

**SUPERIOR COURT OF CALIFORNIA
COUNTY OF MARIN**

REQUEST FOR PROPOSAL

Voice Communications System

PROPOSALS DUE BY

August 26, 2009 – 4PM Pacific Time

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I. INTRODUCTION – SUMMARY OF THE INTENDED PROCUREMENT

1.1 Issuing Body

The Superior Court of California, County of Marin (“Court”) is issuing this Request for Proposal (“RFP”) to provide the Court with competitive bids for a Voice Communications System and Interactive Voice Response/Interactive Web Response (IVR/IWR) System.

1.2 RFP Layout and Sections

This RFP is set forth in sections as follows:

- I. Introduction – Summary of the Intended Procurement
- II. Procurement and Evaluation Process
- III. Vendor Qualifications
- IV. Technical Proposal – Telephone System
- V. Technical Proposal – IVR/IWR System
- VI. Pricing
- VII. Attachments

1.3 Project Overview

The Court is requesting proposals from highly qualified vendors with expertise in providing voice communications systems, professional services for design, installation and configuration of the system, and ongoing support and maintenance services.

Voice communications services at the Marin Superior Court are currently provided by the County of Marin. The Court plans to replace the existing system with a “next-generation” product that will integrate with data communications systems and use the existing data network for transport and connection. The planned system will include basic modern features, such as Caller ID with display phones and message waiting lamps, as well as more advanced “Call Center” features for managing incoming call flow. In addition, the Court plans to evaluate the purchase of a new self-service Interactive Voice and Web Response (IVR/IWR) system to replace the existing Sonant system. While the current IVR/IWR system provides adequate service, the purpose of considering replacement is to have a single vendor with responsibility for all systems and functions.

Respondents to this RFP may choose to only bid on the Telephone System portion of this RFP, may team up with a partner for the IVR/IWR Jury Services application development, or propose a unified system that includes both solutions within one integrated system. However, the Court will not accept separate proposals for only the IVR/IWR portion of the bid.

The Court intends to award contracts to vendors that are able to provide the best technical solutions at the lowest total long-run cost. The successful bidders for the Telephone System and the IVR/IWR System will provide equipment and professional services for installation and support, including Call Center applications and integration with the existing data communications network. However, the Court reserves the right to reject any or all proposals, in whole or in part, submitted in response to this RFP. The Court further reserves the right to make no award and to modify or cancel, in whole or in part, this RFP.

II. PROCUREMENT AND EVALUATION PROCESS

2.1 Procurement Schedule and General Instructions

The Court has developed the following list of key events from RFP issuance through notice contract award. All deadlines are subject to change at the Court’s discretion.

<u>No.</u>	<u>EVENTS</u>	<u>Key Dates</u>
1	Issue RFP	7-27-09
2	E-mail Letter of Intent from Proposers to Participate in Pre-Proposal Conference	8-4-09 5 PM
3	MANDATORY Pre-Proposal Conference Date and Time	8-6-09, 10:00AM
4	Deadline for Proposer Requests for Clarifications or Modifications	8-20-09
5	Proposal Due Date and Time	8-26-09, 4PM
6	Potential Interviews	9-10-09
7	Selection of Lead Vendor	9-15-09
8	Notice of Intent to Award (estimated)	9-15-09
9	Notice of Award (estimated)	9-30-09

The RFP in PDF format will be available on the following website:
Marincourt.org/purchasing_bids_proc.cgi/

2.1.1 Contact List

Submittal Contact: Richard Hodges
GreenIT
Sonoma, CA 95476
707-933-0299
RHodges@GreenIT.net

Project Manager: Richard Hodges
Contracting Officer: Bill Bretag
Superior Court of California, Marin
San Rafael, CA

Court Executive Officer: Kim Turner
Court Executive Officer

2.1.2 Disposition of Material and Confidential or Proprietary Information

All materials submitted in response to the solicitation document will become the property of the Court and will be returned only at the Court’s option, and at the expense of the vendor submitting the proposal. One copy of a submitted proposal will be retained for official files and become a public record. **Any material that a vendor considers as confidential, but does not meet the disclosure exemption requirements of the California Public Records Act, should not be included in the vendor’s proposal as it may be made available to the public.**

Even though the Public Records Act (PRA) does not apply to the Court, the Court’s policy is to look to the PRA for guidance in responding to requests for documents. If a vendor’s proposal contains material noted or marked as confidential and/or proprietary that, in the Court’s sole opinion, meets the disclosure exemption requirements of the

PRA, then that information will not be disclosed pursuant to a written request for public documents. If the Court does not consider such material to be exempt from disclosure under the PRA, the material may be made available to the public, regardless of the notation or markings. If a vendor is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the PRA, then it should not include such information in its proposal because such information may be disclosed to the public.

2.1.3 Proposal Preparation Costs

Vendors submitting proposals do so entirely at their expense. There is no express or implied obligation by the Court to reimburse a vendor for any costs incurred in preparing or submitting proposals, providing additional information when requested by the Court, participating in any selection interviews or product demonstrations, or participating in this procurement.

2.2 Mandatory Pre-proposal Conference

A Pre-Proposal Conference to answer questions related to this RFP will be held on the date and at the time specified in Section 2.1. The location of the pre-proposal conference is stated below:

Marin Superior Court -3501 Civic Center Drive, San Rafael Ca. Room 116

The Pre-Proposal Conference is mandatory; prospective proposers are required to attend in order to better understand the proposal requirements. In the event a potential proposer is unable to attend the Pre-Proposal Conference, an authorized representative may attend on their behalf. A representative may only sign in for one vendor. Proposals from vendors who did not attend the Pre-Proposal Conference will not be accepted and will be returned unopened.

A Letter of Intent from a pre-proposal conference participant must be sent to the Submittal Contact via e-mail at the address listed in Section 2.1.1 **rhodges@greenIT.net** by the date and time noted in Section 2.1 indicating the number of individuals (of vendor and its subcontractors) who plan on attending the pre-proposal conference. The Court will prepare a summary of questions and answers from the pre-proposal conference, as an addendum, which will be provided to attendees.

2.3 Pre-Submittal Process

2.3.1 Request for Clarifications or Modifications

Vendors interested in responding to this solicitation may submit questions on procedural matters related to the RFP or requests for clarification or modification of this solicitation document, including questions regarding the Contract Terms and Conditions in Attachment B, to the Project Manager. If the vendor is requesting a change, the request must set forth the recommended change and the vendor's reasons for proposing the change. All questions and requests must be submitted in writing via e-mail to the Submittal Contact listed in Section 2.1.1 no later than the date specified in Section 2.1, Procurement Schedule and General Instructions. Questions or requests submitted after the due date will not be answered.

Without disclosing the source of the question or request, the Project Manager will provide a copy of the questions and answers to all potential proposers.

If a vendor's question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the vendor may submit the question conspicuously marking it as "CONFIDENTIAL." With the question, the vendor must submit a statement explaining why the question is sensitive. If the Court concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered, and both the question and answer will be kept in confidence. If the Court does not concur regarding the proprietary nature of the

question, the question will not be answered in this manner and the vendor will be notified.

2.3.2 Ambiguity, Discrepancies, Omissions

If a vendor submitting a proposal discovers any ambiguity, conflict, discrepancy, omission, or other error in this solicitation document, the vendor shall immediately provide the Submittal Contact listed in Section 2.1 written notice of the problem and request that the solicitation document be clarified or modified. Without disclosing the source of the request, the Court may modify the solicitation document prior to the date fixed for submission of proposals by providing an addendum to potential proposers or, if identified in Section 2.1, by posting the addendum on the Court website.

If prior to the date fixed for submission of proposals a vendor submitting a proposal knows of or should have known of an error in the solicitation document but fails to notify the Court of the error, the vendor shall propose at its own risk, and if the vendor is awarded the contract, the vendor shall not be entitled to additional compensation or time by reason of the error or its later correction.

