



## **Telephone & Contact Center Technology Upgrade Request for Proposal**

Please acknowledge receipt of this document and your company's intent to participate in this RFP process by completing the Intention to Participate Form and emailing it to SBCERA's Sourcing and Procurement Point of Contact (POC) Josh Streets ([jstreets@scoreboardgroup.com](mailto:jstreets@scoreboardgroup.com)) by **June 5<sup>th</sup>2020** at 5:00 PM PST.

If your company chooses not to respond to this RFP, all copies of this RFP, whether distributed in hard copy or electronically (including all file attachments), may not be further copied, distributed, disclosed, retained or used by your company or any other party.

**RFP Response Due Date: June 17<sup>th</sup>, 2020**

## Intention to Participate Form

***SBCERA / [Insert Supplier's Name]***

**[Supplier's POC name]**

On behalf of SBCERA, I am pleased to welcome your company to this 'Telephone and Contact Center Technology RFP'.

Please note that the RFP schedule requires that suppliers confirm their intention to participate in this RFP on or before 5:00 PM PST on **June 5<sup>th</sup>, 2020**

Please indicate whether or not your company intends to respond to this RFP by checking Yes or No and returning this form to me via email.

\_\_\_\_\_  
Yes

\_\_\_\_\_  
No

SBCERA POC name: Josh Streets  
SBCERA POC Title: ICMI Consulting Advisor  
Email: [jstreets@scoreboardgroup.com](mailto:jstreets@scoreboardgroup.com)  
Phone: 319.540.3340

The RFP document is attached in the following pages. Please reference the RFP Schedule (Section 6) for additional important dates relevant to this RFP.

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## **SECTION 1 – INTRODUCTION: SBCERA**

### ***1.1 About SBCERA (San Bernardino County Employee Retirement Association)***

#### *Company Background*

The San Bernardino County Employees’ Retirement Association (SBCERA) is a defined benefit pension plan providing retirement, disability, and death benefits on behalf of approximately 42,000 members and beneficiaries. SBCERA serves 17 employers throughout California and invests more than \$10 billion in assets.

SBCERA was established on January 1, 1945 under the County Employees Retirement Law of 1937 following a vote by the people of the County on May 16, 1944. SBCERA is an independent government entity, separate from the County of San Bernardino.

As a defined benefit pension plan, SBCERA provides eligible members with a lifetime retirement benefit based on their years of service, age at retirement, final average compensation, and benefit formula. This pension is “The Foundation for a Secure Retirement” for SBCERA members and serves as a stable, reliable source of income—both for those already enjoying retirement and those who will retire in the years to come.

It is the mission of the San Bernardino County Employees’ Retirement Association (SBCERA) to provide the members and their beneficiaries with those retirement and related benefits and services which they have earned, and which are commensurate with their years of service and compensation.

It is the responsibility of those charged with administration of SBCERA to:

- Effectively collect contributions to fund liabilities incurred;
- Diversify the investments of the system so as to minimize the risk of loss and to maximize the rate of return;
- Administer the benefits impartially, fairly and in accordance with the applicable law;
- Deliver service to the membership in an accurate, courteous, prompt, professional and cost-efficient manner;
- Appropriately set employer and member contributions in accordance with responsible funding practices; and
- Strategically plan for the future.

SBCERA’s membership includes active, deferred, and retired members and beneficiaries. SBCERA administers benefits for two membership classifications, Safety and General, and two tiers, Tier 1 and Tier 2.

All active members and participating employers contribute to SBCERA. These contributions are held in trust by SBCERA and are invested for the long-term.

**URL**

[www.sbcera.org](http://www.sbcera.org)

## **1.2 Business Ethics**

SBCERA is committed to the highest standards of ethical conduct in all of our business dealings. We will select and continue to do business with Suppliers on the basis of the price, quality and timeliness of the products and services they offer and the requirements of our members, employers, and staff. SBCERA will also consider establishing and maintaining multiple sources of supply to better ensure continued deliveries and reasonably priced high-quality services.

We invite all Suppliers to compete for our business, and in return, Suppliers can expect a level playing field.

## **SECTION 2 – Rules of Engagement**

### **2.1 Rules**

- a. By accepting SBCERA's invitation to participate in this RFP, your company unconditionally agrees to all of the following:
- b. Any Supplier may be removed from this RFP process for failure to comply with the requirements of this RFP, listed in section 6.2.
- c. SBCERA reserves the right to reject any and all proposals and does not bind itself to accept the lowest bid for any materials, products or services submitted.
- d. In submitting a proposal, your company understands that SBCERA will determine at its sole discretion which proposal, if any, is accepted in its entirety or any portion whatsoever based on the selection process, final selection and any communications associated with the selection.
- e. The submission and receipt of proposals does not obligate SBCERA in any way to engage in business of any kind with your company.

