

Request for Proposal

Phone System Replacement for

State Bar of Michigan

Proposal Due Date:
September 29, 2010; 3:00 p.m. DST

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State Bar Requirements

Background Information

The State Bar of Michigan (State Bar) is seeking proposals for a phone system replacement (equipment, installation, training, maintenance, service and trade-in), in accordance with the specifications, terms, and conditions stated herein. Contractor will work solely with the State Bar.

The State Bar is a unified bar operating under the supervision of the Supreme Court of the State of Michigan. It is organized as a public body corporate and is located in downtown Lansing, Michigan. The State Bar has over 40,000 members and a budget of close to \$10 million annually and is exempt from paying sales tax.

This Request for Proposal (RFP) provides a standard base from which to evaluate alternatives for real-time IP systems and to allow the bidder flexibility in providing the most appropriate and cost-effective solution. The acceptance of a Response to RFP does not obligate State Bar to purchase any system.

State Bar Contacts

For questions about the RFP or solution requirements, contact:

Contact Name: Will Kramer

Phone Number: 517-346-6359

Email Address: wkramer@mail.michbar.org

Proposal Filing Date

Responses should be received by 3 p.m., on Wednesday, September 29, 2010. Bids received after that time may not be considered. Deliver bids to:

Name:	Will Kramer
Company:	State Bar of Michigan
Address:	306 Townsend Street, Lansing, Mi 48933
Telephone:	517-346-6359
# of hard copies	2
# of soft copies	1

Schedule of Events

Event	Date
RFP Issued	September 1, 2010
Last Day for Questions / Clarifications	September 15, 2010
Response to Bidder Questions	September 21, 2010
Proposal Due	September 29, 2010
Purchasing Decision	October 11, 2010
Solution Implementation Date	Before December 30, 2010

State Bar Environment and Requirements

State Bar's current environment is as follows: Siemens 9006 Model 30 with phonemail, interalia, and ACD system. Both digital and analog boards support the connected devices. No IP infrastructure exists for the phone system. Several vendors provide different connections for local, long distance and fax services. State Bar would like to retain the existing 17 digital Optisets on the first floor and replace the remainder of the digital telephones.

The proposed solution must address the following objectives: The ability to use existing analog/digital infrastructure as well as provide IP services to staff home offices. Maintain all existing hunt groups, enhance ACD programming through skills-based routing and reporting, music on hold and other functionality setup for our business operation.

The submission of a proposal will be construed to mean that the bidder is fully informed as to the extent and character of the supplies, materials, or equipment required and representation that the bidder can furnish the item(s) in complete compliance with the specifications.

Proposals must include proof of liability insurance and amounts.

An agreement must be included to indemnify the State Bar from any liability resulting from work on this agreement.

The vendor must provide a statement attesting that all information provided in its proposal to the State Bar is true and accurate to the best of its knowledge.

Include any warranties and guarantees offered by your firm in the proposal.

Proposal prices quoted by the vendor shall be firm and not subject to increase during the term of any contractual agreement between the State Bar and the successful bidder as a result of this proposal document. Should the price of any components covered under this agreement decrease after the award of the contract but prior to installation, the cost for the State Bar shall reflect that decrease. The State Bar reserves the right to negotiate the price, delivery and terms of this RFP.

The successful vendor must guarantee that all delivered material, equipment, and/or services shall be as bid. No substitutions will be accepted unless prior to delivery, material/equipment has been inspected, found to be equal to the item(s) specified, and approved in writing by a State Bar representative. All materials, products, and services offered must be standard, new, latest model of regular stock product or as required by the specifications, type of equipment, or furniture offered;

furthermore, no products/materials have been submitted or applied contrary to manufacturer's recommendations and standard practice. Vendor will have carefully checked the enclosed figures and understands that it shall be responsible for any error or omission in the bid offer. Vendor will have carefully examined the instructions and specifications and will furnish this material/product with such specifications for the price set forth in this bid.

Proposals shall remain firm for a period of 120 days from the bid opening. It is the intent to evaluate proposals and award the RFP on or before October 1, 2010.

State Bar will base its decisions regarding responses to this RFP on the following criteria, including but not limited.

Key Decision Criteria

- **Financial viability and strategic direction.** The bidder of the proposed solution must be experienced, financially viable, capable of sustained ongoing support and development of the products proposed. Bidder must have a defined vision for the proposed system that includes a strategic plan for IP support, as well as legacy investment protection.
- **Asset management** and protection, ensuring the capital investment provides flexibility in adapting future changes in technology. The solution must
 - Support deployment in a vendor-neutral network infrastructure
 - Adhere to industry standards
 - Insure modular, cost-effective growth
 - Support a distributed, scalable architecture
 - Support circuit-switched, packet-switched and mixed network environments
 - Provide a common interface for managing system and endpoint client configurations
- **Efficiencies at the desktop**, helping employees communicate better and work more productively through
 - Support robust, full feature set across digital and IP endpoints and IP softclients
 - Support user mobility through single-number access and wireless devices
- **Common applications**, providing the same functionality all communication platforms
 - Permit addition of advanced, standards-based server applications as needed, such as unified messaging, unified communications, contact center, mobility, etc.
 - Support modular growth in capacity and feature functionality
 - Support robust CTI links with industry standards
- **Effective management tools** that provide maximum flexibility, for rapid, efficient and cost-effective configuration changes and centralized management control. The solution must support changes on the real-time IP system for IP, TDM and mixed deployment environments from a common application interface.

