

**PHONE SYSTEM REPLACEMENT
REQUEST FOR PROPOSAL
RFP #17-18-003**



**LUZERNE COUNTY TRANSPORTATION
AUTHORITY**

LCTA

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LUZERNE COUNTY TRANSPORTATION AUTHORITY | TELEPHONE SYSTEM REPLACEMENT REQUEST FOR PROPOSAL

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NOTICE TO PROPOSERS

REQUEST FOR PROPOSAL (RFP)

RFP #17-18-003

Luzerne County Transportation Authority Telephone System Replacement

Luzerne County Transportation Authority is seeking proposals for a Hosted VoIP telephone system. The scope of this Request for Proposal (RFP) is for IP Phones, network equipment (if specifically required by vendor), IP phone services, software (if any), and training. However, if deemed in the best interest of Luzerne County Transportation Authority, it reserves the right to pick and choose from the list of procured items, add and delete items and/or to order from multiple vendors.

Copies of the Request for Proposals may be obtained from the LCTA website (www.lctabus.com) or by contacting Lou Uritz, Procurement Manager at luritz@lctabus.com. Email correspondence is preferred to ensure all queries are properly documented and responded to.

When requesting a copy of the RFP, leave your full name, company name, mailing address, email address, and telephone number (with area code).

Proposals (one [1] original and three [3] copies) will be received by the Luzerne County Transportation Authority 315 Northampton St, Kingston, PA 18704, until:

January 10, 2018 – 12:00 PM

Proposals should be submitted on the forms provided, including all Exhibits. Please mark the envelope in which the proposal is submitted “Luzerne County Transportation Authority Telephone System Replacement Proposal” RFP 17-18-003.

As per the specifications on file with and available from:

Lou Uritz
Luzerne County Transportation Authority
315 Northampton Street
Kingston, PA, 18704 (570) 288-9356 x210
luritz@lctabus.com

All proposals shall be subject to all applicable state and federal laws, subject to approval of a financial assistance contract between the Luzerne County Transportation Authority and the U. S. Department of Transportation, and in compliance with all applicable Equal Employment Opportunity laws and regulations.

This Authority solicits and encourages Disadvantaged Business Enterprise participation. DBE’s will be afforded full consideration of their responses and will not be subject to discrimination. Proposers will be required to comply with the Luzerne County Transportation Authority DBE Program goal requirement where applicable. A copy of the DBE Program can be found at the following link: <http://www.lctabus.com/employmentifbandrfps/procurementanddbe.html>

Luzerne County Transportation Authority reserves the right to postpone, accept, or reject any and all proposals, in whole or in part, or to waive any and all informalities, as it deems in its best interest. Any person on the list of ineligible contractors for federally and or state assisted projects is not an eligible proposer.

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Anticipated Procurement Schedule

(Subject to Change)

PROPOSALS ADVERTISED	11/29/2017
QUESTIONS/CLARIFICATIONS BY EMAIL	12/13/2017
RESPONSE TO QUESTIONS/CLARIFICATIONS	12/27/2017
PROPOSALS DUE DATE (No Later than 12:00 PM)	01/10/2018
AWARD OF CONTRACT	01/23/2018
NOTICE TO PROCEED	01/24/2018

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SECTION I GENERAL INFORMATION AND CONDITIONS

Any matters concerning this procurement will be addressed directly to Lou Uritz, Procurement Manager, LCTA, 315 Northampton Street, Kingston, Pennsylvania 18704, in writing or luritz@lctabus.com. Email correspondence is preferred to ensure all queries are properly documented and responded to. The Selection Committee members are not to be contacted by any of the Proposers regarding this RFP. If additional information or clarification is required from a Proposer, they will be contacted directly. Each Proposer will be advised in writing of any award recommendations.

Technical and System Information - All technical and system inquiries should be directed to: Josh Burkholder IT Coordinator (jburkholder@lctabus.com) Cc. Lou Uritz (luritz@lctabus.com)

Mandatory meeting for site review - Interested vendors must contact LCTA to schedule on-site system review and evaluation. This must be done prior to bid submission. Contact Joe Roselle, Director of Administrative Services (jroselle@lctabus.com) and Lou Uritz, Procurement Manager (luritz@lctabus.com) to schedule your visit.

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1.0 The Contract Documents

The Agreement, the proposal, General Conditions and Specifications with all notes and or changes made thereon before signing of the Agreement are the Documents forming the Contract.

1.1 Financial Assistance Grant

Financial support of this project is provided through financial assistance grants from the Pennsylvania Department of Transportation (PADOT) and LCTA. The successful proposer(s) and all subcontractors will be required to comply with all terms and conditions prescribed for third party contracts in a grant contract between the United States of America and the purchaser.

1.2 Approval by United States Department of Transportation

The award of a contract for labor and materials is subject to the concurrence of the United States Department of Transportation (DOT).

1.3 Federal Regulations...N/A

1.4 Intent of Specifications

It is the intent of these specifications to take advantage of the latest advances in industrial design and construction. It is the intent to specify durable materials and which will be rugged and most suitable for LCTA considering such facts as may be reasonably and properly taken into account. Only new materials, produced by manufacturers who have demonstrated experience in this field will be considered. The units offered shall be of the latest design in current production. The proposal shall include a complete description of each major component to be furnished, including materials, manufacturer, model number or other specific identifications.

1.5 Compliance with Specifications

In all cases, materials must be furnished as specified, but where brand names are used, consider the terms "approval equal" to follow. However, written approval for any proposed "equal" must be received before the scheduled proposal opening.

All proposals received shall remain in effect 30 days after proposal opening.

Invoices shall be furnished upon shipment and payment shall be made net thirty (30) days from shipment.

1.6 Award of Contract

LCTA will evaluate proposals and will make an award to the proposer whose proposal represents the best overall value and fit with LCTA's organizational needs and requirements. Evaluation and award will occur in the manner detailed in Section III PROPOSAL EVALUATION AND SELECTION PROCESS (Pages 23-25)

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1.7 Term of Payment

The contractor shall submit billing in accordance with the terms of the executed contract and based on services performed, or materials provided. Upon acceptance of the services and materials by LCTA, payment will be made net Thirty (30) days approx. according to the stated terms.

1.8 Taxes

LCTA is exempt from payment of all federal, state and local taxes in connection with this purchase and said taxes shall not be included in the bid price. LCTA will provide necessary tax exempt certificates.