- f. SBCERA may, during the course of the evaluations, enter into negotiations with more than one Supplier simultaneously. Any and all relationships will be deemed non-exclusive. Further, if SBCERA awards business to any Supplier, it must be clearly understood and accepted by the primary company that award of the business, is also non-exclusive.
- g. SBCERA is not liable for any costs incurred by each Supplier in the preparation, presentation or any other aspect of the proposals received by reason of this request. All costs and expenses associated with this RFP process will be born solely by each Supplier.
- h. SBCERA reserves the rights to (a) modify the terms of this RFP at any time, and (b) notify Suppliers, as needed and at SBCERA's sole discretion, that are participating in this RFP of any changes or additions to this RFP.
- i. Proposals submitted may be reviewed and evaluated by any person at the discretion of SBCERA, including non-allied and independent Suppliers retained by SBCERA now or in the future for the purpose of obtaining evaluations to proposals.
- j. Your company may be asked to further explain or clarify areas of their proposal in writing during the evaluation process. As part of the evaluation process, site visits may be requested.
- k. SBCERA will retain all responses and has no responsibility to return them to the Suppliers.
- l. SBCERA reserves the right to attach, paraphrase or adapt the purposes of preparing the services agreement relating to this RFP any of the material submitted as part of a Supplier's response. Accordingly, each Supplier should "scrub" its marketing and sales materials prior to submission.
- m. Care has been taken to ensure the accuracy of this document, and SBCERA does not accept responsibility for any errors or omissions.

## **SECTION 3 – PROJECT BACKGROUND, SCOPE AND BUSINESS REQUIREMENTS**

### ***3.1 Program Background***

This document is intended to provide sufficient information for prospective suppliers to produce a proposed solution(s) to address SBCERA's contact center and telephony operating needs.

SBCERA recognizes that there may be changes to the overall structure of the final solution based upon internal changes as well as suggestions prospective suppliers may have in their solutions. Nonetheless, as much information as possible has been included in this document to form the

basis of supplier proposals and an opportunity will be provided to address any further questions the supplier may have prior to an oral presentation to several SBCERA stakeholders.

Prospective partners are encouraged to submit any questions and requests for clarification through the channels specified in Section 12 below.

### **3.2 Program Scope**

SBCERA is seeking telephony/technology supplier partner that will take on current and future business needs. SBCERA is interested in suppliers who can provide SBCERA with superior contact center and office related telephony services to include the following:

Services provided to SBCERA office employees, agents in their contact center, as well as other remote working locations.

The following items, provide as detail to overall scope of existing environment and future needs:

#### **3.2.1 Contact center**

- Over 150k phone contacts per year (queue, direct, outbound)
- Operating hours are 8:00am-5:00pm; Monday through Friday
- ShoreTel 14.2 VoIP on premise, Enghouse for IVR & Call Recording
- Pension management system Pension Gold by LRS
- Agents have the ability and requirement to work from home securely
- Uptime is close to 100%

#### **3.2.2 Calls**

- Current state has 6 active/traditional queue groups handling calls & office work
- Service level goals currently established are 80% answered in 120 seconds
- 2019 service levels exceeded goal at 84% of calls answered within 120 seconds
- Average handle time for these interactions is approximately 11 minutes
- There are currently 87 active skills, including shared voicemail skills, for routing

#### **3.2.3 Phone Agents & Business Users**

- 100 total licenses or seats needed
- 45 contact center, 55 office licenses
- Requires concurrent call capacity of 33 in current state
- Approximately 100 physical phones capable of taking calls; having the ability for staff to use softphone only if comfortable or working from a remote location

- IVR is currently in place

### ***3.3 Business Requirements***

- **P0 – Required for launch**
- **P1–Not required for launch, but still needed**
- **P2 – Nice to have**

Not Ranked In Priority Order, But Deliverables Required

#### **3.3.1 Required – P0**

<b>IVR/Auto Attendant</b>	Allow callers to be automatically transferred without intervention
<b>Integrated E-Mail</b>	Ability to offer e-mail assistance with applicable tracking mechanisms within the same platform as other contacts
<b>Call Dispositions</b>	Ability to choose a call type or reason within the system for reporting purposes.
<b>Call Barge</b>	Feature that allows silent live call listening with the ability to barge into the call to speak with both parties.
<b>Call Audio Recording</b>	Ability to record specific calls for multiple purposes
<b>Unified Messaging</b>	Voicemail to E-Mail – Records a voicemail as an audio file and sends it to an e-mail address automatically with ability to download and play audibly.
<b>Active Directory Search</b>	Integrated Active Directory user search and referencing.
<b>Call Blocking</b>	Ability to reject a call based on incoming criteria within the administrator interface
<b>Hold/Transfer/Consult</b>	Ability to choose all 3 options via the hard or soft phone with a caller on the line.
<b>Paging/Intercom Over Sets</b>	Ability to page or announce in real time over specific handsets or for specific users.
<b>Virtual Hold</b>	Ability for the caller to receive a callback if wait times reach a certain threshold as determined by the administrator