- **Global availability**, covering remote serviceability and technical support of the entire proposed solution, including applications. Bidder's resource infrastructure must provide a single point of contact. Services available from the bidder must include:
 - Quality assurance process for delivery of services
 - Installation and integration services, including project management and training
 - Availability of support 24 hours a day, seven days a week through Help Desk infrastructure and online support
 - Scheduled Onsite preventive maintenance services
 - Onsite support 8 a.m. to 5 p.m., Monday through Friday with 4 hours response

In addition, the real-time IP system must provide fault tolerance options to ensure continued operation.

Within the specified criteria, each bidder is invited to design a solution meeting defined objectives. Preference will be given to the bidder providing a comprehensive, cost-effective, single-vendor solution for current specifications, future technology and capacity requirements and ongoing service and support.

The sections covering each part of the required solution detail the features, capacities and hardware and software requirements necessary to meet the RFP specifications. Bidder is responsible for clarifying any items in accordance with the Schedule of Events.

State Bar may, at its option, elect to conduct oral presentations/ demonstrations with selected vendors and/ or request site visits from vendors still under active consideration, at no cost to the State Bar. Demonstrations may be requested to be held at the State Bar facility. The State Bar is not required to hold such presentations or demonstrations and is not obligated to provide vendors with such an opportunity.

Price for the solution, installation, and the cost of ongoing maintenance is an important factor, but is not the sole decision factor.

Proposal Format

Organize Response to the RFP in the following manner:

- **Table of Contents**
- **Section 1 Executive Overview** — This section summarizes the response, structured so anyone reading only this section has a clear understanding of the proposed solution. Bidders must clearly identify the benefits afforded through the implementation of the proposed solution.
- **Section 2 Solution Overview** — This section provides a design narrative and diagram of the proposed solution.
- **Section 3 Bidder Profile and Capabilities**

- **Proposed Requirements** — This section provides the proposal evaluation team sufficient information to assess compliance with technical and support requirements. Clearly identify optional features included in the proposed solution.

Section 4 — Real-Time IP System

Section 5 — Endpoint Clients

Section 6 — Messaging Solutions

Section 7 — Contact Center Solutions

Section 8 — State Bar Support

- **Section 9 Configuration, Pricing and Terms and Conditions**
- **Section 10 Appendices**

SECTION 1 EXECUTIVE SUMMARY

Provide an overview of the proposed solution.

SECTION 2 SOLUTION OVERVIEW

Provide a design narrative of the proposed solution and include network diagram.

SECTION 3 BIDDER PROFILE AND CAPABILITIES

Complete the following table:

Corporate Profile:

Corporate Name

Corporate Address

Telephone Number

Internet

Doing Business Since

Contact Information:

Account Representative:

email Address

Telephone Number

Address

Technical Support:

email Address

Telephone Number

Sales Manager:

email Address

Telephone Number

24x7 Support Center

Telephone

Internet

Annual Gross Sales for last four (4) years:

2009 _____ 2008 _____ 2007 _____ 2006 _____

Any Deviations from Specifications

Acknowledgement of accuracy

Firms Geographical Area of Operations

Indemnify the State Bar from any Liability

Proof of Liability Insurance

Provide three (3) customers that have purchased comparable phone systems.

business

contact

phone number

Supplier Authorization

Include a statement on letter head that certifies that the bid submitted meets or exceeds all the specifications, that current functionality are included, that all conditions are acknowledged, and the firm prices and terms specified by the bidder are true and accurate.

Non-Manufacturer

If the proposing bidder does not manufacture the recommended solution, please provide manufacturer's name and bidder/manufacturer relationship. If bidder does not provide installation, warranty or maintenance services, explain manufacturer/subcontractor responsibilities including future support for proposed solution.

3.1 Financial Stability, Industry Experience and Support Capabilities

Bidder must demonstrate experience in providing IP communications technology. Provide a brief history of the bidder's company, including financial stability and experience in the manufacturing, implementation and support of the proposed solution. Summarize availability for 24-hour, 7 day a week support and describe remote and on-site capabilities.

3.2 Strategic Direction

Provide strategic direction for solution proposed with emphasis on areas such as investment protection, applications enhancement, etc.

SECTION 4 REAL-TIME IP SYSTEM

4.1 Real-Time IP System Solution

4.1.1 Configuration Requirements

The tables below summarize requirements by user type and location.

Host¹ Location Configuration	Licensed	Equipped²	Wired³
Digital endpoint client (telephone) users	111	120	144
Analog endpoint client (telephone) users	43	48	72
IP endpoint client (telephone) users (need capability, but not users)	0	0	0
PC endpoint client only (soft client) users external remote workers	3	3	10
Application Licensing			
Messaging users (separate RFP section defines feature requirements)	115	130	130
Contact center users (separate RFP section defines feature requirements) — Agents supported with digital phones	15	20	20
Trunking			
Analog CO trunks (back-up trunks Central Office)	8	16	16
Digital T1 trunk spans (24 ports each)	1	1	1
PRI trunk spans (23 B channels + 1 D channel)	2	2	2
Messaging channels	12	12	12

Application Requirements	Yes /No / Option
Integrated corporate directory	Yes

¹ Host location users include Contact Center Agents, unless annotated as located at a Remote Location. Requirements for remote locations (copper connected or supported via data network infrastructure) are summarized in a separate table.

² Equipped means the specified quantities equipped at implementation.

³ Wired for / Slot for capability means the specified quantities can be expanded beyond Equipped quantities of the proposed solution with only the addition of licenses, desktop devices and line/trunk cards.

Application Requirements

Call accounting application
 Other — describe

**Yes /No /
 Option**
 No

Other Requirements (Yes = provided by bidder)

MDF
 Recorders/announcers
 Servers for bidder-supplied applications

Yes/No
 Yes
 Yes
 Yes

State Bar will provide PCs and printers.