1.9 Materials Warranty

The proposer shall assume responsibility for all materials and accessories used in the equipment whether the same is made by the manufacturer or purchased ready-made from an outside source.

1.10 Delivery/Completion

Each proposal shall provide for the realistic delivery/completion of the project to the property of LCTA and the proposer shall state the earliest possible date for delivery/completion of the project.

1.11 Contractual Obligation of Proposer

Each proposal shall be submitted with the understanding that the acceptance in writing by LCTA of the labor and materials described therein shall constitute a contract between the proposer and LCTA, which shall bind the proposer on his part to furnish and deliver at this proposal price in accordance with the conditions of said accepted proposal and specifications.

1.12 Warranty

The proposer shall warrant that all materials will conform to the published specifications and will be free from defects in material workmanship and title. The product must be of first quality and the workmanship must be the best attainable. All materials furnished shall be subject to testing to assure compliance with contractual specifications. The warranty period shall be one year from date of acceptance. If it appears that within one year from date of acceptance that any materials fail to meet the warranty specified above and the purchaser notifies the supplier promptly, the supplier shall thereupon correct any deficit, including nonconformance with the specifications or bid award terms, whichever is applicable and, at his option and expense, either repair or replace any defective materials or parts.

1.13 Patents

The proposer shall assume all costs arising from the use of patented materials, equipment, devices, or processes not furnished by LCTA, used on or incorporated in the project and shall indemnify and save harmless LCTA, PennDot, and their duly authorized representatives, from all suits of law, or actions of every nature for, or on account of, the use of any patented materials, equipment, devices or processes.

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1.14 Inspection and Acceptance

All labor and materials, covered by this specification, shall be subject to the inspection of LCTA. This inspection shall be made at the point of delivery or with the material installed. The point of inspection shall be optional with the purchaser and written acceptance shall take place within thirty (30) days of the completion of installation.

1.15 General

- a. The supplier shall comply with all applicable federal, state and local laws.
- b. Sealed proposals shall be submitted in envelopes clearly marked “LCTA Telephone System Replacement-RFP 17-18-003” and must be received at the office of the Authority prior to the time noted in the Anticipated Procurement Schedule. Proposals received after the scheduled time of the bid opening time will not be considered.

1.16 Conditional Bids

Conditional bids, or those which take exception to the specifications, will be considered non-responsive and will be rejected.

1.17 Proposal Forms and Response Content

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Bids should be submitted on forms provided along with any additional supportive documentation.

1.18 Definition of Terms

The terms "manufacturer"- "supplier"- "contractor" used in this specification means the concern or its duly authorized representative accepting the order to furnish and deliver material covered by this specification. The terms "purchaser"- "LCTA" refers to the Luzerne County Transportation Authority.

1.19 Errors & Omissions

The supplier will not be allowed to take advantage of any errors or omissions in the specification. Full instructions to correct errors or omissions will be given to the supplier should errors or omissions be called to the attention of LCTA.

1.20 Packing and Shipping

All materials shall be packaged and shipped in a manner to insure their receipt without loss or injury and to permit further handling if necessary. Small stock shall be securely bundled, bagged, boxed or crated.

The supplier shall be responsible for and replace any material lost or damaged during transit of materials F.O.B. LCTA. Each package shall be plainly marked indicating the kind and quantity of material, part number and the purchase order number of the LCTA.

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1.21 Rejection

Failure of any of the material or of a sample or samples thereof to satisfactorily meet inspection will be cause for rejection of the material furnished under this specification. The supplier shall pay rejected material transportation charges both ways.

1.22 Contract Changes

The Contracting Officer, at any time, by a written order, and without notice to the sureties make changes within the general scope of this contract, in any one or more of the following: (i) Drawings, designs, or specifications; (ii) method of shipment or packing; and (iii) place of delivery. If any such change causes an increase or decrease in the cost of, or the time required for, the performance of any part of the work under this contract, whether changed or not changed by any such order, an equitable adjustment shall be made in the contract price or delivery schedule, or both, and the Contractor shall be notified in writing accordingly. Any claim by the Contractor of the notification of change: Provided however, that the Contracting Officer, if he decides that the facts justify such action, may receive and act upon any such claim asserted at any time prior to final payment under this contract. Failure to agree to any adjustment shall be a dispute concerning a question of fact; however, nothing in this clause shall excuse the Contractor from proceeding with the contract as changed.

1.23 Interest of Members of or Delegates to Congress:

No member of, or delegate to the Congress of the United States, shall be admitted to any share or part of this contract or to any benefit arising therefrom.

1.24 Conflicts of Interest

No member, officer, or employee of the Public Body, Transit Authority, or locality during his tenure or one year thereafter shall have any interest direct or indirect, in the Contractor, the Contract or proceeds thereof. Throughout the proposal review process and subsequent contract negotiations, proposers shall not discuss or seek specific information about this project with members of the Proposal Committee, LCTA Board or LCTA employees other than project manager.

1.25 Commonwealth of Pennsylvania Non-Discrimination Clause

LCTA is a contract recipient of funds from the Commonwealth of Pennsylvania. A condition for the receipt of the funds is that all subcontracts must certify to compliance with the Non-Discrimination Clause (Exhibit D).

1.26 Protest and Appeal Procedures

This procurement is conducted under contracting guidelines issued by the Federal Transit Administration, PennDOT and LCTA Procurement policies . All protest decisions must be in writing. A protester must exhaust all administrative remedies with LCTA before pursuing a protest with PennDOT, protests and appeals to PennDOT may be made only on the basis that LCTA does not have written protest procedures or failed to follow such procedures.