2.3.3 Contact with Court

Vendors are specifically directed NOT to contact any Court personnel or consultants for meetings, conferences, or discussions that are specifically related to this RFP at any time prior to any award of a contract. Unauthorized contact with any Court personnel or consultants may be cause for rejection of the vendor's response.

2.3.4 RFP Addenda

The Court may modify this solicitation document prior to the date fixed for submission of proposals by providing notice to potential proposers. If any potential vendor determines that an addendum unnecessarily restricts its ability to propose, it must notify the Submittal Contact listed in Section 2.1.1 no later than three (3) business days following the date the addendum is provided.

Pricing shall reflect all addenda issued by the Court. Failure to do so will permit the Court to interpret the proposal to include all addenda issued in any resulting contract.

2.4 Submission of Proposals

2.4.1 Proposal Delivery

The following must be received no later than the Proposal Due Date and time specified in Section 2.1 (the "Proposal Closing Time"):

- *One signed original copy of the proposal and a separate original copy of the pricing proposal delivered to Marin Superior Court -*
- *One electronic copy of the technical proposal , and one electronic formatted copy of the pricing proposal delivered via e-mail to RHodges@GreenIT.net.*

The original Technical Proposal may be submitted in binders that are not sealed. The outside of the binder must be clearly marked with the Project Title, the Contents of the Binder, the proposer's name, and the date submitted. **Pricing proposals must be included in a separately sealed envelope and should be marked with "Price Proposal" and the proposer's name.**

The hard copy and electronic copy of the Technical Proposals must not include any pricing information. Proposals may be submitted prior to the Proposal Closing Time. Late proposals will not be considered.

Printed proposals must be delivered via U.S. Mail, common carrier, or hand delivery. A receipt should be requested for hand delivered material.

The proposer is solely responsible for ensuring that the full proposal is received by the Court in accordance with the solicitation requirements, prior to the date and time specified in the solicitation, and at the place specified. The Court shall not be responsible for any delays in mail or by common carriers or by transmission errors or delays or missed delivery.

2.4.2 Amendment or Withdrawal of Proposals

A vendor may amend its proposal prior to the Proposal Closing Time. All amendments must be in writing and received by the Court prior to the Proposal Closing Time.

A vendor may withdraw its proposal at any time prior to the Proposal Closing Time by notifying the Submittal Contact listed in Section 2.1.1 in writing of its withdrawal. Amendments or withdrawals offered in any other manner, than described above will not be considered. Proposals cannot be amended or withdrawn after the Proposal Closing Time.

2.4.3 Mistake in Proposal

If prior to a contract award, a proposer discovers a mistake in their proposal that renders the proposer unwilling to perform under any resulting contract, the proposer must immediately notify the Submittal Contact listed in Section 2.1.1 in writing and request to withdraw the proposal. It shall be solely within the Court's discretion as to whether withdrawal will be permitted. If the solicitation contemplated evaluation and award of "all or none" of the items, then any withdrawal must be for the entire proposal. If the solicitation provided for evaluation and award on a line item or combination of items basis, the Court may consider permitting withdrawal of specific line item(s) or combination of items.

2.4.4 Error in Submitted Proposals

If an error is discovered in a vendor's proposal, the Court may at its sole option retain the proposal and allow the proposer to submit certain arithmetic corrections. The Court may, at its sole option, allow the proposer to correct obvious clerical errors. In determining if a correction will be allowed, the Court will consider the conformance of the proposal to the format and content required by the solicitation, the significance and magnitude of the correction, and any unusual complexity of the format and content required by the solicitation.

If the proposer's intent is clearly established based on review of the complete proposal submitted, the Court may, at its sole option, allow the proposer to correct an error based on that established intent.

The total price of unit-price items or individual line items will be the product of the unit or line item price and the quantity. If the unit or line item price is ambiguous, unintelligible or uncertain for any cause, or is omitted, the unit or line item price shall be the amount obtained by dividing the "extension" price by the item quantity.

2.4.5 Authorized Signatures, Validity Period of Proposals

Proposals must include the vendor name, address, telephone, and federal tax identification number. The proposal must be signed by a duly authorized officer or employee of the vendor and include the name, title, address, and telephone number of the individual who is the proposer's designated representative.

Proposals will be valid for ninety (90) days after the Proposal Due Date specified in Section 2.1 (“Proposal Validity Date”). In the event a final contract has not been awarded by the date specified in Section 2.1, the Court reserves the right to negotiate extensions to the Proposal Validity Date.

2.4.6 Knowledge of Requirements

The vendor shall carefully review all documents referenced and made a part of the solicitation document to ensure that all information required to properly respond has been submitted or made available and all requirements are priced in the proposal. Failure to examine any document, drawing, specification, or instruction will be at the proposer’s sole risk.

Proposers shall be responsible for knowledge of all items and conditions contained in their proposals and in this RFP, including any Court issued clarifications, modifications, amendments, or addenda. The Court will provide notice to perspective proposers or, if identified in Section 2.1, post addenda and clarifications to the Court website; however, it is the proposer’s responsibility to ascertain that the proposal includes all addenda issued prior to the Proposal Due Date.

2.4.7 Independence of Proposal and Joint Proposals

Unless a proposer is submitting a joint proposal, the proposer represents and warrants that by submitting its proposal it did not conspire with any other vendor to set prices in violation of anti-trust laws.

A proposal submitted by two or more vendors participating jointly in one proposal may be submitted, but one vendor must be identified as the prime contractor and the other as the subcontractor. The Court assumes no responsibility or obligation for the division of orders or purchases among joint subcontractors.

2.4.8 Covenant Against Gratuities

Proposer warrants by signing its proposal that no gratuities, in the form of entertainment, gifts, or otherwise, were offered by the proposer or any agent, director, or representative of the proposer, to any officer, official, agent, or employee of any Court with a view toward securing award of or securing favorable treatment with respect to any determinations concerning the performance of any resulting contract. For breach or violation of this warranty, the Court will have the right to terminate any resulting contract in whole or in part. The right and remedies of the Court provided in this provision shall not be exclusive and are in addition to any other rights and remedies provided by law or under the resulting contract.

2.5 Overview of Evaluation Process

2.5.1 Evaluation Committee

The Court will conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this RFP. All proposals received from vendors will be reviewed and evaluated by a committee (“Evaluation Committee”). The name, units, or experience of the individual members will not be made available to any vendor. The Evaluation Committee will first review and screen all proposals submitted, except for the price proposals, according to the minimum qualifications set forth in Section 2.6.

Vendors satisfying the minimum qualifications will then be evaluated in accordance with the evaluation criteria set forth in Section 2.7. The Evaluation Committee will first review and complete the evaluation of the technical proposals, without the price proposal. Thereafter, the price proposals will be opened, reviewed, and evaluated to determine an overall evaluation score.

2.5.2 Reservation of Rights

The Court, at its sole discretion, may eliminate proposals that have not met the minimum qualifications of Section 2.6, or have not scored adequately in relation to other proposals to warrant further consideration. The Court reserves the right to reject any or all proposals, in whole or in part, and may or may not waive any immaterial deviation or defect in a proposal.

The Court's waiver of an immaterial deviation or defect shall in no way modify the solicitation document or excuse a vendor from full compliance with solicitation document specifications.

If a proposal fails to meet a material solicitation document requirement, the proposal may be rejected. A deviation is material to the extent that a response is not in substantial accord with the requirements of the solicitation document. Material deviations cannot be waived.

Unless otherwise specified in the solicitation, the Court may accept any item or combination of items as specified in the solicitation; of any proposal unless the proposer expressly restricts an item or combination of items in its proposal; and conditions its response on receiving all items for which it provided a proposal. In the event that the proposer so restricts its proposal, the Court may consider the proposer's restriction and evaluate whether the award on such basis will result in the best value to the Court or may determine in its sole discretion that such restriction is non-responsive and renders the proposer ineligible for further evaluation.