4.1.2 Proposed Solution Benefits

The proposed system must support packet-switched (IP and SIP), circuit-switched (TDM) and mixed IP/TDM network environments. The solution must provide investment protection through universal endpoint clients and applications supported across the enterprise network. Describe how this is accomplished, with emphasis on how State Bar’s operations will benefit from the proposed solution.

4.1.3 Open Standards and Published Interfaces

The proposed system must support open standards. Describe support for open standards and published interfaces, with emphasis on how State Bar’s operations will benefit from the proposed solution.

4.2 Real-Time IP-System Architecture

4.2.1 Software Architecture

4.2.1.1 Software Security

Describe operating system protection against viruses, worms, etc.

4.2.1.2 Software Licensing

Describe licensing requirements, including availability of dynamic licensing for end users.

4.2.1.3 Feature Set

The solution must provide, at a minimum, the following features:

- Full telephony feature set for digital and IP endpoint client users
- Signaling and payload encryption for IP endpoints
- Multi-lingual user interfaces
- Feature transparency and single system image across all networked sites
- Application sharing across enterprise-managed IP network

Standard protocols and computer telephony interfaces
 Centralized management with single point of access
 Centralized, remote management of IP endpoints
 Remote monitoring by bidder via secure VPN connection

Provides an overview of how solution delivers above-listed functionality. Describe any significant limitation or restrictions based on protocols or configuration proposed.

4.2.1.4 Software-only Remote Site Support

The proposed system requirements for remote sites include support for optional software-only applications on industry-standard servers. Describe.

4.2.1.5 Encryption

If VoIP solution is proposed, the solution must support signaling and data stream encryption. Describe encryption features and compliance with AES counter mode and SRTP/SRTCP standards, including any benefits provided by the standard employed.

4.2.1.6 Optional Applications

Briefly describe optional server-based applications available. Identify optional features included in the proposed solution, as well as other optional applications that may be beneficial to State Bar.

4.2.1.7 Maximum Software Capacities

Complete the following table with the maximum software capacities of the proposed solution.

Software Configuration Capacities	Maximum Capacity
Logical lines (ports plus phantom extensions)	
LCR (least cost routing) outbound dialing rules	
Digit screening	
Busy Hour Call Attempts (BHCA)	
Class of service	
Conference calls per system	
Maximum number of parties per conference call	
Call forwarding hops	
Multiple line appearances per extension number	
Distinctive ring tones	
Simultaneously active languages	
Personal Identification Numbers	
Speed Dialing	
System speed dial numbers	

Software Configuration Capacities	Maximum Capacity
System speed dial numbers per station	
Station speed dial per system	
Station speed dial numbers per station	
Groups	
Communication groups (Com Group) per system	
Members per Com Group	
Hunt groups per system	
Members per hunt group	
Pickup groups per system	
Members per pickup group	

4.2.2 Hardware Architecture

4.2.2.1 Maximum Capacities

The proposed system requirements include modular, distributed architecture. Describe the hardware architecture, including support for remote sites and multi-feature support via common hardware interfaces for IP-distributed systems.

4.2.2.2 Maximum Hardware Capacities

Complete the following table with the maximum hardware capacities of the proposed solution.

Hardware Configuration Capacities	Maximum Capacity
Total cabinets	
Total emergency processor cabinets / sites	
Total software-only remote sites	
Ports per system	
Stations:	
IP users	
SIP users	
Analog users	
Digital users	
Total stations	
IP gateways	
SIP gateways	
Trunks:	
Analog	
Digital	
T1/PRI interface per node	

Explain how the addition of station users, trunks and/or data communications affects the traffic handling capability of the proposed solution.

4.2.3 Survivability

4.2.3.1 Redundancy

The real-time IP system must optionally offer:

Redundant CPU, redundant switching unit and redundant power supplies, ensuring there is no single point of failure in the switching and power system

Backup and/or standby IP gateways

Describe the level of redundancy available and proposed.

4.2.3.3 Disaster Recovery

The proposed solution must offer disaster recovery options in case of host system destruction due to a catastrophic event. Describe.

4.2.4 Network Interfaces

The proposed solution must support private and public networks, allowing integration with other like systems and interface with non-bidder systems and public switching systems. Describe networking in TDM and in IP environments.

4.2.4.1 Private Network Interfaces and Services

Describe supported private network interfaces and services.

4.2.4.2 Public Network Capabilities

The platform must be able to interoperate with third-party circuit-switched systems using ISO QSIG. Describe.

4.2.4.3 Public Network Interfaces and Services

Specify supported public network trunk interfaces, signaling protocols and services.

4.3 System Management

System management tools must provide maximum flexibility for rapid, efficient and cost-effective configuration changes affecting personnel and associated equipment. Provide an overview of system

management tools, support for modular management applications and how the proposed system management tool contributes to State Bar's operating efficiency.

4.3.1 Batch Capability

Host management tool must support batch changes and facilitate user/group administration. Describe productivity enhancers provided by the management tool.

4.3.2 Diagnostics

The system must provide integrated diagnostic capabilities and alarms inherent within the system, routine system monitoring, remote diagnostics and remote repair capabilities. Describe standard and optional diagnostics, including any associated additional costs.

4.3.3 Security

Proposed system must support both local and remote access. Describe security features.

4.3.4 Scalability

The host system must support multiple sites with a centralized management. Describe centralized management capabilities and associated benefits.