<b>Contact Center Metrics</b>	Real time and/or historical reporting dashboard of agent performance and associated end user metrics. Business intelligence offerings.
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### 3.3.2 Near Term Future Need – P1

<b>Visual Voicemail</b>	Ability to enable speech to text on voicemails & deliver via e-mail
<b>CTI</b>	Ability to produce computer telephony integration with pension system for screen pops of customers information upon contact
<b>Agent Whisper</b>	Ability to whisper in the rep's ear; similar to call barge, but to speak to only one party (the rep). Announcing call type upon arrival in addition.

### 3.3.3 Nice to Have – P2

<b>Social Media</b>	Additional channel integration for social messaging & possibly service.
<b>SMS/MMS</b>	Asynchronous communication via notifications for customer communication, with the ability to respond if needed.
<b>Chat &amp; Instant Messaging</b>	Ability to chat instantaneously with customers or with internal peers.

## 3.4 General Telephony Information

### 3.4.1 Total number of building locations & names

1. 348 W. Hospitality Lane, Suite 100, San Bernardino, CA 92408

### 3.4.2 SIP Server Present

- Yes

### 3.4.3 Total number of analog extensions

- 13 currently, intention to transition to non-analog lines in new system.

### 3.4.4 Number of digits for extension

- 3-digit dialing. Discovery on 4-digit during implementation for growth potential

### **3.4.5 Concurrent call needs**

- 33

### **3.4.6 VoIP wiring complete**

- CAT 6, currently running in an IP Phone environment

### **3.4.7 PoE connectivity in all**

- POE is available at all onsite locations

### **3.4.8 Total number of Voicemail Ports by location**

- All locations are supported by Enghouse QMS, with the potential of leveraging MS O365 Voicemail system in the near future.

## ***3.5 General Telephony Information***

### **3.5.1 Extension number example**

- 3XX, 1XX, helps identify area of the business

### **3.5.2 User First and Last Name Displays**

- Yes

### **3.5.3 Enable voicemail on all**

- Yes

### **3.5.4 Enable forwarding to a mobile phone**

- Yes, for specific users

### **3.5.5 Restriction on outbound calls**

- 4 classes:
  - Internal

- Local
- LD
- International

### **3.5.6 - 911 Dialing / PSAP Pop existing**

- "9-911" is the preferred method, sending admin or broadcast notice is ideal

### **3.5.8 E-Mail Server Type & Version**

- Exchange or Microsoft O365 (pending)

### **3.5.9 Integrated Fax Needs**

- eFax

### **3.5.10 New IVR or New Auto Attendant Needed**

- Yes

Note: Streamlined IVR design is required. Limited self-service, verification or automation required in the implementation

### **3.5.11 Number of Auto Attendants or Toll-Free Numbers**

- 1 main menu and 1 employee directory menu exist today

### **3.5.12 Night/Holiday Menu**

- Various Holiday Menus are utilized

### **3.5.13 Time Based Routing Design**

- Not in current state, but time-based overflow routing potentially used in addition to skill-based routing in new system.

### **3.5.14 Telephony Settings**

- Music on Hold: Required for contact center with customization

### **3.5.15 Current Call Routing Structure**

- Number of Queues is 6
- Default queues activated during loss of contact center application

### **3.5.16 Number of Skills**

- 87, many for alpha skill routing, potential to utilize ACD/IVR/Skills in future

### **3.5.17 IVR Automation Requirements**

- None currently; possibly in the future

### **3.5.18 Threshold or Other Routing Schemas**

- Total 33 concurrent calls followed by "Busy"

### **3.5.19 Skills Based Routing Present**

- Yes

### **3.5.20 Lines Needed Per Phone Type**

- 3 for executive admins & receptionists
- 2 for standard user
- 1 for "common" area phones, conference rooms

