

Request for Proposal

Hosted Phone System

Rhode Island Student Loan Authority

935 Jefferson Blvd.
Suite 3000
Warwick, RI 02886

December 21, 2022

The following dates are set forth for informational and planning purposes.
The Authority reserves the right to change the dates.

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| RFP Issued: | December 21, 2022 |
| Posted to RI Division of Purchases Website: | December 21, 2022 |
| Conference call for questions: | December 28, 2022 |
| The due date for receipt of proposals: | January 04, 2023 |

Request for Proposals Hosted Phone System

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1. Background

The Rhode Island Student Loan Authority (RISLA) was established in 1981 as a public agency of the State of Rhode Island and is a leading originator of state-based education loans. RISLA also offers free college planning services through the College Planning Center of Rhode Island (CPCRI) and hosts RIScholarships.org a statewide database of hard-to-find local scholarships.

2. RFP Availability

The RFP will be available in PDF format on the [Rhode Island Division of Purchases Website at http://www.purchasing.ri.gov](http://www.purchasing.ri.gov). It is the bidder's responsibility to get updates on RFP changes and status by periodically checking the RI State Purchasing website.

3. Scope of Work

RISLA is soliciting proposals from qualified bidders to provide a UCaaS and CCaaS solution, migration, and setup services. The winning bidder will be responsible for all discovery, planning, configuration, migration, and testing of all requirements within this RFP. Cutover and ports are to be completed during weekend hours with an engineer(s) on-site on the first day of service. All bids shall include a one-year warranty on any hardware or software if applicable.

The vendor must provide RISLA with complete documentation for the system design, administrative procedures, user guides, and implementation. The vendor must also provide both user and Administrative training to RISLA staff. Training should be designed to provide RISLA administrators with the ability to offer complete support for the system. The cost of training must be included as part of the submitted bid.

Potential bids shall include all the following:

- One vendor for all of the following items:
 - Hosted PBX (UCaaS)
 - Call Center as a Service (CCaaS)
 - Call Recording Software
- Service Level Agreement of 99.999% uptime
- 24x7 Support with 4 weeks of expedited go live support
- Geo-redundant data centers
- Live date before April 1
- One-year contract with years 2 and 3 not to exceed +5%
- Test environment available to RISLA before go live

CCaaS

- 24 Agents
- The ability for one agent to be in multiple teams
- Unlimited Incoming and Outgoing Calls
- Inbound and Outbound Call Queues
- Queue Priority Customization
- Skill-Based Routing for Agents
- Agent Ability to change phone number where queue calls are received
- Supervisor's ability to monitor agents with a one-way whisper
- Agent presence displayed to all other agents
- Customizable Wrap-up/Auxiliary Codes
- Customizable delay after each queue call

- Notification/Alert to agents and supervisor that an agent is late returning from a break
- Quickly and easily change queues to closed, as well as scheduled holiday closures.
- After hours voicemail

UCaaS

- 45 Users (Includes 24 CCaaS users)
- Encrypted voicemail to email as an audio attachment
- Ability to forward calls to any external number
- Desktop and mobile application for calls and voicemail
- Admin ability to add/change users, extensions, names, and provision phones
- Ability to record calls on demand
- Cold and warm transfer

Recording

- Recordings are to be encrypted in transit and at rest.
- Ability to download recordings in bulk to local servers for retention
- Ability to record all incoming and outgoing queue calls
- Option for the indefinite retention of recordings

Reporting

- Separate outgoing and incoming data
- Agent Availability
- Separate agent and queue data
- Report on wrap-up codes
- Report on break time reason and times
- Report average hold time per agent and queue
- Report average talk time per agent and queue
- Scheduled daily, weekly, and monthly reports
- Initial report building is the responsibility of the bidder

Remote Site Environment

- (4) Users/Phones/Extensions (In addition to the 45 UCaaS users)
- (1) DID for all incoming and outgoing calls
- All (4) phones should ring when a call is received
- Voicemail to email

4. RISLA's Environment

- (111) DIDs
- Polycom VVX311 Desk Phones
(If not supported, include 50 desk phones in the bid)
- (7) 800 Numbers
- (20) Queues
- (45) Voicemail Boxes
- (100) Wrap-Up Codes
- (36) Possible Auto Attendant Messages (All Queues)
- (35) Away from desk selections
- 300 Outbound, 350 Inbound per day average
- Maximum of 50 simultaneous calls (Must be scalable)
- No auto dialer, IVR, Chat, SMS, or CRM integration

5. Completion Criteria and Deliverables

Following the execution of a contract, RISLA expects all work stated in the scope of work as well as deliverables to be completed by April 1, 2023.