4.3.5 Universal Management

Proposed solution must provide capability to manage diverse communication platforms, applications and third-party products from a single point. Describe universal management applications available and proposed.

4.3.5.1 Accounting Management

Describe CDR (call detail recording) provided by the system without additional charge and optional call accounting applications.

4.3.5.2 Fault Management

The real-time IP system must support SNMP. Describe alarm capabilities, including notification to remote locations, mobility devices and third-party applications.

SECTION 5 ENDPOINTS

5.1 Endpoint Configuration

The proposed solution must support a variety of IP and digital endpoints. Endpoint options must include the items specified in the table below

<i>Station Equipment</i>	<i>Full-Duplex Speaker</i>	<i>Display</i>	<i>Option Bay</i>	<i># of Lines</i>	<i>Qty</i>
Softclient	N/A	N/A	N/A		
Reuse of existing Optiset Basic phones	-	-	-	2	17
Digital telephone w/ color display, Bluetooth capability and headset jacks	√	√	√	4+	94
Analog telephone (re-use, includes fax etc.)	N/A	N/A	N/A		43
Headsets — wired & wireless (existing re-use)	N/A	N/A	N/A	N/A	
Attendant Position — PC-based soft client	N/A	N/A	N/A	N/A	2

* SLK = self-labeling keys

<i>User-Installable Add-on Modules for Up0E mode Telephones</i>	<i>Quantity</i>
Expansion sidecar — supports additional keys	2

5.2 Proposed Desksets

Proposed solution must support analog, digital and IP telephones. List types of phones supported.

5.2.1 TDM Desksets

Digital desksets must support the following:

- Interactive context-sensitive help on all display models
- Integrated speakers on all models
- Full-duplex speakerphone on all speakerphone models
- Color Display
- Bluetooth-capable

State ability to meet requirements listed immediately above. Describe desksets proposed and include pictures.

5.3 User-Installed Modules

The proposed telephones must accommodate user-installed telephone modules. Briefly describe capabilities available through the user installable modules. Include the tools and technical support required to add functionality to the telephone.

5.4 Context-Sensitive Help

Help function must be available on all display endpoints and provide user-friendly prompts with full word descriptions (i.e., limited abbreviation usage). Only those features that are available through the end user's COS (class of service) should be visible. Describe help features.

5.5 Soft Client

Soft client capabilities must include graphical user interface (GUI), QoS, LDAP integration, call lists (missed calls, received calls, attempted calls), post-connect DTMF dialing, task-oriented on-line help and automatic software update mechanism and the capability to add key modules, similar to physical desktop devices. Soft client should also provide TAPI drivers for support of CTI applications.

Describe soft client capabilities, including mobility, wireless LAN support and VPN (virtual private network) support. Also describe any accessories available such as USB handsets and headsets, and provide minimum specifications for any State Bar-provided PCs supporting soft client.

5.6 Other Devices

Describe other devices that support end users, such as wireless handsets not requiring adjunct wireless system, PDAs, etc.

5.7 Directory Capabilities

Describe directory capabilities.

5.8 Attendant Position

The proposed solution must support PC-based attendant consoles and, as an option, the following:

- Integrated centralized directory
- Busy lamp field

Describe attendant consoles available, including minimum client requirements for State Bar-provided PCs.

SECTION 6 UNIFIED MESSAGING AND COMMUNICATIONS SOLUTION

6.1 Unified Messaging & Communications Solution Overview

State Bar is reviewing its options in the area of unified messaging and communications in order to improve productivity and efficiencies by integrating multiple message streams (voice mail, email, fax and SMS). This could include requirements in the areas of voice/unified messaging, presence and collaboration, conferencing (audio, web, video) and speech recognition.

For any solution, State Bar views an open architecture and open integration capabilities as critical. Any solution must accommodate a migration strategy incorporating current technologies as well as have the flexibility to accommodate future developments.

Bidder should provide a brief overview of its vision and strategy with regard to unified messaging and communications. Additionally, Bidder should provide third-party analysis (for example, industry analyst views, award recognition, etc.) of Bidder strategy and products. Provide information that differentiates Bidder's unified messaging and communications solution from competitors.

6.2 Voice/Unified Messaging and Communications Requirements

The solution must provide voice only and optional unified voice, email, fax messaging, text-to-speech (TTS) and speech recognition capabilities for the following number of subscribers:

Voice only: 115

Unified mailbox (email, fax and TTS): 10

Voice and web conferencing: 0

Bidder should confirm compliance with capabilities listed above and describe the solution's capabilities with emphasis on how State Bar operations and end-user productivity will benefit from the proposed solution. State Bar's current email platform is GroupWise V8 and is the long-term strategy for messaging.

6.3 System Requirements

6.3.1 System Architecture

State Bar proposed messaging and unified communications solution must provide the following architecture attributes:

Support open industry standards for data retention and recovery

Be modular and scalable, providing investment protection in existing technologies

Support message storage options on a per user basis

Support simultaneous email integrations on a per user basis

Support simultaneous PBX integrations

Support integration with third-party PBXs

Support integration with other VPIM2 and AMIS-compliant messaging systems

Support multiple languages and multiple time zones

Scale from 25 to 200 subscribers on a single server

Bidder should confirm compliance with above-listed requirements and describe the architecture of the proposed unified messaging and communications solution, addressing each of the requirements set forth above.

6.3.2 IVR Functionality

The unified messaging and communications solution must provide IVR functionality as a standard feature. IVR functionality must provide the following minimum features:

Multiple level menus and associated decision trees for automated call processing and connection (e.g., automated attendant functionality)

Dial-by-Extension or Dial-by-Name Capabilities

Ability to record different greetings or announcements for automatic playback base on day, night, weekend, and holiday operation.

