Texas Municipal Retirement System

Request for Information and Quote

Cloud-based Unified Communications and Contact Center

Software and Services

August 12, 2019

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1. Background information

This section is informational only; TMRS requires no response to this section.

Texas Municipal Retirement System (TMRS) administers a program for 883 Texas cities, providing retirement, disability, and survivor benefits to active and retired municipal employees.

TMRS is planning to replace its existing premise-based Unified Communications (UC) and Contact Center (CC) solution for its Austin, TX, location with a cloud-based UC and CC solution. The CC solution will include omnichannel (voice, email, chat) routing, quality monitoring, and integrate with the benefits system. The new solution will help TMRS to reduce internal support demands, bolster business continuity, and further enable telecommuting.

1.1. Operational overview

Currently, a premise-based Avaya IP Office solution supports the TMRS location. Datel's Contact SWEET product provides reporting and dashboards for the contact center.

There are currently 125 UC users, 6 full time contact center users and 1 contact center lead analyst. The contact center handles approximately 9,000 calls and 500 emails per month, and is open 8am-5pm M-F. Each user has a DID number (including agents) and customers utilize a single toll-free number (or alternatively, local number) to reach the contact center. The total number of DIDs is approximately 200. TMRS utilizes an auto-attendant for exception-prompting, such as high volume, emergency closing, voice mail option for queued calls, and meetings. Users also utilize the auto-attendant for accessing their voice mail boxes remotely.

In the future, TMRS would like to take advantage of the ability to mimic their desk phone features on a mobile phone app.

For pricing purposes use the following:

Enterprise Telephony Users	Concurrent Contact Center Agents (non-peak)	Concurrent Contact Center Agents (peak)	Contact Center Supervisors	Conference phone licenses*	Wall-mounted phones for break rooms, mailrooms, etc. (and licenses)	Mobile App licenses
125	4	7	3	12	11	29

*Desire to reuse existing Polycom Sound Station 6000 conference room phones. Additionally, TMRS has a video conferencing system that utilizes a Crestron-based controller with a BIAMP Audia VoIP-2 Card to interface with SIP UC solutions (see Section 4.1.1).

1.2. Technical Overview

NextGen Member Benefits Solution (MBS) is used by TMRS to manage, track, and administer member benefits. NextGen MBS is a custom-built application written in Java, and running under Microsoft Windows with an Oracle Database Management System serving as the application's database. NextGen MBS utilizes SOAP architecture.

Additionally, all TMRS employee systems are Windows 10 LTSB utilizing a Citrix XenDesktop environment running on VMware vSphere.

TMRS would like to introduce ANI-based screen pops to the NextGen MBS solution as part of this engagement. Additionally, TMRS would like to explore the ability to integrate the agent application into NextGen MBS.

1.3. Implementation Scope and Approach

TMRS will rely on the vendor's experience, expertise and ability to install, design, configure, and integrate. At this time, we anticipate the vendor performing approximately 80% of the implementation tasks (e.g., design, skills setup, routing configurations, integration support, testing, training, etc.), with approximately 20% done by TMRS (mostly in user and routing configuration or integration tasks specific to its systems). TMRS will provide contact center and IT staff that understand their processes and internal systems to assist during the implementation process.

TMRS wishes to explore a proof of concept for the solution, especially for remote users. The proof of concept will focus on ensuring the integration is feasible and the vendor solution works with the in-house and remote agent desktops.

1.4. Support Expectations

TMRS expects the vendor to provide technical and administrative support for the chosen solution, minimizing the reliance on TMRS resources, while also supporting the business users from an application perspective. TMRS expects the vendor will work quickly and closely with internal staff when necessary to resolve issues.

2. Public Information Act, Disclosure, Submission and Evaluation Process

This section is informational only; TMRS requires no response to this section. Vendors should carefully review this information to understand disclosure considerations and to comply with the bidding process.

Note: This document refers to bidding vendors/VARs variously as you/your, firm/Firm, or respondent.