General Protest information:

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a. Bidders wishing to protest bid openings or bid awards may do so by giving written notice to the Executive Director of LCTA. This notice must be given within five (5) calendar days after bid opening or bid award. The protest must state in writing the grounds for protest and provide supporting documentation for their protest. A “no-bid” submittal does not make a business a “bidder” and eligible to protest.

b. If LCTA determines a bid opening should be postponed due to a Protest, all bidders will be notified in writing.

c. If the bids have been opened but a contract has not yet been awarded and a protest has been received in accord with Paragraph (a), LCTA will notify all bidders and will not proceed with the bid award until LCTA has submitted a written response to the protesting bidder and believes the protest to be resolved.

d. If the award of the contract has already been made at the time that a bid protest is received, LCTA will notify the bidder that was given the award that a protest was filed and will delay the issuance of any Notice to Proceed until LCTA believes the protest has been resolved, unless the award of the contract is necessary to protect substantial interests of LCTA. Such written determination should set forth the basis of the determination.

e. Failure of a protestor to comply with the procedures and the time limits stated in these procedures will result in dismissal of the protest by LCTA.

f. If a protest is denied, bidders may appeal the protest in writing within five (5) calendar days of the decision. Appeals must be made by written notice to the Executive Director of LCTA.

g. LCTA will notify FTA/PennDOT of all protests received on FTA and /or State funded solicitations. This notification will occur upon receipt of the protest.

All Protests shall include the following:

- a. Name and address of the protestor
- b. Identification of bid or proposal name
- c. Statement of the grounds of the protest
- d. Support in exhibits, evidence, or documents to substantiate any claim unless not available within the filing time, in which case the expected availability date shall be indicated; and
- e. Specific ruling, relief or action from LCTA

No briefs or other technical forms of pleading or motion are required, but the protest and other submissions should be concise, logically arranged, and direct.

If the Executive Director requires additional information from the protestor, using department, or from interested parties, such information shall be submitted within the time period established by the Executive Director. Failure to timely comply may result in consideration and resolution of the protest without the untimely filed information.

Hearing:

A hearing on the merits of the protest may be held at the discretion of the Executive Director, with or without the request of the protestor, user department, or interested parties. The Executive Director shall establish the necessary procedures for a hearing. Requests for hearings should be made at the time of the filing of the protest or at the request for reconsideration.

Written comments on the hearing may be submitted by any interested party. Any written comments must be received by the Executive Director within five (5) days of the date on which the hearing was held, unless provided otherwise.

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Proposed contract termination shall be reviewed by LCTA legal counsel and, if determined to be required, notice of termination shall be issued by counsel.

Resolution:

The Executive Director shall make a written determination on the merits of the protest as expeditiously as possible within thirty (30) days of receipt of all information or the date of any hearing held on the matter, whichever is later, and shall furnish a copy of the determination to the protestor, LCTA's legal counsel, and other interested parties who have requested a copy in writing.

The record for determination shall include:

- a. A copy of the protest
- b. A copy of the bid or proposal submitted by the protestor and copy of the bid or proposal that is being protested
- c. A copy of the solicitation, including the specifications or portions, relevant to the protest
- d. A copy of the abstracts of bids or proposals or relevant portions thereof
- e. Any other documents which are relevant to the protest, including the contract, if one has been awarded
- f. Findings and conclusions in the matter together with copies of supporting documentation. If the award was made after receipt of the protest, the statement shall include the determination required under part d of the General Protest Information noted previously
- g. Statement of the resolution of the protest

If the determination is that the proper procurement procedures were followed, when the written determination is sent to the protestor, the procurement procedure may resume.

If prior to the award the Executive Director determines that a solicitation or proposed award is in violation of proper procurement procedures, then the solicitation or proposed award shall be cancelled. If after an award the Executive Director determines that a solicitation or award is in violation of proper procurement procedures and that the successful bidder or proposer did not act fraudulently or in bad faith, the Executive Director, after consultation with legal counsel, shall determine whether:

- a. The award may be revised to comply with proper procurement procedures, if possible, provided that a determination is made that doing so is in the best interest of LCTA; or
- b. The award should be terminated

If after an award the Executive Director determines that a solicitation or award is in violation of proper procurement procedures and that the successful bidder or proposer has acted fraudulently or in bad faith, the award shall be cancelled.

Reconsideration of a decision resolving a protest may be requested by the protestor, any interested party who submitted comments during the proceeding, or any using department involved in the protest. The request for reconsideration shall contain a detailed statement of the factual and legal grounds upon which the reversal or modification is deemed warranted, specifying any errors of law or fact.

Request for reconsideration of a decision resolving a protest shall be filed not later than fifteen (15) days after issuance of such decision.

The final written determination of the Executive Director shall be issued within fifteen (15) days of receipt of the request for reconsideration.

Appeals to the Executive Director:

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The protestor may request a meeting to review the protest with the Executive Director of LCTA or request a written determination from the Executive Director of LCTA indicating concurrence or non-concurrence with the final determination of the Executive Director.

The request for review by the Executive Director must be filed within five (5) days after the final written determination of the Executive Director.

The Executive's decision is the final determination for purposes of judicial review.

The Executive Director shall not receive, nor shall any person directly or indirectly involved in a protest receive any evidence, explanation, analysis, advice, whether written or verbal, regarding any matter at issue in a protest, without notice to all known parties with a direct interest in the proceedings.

Note that nothing in this policy waives any of the rights that Luzerne County Transportation Authority, as an Authority, has for bidding or other processes required pursuant to the Municipalities Authorities Act or similar statutes.

1.27 Covenants Against Gratuities

If awarded the contract, the Contractor shall warrant that he or she has not offered or given gratuities (in the form of entertainment, gifts or otherwise) to any official or employee of LCTA or its operating contractor, with a view toward securing favorable treatment in the awarding, amending, or evaluating performance of contract.

1.28 Assignment of Contract

The Contractor shall not assign or transfer any interest in the contract or delegate its performance of duties, except upon written approval of LCTA, which approval shall not be unreasonably withheld. Consent to assign, transfer or delegate any interest or performance on this contract shall not be construed to relieve the Contractor of any responsibility for the fulfillment of the contract.

1.29 Insurance and Liability

Insurance

The awarded proposers shall obtain and maintain in full force and effect throughout the term of the Contract, such insurance and Workers Compensation Insurance as set forth herein. The awarded proposers shall assume full financial responsibility for its personnel, including all deductions of Social Security and withholding taxes and required contributions to state and federal unemployment compensation funds. Awarded Bidder shall include all Subcontractors as insured under its policies or shall furnish separate certificates or endorsements for each Subcontractor. All Subcontractors shall be subject to all of the requirements stated herein.

Awarded proposers shall provide Certificates of Insurance evidencing such coverage to LCTA before the commencement of any work under any Contract resulting from this proposal. Certificate of Insurance to show policy numbers, date of expiration, and limits of liability and further provide that the insurance will not be canceled or changed prior to ten (10) days after written notice of such cancellation has been mailed to LCTA.