Multi-lingual capabilities allowing pre-selection of a language based on different access numbers or allow callers to select a language using menu prompts.

Ability to create applications that can read and write to and from external databases

An easy-to-use graphical management tool to build applications (e.g., database queries, recorded messages, branching, etc.).

Ability to create and automatically deliver customized reports on any part of an application

Optional Enhancement to Basic IVR function

Automatic speech recognition so the user can respond via speech or DTMF keys

Convert textual data to speech in real time

Bidder should confirm compliance with the above requirements and describe the IVR capabilities.

6.3.3 Group Mailboxes

It must be possible to configure a Group Mailbox so that multiple users can share a single mailbox in the system. Bidder should confirm compliance and describe this capability.

6.3.4 Guest Mailboxes

The solution must allow a subscriber to create guest mailboxes which will allow his guest to access his/her guest mailbox via the TUI to send, receive, answer, and delete voice messages with other guests of the subscriber. Bidder should confirm compliance of this required system feature.

6.3.5 Broadcast Messaging and Distribution Lists

The solution must provide broadcast messaging based on subscriber profile criteria and standard distribution list containing user names. Bidder should confirm compliance and describe these capabilities.

6.3.6 Dial Plan Support

The solution must support a multitude of dial plan requirements. Bidder should confirm compliance and describe this support.

6.3.7 LDAP Support

The unified messaging and communications solution must include Lightweight Directory Access Protocol (LDAP) as a means to interface with a central directory and other enterprise directories. Bidder should confirm compliance and describe this support.

6.3.8 System Administration

The unified messaging and communications solution must provide a web-based system administration tool and enable the following capabilities:

System and User Administration

Service and Audit Logs

System/User Reporting

Backup/Restore

Security Requirements, including but not limited to, different levels of system administration, external call restriction categories, failed access attempts, subscriber password, password expiration, uniqueness and trivial check

Bidder should confirm compliance and describe the web-based system administration tool provided addressing each of the requirements set forth above.

6.3.9 Management Reporting

The unified messaging and communications solution must provide a management reporting interface and functionality. Bidder should confirm compliance and briefly describe standard reporting capabilities.

6.3.9.1 Custom Report Generation

The unified messaging and communications solution should provide the ability to create customized subscriber activity and system utilization reports. Describe the reports available and report generation process.

6.3.9.2 Report Scheduling

The unified messaging and communications solution must support ad hoc and scheduled reporting. Bidder should confirm compliance and describe how reports are scheduled.

6.3.9.3 Data Export

The unified messaging and communications solution must be able to export reports. Bidder should confirm compliance and describe the formats available to export reports.

6.4 User Requirements

6.4.1 User Interface Requirements

The solution must provide the following interfaces:

Telephone access as a standard user interface with access to the features listed below in the requirement below

Web access as a standard user feature with the ability to administer their personal mailbox and handle messages via a standard browser. This web-based tool must provide the following functionality for the user:

- Password Administration
- Time Schedules
- Outcalling Definitions
- Greeting Settings
- Call Forwarding Options
- Short cut keys
- Mail client
- GUI email access for unified messaging and communications features

Bidder should confirm compliance, and describe each of the above user interface capabilities and feature access.

6.4.2 Voice Messaging User Feature Requirements

The solution must provide the user with a rich set of standard voice messaging features accessible via the phone. The solution must be capable of supporting, at a minimum, the user features set forth in the table below.

The Bidder should complete the Standard User Feature table. In the Comply column, state whether the feature is supported. ("Y" = Yes and "N" = No). In the Comments column, Bidder should provide:
 Any explanation for non-compliance (for example, expected in a future release)
 Identification of optional features not included in the proposed configuration
 Any explanation of feature access or functionality that the Bidder considers critical information for State Bar

User Feature	Comply (Y/N)	Comments
<i>Inbox</i>		
Message Waiting Indication		
Message Header with Caller Information, Date and Time		
Message Queue for different media types (that is, Voice, Email and Fax)		

User Feature	Comply (Y/N)	Comments
Listening to Messages and Playback Options		
Listen to voice message		
Listen to email message via TTS		
Listen to email message attachment via TTS		
Interrupt, Continue, Fast forward / Rewind message playback or Skip a message (to previous/next)		
Repeat message playback with header information		
Jump to end or beginning during message playback		
Automatic message playback		
Confirm message recipient after playing outgoing message		
Output fax or email message to default printer or fax device		
Listen to or skip message header and Repeat, Jump to Next or Jump to Previous message header		
Save or delete message		
Restore deleted messages prior to ending current session		
Reply to message sender or Reply to All (sends reply to all other message recipients)		
Forward message with/without comment		
<i>Recording Messages</i>		
Record, Review and Send Message, including review of message content and recipients		
Message / Greeting recording		
Jump directly to recording process		
Pause, resume, re-record, stop, delete, review or review last 8 seconds of recording		
Change, add, delete, correct and confirm message recipients		
Send message including marking message send options		
<i>Message Send Options</i>		
Regular Delivery		
Mark message urgent		