2.1. Public Information Act

TMRS is required to provide access to certain records, unless excepted from disclosure, in accordance with the provisions of Chapter 552, Tex. Gov't Code, the Texas Public Information Act ("PIA"). Guidance on determining whether information is excepted from disclosure under the PIA may be found in the Texas Public Information Handbook:

https://texasattorneygeneral.gov/files/og/PIA_handbook_2018.pdf

During the evaluation process, TMRS may make reasonable efforts as allowed by law to maintain proposals in confidence and shall release proposals only to personnel involved with the evaluation of the proposals unless otherwise required by law.

TMRS cannot prevent the disclosure of public documents and may be required by law to release documents that respondent considers to be confidential and proprietary. By submission of a proposal, respondent warrants and represents that all information that it, in good faith and with legally sufficient justification, considers to be confidential, proprietary or otherwise exempt from disclosure under PIA, will be clearly labeled as confidential upon submission to TMRS. Submission of a bid serves to acknowledge that all documents submitted and not marked confidential, as set forth in Section 2.3 below, shall be considered to be public information. All public information submitted, and information that is considered to be public because it is not designated as confidential, in response to this RFIQ may be fully disclosed by TMRS without prior notice to or consent of respondent or any of its subcontractors or agents.

To the extent that you consider any information contained in your RFIQ response to be confidential or proprietary, please follow the directions in Section 2.3.

2.2. Disclosure of Information

Respondent shall supply its confidential information to TMRS separately, each time it submits information, such as in any supplemental information.

By submitting a proposal, the firm acknowledges and agrees that TMRS shall have no liability to respondent or to any other person or entity for disclosing information in accordance with the PIA. Furthermore, TMRS shall have no obligation or duty to advocate the confidentiality of respondent's information to the Texas Attorney General (OAG), to a court, or to any other person or entity.

The firm further understands and agrees that, upon TMRS' receipt of a PIA request for respondent's information, TMRS will provide the requestor the information provided on respondent's "Publicly Available Information" electronic response. If respondent fails to submit its confidential and/or proprietary information as described herein, TMRS shall consider all of the information to be public, and it will be released without notification to the respondent upon receipt of a PIA request. If TMRS receives a PIA request for information for which respondent's confidential information (marked as such by respondent as part of its response to this RFIQ) is responsive, TMRS will notify respondent

and submit the information contained on respondent's "Confidential Information" electronic response to the Texas Attorney General for determination as to whether the information is excepted from public disclosure. Respondent will then be solely responsible to advocate to the OAG that the information is confidential or otherwise not subject to disclosure. Respondent acknowledges and understands that the OAG may nonetheless determine that all or part of the claimed confidential information be publicly disclosed.

In addition, respondent specifically agrees that TMRS may release respondent's information, including confidential information, upon request from individual members, agencies or committees of the Texas Legislature where needed for legislative purposes, as provided for in the PIA, or to any other person or entity as otherwise required by law.

2.3. Evaluation Process, Timeline and Due Dates

We have established a target schedule for evaluating the vendors and solutions proposed. In support of that timeline, we have tried to make our RFIQ as straightforward to answer as possible, enabling you to provide an overview as requested in Section 3, along with answers to specific questions and pricing, and any other details you care to share to show strengths in meeting TMRS's needs. We will schedule demos and presentations as part of our evaluation and look forward to talking with you about your solution and services.

It is your responsibility to ensure the proposal arrives on or before the time and date set forth in the schedule below. TMRS reserves the right to reject any or all proposals submitted or to adjust the timetable below.