The Court reserves the right to negotiate with proposers who have presented, in the opinion of the Evaluation Committee, the best proposal in an attempt to reach a contract. If no contract is reached, the Court can negotiate with other proposers or make no award under this RFP. At any time the Evaluation Committee can reject all proposals and make no award under this RFP. Moreover, the Court reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with vendors to gather additional information.

Proposals that contain false or misleading statements may be rejected if in the Court's opinion the information was intended to mislead the Court regarding a requirement of the solicitation document.

2.5.3 Evaluation of Price Sheets

Price sheets will be reviewed only if a proposal is determined to be otherwise qualified. All figures entered on the price sheets must be clearly legible and must be printed in ink or type written. No erasures are permitted. Errors may be crossed out and corrections printed in ink or typewritten adjacent and must be initialed in ink by the person signing the proposal. If the solicitation requires the proposer to provide an electronic copy of the price sheets and there is a discrepancy in the printed price sheets and the electronic copy, the pricing on the printed price sheets will be evaluated.

Where more than one line item is specified in the solicitation, the Court reserves the right to determine the highest evaluated proposer, either on the basis of individual items, combination of items as specified in the solicitation, or on the basis of all items included in the solicitation, unless otherwise expressly provided.

2.5.4 Requests for Additional Information

The Court reserves the right to seek clarification or additional information from any proposer throughout the solicitation process. The Court may require a proposer's representative to answer questions during the evaluation process with regard to the

vendor’s proposal. Failure of a proposer to demonstrate that the claims made in its proposal are in fact true may be sufficient cause for deeming a proposal non-responsive.

2.5.5 Brand Names

Any reference to brand names and/or numbers in the solicitation is intended to be descriptive, but not restrictive, unless otherwise specified. Proposals offering equivalent items meeting the standards of quality specified may be considered, unless otherwise specified, providing the proposal clearly describes the article offered and how it differs from the referenced brand. Unless a proposer specifies otherwise, it is understood that the proposer is offering a referenced brand item as specified in the solicitation. The Court reserves the right to determine whether a substitute offer is equivalent to and meets the standards of quality indicated by the brand name references, and the Court may require the supply of additional descriptive material and a sample.

2.5.6 Samples

Samples of goods may be required prior to award to determine proposer’s responsiveness to the RFP’s technical requirements. If requested, such samples must be provided at no cost and delivered to the address specified within the timeframe identified in the notification. Failure to submit samples as specified may be grounds for rejection of a vendor’s proposal.

Unless expressly set forth in the solicitation, the sample of goods furnished must be identical in all respects to the product or products being offered.

Proposers offering products of a different manufacturer and model number than those specified in the solicitation may be required to submit samples for inspection and specification compliance testing in order for the Court to determine if the item offered is equivalent to and meets the minimum standards of quality acceptable to the Court as indicated by the manufacturer and model number specified in the solicitation.

Samples, if not destroyed by tests, may, upon request made by the proposer at the time the sample is furnished, be returned at proposer’s expense.

2.6 Minimum Qualifications

To be considered for full evaluation and possible award, proposers must first meet the threshold minimum qualification requirements listed in the following table (minimum requirements can be met by combining experience, expertise, and resources of vendor and any proposed subcontractors):

No.	Minimum Qualifications
1	Be an authorized dealer of equipment manufacturer being proposed and must be in good standing with proposed manufacturer.
2	Maintain a staffed company office within 100 miles of the Courthouse at Civic Center Dr., San Rafael CA
3	Employ a minimum of (3) technicians qualified to install, maintain, and support the proposed systems hardware and software.
4	Neither vendor nor any of its proposed subcontractors are currently under suspension or debarment by any state or federal government agency, and neither vendor nor any of its proposed subcontractors are tax delinquent with the State of California or Federal Government (reference <u>Attachment A</u> , Vendor Certification Form).
5	Meet insurance and labor requirements included in the standard contract. (Attachment B)

The proposer must state specifically in its Executive Summary (see Section 3.1) how it will comply with each minimum qualification specified above. Subject to the Court's right in its sole discretion to waive minor deviations or defects, only those proposals that meet all of the foregoing minimum qualifications shall be considered for a full evaluation and a possible contract award.

Vendors who fail to meet any of the listed minimum qualifications will be notified in writing, and will have three (3) business days from receipt of such notification to file proof that all such qualifications are met.

2.7 Evaluation Criteria

Proposals will be evaluated to determine the proposal or proposals that best meet the criteria set forth in subsections a-k below. The evaluation will be based upon the following criteria. Although some factors are weighted more than others, all are considered necessary, and a proposal must be technically acceptable in each area to be eligible for award. With regards to price, the Court reserves the right, in its sole discretion, to reject any proposal whose price is outside of the competitive range.

- a. Product Architecture
- b. Product Ease-of-Use
- c. Experience on similar assignment.
- d. Reasonableness of price projections
- e. Financial viability and stability
- f. Credentials of staff to be assigned to the project
- g. Ability to meet timing requirements to complete the project
- h. Implementation Plan
- i. Timeliness of Delivery
- j. References
- k. Cost/Pricing factors

2.8 Interviews and Negotiations

2.8.1 Interviews

Following the initial screening of proposals, the Court reserves the right to require, and each proposer must be prepared to conduct, oral presentations and other discussions (written or verbal) on the content of its proposal. If the Court determines that interviews or presentations are required, selected proposers will be notified in writing of the date, place, time and format of the interview or presentation. Proposers will be responsible for all costs related to the interview, which, at the Court's sole discretion, may be in-person and/or by teleconference. Failure to participate in such interviews or presentations shall result in a proposer's disqualification from further consideration.

2.8.2 Negotiations

If the Court desires to enter into negotiations, it will do so with one or more proposers, at its discretion. If the Court enters into negotiations and no contract is reached, the Court can negotiate with the other proposers or make no award under this RFP. The Court reserves the right to award a contract, if any, without negotiations.

2.8.3 Payment

Payment is made based upon completion of tasks as provided in the contract between the Court and any selected vendor.

2.8.4 News Releases

News releases pertaining to the award of any contract resulting from this solicitation may not be made by a vendor without the prior written approval of the Court Executive Officer, as noted in Section 2.1.1.

2.9 Award of Contract

The Evaluation Committee will make a final recommendation for award of the contract. Upon award, the successful proposer(s) will be required to execute a Contract in accordance with the specific requirements and pricing of the RFP response, and provide a certificate of insurance in conformance with the requirements set forth in the General Conditions within thirty (30) business days of award. The period for execution of the Contract may be changed by mutual contract of the parties. Contracts are not effective until signed by both parties.

2.10 Protest Procedures

2.10.1 General

Failure of proposer to comply with the protest procedures set forth in this Section 2.10, will render a protest inadequate and untimely, and will result in rejection of the protest. In no event shall a protest be considered if all submittals are rejected or after a contract has been executed.

2.10.2 Prior to Submission of Proposal

An interested party that is an actual or prospective proposer with a direct economic interest in the procurement may file a protest based on allegedly restrictive or defective specifications or other improprieties in the solicitation process that are apparent, or should have been reasonably discovered prior to the submission of a proposal. Such protest must be received prior to the Proposal Closing Time.

The protestor will have exhausted all administrative remedies specified in Section 2.3.1, Request for Clarification or Modifications; Section 2.3.2, Ambiguity, Discrepancies, Omissions; Section 2.3.4, RFP Addenda; and this Section as applicable, prior to submitting the protest. Failure to do so may be grounds for denying the protest.

2.10.3 After Award

A vendor submitting a proposal may protest the award based on allegations of improprieties occurring during the proposal evaluation or award period if it meets all of the following conditions:

- a. The vendor has submitted a proposal that it believes to be responsive to the solicitation document.
- b. The vendor believes that its proposal meets the administrative and technical requirements of the solicitation; proposes items and/or services of proven quality and performance; offers a competitive price; and
- c. The vendor believes that the Court has incorrectly selected another vendor submitting a proposal for an award.