User Feature	Comply (Y/N)	Comments
Mark message private		
Send message later (future delivery)		
Send message later periodically (for example, weekly/monthly)		
Return Receipt Required		
Message Delivery — Enter number, distribution list or dial-by-name		
Delete Message Delivery prior to ending session		
<i>Personal Distribution Lists</i>		
Create, edit or delete		
Set or modify code number for distribution list		
Add or delete subscriber numbers		
Repeat subscriber number entry		
Scroll through distribution lists		
Scroll through the subscriber list of a distribution list		
Record distribution list name		
Check subscriber numbers		
Create, edit or delete public distribution list if authorized		
<i>Notification Functions (Outcalling)</i>		
Set/define/change outcalling destinations		
Sequential notifications to multiple devices (for example, cell phone, pager, home phone, etc).		
Configure a primary and alternative device destinations for cascade outcalling		
Configurable number of times to call a device if it is busy or does not answer		
Set/define/change message notification options including the subscriber's capability to configure the days and times to receive notification.		
Subscriber ability to configure which message types trigger outcalling (i.e. voice-only, email, fax) and also include only urgent messages, selectively.		
<i>Call Forwarding</i>		
Activate/deactivate call forwarding		
Change call forwarding number		
Find-me/Follow-me Forwarding		

User Feature	Comply (Y/N)	Comments
Set/change/deactivate mobility number call forwarding		
Set/change/deactivate referral extension		
Set/change/deactivate mailbox		
<i>Greetings</i>		
Set, record or change greetings		
Busy line greeting		
Internal greeting		
External greeting		
All caller greeting		
Today's greeting		
After hours greeting		
Assign codes to all greetings		
Message service: Greeting only (no message can be left), Allow/disallow greeting interruption		
Record name (can be set to record name when logging on for the first time)		
<i>Connecting to subscribers</i>		
Enter and call subscriber number		
Correct subscriber number		
Connect to operator (for example, zero out)		
<i>General Features</i>		
Help		
Return to the main menu		
Message filtering		
Set which message types (voice mails, fax messages or emails) should be processed		
Set whether only new or new and old messages should be processed with retrieving messages via telephone		
Reverse playback order (FIFO or LIFO)		
Activate/deactivate continuous automatic message playback		
Voice Prompt Options: Abbreviated, Standard, Multi-lingual		
Shortcut Keys: Allows keys on keypad to be assigned a keystroke sequence to be automatically executed rather		

User Feature	Comply (Y/N)	Comments
then navigating through manually		
Change telephone password (PIN)		
Change of PIN after defined period of time		

6.5 Unified Messaging Features

Unified Messaging features available for selection with the solution should include the following features and capabilities.

6.5.1 Licensing Flexibility

The proposed unified messaging and communications solution must allow and support flexible licensing for various types of functionality on a user-by-user, group-by-group, department-by-department, etc., basis. For example, State Bar requires the ability to choose which users are deployed with voice-only feature functionality and which users are deployed with unified messaging or unified communication capabilities. Bidder should confirm compliance with this flexibility requirement and describe how this capability is provided with the solution.

6.5.2 Email Integration Flexibility

The proposed unified messaging and communications solution should provide the option to support simultaneous integration to multiple email systems and email clients in a mixed environment (Exchange, Lotus, GroupWise, IMAP, POP3, SMTP). Bidder should confirm compliance and describe the solution's email integration capabilities.

6.5.3 Unified Inbox

The unified messaging and communications solution must support unified inbox functionalities, allowing voice, email and fax messages to be accessed and retrieved from a single mailbox. Bidder should confirm compliance and describe the unified mailbox functionalities. State Bar's current email platform is GroupWise V8.

6.5.4 Media Flexibility

The unified messaging and communications solution must provide the unified messaging subscriber media flexibility and the ability to choose the most appropriate medium to receive and reply to their messages. Bidder should confirm compliance and describe how this unified messaging feature is supported.

6.5.5 Fax Messaging Option

The unified messaging and communications solution must support options for either an integrated fax solution or connection to an external State Bar-provided fax. Bidder should confirm compliance with this requirement and describe the fax capabilities supported with the proposed solution.

6.5.6 Text-to-Speech Option

The unified messaging and communications solution must support a Text-to-Speech option. Bidder should confirm compliance and describe how this feature is supported.

6.5.7 Speech Recognition and Voice Dialing Option

The unified messaging and communications solution must support a Speech Recognition and Voice Dialing option. Bidder should confirm compliance and describe how this feature is supported.

SECTION 7 CONTACT CENTER SOLUTIONS

7.1 Contact Center Solutions

State Bar's State Bar contact center requires flexible call control, comprehensive management, desktop options, reporting and options for multi-media, CRM, workforce planning and quality assurance solutions. The bidder must demonstrate expertise in design, implementation and support.

The proposed solution must efficiently and economically route, queue and distribute calls in response to the following contact center characteristics:

Requirement	Place "X" in appropriate box for required feature or <i>number to be supported</i>					
Capacity	Agents	15	Supervisors	5	Network sites	0
Routing	Group-based		Skills-based	x	Custom	
Management	Single application	x	Real-time views	x	User-defined reports	x
Reporting	Statistical	x	Cumulative	x	Custom	
Desktop	Telephone client	x	FT Agent soft client	x	PT Agent soft client	
Media	Callback	x	Email	x	Internet chat	x
Options	Voice announcement	x	Digit collection	x	Message board(s)	
	Agent recording		Workforce planning		IVR ¹	
	CRM Integration ²		S/W development kits			

-
- ¹ Specify minimum number of ports and call flows and database interface requirements, and describe features requirements (e.g., call routing, announcements, self-service, CTI integration, messaging, speech recognition, etc.).
 - ² Specify integration required (e.g., Microsoft CRM, Siebel, SAP, etc.)

Describe solution capabilities, with emphasis on how State Bar's operations will increase State Bar loyalty, agent satisfaction and retention.

7.2 State Bar Contact Center Solution Overview

7.2.1 Application Suite

Contact Center application must provide synchronized updates of PBX and ACD database and multiple routing options as standard features, and fully integrated multi-media support, multi-site networking and remote ACD agents as options. Provide an overview of State Bar Contact Center Offering.