Step	Target Dates
Release RFIQ to vendors	August 12
Vendor Questions due by 5:00pm CT	August 19
Answers provided	August 26
Vendor RFIQ responses due by 5:00pm CT	September 9
Evaluate Vendors (including follow up questions, demos and presentations, reference checks)	Sep 9 – Nov 1
Deployment	Q1 2020

Only written questions submitted by the question deadline above will be accepted. Written answers to such questions shall be sent to all Firms. From the date of the issuance of this RFIQ until the selection process completed and announced, Firms that intend to submit a Proposal should not contact any TMRS staff, Board Trustee or agent other than to submit written questions to the contact person as set forth below. Communicating directly or indirectly with any TMRS staff, Trustee or agent of TMRS regarding this RFIQ during this RFIQ process may result in immediate disqualification.

Respondent firm agrees that it shall not discuss any aspect of its proposal with any other firm that may also be responding to this RFIQ.

All communication should be directed to Eric Obermier at TMRS-UC-RFIQ@tmrs.com. All questions and answers will be shared in writing with all bidders.

Submit proposals and pricing via email to TMRS-UC-RFIQ@tmrs.com by 5 p.m. CT on September 9, 2019.

Responses should be in the following format:

Submit three (3) electronic Proposals, via email, in Word or PDF, labeled as indicated below:

i.   One containing all information, labeled "[FIRM NAME].TMRS UC-CC RFIQ 2019 – Complete";

ii.   One containing only information you consider confidential and/or proprietary, labeled "[FIRM NAME].TMRS UC-CC RFIQ 2019 – Confidential Information" ; and

iii.   One containing only information you consider not to be confidential and/or proprietary, labeled "[FIRM NAME].TMRS UC-CC RFIQ 2019 – Publicly Available Information"

Your proposal must address all of the requirements of this RFIQ. TMRS is not responsible for receipt of any proposal that is not labeled or delivered properly. All RFIQ materials shall include complete, properly executed, and detailed supporting documentation as required. Respondent shall email its proposal to TMRS at TMRS-UC-RFIQ@tmrs.com so that it is received by TMRS by the submission deadline.

3. Provider and Solution overview
This section requires vendor response. Provide the information requested.

TMRS seeks to deploy a cloud-based unified communications and contact center solution that meets its core business, functional, and technical requirements, and is relatively easy to apply to its business needs, manage, and support. **This section requests your solution overview. Use sections 1 and 4-6 as reference for more information on TMRS's environment and specific requirements.**

3.1. Overview of Provider and fit for TMRS
Provide an overview of your experience and fit for the TMRS environment based on the size, scope, requirements, etc. Note how long you have offered the proposed solution and the strength of your services organization for implementation and support of this solution.

Provide a similar overview of any subcontracting partner(s) that will be part of the proposed solution (products and/or services), including the partner's role. If you plan to subcontract any portion of the work, that fact, and the name of the proposed subcontracting firms, must be clearly identified in your response to the RFIQ. No additional subcontracting will be allowed without the express prior written consent of TMRS.

Clearly state who is the developer and owner of the software proposed. If you are not the developer/owner and are a licensed reseller, explain the roles and relationship, including partner level and the characteristics required for that level.

3.1.1. Litigation
Describe any litigation or other regulatory proceedings within the last five (5) years against the firm, or an employee, officer or principal of the firm. State the cause of action and the final result or current status of such proceeding or claim.

3.2. Descriptive overview of proposed solution
Provide a summary description of the proposed solution, highlighting its strengths and suitability for TMRS's needs.

3.2.1. Feature/Function overview
List key features and functions, especially addressing the requirements provided in Section 4. Specifically note any features listed in Section 4 that you cannot provide.

3.2.2. Technical overview
Describe key technical architecture and integration capabilities. Address the reliability, resiliency, security, and configurability of the solution. Clearly show the network connectivity you recommend, what you provide, and what TMRS will need to provide.

Provide data flow diagram(s) showing how the hosted solution would communicate with TMRS network.

Provide high-level architecture and design document(s).

3.2.3. Implementation overview

Provide an overview of your implementation approach, and any key strengths of your approach – such as characteristics of the planning, processes, resources, design, configuration, integration, testing, training (admin and end user), or other factors.

