 5/10/11</td>
</tr>
<tr>
<td>Finalist interviews and limited system demonstrations</td>
<td>Tuesday 5/17/11</td>
</tr>
<tr>
<td>Winner selection</td>
<td>Friday 5/20/11</td>
</tr>
<tr>
<td>Winner notification</td>
<td>Friday 5/20/11</td>
</tr>
<tr>
<td>Contracts negotiation</td>
<td>Friday 6/3/11</td>
</tr>
<tr>
<td>System install target</td>
<td>Monday 7/1/11</td>
</tr>
</tbody>
</table>

This schedule of phases is subject to change and shall not be binding.

**Questions**
Respondents may contact VEIC for clarification and information pertaining to this request for proposal. Any requests for information or clarification must be submitted in writing by e-mail to Todd Weightman at tweightman@veic.org before the end of the question period.

Questions and answers will be emailed or faxed to all bidders who have completed and returned the completed Intent to Bid form.

**Finalist Interviews and Limited System Demonstrations**
Upon review of the RFP responses, VEIC will select the three highest scoring responses based on the criteria listed in the Evaluation of Proposals section of this RFP. These finalists will be asked to provide a demonstration of the proposed system’s functionality and administration in or near VEIC’s primary office in Burlington, Vermont.

In order to facilitate the scheduling of demonstrations, all companies submitting an RFP shall propose two (2) possible dates for the demonstration to occur between Tuesday May 10th and Tuesday May 17th.

**References**
Please supply at least three (3) references that have used your professional services for a similar project.

Include a contact name, phone number, and address, as well as a description of the services provided by the vendor.

**Evaluation of Proposals**
Proposal selection will be based on qualifications and the provision of the highest value to VEIC.

Proposals will be evaluated on the following criteria:

- Proposed design’s adherence to the needs and requirements as defined (20 points)
• Proposed system’s overall capabilities and scalability (20 points)
• Vendor’s demonstrated experience and expertise implementing projects of similar size and scale (20 points)
• Vendor’s demonstrated ability to support the proposed system and VEIC (20 points)
• Overall proposed solution’s cost competitiveness at installation and including consideration of growth and support (10 points)
• High level project plan including detailed design, implementation, testing and training which meets the project timeline (10 points)
• Proposal’s reuse of existing Mitel desktop phone infrastructure (5 points)
• Inclusion in RFP of demonstration dates and references (5 points)

Final selection will include the above criteria and include:

• Vendor interviews and demonstration of system’s functionality (40 points)

VEIC will select and negotiate contract terms with the most qualified vendor. If negotiation is unsuccessful, VEIC will negotiate with the next most qualified vendor, etc. until satisfactory contractual arrangements are achieved. VEIC reserves the right to not award a contract should none of the proposals adequately address the requirements outlined in the RFP.
Description of Current Technology
VEIC is currently running a single Mitel 3300 MXe system, located in our Burlington, Vermont main office. This system was purchased and installed in 2007 and supports 215 staff. System details are as follows:

Offices
1 Central office located in Burlington, Vermont and 2 regional Offices located in Columbus, Ohio and Washington, DC.

Each regional office is connected to VEIC’s primary colocation center in Williston, Vermont via a dedicated 20/30 Mb point-to-point Ethernet connection, with a secondary commercial internet connection for backup.

Mitel Server and Controller Information
- Mitel VoIP Sys Mitel 3300
- Mitel 3300 MXe Controller (1)
- Mitel 6010 VoIP Sys MAS 6010 Teleworker
- Mitel Contact System - PrairieFyre
- Mitel 6110 CCM - ACD
- Mitel 6160 (4 Port)

Phone Set Information
- Mitel 5330 IP Phones (228)
- Mitel 5340 IP Phones (9)
- Mitel 5310 Conference Saucers (4)
- Mitel 5212 IP Phones (7)
- Mitel 5312 IP Phones (10)

License Count Information
- IP User Licenses (338)
- ACD Agent Licenses (21)
- IP Device Licenses (313)
- Mailbox Licenses (283)

ACD Information
- ACD Agents (8)
- ACD Queues (7)
- Average call volume of 4000 calls per month

Phone Numbers and DID Information
- 4 digit extensions assigned to VEIC staff (10XX to 14XX)
- Published Toll Free and local numbers (7)
- Blocks of 100 DIDs 802 area code assigned to VEIC staff (4)
Office Staffing Levels
Staffing and space estimates at the time of implementation:

- Burlington, Vermont
  - FTE (200)
  - Workrooms, conference Rooms and entry spaces (36)
  - Flex Desks (20)
- Columbus, Ohio
  - FTE (20)
  - Workrooms, conference rooms and entry spaces (2)
  - Flex Desks (3)
- Washington, DC
  - FTE (10)
  - Workrooms, conference rooms and entry spaces (3)
  - Flex Desks (10)
- Additional Remote staff (40)
General System Design and Costs