### **3.5.21 Number of Hunt Groups in Office**

- None

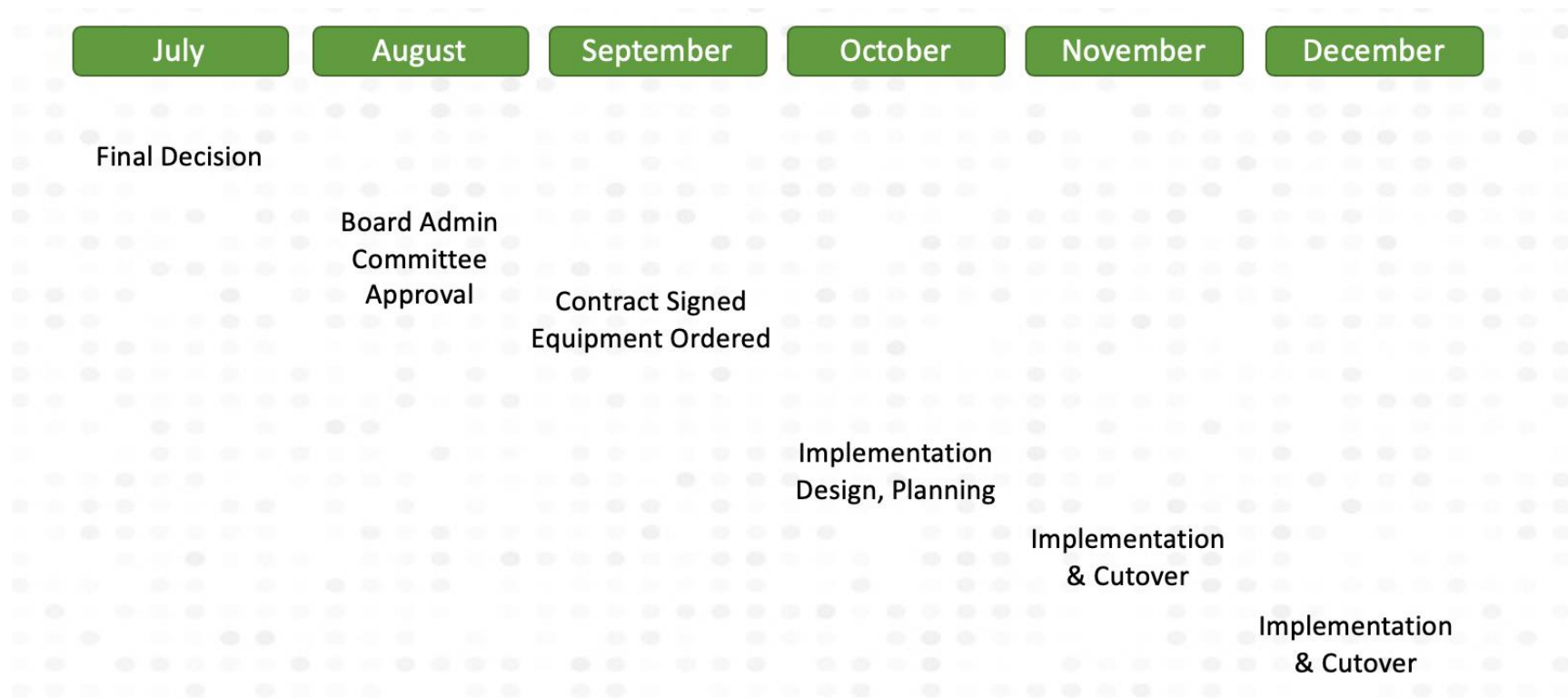
### **3.5.22 Ring Order Requirements**

- Unknown internal DID calls dialed route to shared group of users

### **3.5.23 Call Recording**

- Meets all cloud stored security requirements for financial organizations

### 3.5.24 Desired 2020 Project Timing



Final cutover and system integrity sign-offs completed prior to December 18<sup>th</sup>, 2020.