3.2.4. Support overview

Provide an overview of how you will support TMRS, highlighting how you maintain a reliable and up-to-date system (including patching/updating procedures), monitor system health, detect and resolve problems, meet Service Level Agreements (SLAs), and help the TMRS team to maximize system use. Indicate who provides the various tiers of support.

3.3. Standard Agreements

Provide a copy of your standard purchase agreement and Master Services Agreement (MSA). The selected vendor will be expected to accept certain terms and conditions that are required by law and TMRS policy.

3.3.1. Service Level Agreements

Provide your SLA that shows uptime commitments, severity levels and definitions, response time commitments by severity level, escalation paths and timing, target resolution time by severity level, and remediation.

3.3.2. Statement of Work

Provide a sample statement of work (SOW) for a project of this scope to convey your approach to implementation and the expected timeline. Describe the process to finalize the SOW for signature.

4. Functional Requirements

This section requires vendor response. Validate you can provide the functions described, or note any exceptions. Bidders should also use this section for reference in responding to other Sections.

TMRS requires a highly-functional, integrated contact center and unified communications solution. **Validate you can provide the functionality defined here or note any exceptions.** Provide any additional information on your solution functionality (beyond the overview from Section 3) as appropriate, whether through your own solution or a 3rd party/partner.

4.1. PBX/Unified Communications

TMRS plans to use typical PBX functions available in the market such as: auto attendant, dial plans, speed dialing, call coverage paths, call forwarding, hold, transfer, conference, music on hold, etc. TMRS desires unified messaging with voice mail to email. TMRS also intends for the enterprise users and contact center users to be tightly integrated and part of the same system.

Other specific PBX/Unified Communications requirements include:
- Mobile client assigned to select users (specific count in 1.1 above)
- Presence and Instant Messaging across the enterprise
- Conferencing (up to 16 participants)
- Paging to specific phone or defined zones that include a set of phones

4.1.1. Additional UC questions

1. Can your solution integrate to Microsoft Teams for phone presence and internal instant messaging?
2. Do you have the ability to provide "panic button" for receptionist phone that rings selected extensions?
3. Does your system have find-me/follow-me capabilities?
4. Do you offer a web conferencing solution? If so, describe.
5. Do you offer cloud faxing services? If so, describe.
6. Do you have the ability to accommodate the existing Crestron controlled video system (BIAMP Audia VoIP-2 Card)? See documents attached.

BIAMP_VoIP_DataS
heet.pdf   VoIP2_FAQ.pdf

4.2. ACD/Multimedia/Routing

TMRS plans to use typical configurable ACD functions such as: route based on skills, DNIS, or caller input, definable work states, call treatment messages, auto answer options, classify calls (wrap up/disposition codes). The system must handle voice calls, with the option to handle digital channels (e.g., chat, email) within the routing tool.

Other specific ACD requirements for day-one operations include:
- Easily configured call routing scripts
- Conditional routing that considers a wide range of business conditions (e.g., time of day/day of week, queue status, out of office events, etc.)
- Skills based routing including skill levels/proficiencies, priorities, multiple skills/agent

- Emergency routing to quickly route to a defined destination or announcement either through conditional business rules or "at the press of a button"
- Queue call-back feature that allows the caller a choice to be called-back while maintaining their place in queue
- Email routing and queuing
  - Auto-acknowledgement
  - Auto-response
  - Auto suggest
  - Standard response templates
  - Customized response library
  - Spell check
  - Standard greetings and closings
  - Multithreading
  - Business rules for routing, responses, escalation, notification
- Web Chat routing and queuing with functionality like that outlined for email above (including sharing a common response library and creating unique chat responses)
- Blended queue (across all active media)
- Multiple chat sessions per agent
- Contact classification/ disposition codes
- All media types presented in same agent desktop window
- Pop call specific information on the desktop screen, based on ANI

Validate you can provide the functionality defined here or note any exceptions. Also, indicate if you provide these through your own product or through a partner/3ʳᵈ party.