Such protests must be received no later than five (5) business days after the protesting party receives a no-award notification.

2.10.4 Form of Protest

A vendor who is qualified to protest should submit the protest to the Contracting Officer listed in the Submission of Proposal section of this RFP.

- a. The protest must be in writing and sent by certified or registered mail or delivered personally to the address noted above. If the protest is hand-delivered, a receipt must be requested.
- b. The protest shall include the name, address, telephone and facsimile numbers of the party protesting or their representative.
- c. The title of the solicitation document under which the protest is submitted shall be included.
- d. A detailed description of the specific legal and factual grounds of protest and any supporting documentation shall be included.
- e. The specific ruling or relief requested must be stated.

The Court, at its discretion, may make a decision regarding the protest without requesting further information or documents from the protestor. Therefore, the initial protest submittal must include all grounds for the protest and all evidence available at the time the protest is submitted. If the protestor later raises new grounds or evidence that was not included in the initial protest but which could have been raised at that time, the Court will not consider such new grounds or new evidence.

2.10.5 Determination of Protest Submitted Prior to Submission of Proposal

Upon receipt of a timely and proper protest based on allegedly restrictive or defective specifications or other improprieties in the solicitation process that are apparent, or should have been reasonably discovered prior to the submission of a proposal, the Court will provide a written determination to the protestor prior to the Proposal Closing Time. If required, the Court may extend the Proposal Closing Time to allow for a reasonable time to review the protest. If the protesting party elects to appeal the decision, the protesting party will follow the appeals process outlined below and the Court, at its sole discretion, may elect to withhold the contract award until the protest is resolved or denied or proceed with the award and implementation of the contract.

2.10.6 Determination of Protest Submitted After Submission of Proposal

Upon receipt of a timely and proper protest, the Court will investigate the protest and will provide a written response to the vendor within a reasonable time. If the Court requires additional time to review the protest and is not able to provide a response within ten (10) business days, the Court will notify the vendor. If the protesting party elects to appeal the decision, the protesting party will follow the appeals process outlined below and the Court, at its sole discretion, may elect to withhold the contract award until the protest is resolved, or denied, or proceed with the award and implementation of the contract.

2.10.7 Appeals Process

The Contracting Officer's decision shall be considered the final action by the Court unless the protesting party thereafter seeks an appeal of the decision by filing a request for appeal with the Court Executive Officer, noted in Section 2.1.1, within five (5) calendar days of the issuance of the Contracting Officer's decision.

The justification for appeal is limited to:

- A. Facts and/or information related to the protest, as previously submitted, that were not available at the time the protest was originally submitted; or
- B. The Contracting Officer's decision contained errors of fact, and that such errors of fact were significant and material factors in the Contracting Officer's decision; or
- C. The decision of the Contracting Officer was in error of law or regulation.

The request for appeal shall include:

- (1) The name, address, telephone and facsimile numbers of the vendor filing the appeal or their representative;
- (2) A copy of the Contracting Officer's decision;
- (3) The legal and factual basis for the appeal; and
- (4) The ruling or relief requested. Issues that could have been raised earlier will not be considered on appeal.

Upon receipt of a request for appeal, the Court Executive Officer will review the request and the decision of the Contracting Officer and shall issue a final determination. The decision of the Court Executive Officer shall constitute the Court's final action.

2.10.8 Protest Remedies

If the protest is upheld, the Court will consider all circumstances surrounding the procurement in its decision for a fair and reasonable remedy, including the seriousness of the procurement deficiency, the degree of prejudice to the protesting party, or to the integrity of the competitive procurement system, the good faith efforts of the parties, the extent of performance, the price to the Court, the urgency of the procurement, and the impact of the recommendation(s). The Court may recommend any combination of the following remedies:

- a. Terminate the contract for convenience;
- b. Re-compete the contract;
- c. Issue a new solicitation;
- d. Refrain from exercising options to extend the term under the contract, if applicable;
- e. Award a contract consistent with statute or regulation; or
- f. Other such remedies as may be required to promote compliance.

2.11 General Instructions for Pricing

Vendor must submit pricing as required by Attachments C and D. (see section VI. Below)

In addition to submitting the pricing in the form requested by the Court, vendors must include their standard pricing sheets in the format that they normally use internally and for customers. The total price shown on both the RFP Attachment Pricing sheets and the vendor's standard pricing sheets must match. Both sheets should include a similar level of detail for component line items, unit pricing, and extended pricing.

The electronic version of the Pricing sheets should be submitted as unlocked spreadsheets that can be opened using Microsoft Excel 2003 and used by the evaluation committee for pricing various configuration options. Vendors chosen for contract negotiations will be responsible for ensuring that pricing in contract documents do not conflict with prices submitted in response to this RFP.

Pricing should include all anticipated charges, including but not limited to, freight and delivery, insurance, cost of materials and product, travel expenses, overhead, profits, and other costs or expenses incidental to the vendor's performance.

The Court is exempt from federal excise taxes and no payment will be made for any taxes levied on the vendor's or any Subcontractor's employee's wages. The Court will pay for any applicable State of California or local sales or use taxes on the products provided or the services rendered. Taxes shall be included as a separate line item on a vendor's invoice.

2.12 Government Rates

It is expected that all vendors responding to this solicitation will offer the vendor's government or most favorable comparable rates.

2.13 Warranty

It is expected that the Telephone and IVR/IWR System will be new, un-modified equipment as manufactured, and all manufacturer warranties will be intact. Vendors cannot perform any work on equipment or software that invalidates any or all parts of the equipment warranties. Any modifications or customization done on the hardware or software must be accepted and approved by manufacturer and the Court.

2.14 Invoicing

Vendor shall provide a description of the invoicing process for hardware, software and Professional Services. Vendor selected will be required to provide payment schedule based on mutually agreed acceptance of implementation. If there are unique billing arrangements for deposits, leasing terms, or auto-renewal of any services (i.e. Maintenance), this should be described.

2.15 Contract Terms

Vendors should include a copy of their standard purchase and software licensing agreement with the response to the RFP.

Although the Court will consider contract language proposed by a vendor, the Court will not be bound by contract language received as part of a prospective vendor's response. If the proposer requires that the Court be bound by some or all of the vendor's proposed contract language, the proposal may be considered non-responsive and may be rejected.

2.16 Description of Existing Voice and Data Systems

2.16.1 Existing Voice Communications System

Locating and identifying all existing telephones within the Court buildings will be the responsibility of the selected vendor prior to installation of the new system.

Copies of floor plans for Court areas within the Marin Civic Center in a .dwg format and a current list of extensions in Excel will be provided to vendors that attend the Bid Conference and sign a Non-Disclosure Agreement (NDA).

The Avaya phone system currently being used by the Court is owned by the County of Marin. The County is providing 312 extensions with 187 Telephones and Voicemail boxes. The County is also providing Call Accounting reports, Meet-Me Audio Conference Bridge services, and call routing services. The system is set up with both digital and analog PBX extensions from the County system and DID numbers owned by the County. In addition to the main Court location, the County provides two analog extensions at the Juvenile Court Building in Lucas Valley.

The Court currently uses the ACD (Automatic Call Distribution) feature of the County telephone system to provide call routing, call and call reporting for the Criminal/Traffic "phone room" The system provides real time call information on the telephone set display about the number of calls in queue and longest call hold time.

The Court IVR system is a Sonant with application software to automate Jury Service Notices, inquiries, and postponement requests. The system is licensed for 12 ports and 6 licenses for agent reporting seats. The system resides on a Windows 2000 server owned by the Court and connected to the County Avaya system using a direct T1 interface.

The Court also owns an Avaya Conversant IVR System that hosts an application for access to Tentative Rulings over the phone. This system provides recorded messages to callers that access the system by entering a Case Number. The Conversant system is "manufacturer discontinued" for development and support.