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- A. Comprehensive General Broad Form or Commercial General Liability: \$1,000,000 combined single limits per occurrence and \$1,000,000 annual aggregate covering bodily injury, personal injury and property damage.
- B. Workers' Compensation Statutory coverage, if and as required according to the State Labor Code, including Employers' Liability limits of \$1,000,000 per accident. The policy shall be endorsed to waive the insurer's subrogation rights against LCTA.

Liability

As between LCTA as one party, and the Contractor as the other party, the Contractor is deemed to assume responsibility and liability for all damage, loss or injury of any kind or nature whatever to persons or property caused by or resulting from or in connection with any act, neglect, omission or failure to act on the part of the Contractor or any of his officers, agents, servants, employees or subcontractors in his or their performance of the work. The Contractor shall indemnify and hold harmless LCTA and any and all of its officers, agents, servants or employees from and against any and all claims, loss, damage, charge or expense, including attorney's fees, whether direct or indirect, to which any of them may be put or subjected to by reason of any such loss or injury. In addition to any other remedy authorized by law, so much of the money due the Contractor under the contract as shall be considered necessary by LCTA may be retained until disposition has been made of any claims for damages.

1.30 Advertising and Public Relations

LCTA reserves the right to review and approve any LCTA related copy prior to publication. The Contractor shall not allow any LCTA related copy to be published in the Contractor's advertisement of public relations program until submitting to LCTA related copy and receiving prior written approval from LCTA. The Contractor shall agree that the material published about or referring to LCTA and its equipment shall be factual and in no way imply that LCTA either encourages or supports the Contractor's firm or product.

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**SECTION II
SPECIFICATIONS AND SCOPE OF SERVICES**

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2.0 Scope of Work

It is the intent of Luzerne County Transportation Authority to purchase and implement a replacement telephone system for its Shared Ride secondary site location with system capabilities for expansion and integration to primary site and relocation to a future consolidation location. The objective of the procurement is to improve the operational efficiency and quality of services to our customers by upgrading the capabilities of our VoIP network.

The following sections represent the core requirements of this proposal. With the exception of post-implementation system maintenance (which is optional), all proposals must contain comprehensive discussions of each requirement.

1. Initial Implementation/Replacement at Shared Ride secondary site location
2. Future Projects (expansion & relocation)
3. Primary Site Integration
4. Satellite Sites Integration
5. New Site Consolidation
6. Warranties
7. Training
8. Project Management and Implementation Schedule
9. Post-Implementation Maintenance Support (VENDOR OPTION)
10. Functionality Requirements

For informational purposes, this SOW includes Appendixes containing a Listing of Functional Requirements Profiles (FRP), Glossary of Functional Definitions by Term as well as a Listing of Functional Requirements Profiles.

2.1. Initial Implementation/Replacement at Shared Ride secondary site location

Project Overview:

Desk Phones: 13

Conference Rooms: 1

Fax Machines: 2

Total Phones: 14

Dedicated Lines: 11 (9 callers, 2 faxes)

The secondary site contains a small call center of four agents, plus an office of two dispatch operators. All six callers may be required to use the phone at the same time; faxes services must be constantly available for time-sensitive incoming and outgoing transmissions.

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2.2. Future Projects (expansion & relocation)

The implemented solution must allow for the following future projects. Projects are listed in the order of anticipated competition, but are subject to reordering or removal without further notice.

2.3. Primary Site Integration

The primary site contains a total of 24 phones, 22 desk phones and 2 conference rooms. Four fax-enabled devices also reside in this location, each requiring a dedicated connection for secure and time-sensitive transmissions.

2.4. Satellite Sites Integration

Aside from the primary and secondary locations, there are two satellite offices that have 1 desk phone each. One satellite office has a single fax line in addition to the desk phone. Integration of the satellite sites into the central phone system is considered a “value-add” project and may not be practical.

2.5. New Site Consolidation

LCTA is anticipating an office consolidation into a single site. Both the primary and secondary sites would be moved into a new central location; satellite sites would remain unchanged. The equipment and services need to move seamlessly into the new space with minimal downtime and administrative effort.

2.6. Warranties

The proposer shall warrant that all materials will conform to the published specifications and will be free from defects in material workmanship and title. The product must be of first quality and the workmanship must be the best attainable. All materials furnished shall be subject to testing to assure compliance with contractual specifications. The warranty period shall be one year from date of acceptance. If it appears that within one year from date of acceptance that any materials fail to meet the warranty specified above and the purchaser notifies the supplier promptly, the supplier shall thereupon correct any deficit, including nonconformance with the specifications or bid award terms, whichever is applicable and, at his option and expense, either repair or replace any defective materials or parts.

2.7. User Training

As part of the Project Scope, the selected vendor will develop, provide, and manage a detailed plan for training. This Training Plan must include the information described below.

1. The role and responsibility of the system and/or roll-out vendor in the design and implementation of the training plan (e.g., development of customized training materials, delivering training to LCTA end-users).
2. The role and responsibility of LCTA staff in the design and implementation of the training plan.
3. Overview of proposed training plan/strategy, including options for on-site and/or off-site training services, for the core project team, end-users, and technology personnel.
4. Proposed training schedule for LCTA personnel of various user and interaction levels.
5. Descriptions of classes/courses proposed in the training plan. (The vendor should specify the unit of measure for its training, e.g., units, classes, days, etc., and define the hours associated with these units)

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of measure.) The vendor must be very clear about exactly what training courses are included in the cost of the proposal.

6. The knowledge transfer strategy proposed by the software and/or roll-out vendor to prepare staff to maintain the system after it is placed into production.

7. Detailed description of system documentation and resources that will be included as part of the roll-out by the vendor including, but not limited to, detailed system user manuals, “Quick Reference” guides, online support, help desk support, user group community resources, and others as available. It is LCTA’s intention that the selected vendor will coordinate the training of LCTA personnel in the use of its system/s and that satisfactory implementation of an approved training plan will be a key component of this project’s deliverables.

Documentation, including training manuals and agendas, will be provided by the offeror before each training session with LCTA staff.

User training costs will be specified if not included in the Cost Proposal.