General System Design
Please include in your RFP response a system design which addresses the following needs:

- VoIP telecommunications system designed to support VEIC’s 1 main and 2 regional offices. Each office should include equipment enabling local dialing, e911 capabilities and independent calling capabilities should it be disconnected from our central office in Burlington, Vermont.
- System provides phone sets for 300 stations, including remote staff and home offices.
- Solution to support a total of 40 teleworkers and single person remote offices, including costs for either phone sets or soft phones.
- Solution to support the management of VEIC’s call center, sized to support up to 10 segregated queues and 12 call center agents, with a total call volume of approximately 5000 calls per month.
- Mobility solution to enable seamless and automatic transfer of calls to staff cell phones when out of the office, sized to support approximately 60 staff.
- Unified messaging solution to integrate with Microsoft Exchange infrastructure.
- Layer 3 switching solutions to accommodate approximately 850 PoE ports.

Switching Infrastructure
VEIC’s new office space in Burlington, Vermont will require a centrally managed PoE switching solution located in three server rooms on site. These switches will be interconnected with 12 pairs of MMF fiber-optics with LC connectors and then patched into our existing Dell PowerConnect M6348 switches integrated with our M1000e Dell Blade chassis. Free standing 19” racks will be available for use to mount switching infrastructure.

The RFP should provide a recommended switching solution which possesses the following attributes:

- 750-850 PoE ports
- Layer 3 routing capable of OSPF and static routes
- Central management utility
- Certified interoperability between any proposed equipment and Dell switches, in particular the utilization of one of the existing trunk ports for higher throughput.

Reuse of Mitel Equipment
VEIC currently owns a large number of Mitel IP Phones and peripherals. These include Mitel 5330, 5340, 5212, and 5312 phones and 5310 Conference Saucers.

- Please include in your design how your solution would, if possible, make use of this existing equipment.
Phone Number and Direct Dial Continuity
Please describe how your system can support the retention of VEIC’s existing publically facings numbers including:

- Toll free and other published numbers
- Staff-assigned direct dial numbers

Cost Estimates
- Please include in your RFP response an estimate of costs including material (software and hardware) costs as defined in the General System Design, labor for installation, training and estimates costs for 3 years of system support.
- If the solution required to allow 3rd party software integration includes costs please provide estimates for that.
System Information and Functions Capabilities

Telephone Sets
• Please provide information about phone set models supported by your solution and recommended for use.
• Please describe the features are available with these supported phones.
• Please describe how phone sets are programmed administratively and if end user programming is supported.

Reuse of Mitel Equipment
VEIC intends to reuse some or all of our existing Mitel 5330, 5340, 5212, or 5312 phones sets.
• Please include information about your system’s capabilities available when using Mitel phones.

ACD Solutions
VEIC requires a robust call center/ACD solution to support our existing call center. The solution should provide capabilities to support existing call center needs and allow for significant growth.
• Please provide information which describes the capabilities of your ACD solution.

ACD Reporting
VEIC requires a robust reporting solution which includes standard reporting and the ability to create custom reports. Please include information in your response including:
• Please provide an overview of the types of reports the solution can produce.
• Please provide a sample of commonly used reports generated by your reporting solution.
• Please describe how reports are accessed by end users.
• Please describe the methods available for report delivery to end users.
• Please describe how new reports are created.

ACD Management
• Please describe general categories of ACD administration tasks that Internal IT staff is supported in performing.
• Please describe general categories of ACD administration tasks that vendors/support companies must perform.

Unified Communications Solution
• Please provide an overview of your solution’s unified communications capabilities including its ability to integrate with Microsoft Exchange 2007/2010.
Mobility Solutions:
- Please include in your RFP any documentation or information related to support of remote or teleworking staff including:
  - Technology that allows calls received by VEIC to be directed to multiple devices, including VoIP phones and cell phones simultaneously.
  - Solutions to allow VoIP phones to be located in home offices.
  - The use of software-based phone technology.

System Integration
VEIC develops a custom CRM application called KITT+. This application captures customer names, numbers and critical information related to VEIC implementation efforts. Please include information on how your proposed solution allows for 3rd party application integration; allowing for transfer of information from KITT+ for simple call identification (Screen Pops) on incoming calls.

- Please provide information about how your solution addresses 3rd party system integration.
- Please provide examples of successful integration projects using the proposed solution.

Licensing
- Please indicate what devices require software and/or user licenses.
- Please indicate how software and/or user licenses for all potential solutions are packaged for sale, purchased and installed.
- Please indicate how the voice mail is licensed.

System Capacity and Scalability
- Please describe the maximum capacity of the system in the following areas as it is being proposed in this RFP
  - Phone Sets
  - Voicemail boxes
  - ACD Agents
  - ACD Queues
  - Concurrent incoming and outgoing line capacity
- Describe how the system can be expanded to accommodate a new location or expansion of an existing location
- Please describe how the solution would scale to triple VEIC’s current capacity. Please consider additional offices, staffing increases, increases in ACD lines and call volume.