All of the courtrooms in the County are equipped with Conference Units. The Conference Unit equipment in the Courtrooms belong to Court Call, the Units in the Conference Rooms are owned by the Court. The telephone extension, including analog port and DID number, is provided by the County.

2.16.2 Existing Data Communications System

The Court data network infrastructure is built to a Category 5e standard with no apparent issues or problems. The Court's Local Area Network has the basic elements in place to support voice services, but are in the process of upgrading the "edge" switches to new PoE-enabled Catalyst WS-C3560-G Cisco switches. The Court LAN currently does not have QoS management for voice or VLAN's set up however, this will be setup during a Refresh project beginning July 30th 2009. *A current inventory of LAN gear will be provided to vendors that attend the Bid Conference and sign an NDA.*

2.17 Description of New Telephone System Requirements

The purpose of this project is to improve service to the public and the efficiency of Court staff by providing a new voice communications system that is completely separate from the County of Marin voice network. The Court expects ongoing telephone costs to be significantly reduced and it is expected that the Court will install one new ISDN-PRI trunk with 400 new DID numbers procured via the State of California CalNet II contract. The specific quantities of system components to be included in the proposal are detailed on the pricing spreadsheet included as Attachment C.

Employees of the Court will be provided with a multi-line display telephone set with standard user features including a Direct Inward Dial (DID) number, Caller ID, a message waiting indicator, and voice mail. Unified Messaging for the desktop will be considered as an option. It is intended that some employees or work groups will also receive a 2nd DID number for direct desktop faxing. The new system will operate as a single system with common, standard features for all employees.

The Court currently has 7 full-time employees that provide on-site technology management and support. A variety of other support services are provided by, County Communications Staff, AT&T and Technicians via County Communications. Though system support costs have been included in estimates of future operating costs, the Court does not have a specific plan for administering and supporting its own new voice communications systems.

2.18 Description of IVR/IWR Requirements

The purpose of implementing a new Interactive Voice Response/Interactive Web Response System (IVR/IWR) is to have a single vendor that is responsible for all voice-related communications systems. The initial applications for this system, which are included in this RFP, are an automated system that will provide information to citizens who have been called for jury service and for Tentative Rulings on Civil cases. However, the Court intends to purchase an IVR/IWR platform that will allow for the development and support of additional self-service applications in the future.

The current Sonant system is approximately seven years old and provides both ACD statistics and a screen pop function based on the callers Juror ID number. Screen shots for those features from the current system are included as Attachments E and F.

Any new system purchased by the Court MUST replicate the existing functionality. A complete Call Flow Diagram of the Jury Services application and the text of the Tentative Rulings application can be provide to vendors that attend the Mandatory Bid Conference and sign an NDA

The Marin Court issues approximately 94,000 Jury service summons every year.

END OF INFORMATIONAL SECTION OF RFP

SECTIONS III., IV., V., and VI. BELOW, ARE THE TEMPLATE FOR RESPONDING TO THE RFP. TEXT FROM SECTIONS 1 AND 2 ABOVE ARE INSTRUCTIONS FOR THE VENDORS AND ARE NOT TO BE INCLUDED IN THE RFP RESPONSE.

Responsive proposals should provide straightforward, concise information that satisfies the requirements of this solicitation. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed in conformity to the Court's instructions, requirements of this solicitation, and the completeness and clarity of content.

The electronic copy of the response sections III., IV., and V., may be submitted as a single PDF file (preferred), or as multiple files as long as the files can be opened and read using Microsoft Office 2003 software.

III. VENDOR QUALIFICATIONS

3.1 Executive Summary

3.1.1 Executive Summary Content

The proposer must provide a one-page Executive Summary of its proposal. The Executive Summary should be a "high-level" general overview of how the vendor proposes to accomplish the requirements of this RFP. The proposer must also address in this section how it meets the minimum qualification requirements in Section 2.6.

3.1.2 Vendor Information, Validity, and Authorized Signature

The Executive Summary should include the vendor information, validity period, and authorized signature, as required in Section 2.4.5.

3.2 Company and Subcontractor Information

3.2.1 Company Background Information

The Court requires the vendor to be a reputable company of strong financial standing with experience in the design, installation, and management of Voice Communications and IVR/IWR Systems. The vendor's proposal must provide the information requested below. If the proposer is a joint venture, information about the prime subcontractor and the subcontractor must be submitted separately. The information to be provided is as follows:

- a. Complete name and address of main company location.
- b. Federal tax identification number.
- c. If incorporated, state in which incorporated?
- d. A brief description of the vendor's organization.
- e. Total number of years in business.
- f. Number of years providing products and services similar in size and scope to those requested in this RFP.
- g. If subcontractors are proposed for this RFP, describe the vendor's contract management process for subcontractors included in the vendor's proposal and provide copies of signed formal contracts (e.g., teaming contracts or any other legally binding document), if any exist, between the vendor and each proposed subcontractor.

3.2.2 Subcontractors

If subcontractors are proposed for this RFP, provide the following information for each subcontractor:

- a. Subcontractor name and address of main company location.
- b. Federal identification and/or social security number.
- c. If incorporated, state in which incorporated.
- d. A short narrative of the subcontractor's organization, including organization charts and indication of company officers where applicable.
- e. Principal type of business.
- f. Total number of years in business.
- g. Number of years providing services similar in size and scope to those requested in this RFP.

3.3 Experience and Qualifications

3.3.1 Prior Experience and References

The Court requires the vendor and its subcontractors to have prior experience in all aspects of the products and services described in this RFP for customers similar to or with relevance in the size, complexity and scope of this RFP. The Court reserves the right to contact any named customers as part of vendor evaluation. Vendor shall:

Provide the names, addresses, and telephone numbers for a minimum of five (5) customers for whom the vendor has provided similar products and services within the last 24 months. *If necessary, provide more than (5) references to ensure that there are (5) references for the Telephone System and (5) references for the IVR/IWR, if both systems are included in the proposal.*

3.3.2 Subcontractors

If the vendor intends to subcontract, describe the vendor's experience with each of the proposed subcontractors. For each proposed subcontractor provide the names, addresses, and telephone numbers for a minimum of three (3) customer references, for products and services similar to those described in this RFP. The vendor should include a brief description of the scope of products and services provided to the customer and the duration of the contract.

3.4 Personnel, Staffing, and System Support Operations

3.4.1 Design and Installation Project Team and Project Manager

Proposers shall provide the name, a role description, and brief statement of qualifications for the specific individuals that will be assigned to complete the design and installation of the system; including a Project Manager, Technicians, and Trainer.

3.4.2 Post-Install Support Team and Customer Service Operations

Proposers shall provide a description of the Customer Service operation that will support the Court after the successful completion of the installation. The information provided should include a brief description of the following:

- Ongoing Account Management and Customer Support Role
- Contact process (phone, email, fax, etc.) during regular business hours and non-business hours
- Remote monitoring capabilities offered
- Standard on-site service response times guaranteed by the vendor

- Follow-up process for customer reported trouble tickets
- Internal procedures to track customer service contact and resolution
- Escalation process to resolve outstanding customer service issues
- The location from which service technicians will be dispatched for on-site services in Marin County
- Description of how subcontractors are used in support and the guaranteed performance standards

3.4.3 Installation and Training Project Plan

Proposers shall provide a description of the installation and cutover project plan. The information provided should include, at a minimum, a description of installation methodology, milestones, and a proposed sample project schedule. Also, Proposers should include a description of the training process to be used to provide the training services required. Proposers should describe the expected role of Court personnel and resources to be provided by the Court as part of installation plan and training.

3.5 Basic System and Station Features Checklist

Vendors are to complete the checklist below. A “YES” response indicates that the feature is included as a standard option on the proposed system and does not require any additional hardware, software, or system modification to enable its use. A “NO” response indicates that the feature is not available on the proposed system. A “YES, with Limitation” indicates that the feature can be available on the proposed system but will require some additional hardware, software, or system modification that has not been included in this proposal. All “YES, with Limitation” responses should include an explanation of what is required to enable the feature.