4.2.1. Additional Contact Center/ACD questions

1. Provide screen shots of your user interface for agents, supervisors, and administrators.
2. How are agents notified a contact is being delivered to them from a queue?
3. Do you have a time out timer for inactivity in chat?
4. Provide details on any callback queuing function you may have, including features such as:
   - Variables for offering it (e.g., expected wait time, calls in queue, oldest call in queue, time in queue)
   - Ability to validate the number captured or enter a different number
   - Option to recognize inbound call that is from a number already in the callback queue

4.3. Administration

TMRS requires an administrative tool that enables the contact center to make configuration changes, generate reports, etc. without relying on IT or the vendor. The system must be easy to administer and configure through comprehensive application management. Administrators and end users (contact center agents, managers and supervisors) expect a user-friendly interface. Desired features include:
- Common administration across tools (UC, ACD (all media), QM)
- Easy to use skills management
- Permission-based security to control who can make changes and what types of changes, and track changes through a log
- Ability to schedule reports and create custom reports
- Report format options (e.g., Excel, PDF)

Validate you can provide the functionality defined here or note any exceptions.

4.4. Reporting and Analytics

TMRS requires automated, flexible reporting (real-time and historical) and analytics that addresses contact, member experience, and agent activity end-to-end. TMRS seeks a solution that can provide standard and customized reports with little effort required by business users to access, create, and schedule these reports.

TMRS requires support of standard metrics such as: volume offered and handled; Abandon rate, Average call talk time, wrap time, handle time; Agent availability, work state, and time in work state; Average speed of answer; Percent available time; Configurable service level target (by DNIS, skill group, etc.); Service level objective vs. actual; Occupancy; Log-in/Log-out times and duration; Average/total calls per agent; Number ring no answers; Average hold time; Transfer rate. This information should be available in a variety of standard and configurable reports, across a variety of reporting periods (e.g., by interval, day, week, month), for all media (e.g., Voice, Email, Chat).

Additional reporting requirements include:
- Views of multiple queues, groups, or agents
- Configurable screen display, ability to save as template, and automatically size to various screens; Scorecards visible in dashboards with configurable widgets
- Real-time agent performance to the agent desktop
- Supervisor views of agent performance
- User-based permissions for what can be viewed (e.g., individuals, groups/teams/skills) in real-time or historical reports
- Managers or supervisor notification/alerts based on service level, queue status, work state time, or other thresholds (exception reporting to defined list of recipients)
- Simultaneous viewing of queues, agents' work states and service level
- Reports can be customized easily without vendor intervention
- Cradle-to-Grave Reports that provide information on the contact for its duration in the system
- Flexible user-friendly tool allowing the ability to create, schedule, deliver, and display reports
- Scheduling production and distribution (e.g., email) of pre-identified reports
- Mobile app for displaying real-time contact center metrics on smart phones (e.g., iPhone, Droid) or tablets

Validate you can provide the functionality defined here or note any exceptions. Also, indicate if you provide these through your own product or through a partner/3rd party.

4.5. Call Recording and Quality Management

TMRS requires integrated contact recording with agent scorecards for Quality Monitoring (QM). One hundred percent of voice calls and a configurable amount of data screen capture (e.g., 20%) will be recorded and stored; TMRS must be able to store the recordings for 90 days and easily export/download them to long term storage in a non-proprietary format. TMRS seeks standard features such as: Capture voice, Capture screen, Record email and chat handling sessions, Configurable scorecards, Reporting, and Calibration.

Quality monitoring requirements include:
- Real-time/live monitoring of contacts (across all media) and screens
- Trending and comparisons (calibration)
- Tie QM scoring results to specific interactions and/or agents
- Contact search and retrieval functions
- Reporting summaries of Quality Monitoring results daily, weekly, monthly

- User friendly interface for administration - searching, analyzing, reviewing, scoring, modifying scorecard, reporting
- Security and privacy as outlined in Section 5

Validate you can provide the functionality defined here or note any exceptions. Also, indicate if you provide these through your own product or through a partner/3rd party.