7.2.2 Required and Optional Features

At a minimum, the proposed solution must be able to provide:

- Intelligent routing of State Bar contacts based on group routing or agent skills and preferences, caller ID, dialed number and call volumes with priority queuing
- Single GUI-based management with visual, click-and-drag configuration and real-time reconfiguration
- User-customizable real-time and statistical reporting for contact center activities

Basic system features must also include application programming interfaces (APIs) for integration with optional call prompting and interactive voice response systems in order to provide estimated wait time announcements, self-service and call routing.

Optional features must include:

- Fully integrated Call Processor software that can 'front end' incoming voice calls with automated announcements, caller navigation menus and digit collection
- Agent GUI desktop application with integrated call handling and contact information, performance feedback and real-time presence and collaboration tools
- Message-board support
- Interfaces to third-party applications

Describe basic and optional features.

7.3 Call Control

Describe call routing capabilities, including ability to route on multiple criteria and to provide back-up routing. Call routing capabilities must include routing on:

- Caller preferences
- Caller media choice (e.g., voice; email; outbound, including imported lists; web collaboration)
- Caller input and/or database lookup
- Specific agents
- Agent skills
- Skill preferences
- Real-time conditions and/or performance criteria
- Blended inbound and outbound contacts
- Multi-site load balancing

Describe call control methodology and how the system balances caller time in queue with best agent/skill match.

7.3.1 Integrated Internet and Circuit-switched Routing

The solution must be able to handle Internet and circuit-switched contacts in the same “logical” queue, even if the two types of contacts are physically queued in separate devices. This feature will ensure that, all other things being equal, neither type of call will have priority over the other.

7.3.2 Optional Data Directed Routing

The solution must be able to adjust routing for real-time conditions. Describe the solution's business rules or performance routing capabilities. Also define custom routing or CTI integration for intelligent routing inherent in the contact center solution.

7.3.3 Mobile Solutions

The system must be capable of supporting mobility for agents and supervisors. Provide a brief overview of options available and proposed.

7.4 System Management

The proposed solution must provide a single, easy-to-use, GUI-based desktop management tools for system administration and contact center managers. The solution must provide:

- Visual multi-media call flow configuration tool
- Ability to reconfigure call flows without taking application out of service
- Ability to adjust configuration parameters based on real-time conditions (e.g., number of agents available for email, outbound dialing, web collaboration, if appropriate)
- Ability to configure integrated message prompts, performance messages and digit collection

- Configuration synchronization with associated PBX
- Real-time system reliability and IT monitoring

Provide an overview of the system management tool. Disclose if more than one license or PC is required for the system management desktop.

7.4.1 Integrated Supervisor Client

The Supervisor desktop application must provide ability to view performance in summary and detailed levels. Supervisors must be able to monitor specific agents and enter an on-going call. As standard features, supervisors must also be able to:

- Define alarms and alerts for monitoring contact center performance
- Requeue calls in response to real-time conditions
- Reserve calls for specific agents
- Change priority of multiple calls simultaneously

Describe supervisor desktop capabilities.

7.4.2 Supervisor Customization Capabilities

Supervisors must be able to sign on at different workstation locations while retaining customized settings. Describe the customization capabilities of the Supervisor desktop application.

7.4.3 Reporting Capabilities

Any contact center Supervisor must be able to:

- Access real-time and historical reports from a single interface across the local and wide area networks
- Adjust the amount of detail provided and order in which information is presented in standard report templates
- Create an unlimited number of real-time, cumulative and historical reports

The supervisor should be able to “drill down” on an item appearing in a real-time or historical report to view additional information on a selected agent.

Describe user interface.

7.4.4 Real-time Reporting

The Supervisor desktop application must provide ability to view real-time performance in summary and detailed levels. Information displays must provide agent, group and queue status, as well as active contact status. Supervisors must be able to monitor specific agents or groups, and view information for a user-specified period.

Describe real-time reporting and monitoring capabilities.

7.4.5 Agent States Reporting

The proposed solution must be able to track time spent by agents in several distinct states (i.e., time logged on, time on ACD calls, time in post-call work state, time available for calls, time on break, time on hold, etc.). The system must be able to report on the actual times (time stamps) that an agent logged onto and off the system, whether the agent is working locally or remotely.

7.4.6 Historical Reporting

Historical reports must cover agents, groups and queues (including abandoned and answered contacts). The system must be able to record all call “events” (i.e., routing, transfers, connections, etc.), all agent “events” (i.e., calls in, calls out, transfers, reason codes, dialed numbers, etc.) and their durations from the time a call enters the contact center system until it is disconnected.

Reports must be available online or be generated on a scheduled basis. Provide historical reporting overview and list the titles of standard contact center reports, along with a brief description of their content, for the reports pertaining to media (i.e., voice, callback, email or chat) included in the proposed solution. Describe any customization options.

7.4.7 Statistical Database

A single database must maintain all call records and be ODBC-compliant, allowing access to all data elements. Describe maximum storage capacities.

7.4.8 Supervisor Multi-media Features

In a multi-media implementation, the Supervisor desktop application must allow supervisors, as a standard feature, to:

- Define a single view to monitor all contacts in queue (voice, callback, email and web interactions)
- Monitor the success of outbound contacts
- Perform quality monitoring and coaching (e.g., silent coaching for voice contacts and barge-in of email and Internet contacts)

Describe multi-media features.