2.8. Project Management

The proposal must describe the proposed work product in detail, in the same format as used to describe the project Scope of Work herein. The proposal shall also include a detailed proposed project outline, indicating tasks, sub-tasks, anticipated task duration, anticipated contractor hours, dependencies and deliverables. The project outline must also indicate consultant assumptions regarding LCTA staff level support. Proposer shall provide this proposed project time-line in chart format, indicating tasks, sub-tasks and deliverables. All arrangements for implementation will be agreed upon between LCTA’s Project Manager and the Contractor’s representative assigned as the Contractor’s Project Manager. The Contractor’s Project Manager will regularly be available to the LCTA’s Project Manager to facilitate project implementation.

2.9. Post-Implementation Maintenance Support

For those vendors interested in providing telephone system support after the new system is operational, this section should discuss the following items:

1. The overall level of support (ex. Level 2 help desk, on-site maintenance staff).
2. The hours of support service (ex. 24/7, weekdays only)
3. The guaranteed response time.
4. Inventory levels for needed equipment and peripherals.

Proposed hourly rate for the first three years of service shall be quoted in your Cost Proposal.

LCTA RESERVES THE SOLE AND EXCLUSIVE RIGHT TO AWARD THIS SERVICE TO A VENDOR OTHER THAN THE SUCCESSFUL REPLACEMENT TELEPHONE SYSTEM VENDOR OR TO REJECT ALL PROPOSALS.

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2.10 Listing of Functional Requirements (Required)

Required: The following list of features and functionality have been identified as primary needs for the phone system. These items are nonnegotiable and must be present in the proposed solution.

•	Emergency dialing during power outage
•	Hunt Groups, Line Hunting, or Automated Call Distribution
•	Call queueing into two queues: reservations and general information
•	4-digit intra-site dialing and transfers
•	Phone presence indicators
•	Caller ID
•	Individual and group voice mailboxes
•	Remote access to mailboxes and mailbox settings
•	Headset functionality for call center phones
•	4-digit inter-site dialing and transfers (future)
•	Call Forwarding to internal and external phone numbers

CALL REPORTING & AUTOMATED GREETINGS

•	Number of calls
•	Duration of calls
•	Average wait time
•	Distribution of calls answered / Number of answered calls per agent
•	Call backs of messages received
•	Time-based greetings for initial calls for business hours and after-hours
•	Automatic holiday greetings for calendar days and dates
•	Individual mailbox greetings

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2.11 Listing of Functional Requirements (Preferred)

Preferred Functionality: The following list of features are preferred, but not required; they are open for negotiation. All of the above required and the following:	
•	Active Directory integration
•	Call center display on viewing screen showing calls in queue, wait time, etc.
•	Transfer calls to an external number
•	Paging groups

2.12 Glossary of Functional Definitions by Term

<i><u>Term</u></i>	<i><u>Definition</u></i>
9-1-1 Notification	A process where whenever an extension dials 911, an administrator is notified by either automated voice or text message containing that extension dialed
Announcement Line	A phone number that is not tied to a physical extension but will play a recorded message (e.g. Welcome to Luzerne County Transportation Authority)
Auto-Attendant	A process that answers calls to a Hunt Group, DID, or extension, and provides an interactive menu of options for the caller
Auto-Dial	A process where an extension automatically calls another extension or phone number when the handset is picked up.
Busy Redial	A process that allows an extension to repeatedly call another extension or phone number at regular intervals until it does not receive a busy signal.
Call Flow	A process that controls what happens with an incoming call. (e.g. Calls that ring an extension or Hunt Group that do not get answered after 4 rings go to voicemail/auto-attendant).
Call Forwarding	The Ability to forward a call to another extension or phone number.
Call Queue	A Process by which, when all extensions in a hunt group or DID are busy, the system will place the caller in a queue to wait for the next available extension. This feature would allow the caller to enter a “call back” number after

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	waiting for a period of time without losing their place in the queue.
Call Recording	The ability for specific lines to have all calls recorded and stored in a manner for easy access from computers. (e.g. Customer Service, Dispatch)
Call Waiting	The ability to place a call on hold and take an incoming call
Digital to Analog device	A device that that allows an analog device to use a digital phone line.
Day/Night Mode	A feature that turns off the Hunt Groups at a certain time and presents a separate call flow.
Dial in Direct (DID)	A single phone number that rings on a single extension
Do Not Disturb (DND)	A feature that prevents an extension from ringing. The call will follow the call flow designed for the extension.
Extension Monitoring	The ability for one extension to see whether another extension is currently on the line.
Failover	A process which calls a backup number when an extension is not available, either through phone or network failure
Follow me	A process by which an incoming call is rolled to another extension or phone number after a certain number of rings or time segment. (e.g. An incoming call to the director's extension will call the director's cell phone after the main extension does not answer for 20 seconds). Failed calls should go to the original extension's voicemail.
Hunt Group	A single phone number that has the ability to ring multiple extensions. Each department may have multiple Hunt Groups depending on their configuration.
Integrated Voice Response (IVR)	A process where a caller can use the phone keypad or verbal inputs to respond to or make selections in the phone system.
On demand Call recording	The ability to press a button or sequence of buttons to allow recording of certain phone calls.
Outlook integration	The ability to start a call from a phone number in an email or address book in Microsoft Outlook.
Overhead paging	The ability to page through a public address system or company phones.

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Soft phone	A program that runs on a computer or mobile device
Speed Dial	A process that allows a sequence of buttons to call another phone number or extension
Video Conference	The ability to have video with another party while conducting a call.
External Call Forwarding	The ability to forward an incoming call to a preset phone number outside of the LCTA telephone network.

Mandatory meeting for site review - Interested vendors must contact LCTA to schedule on-site system review and evaluation. This must be done prior to bid submission. Contact Joe Roselle, Director of Administrative Services (jroselle@lctabus.com) and Lou Uritz, Procurement Manager (luritz@lctabus.com) to schedule your visit.

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**SECTION III
PROPOSAL EVALUATION AND SELECTION PROCESS**

LUZERNE COUNTY TRANSPORTATION AUTHORITY | TELEPHONE SYSTEM REPLACEMENT REQUEST FOR PROPOSAL

3.0 Proposal Evaluation

LCTA’s Evaluation Committee will initially review and evaluate each proposal received to determine the Vendor’s ability to meet the RFP requirements. The evaluation criteria described in Section 3.1 will be the basis for evaluation.

The Evaluation Committee will review and evaluate the proposals received and will determine a competitive range of a minimum of two (2) proposals deemed the best suited to meet the needs of LCTA based on the scoring of the evaluation criteria.

