



Asterisk Project

Request for Proposal

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1. Introduction

1.1. Overview

Shelby County, Alabama is embarking on an initiative to update its IP telecommunications needs with an Asterisk Business Edition Server. Presently the County's IP telephony needs are being filled by a Nortel CS1000. The primary objective of the project is enhance IP telephony functionality while significantly reducing operating costs to meet the diverse and growing needs of the County's telecommunications platform.

This Request for Proposal (“**RFP**”) is the first step in the process. The focus will be on providing an open source telecommunications solution that can be fully integrated with the Shelby County's existing IP communications investments to enable us to meet the current and future demands of our end user base. The initiative is aimed at providing the enterprise with the latest telecommunications technology while minimizing the ongoing financial support obligations. Accordingly, Shelby County is soliciting information for installation and implementation of the new system and migration from the existing systems.

1.2. Background

Shelby County is the fastest growing county in the State of Alabama, encompassing approximately 808 square miles in Central Alabama. Shelby County presently has an estimated 171,465 residents and projections are that by 2015 there will be 216,308 people living in Shelby County. Shelby County currently employs almost 600 employees.

The Shelby County Asterisk Project was formulated to explore migrating our IP telephony needs to an open source solution for the enterprise that can also add multiple layers of redundancy for business continuity.

1.3. General Goals and Objectives

The initial goal of the project is designed to reduce costs and improve IP telephony functionality and position the County for future growth. The primary rationale for this project is that the current aged system and cost structure does not support the enterprise business requirements. This project will enable new functionality at a lower cost structure to the enterprise. Thus, Shelby County has developed the following objectives:

Integrate people, processes, and technology to provide a balanced service level.

- Create a collaborative environment where access to data and information is based on flexibility, intuition, data definition, data stewardship, enhanced telecommunications functionality, reporting & monitoring and increased security.

Leverage resources, institutional knowledge, developing skill sets, and technology to continuously improve service and productivity throughout Shelby County.

- Increase the ability to be more responsive to business demands and promote the creation of a faster, more accurate, and more proactive technological environment.

Mitigate risk to Shelby County by focusing on redundant requirements and understanding the impact these requirements have on productivity and customer service.

- Design an environment that encourages solutions that maximize the goals and objectives of Shelby County. This may be accomplished through the use of creative

design, timely issue resolution, thoughtful decision making, and consistent project management.

1.4. Partnering Principles

Shelby County believes the general partnering principles below are essential to successful technology relationships. These principles are incorporated into all contractual relationships regarding strategic applications.

PARTNERING PRINCIPLE #1 COMMITMENT TO STATE-OF-THE-ART PRODUCTS

Shelby County will be making a significant intellectual capital and resource investment in Vendor's products. Vendor historically has made and, within reasonable fiscal constraints is expected to continue to make, investments in the ongoing development of its products, including the Software.

PARTNERING PRINCIPLE #2 PREDICTABILITY OF ON-GOING COSTS AND EXPENSES

Costs and expenses must be clearly articulated and understood by the Parties prior to executing contractual agreements or change orders.

PARTNERING PRINCIPLE #3 DECISION-MAKING AUTHORITY

Each Party will commit knowledgeable and empowered managers and other key decision-makers to cultivate and support the relationship created through the Agreement.

PARTNERING PRINCIPLE #4 TIME-TO-MARKET SOLUTIONS AND REGULATORY UPDATES

In a long-term technology relationship, time-to-market for products is critical to Shelby County. Vendor will work with Shelby County to facilitate timely deployment of Vendor's products.

PARTNERING PRINCIPLE #5 REALIZING EXPECTED AND FUTURE BENEFITS

Vendor will work with Shelby County to identify and set forth in contractual agreements quantifiable, measurable benefits associated with deploying and using Vendor's products.

PARTNERING PRINCIPLE #6 PROTECTION OF INVESTMENT

Vendor will work with Shelby County to ensure investments in Vendor's products are protected economically against shifts in platforms and product migrations.