7.5 Agent Position

7.5.1 Agent Endpoint Client

The agent endpoint client must support high-volume call handling operations. The agent endpoint must provide pre-programmed buttons to control answering position status (e.g., available, post-call work state, logged-on or off, etc.) and visually indicate the status at the answering position. The agent endpoint client must follow the log-on ID with specific agent parameters (including personal extension) and be independent of the physical location of the endpoint client.

As an option, a single, integrated Windows-based agent desktop client can handle multi-media transactions. The application must provide multiple agent types to support part-time agents or

non-call center resources. Agents can sign on at different workstation locations while retaining customized settings.

Describe endpoint client alternatives.

7.5.2 Agent Performance Display

Standard features of the agent desktop application must include the ability to view an agent's individual contact center performance, including the following individual agent performance information:

- Status of the Agent's queue
- Number of callers in queue
- Oldest call in queue
- Type of call
- Caller ID (ANI when available)
- Source of overflowed calls
- Length of time the caller was in queue

7.5.3 Agent Desktop

The agent desktop must provide telephony features via softphone functionality. The agent should have access to pull down transfer lists (including status of other agents), as well as hot key and mouse access to telephony functions. Agent desktop softphone must work with State Bar-provided PC software. Describe agent desktop softphone and collaboration tools.

7.5.4 Synchronized Call and Data Transfer

The Contact Center requires synchronized call/data transfer to another agent. Describe call transfer capabilities.

7.6 Contact Center Architecture

The proposed contact center solution must be modular, scalable and capable of supporting numerous configurations, ranging from the number of agent and supervisor workstations, system administrators, IVR ports or voice prompting channels.

7.6.1 Software and Hardware Architecture

Describe the software and hardware architecture of the proposed State Bar interaction solution, including integration with real-time IP system and licensing requirements.

7.6.2 Voice over IP Contact Center

The proposed call center application must support both packet-switched and circuit-switched calls. The proposed solution must support a Voice over IP contact center without affecting users or requiring additional contact center hardware and software (other than IP endpoints).

7.6.3 State Bar-provided Equipment

Define requirements for any State Bar-provided equipment (servers, PC desktops or ACD printers).

7.7 Contact Center Options

The system must support:

- Multiple media interfaces such as voice announcements to callers, integrated self-service systems and wallboards
- Interface to third-party contact center applications, such as CRM and quality monitoring systems

Provide a brief overview of options available.

7.7.1 State Bar Interaction Solutions

The system must be capable of:

- Providing voice announcements to callers, including queue-specific information
- Supporting wallboards
- Integrating with interactive voice response system, with description of design tools/environment for IVR script development; the method used to test applications and changes; the method of putting changes into production; and any speech recognition capabilities

State ability to meet requirements listed immediately above, and provide a brief overview of options available and proposed.

SECTION 8 STATE BAR SUPPORT

8.1 Implementation Process

The bidder must have a defined implementation process ensuring installation quality assurance. The process should have defined steps with meeting milestones covering all critical elements of the implementation. Describe implementation process.

8.2 Implementation Team

Describe the key team members responsible for the implementation of the proposed solution, including the roles of the team members. Bidder should also describe their ability to provide expertise on a global or regional basis. Upon award of contract, bidder will provide a master project schedule, identifying the tasks the bidder and State Bar will perform.

8.3 Bidder Implementation Responsibilities

Charges for necessary implementation services should be included in the total implementation price of the proposed solution. Briefly describe bidder implementation services included and optional services available.

8.4 State Bar Implementation Responsibilities

State Bar will provide cabling to the MDF and network infrastructure to support VoIP in accordance with bidder-defined network requirements. Describe other State Bar implementation responsibilities.

8.5 Training Requirements

The successful bidder will conduct end-user training, tailored specifically to the proposed components (e.g., telephone user, soft client user, attendant position, etc. as appropriate). Describe end-user training available and identify what is included in the proposed solution.

Indicate if a multi-media browser-based training tool is available for endpoints as well as voice messaging. Describe the feature set of the training tool. This would be utilized for new system training and ongoing refresher or new-hire training.

For administrators, the bidder should support both online training and off-site classroom training. Describe online and off-site training capabilities. Briefly describe any recommended administrator classes.

8.6 Facility Requirements

Summarize space, weight, temperature, heat dissipation, humidity and electrical requirements for the proposed solution.

8.7 Support Resources

All maintenance during the warranty period and under any maintenance agreements shall be performed by the successful bidding organization using personnel approved by the bidder and at no additional cost to State Bar other than those charges identified in the applicable warranty/maintenance agreement.

During and after warranty, the bidder must support the State Bar through a 24-hour a day, 7-day a week support center, as well as online service capabilities. The bidder should also be capable of providing local on-site support. Describe your support process, defining:

- Support center capabilities
- Remote service and MAC capabilities from your support center
- Any online (web) service request capabilities available to the State Bar
- Local on-site service capabilities

8.8 Post-Installation Support

Briefly describe the various maintenance programs and options available following the warranty period. Identify which programs and/or options have been proposed. Bidder should include a copy of its standard warranty and maintenance terms in the appropriate section of the response.

SECTION 9 CONFIGURATION, PRICING AND TERMS AND CONDITIONS

9.1 Configuration/Pricing

Describe the pricing methodology and itemize all charges for individually identifiable components of the proposed solution, including all associated installation, programming and cabling costs. The purchase price excludes estimated freight and sales taxes.

9.3 Standard Terms and Conditions

The bidder shall include a copy of standard terms and conditions applicable to the proposed solution as part of the Response to RFP.

SECTION 10 APPENDICES

The bidder shall include such other materials as required to supplement information contained in other sections of this Response to RFP.