4.6. Other Solutions in Portfolio/Options

Do you have a Virtual Assistant offering? If so, please describe.

Do you have audio conferencing for large meeting spaces? If so, please describe. TMRS has a large room used for all-hands meetings. Many people telecommute and conference in and TMRS is interested in improving the quality of the conferences. This room has a high ceiling and needs a solution that provides good acoustics for microphones and speakers throughout the room.

5. Additional Technical Questions
This section requires vendor response. Provide the information requested.

TMRS requires a highly reliable, redundant, high performing, secure, cloud-based contact center and unified communications solution. Provide the requested information in this section and any information on your technical solution (beyond the overview from Section 3) whether through your own solution or a 3rd party/partner as appropriate.

5.1. Platform

5.1.1. Premise Equipment
Identify anything required on the TMRS premise or data centers, including contact recording for security.

5.1.2. Tenancy
Describe your tenancy model and how that impacts updates, backup, restore, or other functions. Also, describe how your architecture ensures that each customer's volume can be handled adequately with good performance, and can't be impacted by another customer's peaks, administration, or issues.

5.1.3. Data Centers
Do you own your data centers or do you use a third party? If a third party, whom do you use?

Do you provide geographically dispersed redundant data centers? Where are your datacenters located?

TMRS requires that all data is stored in the United States. Confirm your solution meets that requirement.

Describe the security controls and protocols to manage access and protect customer data.

5.1.4. Solution Elements
Indicate if another vendor provides any solution elements proposed. If so, describe the integration with the rest of the solution and any customization.

5.1.5. Desktop/Client
TMRS uses Windows 10 PC with thin client, virtual desktop (Citrix XenDesktop v 7.15 LTSR CU 4 or later) based applications. State compatibility with this configuration.

State whether your desktop client, management, or reporting interfaces use Flash or Java.

5.1.6. Phones
TMRS desires use of hard phones for the on-site users. Indicate whether you can provide hard phones. List hard phone options, or which third party phones your solution is compatible with.

5.1.7. Remote Agents
TMRS also has many remote agents. Describe how your solution supports remote agent capability for CC and UC users. Address phones (hard and soft options) as well as desktop.

State how softphone (headset plugged into PC) works in a Citrix XenDesktop environment.

5.2. Network

5.2.1. Connectivity Options

Provide an overview of the network connectivity options and recommendations for client application access and the voice path.

TMRS may prefer to use a dedicated connection to the cloud provider, dual ISPs and/or an SD-WAN, or some other approach to optimize voice quality. Specifically address what, if any, of these options you provide.

5.2.2. Network Assessment

State any requirements for network assessment to ensure TMRS's LAN/WAN is adequate to support your solution.

5.2.3. Load

Describe any LAN/WAN load considerations between the TMRS data center and your cloud-based data center based on the proposed solution (including full time voice recording and data screen capture for the contact center positions).

5.3. NextGen MBS Integration

Describe how TMRS would accomplish screen pop into the NextGen MBS application (described in 2.2). Describe what TMRS would need to do for the integration.

Describe the level of integration with NextGen MBS to provide complete agent interface within the NextGen MBS. Indicate whether softphone controls can be integrated to NextGen MBS window.

5.4. Reliability/Redundancy

Are all elements in one data center with another designated as backup, or is the solution for TMRS provided by multiple data centers that are "always active"?

5.4.1. Failover

Describe the failover process and whether it is automated or manual. Describe timing and disruption impacts when a failover occurs.

State whether you have procedures for periodic, planned fail-over testing.

5.4.2. Maintenance

Explain how the reliability is continued during any maintenance activity (including upgrades) and the impact on the end user.

If you have maintenance windows when the system is unavailable, describe the protocols such as the notice provided, the hours defined for maintenance windows, approximate frequency, etc.