PARTNERING PRINCIPLE #7 MANAGEMENT PARTICIPATION

Vendor will make appropriate opportunities available to Shelby County to become involved in Vendor's technology strategic planning process. On-going representation and/or observation on appropriate customer councils and committees related to Vendor products also will be made available to Shelby County.

PARTNERING PRINCIPLE #8 QUALITY RESOURCES TO SUPPORT THE RELATIONSHIP

Vendor will commit quality and support resources and systems to support their relationship. You manage what you measure.

PARTNERING PRINCIPLE #9 GROWTH OPPORTUNITIES

Vendor must be flexible in addressing Shelby County's future growth.

PARTNERING PRINCIPLE #10 COMMITMENT TO OPEN ARCHITECTURE ENVIRONMENT

Vendor has adopted and intends to continue to promote open architecture solutions. Vendor will make available to Shelby County all application programming interfaces and other Interfaces and related documentation to promote interoperability among Vendor's system and Shelby County's other systems to the same extent that like items are made available by Vendor to its other customers.

PARTNERING PRINCIPLE #11 ALIGNMENT OF ACCOUNTABILITY/RESPONSIBILITY

Accountability and responsibility will be aligned to facilitate decision making, accountability and a results-focused orientation.

2. Project Scope

2.1. Approach

The project scope encompasses the entire IP telephony system in Shelby County:

1. **Research & Acquisition**
2. **Testing & Integration**
3. **Scaled Deployment**
4. **Maintenance of Business Operations**

2.2. Technology Scope

The hardware and technical infrastructure requirements to support enterprise systems include hardware, software, technical and networking infrastructure, and server requirements.

Proposed solutions will be evaluated for their support and use of the following technology components:

- Full PBX Capability
- VOIP & TDM Capabilities
- User Management and GUI Configuration
- Voice Mail with Microsoft Office Integration
- Conference Bridge – unlimited
- SIP Support
- Basic Call Reporting

2.3. Current Technical Environment

There are a wide variety of telecommunications systems currently in use at Shelby County. This is the result of several influences including the available technology at the time the building was constructed, the varied needs resulting from Shelby County’s broad mission and focus. The systems range from basic KSU systems to the CS1000 appliance. This section briefly describes the architecture associated with the current telecommunication systems.

Presently the County’s master PBX is a Nortel CS1000 used for TDM and IP telephony. In addition there are several Meridian legacy KSU’s in many buildings. Our strategic goal is to eliminate KSU’s and Centrex lines as capital is available to integrate non-IP telephony facilities into the enterprise IP based system. We presently have two PRI’s on survivable switches routed to the CS1000. We utilized a QRS (EvenTide) voice recording solution for analog and digital feeds. Current telephony taxonomy is as follows;

<ul style="list-style-type: none"> • Nortel CS 1000 v 4.5 <ul style="list-style-type: none"> ○ Redundant CPUs ○ 1 signaling server ○ Web base Admin interface ○ PRI interface card • Application Gateway <ul style="list-style-type: none"> ○ Visual voicemail ○ Multi Zone paging via Telecom devices ○ LDAP – Active Directory integration ○ Corporate Directory 	<ul style="list-style-type: none"> • CallPilot unified messaging v5.0 <ul style="list-style-type: none"> ○ 200 + mailboxes ○ Multiple Auto Attendant trees ○ Web base Admin interface • WLAN Nortel 6140 series wireless handsets • 1 Branch office with PRI interface • 2 BCM 50 Survivable gateways at remote locations • 190 + VoIP Nortel 1100E series PoE devices • 60 + TDM M6000 series devices • Nortel I2007 and Polycom 2033 Conf series
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2.4. Key Specifications

Although the existing environment may continue to exist for some time, Shelby County's goal will be replacement of that environment. We are looking for a vendor with a proven history of successful telecommunication implementations at public entities. As a result it is essential that any solution set adhere to the following key specifications. Submission should include detail responses on the following core specifications;