### 3.6 Current State of Telecom Infrastructure

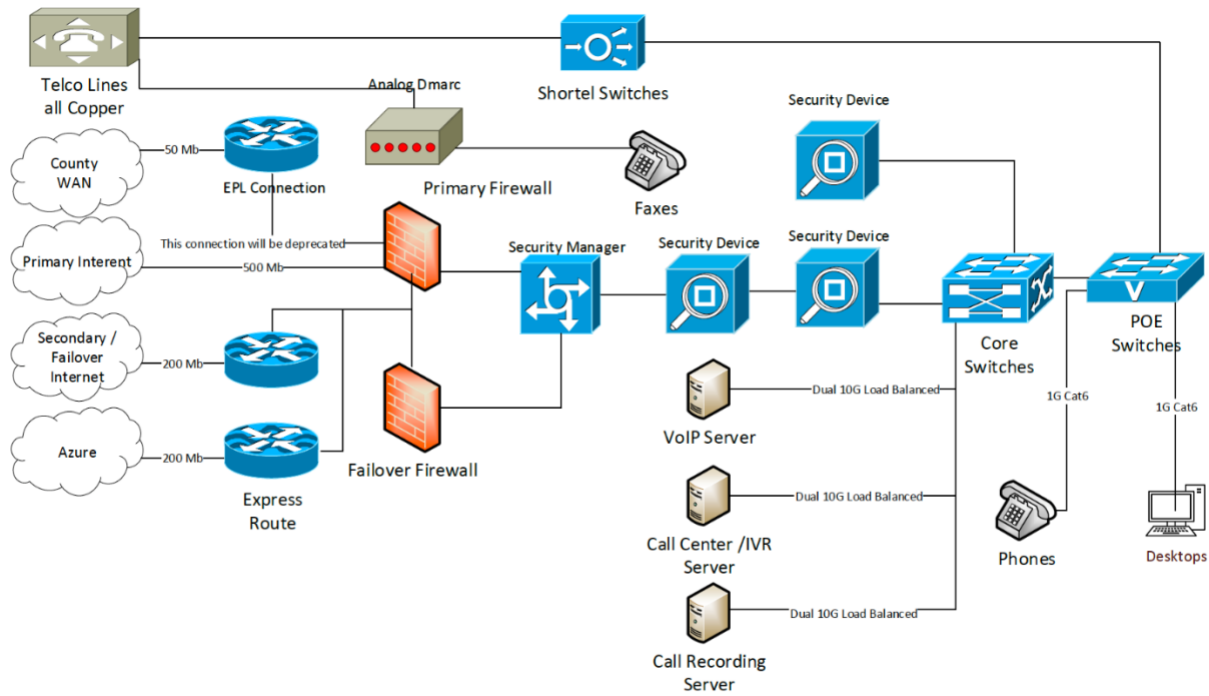


Figure 1: SBCERA's current telecom infrastructure

Cloud service would come over Primary Internet Connection which is a 500 Mb pipe. That line is provided by a Tier 1 carrier. In the event that line goes down we automatically failover to a secondary connection which is a 200 Mb pipe. All current traffic is killed and primary traffic such as any phone or email becomes priority. This is a Tier 2 carrier.

All lines coming in are currently copper. There is a main bundle that provides connection of the current phone system, but there have been add-ons over the years, so there are several other copper lines coming in for fax lines and smaller pairs.

SBCERA's entire backbone is 10G dual fiber in an Active/Active load balanced failover connection, so servers, and core switches have up to 20G of throughput in our datacenter. From the MDF to each floor IDF they run fiber 10G connections with multiple redundant paths, so they do not have the added throughput, but can withstand connections going down and still have full connectivity between each floor and the datacenter.

All desktops run a 1G connection on Cat 6 to the switch on their floor's IDF room, with the exception of a few that may still be Cat 5E.

### 3.7 PBX Inventory & Phone/License Needs (See New Vendor Column for Proposal/Quote)

Equipment/Licenses	Current	New Vendor	Notes
ShoreTel Physical Server	1	TBD	Server 2012 R2. Need depends on whether we go with on premises or cloud based.
ShoreTel SGT1k PRI Switch	1	TBD	
ShoreTel SG90 Switch	2	TBD	
ShoreTel SG50 Switch	3	TBD	Switch need would also depend on selection of new system.
<b>ShoreTel System License (Enterprise Edition)</b>	1	1	If replacing ShoreTel and new system on premises, then at least 1 system; 2 for redundancy.
<b>ShoreTel Extension License</b>	107	100	Based on our current numbers of active extensions, 100 would be sufficient.
<b>ShoreTel Mailbox License</b>	79	80	This number is lower than extensions because conference room phones don't require it.
ShoreTel Softphone License	1	TBD	Unless we want to purchase some for testing purposes.
ShoreTel Mobile Access License	4	TBD	Not currently used. A need for something like this would depend on options on new system.
ShoreTel SIP Trunk License	42	TBD	Would only apply depending on need for new on premises system.
ShoreTel Operator Access License	1	TBD	Need would depend on how new system handles "Operator" type access, and/or potential IVR design.
<b>ShoreTel Personal Access License</b>	92	100	Permissions for use of phone. If using desk phones on a voip or cloud system
ShoreTel TAPI Application Server	3	TBD	For connecting other phone system applications, may not be needed on new system.
ShoreTel IP230 Phone	52	TBD	
ShoreTel IP560 Phone	7	TBD	
<b>ShoreTel IP485g</b>	33	100	92 total phones, but will likely need 100 for growth potential. If replacing desk phones
Business audio System	1	TBD	Music on hold, loaded with royalty-free music. This is used for ShoreTel only.
Enghouse CCE Primary Physical Server	1	TBD	Server 2012 R2. Need depends, on premises or cloud based. Call Center Software. Music on hold for IVR.
Enghouse CCE Secondary VM Server	1	TBD	Server 2012 R2, for redundancy. Main number DID must be manually changed to point to this server.
<b>CC Agent Licenses</b>	38	45	Includes all of MS and Fiscal, 3 in IS, all of Disabilities, it would not include communications, admin, HR, legal, or investments.
Enghouse QMS Server	1	TBD	Need would depend on how new system will handle recordings.
Enghouse QMS Recording Licenses	53	80	Non-agent need recording ability as well. Requirement to give entire organization ability to record call from their desk
Enghouse QMS Desktop Utility Licenses	53	TBD	Utility for easy stopping of recordings.