5.5. Encryption/Security

Provide an overview of the security infrastructure of the network and technology used.
Address these specific security questions:

Security Compliance
- Describe the security related to the user interface.
- What type of security exists within the applications to prevent abuse and malicious activities?
- Is the offering regularly audited? Provide copies of SOC Report findings and compliance results, including management responses.
  - If not, what level of compliance is the offering?
- How do you protect the services from standard IP vulnerabilities, including denial-of-service attacks?
- What is in place to prevent device-level exploits? This should include any locally installed gateways, data-storage devices, and phones.
- Describe your security architecture, including firewalls, IDS/IPS, APT, segmentation, etc.
- Specifically address how you manage security for interaction information **"in flight"** for calls, emails, chat, text, etc.:
  - Can all media packets (voice, web chat, IM etc.) in flight be encrypted?
  - How is data protected during interaction handling?
  - What encryption schemes are used?
  - Who has the encryption keys?
  - Is access reviewed and approved?
- Specifically address how you manage security for interaction information that is **"at rest"** in storage (calls, emails, chat, text, etc.):
  - Where is the data stored?
  - Do you encrypt all stored data?
  - What encryption schemes are used?
  - Who has the encryption keys?
  - Who has the ability to access stored data besides the customer (administrators)?
  - How is access controlled, granted, and removed?
  - Is access reviewed and approved?
  - How is authentication protected (what encryption scheme, what SSO schemes)?
  - Is multi-factor authentication (MFA) available? If so, describe the options.
- Specifically address how the solution supports security of confidential personal information (e.g., SSN, financial information, etc.)
  - How are recordings suspended or select content masked?

Data Management
- Describe what is stored in the cloud and what is stored on the customer site. If options exist, describe them and your recommendation for TMRS given the nature of the interactions (i.e., that they may include protected personal and financial information).
- Do customers share the same data servers?
  - Describe written policies, procedures, and methods that ensure customer data is not available to other customers.
- Do you offer options for clients to keep their data within their own network? Describe.
- Do you have a process for handling legal holds placed on data stored within your system? If so, please explain.
- If there was a breach of data or hack of a facility, what is your policy for reporting this to us and what options are offered to us as a client?
  - What kinds of breaches will prompt a notification to customers?
- Have you ever had unauthorized access to your systems or the systems being offered? Please provide a description of any such incident in the past 3 years and if any customers/clients were notified as a result of the incident.

6. Additional Implementation and Support Questions
This section requires vendor response. Provide the information requested.

6.1. Implementation

TMRS requires on-site cutover support. Confirm that you can provide onsite time and describe the resources and approach for cutover support. Indicate if you would use local resources (Austin area).

Describe your approach for solution design and training. State whether you have options to conduct these steps on-site.

Clearly define the role of the TMRS resources (IT or contact center) required during different phases of the project.

What is your typical implementation timeline?

6.2. Proof of Concept

TMRS would like to first test the solution in a Proof of Concept (PoC) scenario prior to full implementation. The proof of concept will focus on ensuring the integration with NextGen MBS is feasible and the vendor solution works with the in-house and remote agent Citrix desktops. The PoC will also help TMRS evaluate the user interface for all user types (CC and UC).

The PoC is expected to be 1-2 months, and include up to 6 user licenses (e.g., 1 Supervisor, 2 agents, 3 UC users, including two with mobile). TMRS welcomes the vendor input on how best to accomplish the PoC.

State whether you can support this and detail suggested ways to accomplish this. Indicate if you will charge TMRS for a PoC and what types of charges would be incurred (licensing and/or professional services).

6.3. Project Team

Provide an overview of the project team that you would assign for implementation, including titles, roles, and estimated amount of their time they would be assigned to this project.

TMRS will want to ensure continuity of the project team from kick-off to acceptance, and reserve the right to request replacement of any resources that are not performing to the agreed to timeline and demonstrating the necessary focus on and commitment to this project. Confirm your agreement with these requirements.

6.4. Training

Describe your approach to training. Do you utilize "train-the-trainer," instructor-led online, video recordings, etc. Address the training for end users (including agents and supervisors) and for administrators.