	Description of System Feature/Function	Yes	No	Yes, with Limitation
1.	3 –party conference			
2.	6 –party conference			
3.	Autodial			
4.	Automatic Callback			
5.	Automatic Redial			
6.	Automatic Route Selection			
7.	Automatic Set Relocation			
8.	Call forward			
9.	Call Forward-Busy/No Answer			
10.	Call Forwarding - All Calls			
11.	Call Forwarding to an Outside Line			
12.	Call Hold			
13.	Call Park			
14.	Call Pickup			
15.	Call Queuing (without ACD)			
16.	Call Transfer			
17.	Call Waiting			
18.	Call Waiting Tone Indication			
19.	Caller I.D.			
20.	Camp – On			
21.	Class of Service			
22.	Direct Inward Dialing			

23.	Directory look-up on Phone display			
24.	Distinctive Ringing			
25.	Do Not Disturb			
26.	Flash Key			
27.	Forced Authorization Codes			
28.	Group Call Pickup			
29.	Last Number Redial			
30.	Message Waiting Indicator (Visual)			
31.	Music on Hold Interface			
32.	Mute/volume control/ring volume			
33.	Night Answer Mode			
34.	On-Hook Dialing			
35.	On-Hook Voice Announcement			
36.	Overhead Paging System Interface			
37.	Station Intercom/Paging			
38.	Station Speed Dial			
39.	System Speed Dialing			
40.	Toll Call Restriction			

3.6 Environmentally Preferable Purchasing

The Court requests available information from all participating vendors regarding the support and employment of environmentally responsible business practices.

3.6.1 Manufacturer

For each of the manufacturers whose name brand appears on a hardware product you are proposing on your pricing sheet, answer the following questions:

- a. Does the manufacturer have a formal Corporate Social Responsibility (CSR) Program?
- b. If yes, does that program report on specific objective goals for environmental and social responsibility and report annual progress on meeting those goals?
- c. If yes, do those goals include specific commitments to environmental goals for the company’s own products and operations?
- d. Does the manufacturer have an Environmental Management System that is certified to the ISO 14001 standard?
- e. Does the manufacturer’s Environmental Policy specifically address responsibility for the actions and activities of its supply chain both inside and outside the United States?
- f. Does the manufacturer have a product takeback and end-of-life management program for IT equipment?
- g. If yes, does that end-of-life management program accept the principles of the Basel Action Network’s “Electronics Recycler’s Pledge of True Stewardship”?
- h. Is the manufacturer participating in industry initiatives such The Green Grid or the Climate Savers Computing Initiative?
- i. Does the manufacturer have a program for reducing product packaging waste and for using reusable, recyclable, environmentally benign materials in product packaging?
- j. Does or has the manufacturer participated in US EPA Design for the Environment (DfE) programs such as Lead-Free Solder, Flame-Retardants in Circuit Boards, Wire & Cable, or Computer Displays? (<http://www.epa.gov/dfe/>)
- k. If the manufacturer does NOT have a formal EMS or ISO 14001 Certification, do they have programs for:

- Measuring and reducing energy consumption in the office?
- Reducing and recycling solid waste?
- Universal Waste management in compliance with California law?
- E-Waste management in compliance with California law?
- Encouraging employs to use energy-efficient modes of transportation to and from work, i.e. walking, biking, car pooling, or public transit?

3.6.2 Channel Partner/VAR

For the company that will be the contracting entity providing the system integration, installation, management and support services to the Court, answer the following questions:

- a. Does your company have a formal Corporate Social Responsibility (CSR) Program?
- b. Does your company have a formal Environmental Management System?
- c. Does your company have programs for:
- d. Measuring and reducing energy consumption in the office?
- e. Reducing and recycling solid waste?
- f. Universal Waste management in compliance with California law?
- g. E-Waste management in compliance with California law?
- h. Reusing, refurbishing or donating electronic equipment?
- i. Encouraging employees to use energy-efficient modes of transportation to and from work, i.e. walking, biking, car pooling, or public transit?
- j. Does your company include in its proposal a commitment to take back and responsibly manage in compliance with the BAN E-Stewardship principles all hardware products proposed in response to this RFP at no additional cost to the Court other than the pricing proposed?
- k. If yes, does that commitment include the proper handling of broken equipment returned under warranty?
- l. Will your company manage the proper and safe disposal of any surplus equipment created by the replacement of existing equipment?
- m. Briefly describe your process and commitment for the clean-up and proper disposal of all waste materials created during the system installation. Ideally, all waste materials (including packaging and cable) will be recycled and none sent to landfill.

3.6.3 Channel Partner/VAR

- a. Provide a description of the environmental responsibility programs, initiatives, and commitments your company has undertaken for its own operations and for the products it sells.

3.6.4 Products

- a. Any personal computer product proposed as part of the system solution must be EPEAT certified at a level of silver or higher.
- b. Vendors should propose only flat-panel devices and any computer monitor or display proposed must be TCO 99 certified, or equivalent.
- c. Any product included in your proposal that is covered by any US EPA Energy Star standards category must be Energy Star compliant to the most current standard.
- d. Complete the attached worksheet (Attachment G) for energy consumption specifications of each type of component included in your proposal.

For each type of hardware product you are proposing on your pricing sheet, answer the following questions:

- e. Are all products compliant with the European Union RoHS directive, including restrictions on the use of lead-free solders?

- f. Do the proposed servers include power supplies that meet the 80 PLUS® performance specifications?

3.6.5 Products - Optional

- a. Provide a description of the energy consumption profile of your proposed system, including any notable energy management features, and compare it to traditional digital PBX's and to competitive IP voice communications systems.
- b. Provide a description of the energy consumption and environmental benefits of the features and revised work processes that your proposed system can enable (e.g. reduced car travel, reduced consumption of paper, etc)

IV. TECHNICAL PROPOSAL – TELEPHONE SYSTEM

4.1 Base Telephone System

- a. Describe the base switch hardware and software that is proposed.
- b. What is the current software level for the product and when was it issued for general availability?
- c. What is the planned release date for the next software revision?
- d. What is the current version of the proposed system hardware and when is the next planned introduction of new hardware components that will supersede what is proposed?
- e. For the proposed system specified in the spreadsheet included in Section VI., how many IP Telsets can be added for growth before any expansion of the device hardware is required?
- f. For the proposed system specified in the spreadsheet included in Section VI., how many Analog Telsets can be added for growth before any expansion of the device hardware is required?
- g. Does the base system support the use of fax machines as analog extensions? If YES, describe any special requirements.
- h. Provide a schematic diagram that shows the major components of the system, where they would likely be located, and how they are interconnected, including all peripheral devices required to support the additional features such as ACD, Call Center reporting, Call Accounting, Desktop Fax, and Unified Messaging.

4.2. Messaging System

- a. Describe the type and model of voice messaging system proposed.
- b. What type of integration is used between the base telephone system and the voice messaging system?
- c. Does the proposed product support “integrated” or “unified” desktop messaging that displays voice messages, faxes, and e-mails on a single user screen?
- d. If YES, describe the system architecture and features.
- e. When were units of the proposed product first shipped to customers?
- f. What is the current software release for the product, and when was it issued for general availability?
- g. What is the planned release date for the next software revision?
- h. Does the proposed system integrate with the ACD/Call Center System so that inbound callers who leave a queue temporarily can be restored to their original place in queue?
- i. Does the proposed system offer direct-to-desktop faxing as an option?
- j. If YES to i., what additional components are necessary to enable this feature? If NO, what additional hardware and software are required to support this application?
- k. If YES to i., and a separate fax server is required to support this application, what integration is proposed between that server and the base telephone system?
- l. What client software is proposed that will be installed on individual desktop PC's for managing, creating, and sending faxes?
- m. Does the desktop fax product support in-dial and out-dial fax via the same trunk facilities used for voice calls?