LCTA, at its sole discretion, reserves the right to have system demonstrations with those Vendors. Such demonstrations will be conducted at LCTA offices or a mutually agreed upon location. Time limitations and demonstration requirements will be provided with the notification. Each Evaluation Committee member will score the demonstration. Demonstrations may involve a scripted demonstration as well as a demonstration “lab.”

LCTA may request additional information or clarification of proposals and hereby reserves the right to select the particular response to this RFP that it believes will best serve its business and operational requirements, considering the evaluation criteria set forth below.

3.1 Selection Process

Criteria	Description
Understanding the Problem	This refers to the Proposer’s understanding of the needs that generated the RFP, of the LCTA’s objectives in asking for these services, and of the nature and scope of the work involved.
Proposer Qualifications	This refers to the ability of the Proposer to meet the terms of the RFP, especially the time constraint and the quality and relevancy of previous projects performed for similar organizations. This also includes the Proposer’s financial ability to undertake a project of this size.
Personnel Qualifications	This refers to the competence of professional personnel who would be assigned to the project by the Proposer. Qualifications of professional personnel will be measured by experience and education, with particular reference to experience on audits similar to that described in the RFP.
Soundness of Approach	Emphasis here is on the techniques for collecting and analyzing data, sequence and relationships of major steps, and methods for managing the project. Of equal importance is whether the project approach is completely responsive to all written specifications and requirements contained in the RFP and if it appears to meet LCTA's objectives.
Price	Refers to the overall proposal price

The Proposals will be evaluated by a Selection Committee established by LCTA. Proposals will first be evaluated based on technical understanding and approach, responsiveness to all required documentation required, proper form completion and submission. Responsible vendors and responsive proposals will then be evaluated on the criteria noted above. The

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total evaluation points, as separately determined by each Selection Committee member will be added and each Proposer will be ranked in numerical sequence, from the highest to the lowest score.

LCTA reserves the right to reject any or all proposals, to accept other than the lowest price proposal, to negotiate separately with any source whatsoever, and to accept the proposal considered to be most advantageous to LCTA. LCTA also reserves the right to select the Contractor on the basis of proposals received without seeking further information or clarification from Proposers.

Upon review of the proposals, LCTA will designate the most qualified Proposers as finalists (competitive range). These finalists may be invited to make an oral/visual presentation and participate in a question and answer session to clarify their proposal with the LCTA Selection Committee. If interviews or presentations are held the Selection Committee may re-evaluate the proposals of those firms. If negotiations are held they will be held with all proposed finalists in the competitive range. The LCTA staff would then negotiate with the most highly qualified firms, as evidenced by the ranking given a Proposer by the Selection Committee.

Following negotiations, each of the Proposers in the competitive range may be afforded the opportunity to amend their proposal and submit their best and final offer. The best and final offers will then be evaluated using the same criteria as for the initial proposals, and the rankings adjusted. If there is one (1) proposal that is the most advantageous offer for LCTA, then an award may be made to the Proposer. If not, LCTA reserves the right to request another best and final offer. If the LCTA staff is unable to negotiate a satisfactory contract with the first ranked Proposer at a fair and reasonable price, negotiations will be formally terminated. Negotiations would be undertaken with the second-ranked Proposer, and so on, until a satisfactory contract could be negotiated. The negotiated contract recommendations would then be presented to LCTA's Board of Directors for approval.

Any matters concerning this procurement will be addressed directly to Lou Uritz, Procurement Manager, LCTA, 315 Northampton Street, Kingston, Pennsylvania 18704, in writing or luritz@lctabus.com. Email correspondence is preferred to ensure all queries are properly documented and responded to. The Selection Committee members are not to be contacted by any of the Proposers regarding this RFP. If additional information or clarification is required from a Proposer, they will be contacted directly. Each Proposer will be advised in writing of any award recommendations.

Technical and System Information - All technical and system inquiries should go to:

Josh Burkholder IT Coordinator (jburkholder@lctabus.com) Cc. Lou Uritz (luritz@lctabus.com)

Mandatory meeting for site review - Interested vendors must contact LCTA to schedule on-site system review and evaluation. This must be done prior to bid submission. Contact Joe Roselle, Director of Administrative Services (jroselle@lctabus.com) and Lou Uritz, Procurement Manager (luritz@lctabus.com) to schedule your visit.

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**SECTION IV
INFORMATION NEEDED FROM VENDORS**

LUZERNE COUNTY TRANSPORTATION AUTHORITY | TELEPHONE SYSTEM REPLACEMENT REQUEST FOR PROPOSAL

4.0 Proposals must be submitted in the format, including heading descriptions, outlined below. To be considered, the proposal must respond to all requirements in this part of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal. Each proposal shall consist of one (1) original and three (3) copies of sealed submittals. The submittals are as follows: (i) Technical Submittal, in response to Sections II-2.0 through 2.09 hereof; (ii) Cost Submittal, in response to Section II-2.10 & 2.11 hereof. LCTA reserves the right to request additional information which, in LCTA's opinion, is necessary to assure that the vendor's competence, number of qualified employees, business organization, and financial resources are adequate to perform according to the RFP.

LCTA may make such investigations as deemed necessary to determine the ability of the Proposer to perform the work, and the Proposer shall furnish to LCTA all such information and data for this purpose as requested by LCTA. LCTA reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Proposer fails to satisfy LCTA that such Proposer is properly qualified to carry out the obligations of the agreement and to complete the work specified.

4.1 Statement of Services

State in succinct terms your understanding of the services required by this RFP.

4.2. Management Summary

Include a narrative description of the proposed effort and a list of the items to be delivered or services to be provided.

4.3. Work Plan

Describe in narrative form your approach (plan) for accomplishing the services listed in the Scope of Work (Section 2.0) of this RFP. The Work Plan shall include the following activities:

- A discussion of the business and technical requirements of this project from the vendor's prospective. The vendor should specify the brand and model of all telephone system products (including software) as part of this discussion. The vendor is also required to provide a detailed discussion of the proposed infrastructure solution including the specific hardware and software products to be installed as well as any license or other annual fees associated with this solution.
- A discussion of the system implementation and conversion strategy to be employed by the vendor.
- A discussion of the user training program to be performed by the vendor. This plan should include a discussion of the training methodology (ex. "train the trainer") as well as customized training materials and training delivery. This plan should also discuss the vendor's perspective concerning the roles and responsibilities of LCTA staff in designing and implementing this plan.
- A discussion of the warranties included in the proposal.
- A discussion of the vendor's approach to managing the project. The vendor is required to designate a qualified staff member to serve as the project manager. This individual should be readily available and will be LCTA's primary point of contact with the vendor during the project.
- At the vendor's option, a discussion of the post implementation support that will be offered. This section should include all of the requirements contained in the Scope of Work section of the RFP.