Goals to be achieved to be successful include:

- What is the total project timeline, from start to go live?
- What amount of technical and administrative staff will be provided?
- Where is the system hosted?
- Please describe the disaster recovery and business continuity plan of the host.
- The vendor must provide complete documentation for the system design, application administrative procedures, user guides, and implementation.
- The vendor must provide the technical, user, and administrative training for separate RISLA employee groups.
- The cost of all user training, whether web-based or user lead, must be included as part of the submitted bid. This training will be made available to a total of 2 technical staff, 6 managers/supervisors, and 25 users.

6. Proposal Questionnaire

Please answer the following questions in your proposal to provide RISLA personnel with insight into the bidder's capabilities, experience, and philosophy.

1. Background. Please document information regarding your company and your team.
 - a. Provide company name and address.
 - b. Designate who will be RISLA's primary point of contact and provide their direct contact information.
 - c. Please provide a brief description and history of your company.
2. Experience. A description of the firm's relevant experience.
 - a. When was the company established?
 - b. How many full-time employees do you have and what is their average tenure?
 - c. How many comparable projects does your company complete annually?
 - d. Please include a list of clients and the number of years you have worked with them.
3. References. Provide three (3) client references from previous work including organization name, name of contact, phone number, email address, description of services provided, term of service, result, and any other relevant information.

The Authority reserves the right to contact any references to assist in the evaluation of the proposal, to verify the information contained in the proposal, and to discuss the company's qualifications with any reference. By submitting its response to this RFP, the company consents to such types of contact with references. Also, the Authority reserves the right to obtain and consider information from other sources concerning a company, such as the firm's capability and performance under other contracts. By submitting its response to this RFP, the company consents to such types of contact with other such sources.

4. Equal Employment Opportunity. The bidder must include an explanation of its commitment to equal

opportunity and affirmative action and include a copy of its equal opportunity and affirmative action policies.

5. Ethics. RISLA and its Board of Directors and staff are committed to maintaining the highest standard of ethics in the awarding of contracts. In accordance therewith RISLA requires that the chief operating officer of each bidder certify the following:

“Neither the bidder nor any officer, employee, agent, representative or affiliate of the Proposer has given or offered or shall give or offer to any Board Member, employee, or representative of RISLA or any family member of the foregoing, or to any business by which any of the foregoing persons are employed, or to any official of the State of Rhode Island who is subject to the State Code of Ethics, any gift, loan, political contribution, reward, or promise of future employment based on any understanding or the expectation that the vote, official action, or judgment of the person would be influenced thereby, and, that no officer, employee, agent, representative, or affiliate of the Proposer shall have any direct or indirect nonincidental contact with any member of the board of directors of RISLA during any period before RISLA’s award of the contract, except at a public meeting of the Board of Directors of RISLA or at a meeting of a subcommittee of the Board of Directors.”

Any violation of the foregoing shall result in immediate disqualification of the Bidder.

7. Pricing

The bid should indicate the overall fixed price for the prospective engagement as well as the cost of each project segment: software, hardware, recording, reporting, system support, and monthly service charges including all state and federal taxes.

8. Selection Process

A review of the proposals will be undertaken by a committee comprised of staff from RISLA. This committee will review all proposals.

A conference call will be held on December 28, 2022 @ 2:00 p.m. to publicly address any questions individuals or company’s responding to this RFP may have. If you are interested in participating in this call, please contact RFP@RISLA.COM for information.

9. Presentations

Bidders may be required to make a presentation of their proposal or demonstration of their product to the Authority. The presentation may occur at the Authority’s offices or remotely. The determination as to the need for presentations, the location, order, and schedule of the presentations is at the sole discretion of the Authority.

10. Communications

Except for a question-and-answer process and other communications which might be initiated by the RFP review committee during its review, please note that no member or representative of your company may discuss the RFP or your proposal with any employee or board member of RISLA or any Rhode Island state official, office holder, or employee (including general officers, state legislators, and their staffs, etc.) or any other party

who might reasonably be considered to have any influence on vendor selection until RISLA has announced a decision concerning this RFP. Bidders shall, in their proposals, represent and warrant that they have complied with the preceding sentence.

11. Bid Submission Requirements and Right to Reject

Please provide an electronic copy of your submission to RFP@risla.com. Oral information provided by the firm shall not be considered part of the proposal.

Proposals must be received no later than 4:00 p.m. on January 4, 2023. Any proposal received after this deadline will be rejected. This RFP does not commit the Authority to pay costs incurred in the preparation of proposals. The Authority reserves the right to accept or reject any and/or all proposals, in part or their entirety at any time before execution of a written contract.

12. Award Notice and Acceptance Period

The Authority will notify all companies submitting a proposal of its intent to award a contract, contingent upon satisfactory negotiation thereof. Negotiation and execution of the contract shall be completed in a reasonable time, as determined by the Authority. If the selected company fails to negotiate and deliver an executed contract in the said time, the Authority may cancel the award and award the contract to another company.