4.3 System Management Tools and Call Accounting System

- a. What administrative system software does the vendor propose?
- b. What server platform and operating system does the software require?
- c. Must the server platform be dedicated to the system management application (i.e. can other applications run on the same computer)?
- d. What type of connection and protocol does the system use to communicate with the telephone system and the messaging system?
- e. Does the system allow the system manager to administer both telephone stations and voice mailboxes from same screen in the same session? If NO, provide a description of the process for managing standard MAC orders.
- f. What system monitoring and reporting capabilities are included in the proposed administrative software package for traditional switched telephony functions (e.g. trunk utilization)?
- g. What system monitoring and reporting capabilities are included in the proposed administrative software for IP transport and packet processing (E.g. packet delay times, packet loss, codec usage, etc.)?
- h. What type of Call Accounting System is proposed?
- i. Does the CAS system require separate hardware? If so, describe hardware and software requirements.
- j. Does the CAS system allow for budget-based cost coding? To what level?

4.4 Telephone Sets

- a. Describe the telephone sets that are proposed for:
 - Standard Offices
 - Executive Offices
 - Basic Non-Display IP Phone
- b. When is the next planned introduction of new telsets that will add to or supersede what is proposed?
- c. Does each of the proposed telsets include an Ethernet switch? If yes, describe capabilities of switch. DO you mean a Network Interface Card versus a Switch? Or is this a small internal switch??
- d. What color options exist for each of these types of sets?
- e. Do any of these types of telsets require printed paper labels to be created and installed for the labeling of function keys? If YES, which ones?
- f. If YES to e., is the software for creating and printing labels included with the proposed system?
- g. Is there a specific brand of headset that the vendor recommends for use with the proposed telsets?
- h. Is the telset proprietary and only usable with that manufacturer's equipment or a basic IP based phone?

4.5 Automatic Call Distribution

- a. Is the ACD function built into the base telephone hardware and software system? If YES, briefly describe the capabilities and limitations of the ACD within the overall system.
- b. If NO, describe the separate proposed hardware and software that will support the ACD function.
- c. If a separate server is required, describe the required server platform and operating system.
- d. If a separate server is required, must the server be dedicated to the ACD application (i.e. can other applications run on the same computer)?
- e. What is the current software release for the product and when was it issued for general availability?
- f. What is the planned release date for the next software revision?
- g. What tool is used for managing changes to the ACD configuration? Briefly describe the capabilities of the tool and the user interface.
- h. Is the ACD function configurable by a Court IT technician or is special training required?
- i. Can changes to the ACD configuration be made in real-time?
- j. Does the ACD allow agents to log into more than one call queue at the same time?
- k. Does the system provide the ability to inform callers of expected wait times and/or their place in queue? If YES, describe how that feature works, including limitations.

4.6 Call Center Management Tools

- a. Describe the proposed hardware and software required for administration, management, and reporting for Call Center operations.
- b. What is the current software release for the product(s) and when was it issued for general availability?
- c. What is the planned release date for the next software revision(s)?
- d. If a separate server is required, describe the required server platform and operating system.
- e. If a separate server is required, must the server be dedicated to the system management application (i.e. can other applications run on the same computer)?
- f. Briefly describe the *real-time* reporting capabilities for the proposed system, including devices (telsets, PC's, wallboards) and content (calls in queue, longest hold time, agents logged in, etc.).
- g. Briefly describe the *historical reporting capabilities* of the proposed system, for both standard and custom reports, including limitations on those capabilities and the export of report data to other programs.
- h. Provide the application used to develop the reports.

4.7 E-fax Server and Desktop Software

- a. Describe the base system hardware and software that is proposed.
- b. What is the current software level for the product and when was it issued for general availability?
- c. What is the planned release date for the next software revision?
- d. What is the current version of the proposed system hardware and when is the next planned introduction of new hardware components that will supersede what is proposed?
- e. How does fax client software get installed on a Personal Computer?
- f. Is there an .msi file available for deployment of the client software by group policy?
- g. Does the fax client software integrate with Microsoft Outlook?

NOTE: Items specifically not included in this procurement are:

- Wired or wireless headsets
- Overhead paging speakers and amplifiers
- External or 3rd Party System for recording telephone calls
- Remote Call Center Agent capability
- Outbound calling campaign software/database
- Video conferencing systems

V. TECHNICAL PROPOSAL – IVR/IWR SYSTEM

5.1 Basic System Description

- a. Provide a brief summary description of the proposed system.
- b. Describe how the proposed IVR/IWR system interfaces with the proposed telephone system (e.g. analog, digital, integrated system).
- c. Does the proposed system use industry-standard, non-proprietary voice computer-telephony boards? If YES, list make and model. If NO, describe proposed product.

5.2 Proposed System Hardware

- a. Does the proposed system include a server platform?
- b. What are the recommended (not minimum) technical requirements and specifications for the server including processor type and speed, memory, bus type, storage, power supplies, and mounting configuration (rack or tower)?
- c. What is the maximum number of boards and ports that the proposed or recommended server system can support?
- d. List the type, brand, and model of all cards to be installed in the server.
- e. Do any of the cards to be installed come in different port densities than what is proposed? If YES, describe.
- f. Can the proposed system cards support speech recognition software applications without any additional or replacement hardware?
- g. What elements of the system as proposed include redundancy in the event of component failure?
- h. What hardware options are available for backup and recovery of applications programming in the event of system failure? What backup system is proposed that will allow recovery and re-deployment of applications programming within 2 hours of repair of a hardware failure?

5.3 Proposed System Software

- a. List all software products that are proposed including software name, manufacturer, current release version, initial release date, and date of next expected release.
- b. Briefly describe the functions, capabilities, and limitations of each software component proposed.
- c. What is the Operating System software for the proposed system?
- d. Is the proposed applications software able to support an interface and work with both the ACS Juror and JSI Jury+ jury management software systems?
- e. In what programming language(s) was the proposed application software written?

5.4 IVR/IWR Host and Database Interfaces

- a. Describe the upload/download process between the IVR/IWR system and host databases.
- b. Does the proposed system mirror or maintain any portion of the host database on the IVR/IWR server?
- c. Describe available options for external host interface links and protocols supported by the proposed system.
- d. State the maximum number of host sessions to which the system can log on simultaneously.
- e. Describe how the proposed system supports the ability to simultaneously communicate with two (2) or more different hosts.
- f. Describe capabilities and processes for automatic logon and host computer status monitoring.
- g. Describe the system capabilities for handling host unavailable conditions.

5.5 Speech Recognition

- a. List and describe all additional software and hardware components required to enable speech recognition in addition to the standard touch-tone IVR.
- b. What company originally created the speech recognition software that is proposed, and who now supports ongoing development of the product?
- c. Describe the standard grammars included with the proposed system, including limitations.

5.6 System Administration, Diagnostics, and Development Tools

- a. List and describe the System Administration and Diagnostic tools that are included in your proposal.
- b. List and describe the Application Development and programming tools that are included in your proposal.
- c. Does the application development software tool, as proposed, provide the ability to test new or modified scripts before they are made active? Explain.
- d. Describe the automatic self-testing and diagnostic tools included with the proposed system and how they function within the existing network environment.
- e. List and describe the standard system operating reports included with the proposed system and how those reports can be accessed by Court Staff.

VI. PRICING

Pricing must be submitted using the spreadsheets Attachments C and D. For the printed version, the spreadsheet may be shifted to landscape mode and printed on multiple pages if that is required to make space for notes. The electronic version of the pricing spreadsheet must be submitted as an unlocked Excel file with working formulas and no hidden columns.