Ref. #	Requirements	Compliance Statement – note inclusion, exclusion or add on option
2.4.1	Asterisk Business Edition Server (ABS) - Dual servers	
2.4.2	Redundant PRI capacity between two ABS servers in different physical fibre locations	
2.4.3	Licenses for Min. 50 concurrent calls (initial set) scalable to 200+ concurrent calls	
2.4.4	Unified messaging – Voice Mail with multiple trees	
2.4.5	Call Attendant functionality with menu trees	
2.4.6	Redundant Hard Drives and Power Supplies	
2.4.7	Support Port side recording from QRS (EvenTide)	
2.4.8	Nortel SIP Phone Provisioning (1100 series)	
2.4.9	TDM Phone Provisioning (M6000 series)	
2.4.10	Speech Recognition & Speech Synthesis capabilities	
2.4.11	Integration with Microsoft Office	
2.4.12	Echo Cancellation	
2.4.13	Multi Zone paging via Telecom devices	
2.4.14	LDAP – Active Directory integration	
2.4.15	Compatible with Microcall reporting	
2.4.16	Web Based User Interface	
2.4.17	VoIP VLAN segregation	
2.4.18	Denote Music/Message On Hold options	
2.4.19	Corporate Directory functionality	
2.4.20	Security controls to allow restrictions on users and levels of access and control	
2.4.21	Caller ID functionality	
2.4.22	Telephony devices should support switching capabilities (Single cable for POE)	

	VoIP/Data)	
2.4.23	Video Conferencing current features and/or planned functionality	
2.4.24	Define procedures required for firmware upgrade for 1100 series and purposed SIP compliant phones	
2.4.25	Define any special cabling requirements	
2.4.26	Provide road map and end of life for all hardware and software	
2.4.27	Pinpoint 911 capable	
2.4.28	Denote any API's available	
2.4.29	Denote IP based telephony devices and/or specs that do not work with proposal solution	
2.4.30	Denote logging ability and history storage requirements	
2.4.31	Denote ports utilized across network and/or firewall transversal.	
2.4.32	Outline QOS options and implementation features	
2.4.33	Proposed approach on existing survivable gateways at remote locations	
2.4.34	Denote wireless handsets options/usage	
2.4.35	Denote backup schema and methodology	
2.4.36	Proposed deployment plan with Shelby County	
2.4.37	Proposed support process and response time frames	

3. Vendor Qualifications

3.1. General Information

Each vendor shall give a brief background and history of its company, including the following:

- Corporate vision
- Software vision and applicability to County government
- Services and support vision
- Customer base specifically in public sector

3.2. Financial Data

Each vendor shall provide the following financial data:

- A copy of a credit rating report from any of the major credit rating agencies, Dun & Bradstreet, Moody's, Standard & Poor's, etc.
- Last 3 years of audited Key Financial Reports (Income Statements, Balance Sheet, etc.)

3.3. Market Experience

Each vendor shall provide information that demonstrates its commitment to the government market, including the following:

- List all government based entities that have implemented your solutions within the last three (3) years, the versions used by each, and the associated modules they implemented.

3.4. References

Provide three (3) references in the following format:

- Institution name
- Date contract was signed
- Date Implementation was completed
- Background of the project
- Modules Implemented
- Scale (budget and people assigned to project)
- Brief explanation of why this reference is relevant to Shelby County
- Reference Contact Name
- Reference Contact Title and Role in Implementation
- Contact Information, preferably address, telephone and email

3.5. Pricing

Each vendor shall provide a detailed pricing proposal for the proposed hardware and software solution. The proposal should also include pricing information for support and maintenance services for at least 3 years following implementation. The vendor should submit proposals with individual unit prices reflected on all hardware and software options and/or optional components. At a minimum, ensure pricing exists for all items included in section 2.4. Professional services, software and other expense items should be separate from hardware components. Annual maintenance cost should be included within proposal submission. County reserves the right to purchase none, one or several units based upon the proposal unit prices.