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4.4. Prior Experience and References

Include a narrative description of your firm's experience and qualifications for the components being bid. Specific experience with similar organizations should be included. Experience should be related to work performed by individuals who will be assigned to this project as well as that of your company. Previous engagements referred to should be identified and the name of the customer shown, including the name, address, and telephone number of the responsible official of the customer, company, or agency who may be contacted. Include a minimum of three (3) references.

4.5. Personnel

If possible, include the number, and names of consulting staff who will be assigned to the project. Indicate the responsibilities each will have in this project and how long each has been with your company and in their current roles. If applicable, identify subcontractors you intend to use and the services they will perform.

4.6. Consultant Information where applicable .

All firms submitting proposals should state:

- Whether they meet applicable Pennsylvania State licensing requirements.
- Their policies regarding notification of changes in key personnel.
- Any relationship your firm has with LCTA.
- Whether they have been the object of any disciplinary action in the Commonwealth of Pennsylvania during the past four years.

4.7. Locations

List your firm's total number of locations and employees and the number of locations and employees in Pennsylvania. Also, if different, please list the business address(es) of the personnel who will be assigned to the engagement. Note that location will not be a determining factor in vendor selection. Inclusion is for informational purposes only.

4.8. Scope of Work and Project Timeline

The proposal must describe the proposed work product in detail, in the same format as used to describe the project Scope of Work herein. The proposal shall also include a detailed proposed project outline, indicating tasks, sub-tasks, anticipated task duration, anticipated contractor hours, dependencies and deliverables. The project outline must also indicate vendor/consultant assumptions regarding LCTA staff level support. Proposer shall provide this proposed project time-line in chart format, indicating tasks, sub-tasks and deliverables.

4.9. Cost Submittal

All costs should be bound and sealed separately from the remainder of the proposal. Costs should not be included in the Technical submittal. Cost proposals must be completed as requested and must be completed on the Exhibit A Cost Proposal Form" that is found in Section V. (any supportive information may be included)

The cost submittal should include:

1. Completion of the appropriate sections of the Cost Proposal Form. These sections include:
 - A. Section 1 - Required Functionality- This section outlines the telephone system requirements as detailed in Section 2.10; please note any specific variations to the associated RFP.

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- B. Section 2 - Required & Preferred Functionality - This section outlines the telephone system requirements, required and preferred as detailed in Section 2.11; please note any specific variations to the associated RFP
- C. Section 3- User Training Requirements- The vendor shall enter the total amount for the user training activities contained in their corresponding proposal as detailed in Section 2.7.
- D. Section 4 – Post Implementation System Maintenance Support - Those vendors interested in providing post system maintenance support should list the first three years' annual costs as detailed in Section 2.9.

The cost submittal should describe the proposer's standard progress billing policy/procedures. LCTA will determine if proposer's standard procedure is acceptable. LCTA and the selected Proposer will agree upon final contract terms.

Any costs not provided in the cost proposal will be assumed as no charge to LCTA.

The selected Proposer shall only perform work on this contract after the Effective Date is affixed and the fully-executed contract sent to the selected Proposer. LCTA shall issue a written Notice to Proceed to the selected Proposer authorizing the work to begin on a date which is on or after the Effective Date.

The selected Proposer shall not start the performance of any work prior to the date set forth in the Notice to Proceed and LCTA shall not be liable to pay the selected Proposer for any service or work performed or expenses incurred before the date set forth in the Notice to Proceed. No LCTA employee has the authority to verbally direct the commencement of any work under this Contract.

This section summarizes the documents required for this proposal. Four (3) copies and one (1) original of Contractor's proposal must be submitted and shall be organized in conformity with this Section IV as follows:

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**SECTION V
PROPOSAL SUBMISSION FORMS**

EXHIBIT A
Cost Proposal Form

Section 1 - Required Functionality (Section 2.10)

Desk Phones: 13
Conference Rooms: 1
Fax Machines: 2
Total Phones: 14

Dedicated Lines: 11 (9 callers, 2 faxes)

The secondary site contains a small call center of four agents, plus an office of two dispatch operators. All six callers may be required to use the phone at the same time; faxes services must be constantly available for time-sensitive incoming and outgoing transmissions.

Proposed Cost: _____

Section 2 - Required & Preferred Functionality (Section 2.11)

Desk Phones: 13
Conference Rooms: 1
Fax Machines: 2
Total Phones: 14

Dedicated Lines: 11 (9 callers, 2 faxes)

The secondary site contains a small call center of four agents, plus an office of two dispatch operators. All six callers may be required to use the phone at the same time; faxes services must be constantly available for time-sensitive incoming and outgoing transmissions.

Proposed Cost: _____

Section 3 - Training (Section 2.7)

The vendor must be very clear about exactly what training courses are included in the cost of the proposal. User training costs must be specified if not included in the Cost Proposal.

Proposed Cost/Hourly Rate: _____

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Section 4 Post-Implementation Maintenance Support (Section 2.9)...OPTIONAL

For those vendors interested in providing telephone system support after the new system is operational, include detailed description of service(s) quoted... this section should discuss the following items:

1. The overall level of support (ex. Level 2 help desk, on-site maintenance staff).
2. The hours of support service (ex. 24/7, weekdays only)
3. The guaranteed response time.
4. Inventory levels for needed equipment and peripherals.

Proposed Cost/Hourly Rate: _____

Proposed cost/hourly rate for the first three years of service shall be quoted on the Cost Proposal Form above... Please note:

LCTA RESERVES THE SOLE AND EXCLUSIVE RIGHT TO AWARD THIS SERVICE TO A VENDOR OTHER THAN THE SUCCESSFUL REPLACEMENT TELEPHONE SYSTEM VENDOR OR TO REJECT ALL PROPOSALS.