In addition to submitting the pricing in the form requested by the Court, vendors must include their standard pricing sheets in the format normally used internally and/or for customers. The total price shown on both the RFP Attachment Pricing sheets and the vendor's standard pricing sheets must match. Both pricing submissions should include a similar level of detail for component line items, unit pricing, and extended pricing.

This RFP has been written knowing that the type of systems for which the Court is soliciting proposals have a variety of architectures and pricing schemes. The pricing sheets have been structured in a manner that attempts to capture, in detail, the pricing for the various elements that should be included in all system proposals. However, all of the individual line items will not apply to every proposal or system.

In completing the pricing sheets, vendors are to break out the pricing of the various components included in their system proposal in a way that best meets the intent of the pricing spreadsheet. Modifications, insertions, and deletions are allowed on the pricing spreadsheet as long as the basic form and structure is retained, but all changes should be noted and explained in the space provide for notes.

Vendors must provide detailed pricing by component parts, unit pricing for those components, and the direct cost of installation for those components as shown on the Pricing spreadsheet. On the spreadsheet vendors should fill in all gray shaded areas. Where specific quantities of components are given on the pricing sheet, vendors must propose that quantity. Where the phrase "Vendor Spec" appears, proposers are to include that quantity or amount that their proposed system will require to meet the needs of the Court as expressed in this RFP.

VI.A Telephone System

1. System Hardware – This section should include prices for all of the tangible, physical equipment required for the installation and operation of the basic telephone system, except telsets. The system will need to provide for PSTN connectivity with one (1) ISDN-PRI and eight (8) analog LS/GS trunks as back-up/alternate route paths. The system will also need to provide a T1 interface for connection to the Sonant system if that system is to be retained rather than replaced. Locating and identifying all existing telephones within the Court buildings will be the responsibility of the selected vendor prior to installation of the new system.

Aside from the PSTN connections and IVR/IWR integration, it is assumed that all voice traffic will be carried on the existing LAN infrastructure.

At installation, the system will need to support two hundred (200) IP stations and forty (40) analog stations. As proposed, the system must provide for growth to two hundred fifty (250) stations without any significant additions of hardware to the base system.

As mentioned above, the Court is in the process of upgrading all LAN switches to be current, PoE-enabled Cisco gear.

2. System Software – As proposed, the system must be fully-licensed for two hundred (250) stations and the network connectivity described above. In addition, the system must be licensed for two hundred (200) voicemail boxes. If additional voicemail box licenses are required to provide basic AutoAttendant and routing functions, vendors should note that requirement and provide an estimated additional quantity required based on the information provided in the RFP.

For Unified Messaging and Desktop Fax, the RFP specifies a quantity of two hundred (200) licenses. If a vendor's base pricing for those software licenses includes a higher quantity (e.g. 500) that should be noted. If these licenses are automatically included in the Extension/User license, that should be noted.

The Court requires a simple Call Accounting System (CAS). This system must enable Court personnel to track outbound, inbound, and internal calls by originating extension for date, time of day, number called, and call duration. If the proposed base system can provide the functionality required without additional hardware or software, no add-on CAS is required. If the base system does not include this feature, vendors should propose a CAS package that is simple to use and manage.

3. Telephones – Vendors should choose and propose telephones in three (3) categories as shown. Specific requirements for those telsets have not been provided. Vendors are to propose the devices they think would best meet the needs of the Court based on the information provided. The quantities given for each type of telset are estimates based on the review of Court employee activities and functions.
4. Professional Services – In this section vendors are to include pricing for all professional services that are not directly related to the system installation and included in section 1 above.
5. Call Center – As described in 2.16 above, the Court now uses a rudimentary Call Center application for the Traffic and Criminal Divisions. The Needs Analysis indicates that there are opportunities for efficiency and improved service within the Court by providing that functionality to a broader range of employees. However, there is currently no specific plan for which Divisions would use the system and how it would be designed.

In this section vendors are to provide pricing for all additional ACD and Call Center functionality that is not part of the base system, including software licenses for 40 concurrent active agents and 5 Supervisors. In Section 3 of the RFP response proposers should include a complete description of the proposed Call Center system. Supervisors and Agents should have the ability to view on their desktop computer basic operating information such as agent status, number of agents logged in, calls in queue, longest wait time, etc., and receive alarms when operating thresholds are violated (e.g. no agents logged in, calls overflowing, more than X calls in queue, etc.).

6. E-fax Desktop Fax System - Vendors should provide pricing or a complete turn-key e-fax solution with the capacities indicated on the pricing spreadsheet. If the hardware and/or software for this feature are included in the base system pricing, that should be noted on the form.
7. Ongoing System Support and Maintenance In this section vendors are to provide pricing for the specific service support options requested, by year and by hour. Items 7.1 and 7.2 are discrete options. Pricing is to be provided for the two options requested.

For the System Maintenance Agreement, vendors should assume that the agreement covers system hardware repair and replacement coverage including telephone sets, onsite and remote service support

for system failures and operating problems, and regular software patches/maintenance (i.e. “dot releases”).

Section 7.3 is for a service contract covering major new software releases. If upgrades are part of the ordinary service offering, it should be noted.

The pricing requested in this section is for a twelve (12) month agreement. Longer-term contracts with discounted rates may be proposed as an option.

Sections 8, and 9 of the pricing spreadsheet are for Ongoing System Support and Maintenance Costs associated with the additional system components: Call Center and E-fax

VI.B IVR/IWR System

1. System Hardware – This section should include prices for all of the tangible, physical equipment required for the installation and operation of the basic twelve (12) port IVR/IWR system with touchtone access, web access, and optional speech recognition capability. The costs of design, configuration and installation are not to be included in this section.
2. System Software – As proposed, the system must be fully-licensed for the proposed Jury Service and Tentative Rulings application software for the basic touchtone voice interface and the web interface. The base proposal should include system administration software and any other software required to support the required application.
3. Development and Installation Professional Services – Vendors must include pricing for all consulting, development, installation and support services to create and deploy a working Jury Services IVR/IWR Application customized to the needs of the Marin Superior Court.
4. Options and Additions – Vendors are to provide pricing for the Options and Additions as listed. If any of the listed items are included as components of the basic system, at no additional cost, that should be noted.
5. Ongoing Support Costs – In this section vendors are to provide pricing for the specific service support options requested, by year and by hour.

For the System Service Support Agreement, vendors should assume that the agreement covers system hardware repair and replacement coverage, onsite and remote service support for system failures and operating problems, and regular software patches/maintenance. Periodic major software upgrades may be excluded, but if that is part of the ordinary service offering, or is required as a condition of software licensing, it should be noted. The pricing requested in this section is for a twelve (12) month agreement. Longer-term agreements may be proposed as an option.

6. Additional Applications – Vendors are invited to propose software applications that can run concurrently on the proposed hardware/software platform proposed for the Jury and Tentative Rulings application. Optional IVR/IWR applications could, for example, include Traffic and Criminal Case information and fine and fee payment capabilities.

VII. ATTACHMENTS

- Attachment A – Vendor Certification Form (included in this document)
- Attachment B – Sample Contract
- Attachment C - Pricing Sheet
- Attachment D - IVR/IWR pricing Sheet
- Attachment E - Screen Shot of Jury IVR ACD Data
- Attachment F - Screen Shot of Jury IVR Screen Pop
- Attachment G - Environmentally Preferable Purchasing Worksheet

**ATTACHMENT A
VENDOR CERTIFICATION FORM**

I certify that neither _____ (Proposer) nor any of its proposed subcontractors are currently under suspension or debarment by any state or federal government agency, and that neither Proposer nor any of its proposed subcontractors are tax delinquent with the State of California. I have listed all contracts with government or commercial customers during the five (5) years preceding submission of this Proposal.

I acknowledge that if Proposer or any of its subcontractors subsequently are placed under suspension or debarment by a local, state or federal government entity, or if Proposer or any of its subcontractors subsequently become delinquent in California taxes, our Proposal may be disqualified.

Signature

Printed Name

Title

Date