3.6. Software Support Services by Vendor

Each vendor shall provide the following minimum information regarding support services:

- a. The solution is to be configured installed and tested and made operational within **60 (sixty days)** of professional services contract execution.
- b. Awarded company must provide system and services support (technical support desk, remote diagnostics, on-site technical visits).
- c. Awarded company must provide training and written documentation.
- d. Awarded company must have a local support representative (within 50 mile radius) that is available to deal with any issues or emergencies.

4. Instructions, Requirements

This RFP is only available in electronic PDF format. The County will review all responses and supporting documentation to this RFP and, if necessary, gather or solicit additional information that may be required to fulfill the purpose and expected outcomes contained in this document. Responding to this RFP is not mandatory. If a vendor is electing not to respond, please notify us by email of your decision as soon as possible.

4.1. Submission of Responses; Handling of Vendor Inquiries

Vendors must respond to this Request for Proposal by close of business on August 28, 2009. Responses should be submitted in Microsoft Word or PDF format via email to:

Phil Burns
CIO Shelby County
102 Depot Street
Columbiana, Alabama 35051-1118
205.670.6999
pburns@shelbyal.com

We may request respondents to present oral and/or provide demonstrations of the information contained in their response to this RFP.

4.2. Confidential Information

Shelby County is a public institution, and as such, it is subject to the Alabama Public Records Laws. Vendor responses are not public documents until a contract is awarded. After a contract is awarded, if Shelby County receives a public records request pursuant to this statute for the vendors' proposals or other information relating to this RFP, it is required by law to disclose such information unless such information meets the definition of a "trade secret". A "trade secret" is typically defined as "business or technical information, including but not limited to a formula, pattern, program, device, compilation of information, method, technique, or process that: (a) derives independent actual or potential commercial value from not being generally known or readily ascertainable through independent development or reverse engineering by persons who can obtain economic value from its disclosure or use; and (b) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy." The vendor disclosing such trade secret must clearly mark such information "Confidential" in order for Shelby County to assert that it is a protected trade secret and not a public record if it receives a public records request.

4.3. Timeframes for Evaluation Process

The timeframes for the evaluation process will be as follows:

- **Distribute RFP on August 7, 2009**
- **Receive Proposals from Vendors up to August 28, 2009**
- **Complete Evaluations from Vendors by September 18, 2009**

4.4. Incorporation of Vendor Proposal

THE PROPOSAL SUBMITTED BY THE SUCCESSFUL VENDOR, TOGETHER WITH THE REPRESENTATIONS MADE BY THE SUCCESSFUL VENDOR, MAY BE INCORPORATED INTO A MASTER TECHNOLOGY AGREEMENT BETWEEN SHELBY COUNTY AND THE SUCCESSFUL VENDOR.

In the event of a conflict between the terms of the successful vendor's proposal and this RFP or the terms of another document relating to this RFP, the order of precedence set forth in the Master Technology Agreement shall apply.

5. Legal Requirements

5.1. Overview

Shelby County wants to memorialize its arrangement with the successful vendor with a

contract that fully and accurately captures the various commitments being made by vendor. Shelby County reserves the right to negotiate with more than one vendor as it determines which vendor to purchase the system.

5.2. The Master Technology Agreement

Shelby County plans to use a Master Technology Agreement, or "MTA" to establish the contractual relationship with the successful vendor. The MTA will be structured as a master agreement to afford Shelby County the flexibility to acquire additional products and services in the future without the need to renegotiate the base agreement. Shelby County is mindful that the MTA will need to be tailored to take into consideration technical and functional aspects of a vendor's solution; however, the core approach and basic terms and conditions contained in the contract are not expected to change.

5.3. Use of Legal Counsel

Shelby County will use legal counsel to develop the MTA and may be using legal counsel to assist it in reviewing the vendors' responses. Because a legal review of each vendor's response may be undertaken by Shelby County in determining the likelihood of securing a contract with such vendor, Shelby County strongly recommends that each vendor involve its legal counsel as well.