Figure 2: Potential Phone & License Count

## SECTION 4 – REQUEST FOR INFORMATION & BUSINESS REQUIREMENTS

### *4.1 Architecture, Capacity & Redundancy*

- a. Describe your voice and data networking fail over capabilities between your clients and Supplier datacenters.
- b. Describe your internal network failover capabilities for SBCERA's location.
- c. Describe in detail how capacity is monitored, e.g. bandwidth, network utilization, live network traffic monitoring, network capacity, and planning metrics with fully hosted clients.
- d. What call recording volume can you ingest?
- e. What uptime % can you guarantee?
- f. What hours is your support center staffed?
- g. Describe your workstation configuration recommendations and phones recommended.
- h. Describe your network security architecture and capabilities as it relates to data networks supporting SBCERA. Specifically, network segmentation (e.g., stateful inspection firewalls, intrusion detection, etc.) security monitoring (e.g., log management and monitoring), and forensics.
- i. Describe your internal network design to include network vendor hardware and software, capacity thresholds, alarming, redundancy mechanisms, and the use of server and/or network-based load balancing environments. (Include additional details as a Word or PDF attachment to your proposal.)
- j. SBCERA requires a documented software and hardware update process. How do you update desktop software and how often? What tools do you use? Is there a cost?
- k. SBCERA requires Supplier to have a Business Continuity and Disaster Recovery Plan. Provide an overview/copy of your contingency/disaster recovery plan for those processes and systems. (Include additional details as a Word or PDF attachment to your proposal)
- l. SBCERA prefers to have and maintain separate test environments that mirror the production environment setup in this project. Will there be additional cost for a small lab for testing?



## ***4.2 Security Requirements***

- a. When passing user data to the applications, are multiple values supported (e.g. Multiple locations) or single values only? How do changing I.P. addresses regularly affect user to data results?
- b. Describe the mechanisms SBCERA will use to enforce any authorization policies (e.g. only users from a specific location should have access, only users from a specific team should have access, etc.)
- c. Describe the management framework that should be established by the Supplier to initiate and control the implementation of information security within the Supplier organization.
- d. Describe your set of rules and procedures regulating the use of information, including its processing, storage, distribution, and presentation.
- e. Network security concerns relate to the operation, management, support, and maintenance of network equipment as it relates to best practices in logical access and authorization segmentation, and protection. Describe how you ensure the managed network is secure so that data is protected when transmitted over both trusted and untrusted networks.
- f. Describe how your internal and external networks demonstrate a commitment to secure networking. The design must be documented, on paper or in an electronic chart, including notes. External connections should be managed carefully; connections to networks for third parties should only be created after security due diligence has been completed. Procedures should verify the authenticity of the counter party providing electronic instructions or transactions through trusted exchange of passwords, tokens, or cryptographic keys.
- g. Describe your incident response plan, incident handling procedures, and tools to ensure an effective and timely response to any incidents and the reporting of those events.

## **SECTION 5 – RFP EVALUATION CRITERIA**

### ***5.1 General Criteria***

SBCERA will evaluate Suppliers' responses based upon various criteria, including, but not limited to, the following:

- A. Services and Competence: high-quality client services along with the abilities and knowledge base to meet the functional and technical requirements indicated in this RFP's determined by SBCERA. (High quality client services include, and are not limited to, a Supplier's willingness to be creative and flexible in an effort to meet SBCERA timelines and resources that possess both hard and soft skill-sets.)

- B. Company Information: Stability and strength of each Supplier's organization and SBCERA's assessment of the Supplier's financial position (based on SBCERA's analysis of the financial information provided by the Supplier, which includes Supplier's insurance.)
- C. Quality: Excellence of Supplier's proposal regarding Supplier's
  - a. Responses to the questions included in this RFP and "SBCERA Customer Service Centers RFP Response Workbook".
  - b. Your company's acceptance of SBCERA's terms and conditions in the applicable Agreement(s).
  - c. Total Cost proposal.
  - d. Quality of each Supplier's customer references.

## ***5.2 More Specific Criteria***

Our objectives include, but are not limited to your company's following capabilities:

- A. Ability to meet business and technical objectives and requirements.
- B. Ability to integrate your company's proposed solution within SBCERA's current technical and operating environments.
- C. Ease of expansion for both growth and scalability.
- D. Support of the project delivery schedule.
- E. Ease of deployment, implementation, training support and use of the proposed solution.
- F. Total Cost and/or Total Cost-model.