System Management
- Please describe general categories of system administration tasks that Internal IT staff is supported in performing.
- Please describe general categories of system administration tasks that vendors/support companies must perform.
Redundancy and Reliability
- Please describe how the solution is designed to tolerate hardware failures.
- Please describe how the solution ensures maximum system uptime.

Vendor Support Structure
- Please detail your organization’s support staff size, amount of training and years of experience supporting the technology that are part of the recommended solution.
- Please describe how support will be delivered to our Ohio and DC offices.
- Describe any standard SLA agreements you provide to customers under support.
- Please describe how support contracts are provisioned and how support is priced.
- Please describe how moves, additions, and changes are requested and fulfilled.

Vendor Demonstration Dates
Please provide 2 possible dates between Tuesday May 10th and Tuesday May 17th for a local demonstration of the proposed solution.
### Functionality Checklists

#### Minimum Telephone Features Checklist (for Recommended Sets)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Supported</th>
<th>Comment/Indication of limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alphanumeric Display</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Able to access voice mailbox</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automatic Outside Line Answer/Hold</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Built-in full duplex capability speakerphone</td>
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<tr>
<td>Call Forwarding</td>
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<tr>
<td>Call Park</td>
<td></td>
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<tr>
<td>Call Park/Swap</td>
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<tr>
<td>Call Pick-up</td>
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<tr>
<td>Call Transfer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caller ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capable of monitoring multiple voice mailboxes for messages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capable of using a headset</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check voicemail from an outside line.</td>
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<tr>
<td>Delayed Ringing</td>
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<tr>
<td>Distinctive Ringing</td>
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<tr>
<td>Do Not Disturb capability</td>
<td></td>
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<tr>
<td>Feature button display – this can be hardware or software</td>
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<tr>
<td>Intercom capability with audible tone distinguishable from</td>
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<tr>
<td>the regular ring</td>
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<tr>
<td>Last number redial</td>
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<tr>
<td>Message Indicator for voice messages</td>
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<tr>
<td>Multiparty conferencing capability from the phone set</td>
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<td></td>
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<tr>
<td>Mute function</td>
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<tr>
<td>Paging accessible to all stations or group call</td>
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<tr>
<td>Station and system speed dialing</td>
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<tr>
<td>The ability for a single phone to monitor multiple extensions.</td>
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<td></td>
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<tr>
<td>User programmable keys</td>
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<td></td>
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<tr>
<td>Volume control</td>
<td></td>
<td></td>
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<tr>
<td>Extension look-up/directory for internal staff</td>
<td></td>
<td></td>
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<tr>
<td>Call history</td>
<td></td>
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</tbody>
</table>

#### Minimum Telephone Features Checklist (for Reused Mitel Sets)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Supported</th>
<th>Comment/Indication of limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alphanumeric Display</td>
<td></td>
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<tr>
<td>Able to access voice mailbox</td>
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<td>Automatic Outside Line Answer/Hold</td>
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<td>Call Park</td>
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<tr>
<td>Call Park/Swap</td>
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<td>Call Pick-up</td>
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<td>Call Transfer</td>
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<td></td>
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<tr>
<td>Caller ID</td>
<td></td>
<td></td>
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<tr>
<td>Capable of monitoring multiple voice mailboxes for messages</td>
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</tbody>
</table>
### ACD Feature Checklist

<table>
<thead>
<tr>
<th>Feature</th>
<th>Supported</th>
<th>Comment/Indication of limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue segregation: Ability for the ACD system to ensure that callers are not directed between queues inadvertently</td>
<td></td>
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</tr>
<tr>
<td>Ability to manage a call tree for multiple languages (English and Spanish).</td>
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<tr>
<td>Flexible main greetings for regular, and non-regular hours including special events such as holiday, inclement weather announcements, and emergency situations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to control greetings for regular and non-regular hours including special events such as holiday, inclement weather announcements, and emergency situations by queue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prioritization of agents by queue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position in queue information delivered to caller</td>
<td></td>
<td></td>
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<tr>
<td>Ability to customize hold music</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automatic agent log out if the call is not answered in a certain number of rings</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ACD Reporting Checklist

<table>
<thead>
<tr>
<th>Reports</th>
<th>Supported</th>
<th>Comment/Indication of limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity by queue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity by agent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Call source</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agent availability per day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average call duration by queue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calls missed (interflowed) by queue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Supported</td>
<td>Comment/Indication of limitations</td>
</tr>
<tr>
<td>----------------------------------------------</td>
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<td>-----------------------------------</td>
</tr>
<tr>
<td>Dial by Name Directory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change voicemail settings from an outside line</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dial 0 to reach an operator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message-only information or business &quot;mailboxes&quot;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to retrieve deleted messages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voicemail forwarding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voicemail caller ID / Time of Message</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer of emails to VM or vice versa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remote access to all VM boxes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>