**EXHIBIT B
NON-COLLUSION STATEMENT**

AFFIDAVIT OF NON-COLLUSION:

I hereby certify:

1. That I am the Proposer (if the Proposer is an individual), a partner of the Proposer (if the Proposer is a partnership), or an officer or employee of the proposing corporation, have authority to assign on its behalf (if the Proposer is a corporation);
2. That the attached Proposal have been arrived at by the Proposer independently, and have been submitted without collusion with, and without any agreement, understanding or planned common course of action with any other vendor of materials, supplies, equipment or services described in the Request for Proposal, designed to limit independent proposing or competition;
3. That the contents of the Proposal have not been communicated by the Proposer or its employees or agents to any person not an employee or agent of the Proposer or its surety on any bond furnished with the Proposal, and will not be communicated to any such person prior to the official submittal date of the proposal; and
4. That I have fully informed myself regarding the accuracy of the statements made in this affidavit.

DATE: _____

COMPANY NAME: _____

AUTHORIZED REPRESENTATIVE NAME: _____

TITLE: _____

SIGNATURE: _____

TELEPHONE: _____

TRADING AND DOING BUSINESS AS (CHECK ONE)

Individual

Partnership

Corporation
(seal)

**EXHIBIT C
NON-COLLUSION DISCLOSURE**

The Proposer shall disclose, to the best of his or her knowledge, any member of the Board of Directors or any employee of the Luzerne County Transportation Authority, or any relative of any such directors or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

NAME	RELATIONSHIP
_____	_____
_____	_____
_____	_____

IF NOT APPLICABLE, STATE "NONE": _____

DATE: _____

COMPANY NAME: _____

AUTHORIZED REPRESENTATIVE NAME: _____

TITLE: _____

SIGNATURE: _____

EXHIBIT D
COMMONWEALTH OF PENNSYLVANIA
NON-DISCRIMINATION CLAUSE

DURING THE TERM OF THIS CONTRACT, CONTRACTOR AGREES AS FOLLOWS:

1. Contractor shall not discriminate against any employee, applicant for employment, independent contractor, or any other person because of race, color, religious creed, ancestry, national origin, age or sex. Contractor shall take affirmative action to insure that applicants are employed, and that employees or agents are treated during employment, without regard to their race, color, religious creed, ancestry, national origin, age or sex. Such affirmative action shall include, but is not limited to: employment, upgrading, demotion or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training. Contractor shall post in conspicuous places, available to employees, agent's applicants for employment, and other person, a notice to be provided by the contracting agency setting forth the provisions of this non-discrimination clause.
2. Contractor shall, in advertisements or requests for employment placed by it or on its behalf, state that all qualified applicants will receive consideration for employment without regard to race color, religious creed, ancestry, national origin, age or sex.
3. Contractor shall send each labor union or workers' representative with which it has a collective bargaining agreement or other contract or understanding, a notice advising said labor union or workers' representative of its commitment to this non-discrimination clause. Similar notice shall be sent to every other source of recruitment regularly utilized by Contractor.
4. It shall be no defense to a finding of non-compliance with this non-discrimination clause that Contractor had delegated some of its employment practices to any union, training program, or other source of recruitment, which prevents it from meeting its obligations. However, if the evidence indicates that the contractor was not on notice of the third-party discrimination or made a good faith effort to correct it, such factor shall be considered in mitigation in determining appropriate sanctions.
5. Where the practices of a union or any training program or other source of recruitment will result in the exclusion of minority group persons, so that Contractor will be unable to meet its obligation under this non-discrimination clause, Contractor shall then employ and fill vacancies through other non-discriminatory employment procedures.
6. Contractor shall comply with all state and federal laws prohibiting discrimination in hiring or employment opportunities. In the event of Contractor's non-compliance with the non-discrimination clause of this contract or with any such laws, this contract may be terminated or suspended, in whole or in part, and Contractor may be declared temporarily ineligible for further Commonwealth contracts, and other sanctions may be imposed and remedies invoked.
7. Contractor shall furnish all necessary employment documents and records to, and permit access to its books, records, and accounts by, the contracting agency and the Office of Administration, Bureau of Affirmative Action, for the purposes of investigation to ascertain compliance with the provisions of this clause. If Contractor does not possess documents or records reflecting the necessary information requested, it shall furnish such information on reporting forms supplied by the contracting agency or the Bureau of Affirmative Action.
8. Contractor shall actively recruit minority subcontractors or subcontractors with substantial minority representation among their employees.

9. Contractor shall include the provisions of this non-discrimination clause in every subcontract, so that such provisions will be binding upon each Subcontractor.

10. Contractor obligations under this clause are limited to the Contractor's facilities within Pennsylvania or, where the contract is for purchase of goods manufactured outside Pennsylvania, the facilities at which such goods are actually produced.

FIRM NAME

DATE

BY: _____
SIGNATURE AND TITLE

EXHIBIT E
REQUEST FOR CLARIFICATION, EXCEPTION OR APPROVED EQUAL

Proposal Document Page: _____

Section Title: _____

Nature of Request: _____

If the proposer is seeking concurrence with an approved equal, please submit supporting documentation and/or samples to support your contention that the requested equal meets or exceeds the specification required.

Signed _____

LCTA's RESPONSE

Approved: _____ Denied: _____

Justification: _____

**EXHIBIT F
ADDENDUMS**

Any changes to this RFP document will be made by written addendum issued by LCTA. Upon issuance, the addendum will be considered part of the RFP and will prevail over inconsistent or conflicting provisions contained in the original document. Addenda will be emailed to all potential proposers who have previously requested a copy of the RFP.

Proposers shall acknowledge receipt of all addenda below, and they shall also include a copy of all addenda in an appendix to the proposal. As with other required documentation, proposers that fail to reference receipt of addenda and do not include a copy of the addenda as indicated may be excluded from consideration for contract award.

ADDENDA ACKNOWLEDGEMENT

The undersigned acknowledges receipt of the following addenda (if any) to the proposal.

Addenda #1 _____ DATE	_____ Signature
Addenda #2 _____ DATE	_____ Signature
Addenda #3 _____ DATE	_____ Signature
Addenda #4 _____ DATE	_____ Signature
Addenda #5 _____ DATE	_____ Signature
Addenda #6 _____ DATE	_____ Signature
Addenda #7 _____ DATE	_____ Signature
Addenda #8 _____ DATE	_____ Signature