The following items must be easily identified for analysis:

- 1. Recommended configuration and price (up front and recurring). Pricing should be inclusive of all Communications System services, licenses, and software, as well as any interface software required to the LAN, voice carriers, or integrations costs and should clearly identify the cost of support and maintenance.
- 2. The Vendor is responsible for identifying and providing the functionality and cost of each line item. The vendor must identify both one-time non-recurring charges like implementation and setup fees as well as ongoing costs including but not limited to maintenance, support, licenses, and upgrades.
- 3. Pricing must include installing and configuring all software proposed for your solution.
- G. Key personnel that would be assigned to support the solution and availability of such resources.
- H. Past relevant experience with this type of solution and the ability to demonstrate relevant experience.
- I. Demonstrated financial stability and commitment and overall financial strength of your SECTION 6 – REQUIREMENTS FOR SUBMITTING RESPONSES

## ***6.1 Proposal Submittals***

- A. To be included in the evaluation process, a Supplier must submit an electronic copy of the response to SBCERA via the representative listed. Reference the Schedule in Section 7.1 for all dates of this RFP.
- B. To ensure confidentiality and that the highest level of fairness is exercised during the evaluation process, all inquiries and comments concerning the scope described herein are to be directed in writing to SBCERA Primary Point of Contact (POC) listed on page 1 of this RFP and also provided below for your ease of reference.
- C. ICMI is a consultant to SBCERA during this RFP process. Should your company circumvent this single point of contact and communicate in any fashion regarding this RFP with other SBCERA associates, your company may be subject to immediate disqualification from this RFP process.
- D. In the event that SBCERA POC is unavailable, the Secondary POC, Barbara Hannah, will be assigned. Suppliers may not call the Secondary POC unless specifically asked to do so by the POC listed on the first page of this RFP. You will be notified if and when to contact the Secondary POC.
- E. If additional information is requested by any single company and such data is provided, SBCERA will make every effort possible to provide all participants with the same information regardless of whether it was requested or not.

## ***6.2 Format and Structure of Supplier's Response and Answers to Questions***

Each supplier must submit its electronic copy in Microsoft Word file form that is compatible with Microsoft Operating System and Microsoft Word. (Additional information that a Supplier submits as attachments may be in other formats.)

Proposal Requirements:

### **Written Proposal Deliverable:**

Please provide a written narrative/description of your proposed solution(s) including the following elements (i.e. #'s 1 through 10) listed below. Please provide any examples or samples as separate PDF or Word documents (attachments) and include with your proposal.

1. Overview of your company and its capabilities
2. Proposed solution
3. Proposed Operational Relationship with SBCERA – (Account Management & Regular Meetings, i.e. leadership structure and how you propose supporting SBCERA account, type of regular meetings etc.)
4. Proposed Locations of Support

5. Implementation Procedures / Activities / Timelines
6. Overall Process Improvement approach if applicable
7. Reporting capabilities

**Other Proposal Deliverables:**

1. Please provide a written response to each Business Requirement or Question in the “SBCERA Customer Service Centers RFP Response Workbook.”
2. Please note that there may be a request associated with some Business Requirement Questions in the Response Workbook that may require a diagram, plan or a more detailed explanation. These responses must be provided in a separate PDF or Word Document as an Attachment. These Attachments must clearly reference the specific “question number” called out.
3. Please provide your proposal pricing and discounts in the “SBCERA Customer Service Centers RFP Response Workbook,” on the Discounts TAB.
4. Information requests related to Sections 4, 8, 9, 10 and 11 of this RFP.
5. Supplier’s financial statements and insurance information including Certificate of Insurance and standard representations for warranties requested.

Your company’s response should be structured in the following order:

1. Title page and Table of Contents.
2. Supplier’s written narrative/description of your proposed solution(s) including the elements as listed above.
3. Completed “SBCERA Customer Service Centers RFP Response Workbook” including information requests, answers to questions, program pricing and discounts.
4. Information requests related to Sections 4, 8, 9, 10 and 11 of this RFP.
5. Supplier’s insurance information including Certificate of Insurance and standard representations for warranties requested of this RFP.
6. Appendices including information requests, additional reference material, attachments, and warranties, etc.

## SECTION 7 – SCHEDULE

### 7.1 Schedule of Supplier's Required Submissions and/or Events

Table 1: RFP Schedule

Date	Description
On or before 5 PM PST on 5/29	RFP is released to public
On or before 5 PM PST on 6/5	Each Supplier confirms to SBCERA's POC, via email, its intention to participate in the RFP or not
On or before 5 PM PST on 6/10	Deadline for Suppliers to submit follow-up questions
On or before 5 PM PST on 6/12	SBCERA hosts mandatory Q&A call with interested Suppliers (or SBCERA may provide written answers to all Suppliers' questions that do not contain proprietary information) All vendors planning to submit a proposal must participate in the call.
On or before 5 PM PST on 6/17	Electronic RFP responses submitted to SBCERA's POC contact via email
Timing to be determined	Suppliers will be notified via e-mail by 6/22 if presentations or next steps are required. Agendas are provided to Suppliers making presentations.