6.5. Informal Training/Knowledge Transfer

Describe how you provide informal training and knowledge transfer in the process of conducting the implementation. TMRS's goal is that the users are knowledgeable to leverage the system effectively and make basic administration changes.

6.6. Testing

TMRS requires the vendor to perform testing as a part of the implementation. Passing testing will be a condition of acceptance. Describe the testing you provide (and include it in pricing). Describe the testing you expect TMRS to conduct.

6.7. Project/Support Transition

Describe your transition from an implementation project team to standard support.
- When does the transition take place?
- How do you define project acceptance?
- When does project acceptance occur (e.g., at cutover, after 60 days of stable performance)?
- Is there a formal hand-off process? Describe.

6.8. Documentation/Knowledge Base

Provide an overview of or link to the online documentation and knowledge base. Describe any tutorials and help systems available for the product (on-line, help buttons, etc.). Provide details on your documentation aimed at:
- IT staff for integration.
- Administrators for configuration of users, routing, skills, etc.
- Supervisors and Analysts for configuration and use of reports, QM, etc.
- Agents for the desktop interface (user client).

6.9. Help Desk Availability and Accessibility

- Describe who TMRS would contact and via what channel(s).
- Define the hours of availability of your help desk (staffed, not on call).
- Indicate where your help desk resources are located (all locations) and whether they are employees, contractors, or a partner or outsourcer.
- Describe the media options (e.g., call, email, web form) and process for accessing your help desk and submitting an issue.

6.10. NOC(s)

Describe your Network Operations Center(s) – location(s), staffing via employees or contractors, etc.

6.11. Upgrades

Describe the process to keep TMRS operating on the latest software versions and how you handle upgrades (e.g., communication, timing, testing, etc.).

Do you provide email notification to those who subscribe to receive routine updates on features/functions and other updates?

7. Pricing

This section requires vendor response. Provide the information requested.

TMRS requests a quote that includes all features/functions described in this document and not noted as optional or future.

Note any assumptions you have made in providing the price quote. Include pricing for implementation professional services.

Provide the pricing that clearly indicates the item, cost per item, total, and discounting applied. Delineate software licensing, hardware (if required or supplied, including phones), installation, and professional services for implementation, including any integration, application design, configuration, testing, and training required. Provide "menu" pricing that provides separate sub-totals where appropriate.

7.1. Licensing structure

Clearly indicate your licensing structure. Indicate if licenses apply to named users, maximum concurrent users, or some other basis, and how they are charged (e.g., max monthly, average monthly). Provide your definitions of Named and Concurrent and describe how you count them.

7.1.1. Flexing to Peaks and Valleys

State any constraints on adding or reducing licenses to accommodate peaks and valleys. Indicate the process for increasing/decreasing licensing based on use.

7.1.2. Licensing source

Indicate if the licensing is purchased directly with you or must be procured separately (e.g., directly through the vendor).

7.2. Hardware and Phones

Provide quotes for any onsite equipment, including phones and any servers, gateways, or other hardware.

Indicate if you offer the option to buy or lease phones, and if so, provide pricing for both options

7.3. Variable Costs

List variable costs, such as minutes for DID, Toll Free, Long Distance. Etc. Specifically indicate if licenses include a defined set of minutes or if all minutes are charged.

7.4. Professional services fees

Provide your professional services fees to deliver the solution and functionality described, including any assumptions.

Also, provide hourly rates for professional services, by resource type, that would apply to TMRS for professional services beyond the initial scope.

7.4.1. Travel time and expenses

TMRS will not pay for travel time or for any markup on expenses. Travel expenses should be included in the fixed cost. Confirm that you can comply with these requirements or state any exceptions.

7.4.2. Training pricing

Provide costs for any formal training provided as part of solution delivery including end users and administrators or indicate if all training is included in the licensing and/or professional services. Include costs for optional on-site training (inclusive of fees and travel).