*Please*

*note that the dates in Table 1 above serve as a guideline and as such are subject to change at SBCERA's sole discretion.*

## SECTION 8 – SUPPLIER PRESENTATIONS

The purpose of presentations is to enable SBCERA to review your company's solution and/or product/service capabilities. At its own discretion, SBCERA will invite Suppliers that have proposals of interest to SBCERA to demonstrate the current versions of their solutions/products/services in meetings at a location to be determined. It is understood that not all Suppliers participating in this RFP may be asked to provide a presentation. Guidelines and an agenda will be provided to relevant Suppliers prior to the meetings in June/July 2020. It is up to the Supplier to ensure appropriate resources are present who can effectively present the Supplier's solution/product/services and answer SBCERA's questions. A subsequent board interview of the business partner may be required prior to contracting services.

## SECTION 9 – SUPPLIER'S INFORMATION

### 9.1 Supplier's Profile

Please complete the "Supplier Profile" Tab in the "SBCERA RFP Response Workbook", "Supplier Profile" TAB.

### 9.2 Supplier's Contacts

Please complete the "Supplier Contacts" Tab in the "SBCERA Customer Service Centers RFP Response Workbook".

### 9.3 Supplier's Strategies

Please complete the "Supplier Strategies" Tab in the "SBCERA Customer Service Centers RFP Response Workbook".

## **SECTION 10 – SUPPLIER’S INSURANCE INFORMATION**

Answers to all questions and other information requests in this Section 10 are to be (a) attached as one information bundle and (b) identified as Section 10 Information and (c) included with your RFP response.

### ***10.1 Insurance Requirements.***

Explain your insurance levels for any onsite technicians or personnel.

## **SECTION 11 – WARRANTIES**

### ***11.1 Warranty Representations & Master Services Agreements***

Each Supplier should include its standard representations and warranties for services, software and hardware that apply to its response, including any optional warranties available. In addition, any copies of required Master Services Agreements for SBCERA’s legal review, including possible revisions and additions to the terms to the Master Services Agreement. The selected Supplier agrees to negotiate the terms of the Master Services Agreement. The final negotiated Master Services Agreement will incorporate the terms of this RFP and the winning proposal, without substantial deviation.

## **Section 12 - QUESTIONS**

### ***12.1 RFP Q&A***

Questions regarding this RFP will be accepted via email through **SBCERA’s Sourcing and Procurement Point of Contact (POC) Josh Streets** ([jstreets@scoreboardgroup.com](mailto:jstreets@scoreboardgroup.com)).

All questions must identify the RFP section to which the question refers. Questions and responses thereto will be answered at a mandatory Q&A call with interested Suppliers (or SBCERA may provide written answers to all Suppliers’ questions that do not contain proprietary information) All vendors planning to submit a proposal must participate in the call. Written questions will be accepted until 5:00 p.m. PDT on June 10, 2020.

## **Section 13 – OBTAINING COPIES OF RFP**

### ***13.1 RFP Access***

This RFP can be found on SBCERA’s website at [www.SBCERA.org](http://www.SBCERA.org). If you are unable to download this document from the website, you can also obtain an electronic copy of the RFP through email. Send your request to **SBCERA’s Sourcing and Procurement Point of Contact (POC) Josh Streets** ([jstreets@scoreboardgroup.com](mailto:jstreets@scoreboardgroup.com)). All responses to this RFP must be submitted in accordance with the instructions contained in the RFP.

## **Section 14 – NOTICE TO PROPOSERS REGARDING RESPONSIBILTiy OF COSTS**

All costs of preparation and presentation associated with responding to this RFP will the responsibility of the Supplier.

## **Section 15 – NOTICE to SUPPLIERS REGARDING THE CALIFORNIA PUBLIC RECORDS ACT**

SBCERA as a California public entity is subject to the transparency laws of the State of California, including the Public Records Act (Government Code section 6253 et seq.) Responses to this RFP become the exclusive property of SBCERA. At such time staff recommends a Supplier proposal to the SBCERA Board, and such recommendation appears on the agenda, all proposals submitted shall be regarded as public records. Exceptions will be those elements in each proposal, which are defined by law as business or trade secrets and are so reasonably and conspicuously marked as "TRADE SECRETS", "CONFIDENTIAL", or "PROPRIETARY" in red ink within the proposal. SBCERA shall not in any way be liable or responsible for the disclosure of any such records including, without limitations, those so marked if disclosure is deemed to be required by law or by an order of the court. The Proposer shall indemnify SBCERA for any and all attorney's fees awarded against SBCERA based on SBCERA's refusal to disclose those elements of the proposal marked by the Proposer with a restrictive legend. Proposers shall not mark their entire proposal as confidential. Such an attempted designation is not valid and will not be honored and will instead result in the entire proposal being treated as a non-confidential public record.

**Submission by a Proposer constitutes a complete waiver of any claims whatsoever against SBCERA, and/or its agents, officers, or employees, that SBCERA has violated a Proposer's right to privacy, disclosed trade secrets or caused any damage by allowing the proposal to be inspected.**