# REQUEST FOR PROPOSAL (RFP) # 28187-KK
## UNIFIED COMMUNICATIONS CONSULTING AND MANAGED SERVICES

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 INTRODUCTION:</td>
<td>..........................................................</td>
<td>3</td>
</tr>
<tr>
<td>2.0 PREPARING AND SUBMITTING A PROPOSAL:</td>
<td>..........................................................</td>
<td>8</td>
</tr>
<tr>
<td>3.0 EVALUATION AND CONTRACT AWARD</td>
<td>..........................................................</td>
<td>12</td>
</tr>
<tr>
<td>4.0 GENERAL PROPOSAL REQUIREMENTS:</td>
<td>..........................................................</td>
<td>14</td>
</tr>
<tr>
<td>5.0 MANDATORY REQUIREMENTS:</td>
<td>..........................................................</td>
<td>15</td>
</tr>
<tr>
<td>6.0 TECHNICAL REQUIREMENTS</td>
<td>..........................................................</td>
<td>16</td>
</tr>
<tr>
<td>7.0 COST PROPOSAL</td>
<td>..........................................................</td>
<td>17</td>
</tr>
<tr>
<td>8.0 REQUIRED FORMS</td>
<td>..........................................................</td>
<td>18</td>
</tr>
</tbody>
</table>
DEFINITIONS:

The following definitions of terms shall apply, unless otherwise indicated:

“Contract” means written agreement between the State and Contractor(s) that covers the delivery of work to be performed subsequent to this RFP.

“Contract Administrator” means the individual in DOA’s Division of Enterprise Technology (DET) responsible for administering day-to-day operational matters of the Contract.

“Contract Manager” means the individual in the State Bureau of Procurement (SBOP) responsible for managing this RFP and subsequent contractual issues.

“Contractor” means a proposer that is awarded a Contract under this RFP and its employees or other personnel (including officers, agents and subcontractors) provided by the Contractor to perform work under this Contract.

“Cooperative Purchasing” means Wisconsin statutes (s. 16.73, Wis. Stats.) establish authority to allow Wisconsin municipalities to purchase from state contracts. A “municipality” is defined as any county, city, village, town, school district, board of school directors, sewer district, drainage district, vocational, technical and adult education district, or any other public body having authority to award public contracts (s. 16.70(8), Wis. Stats.). Federally recognized Indian tribes and bands in this state may participate in cooperative purchasing with the state or any municipality under ss. 66.0301(1) and (2), Wis. Stats.

“Department” means the Department of Administration.

“DET” means Division of Enterprise Technology.

“DOA” means Department of Administration, State of Wisconsin.

“DVB” means Disabled Veteran-Owned Business.

“ITIL” means Information Technology Infrastructure Library.

“MBE” means Minority Business Enterprise.

“Proposal” means the complete response of a proposer submitted on the approved forms and setting forth the proposer’s prices for providing the services described in the RFP.

“Proposer” means any individual, company, corporation, or other entity that responds to this RFP.

“RFP” means Request for Proposal.

“SLA” means Service Level Agreement.

“SOW” means Statement of Work.

RFP #28187-KK Unified Communications Consulting and Managed Services
“State” means the State of Wisconsin.

“SBOP” means State Bureau of Procurement.

“Subcontractor” means any entity that enters into any agreement with the Contractor to fulfill the requirements and performance obligations of the Contract.

“UC” means Unified Communication.

“Unified Communications” is the realization of converging technologies integrating voice, video, conferencing, messaging, and collaboration across multiple platforms, applications, and locations through one common service.

“VoIP” means Voice over internet protocol.

1.0 INTRODUCTION:
The purpose of this Request for Proposal (RFP) is to provide interested parties with information to enable them to prepare and submit a proposal for Unified Communications (UC) consulting and managed services. It is not for the procurement of UC service itself or any type of hardware or software. The Department of Administration (DOA), Division of Enterprise Technology (DET), as represented by the DOA State Bureau of Procurement, intends to use the results of this solicitation to award multiple contracts for consulting and managed services.

The contracts will be used to procure a wide variety of UC related services. Specifically this request for proposal will establish UC related vendor contract(s) to procure unified communication consulting and managed services including business analysis, network and voice application technical expertise, project management and support services to develop telephony system business cases, UC cost and return on investment (ROI) analysis, system architecture, technology conversion and vendor management services.

The State will solicit individual quotes for service as projects are conceptualized and defined. The individual projects and requests for services will vary in size and nature (e.g. groups with less than 10 lines to groups over 10,000 lines). The State may utilize any or all of the resource categories listed in section 1.3 within a project, which will be executed as a separate Statement of Work (SOW) for users of the Contract.

DET is working with state agencies and local governments to develop a Wisconsin UC strategy that will address technology changes in telephony, communication and collaboration services. Establishing a Unified Communication roadmap will assist Wisconsin government to maintain viable communication tools and control costs.

The Unified Communications Enterprise Strategy has three main business goals:

1. Technology Upgrade: The need to replace legacy phone technologies and contracts.
2. Increase Productivity: The need to realize gains made through communication integration.
3. Maintain Financial Neutrality: The need to maintain costs at or below current investment rates for telephony services.

1.1 Scope and Objectives
DET intends to make transition from analog telephony to voice over internet protocol (VoIP) telephony and UC services as seamless as possible for the State agencies. The primary objectives of this solicitation are to establish Contract(s) that includes:

1) Range of consulting services related to UC technology including gathering business requirements, understanding industry trends, developing use cases, ROI, standardization and implementation strategies.

2) Managed services for VoIP and UC deployments including hosted, UC as a service, hybrid and on premise solutions.

3) Technical expertise to design and architect voice, communication and collaboration solutions for a diverse government community.

4) Technical expertise to develop interoperability strategies and technical solutions.

5) Project management services to transition the State agencies from analog voice to VoIP and UC services.

6) Seamless integration with existing support and ITIL based incident, request and change processes.

7) Contract analysis reducing complexity of products, licensing options and licensing costs.

8) Optimize Wisconsin enterprise shared service initiatives to develop UC service offerings reducing the complexity and diversity of products, skills and staffing.

9) Consolidated and simplified invoice process with raw data and readable data available through a web portal and invoices that contain every phone number and service being paid.
1.2 Background and Goals
The State of Wisconsin currently has over 40,000 Centrex lines and 20,000 voicemail boxes. Some government entities have already implemented voice over IP (VoIP) and UC services for reasons ranging from new facility planning, cost savings and improved communication toolsets. These projects are providing the State of Wisconsin an enterprise perspective to address security and efficiencies in network design, licensing, support and contract management.

<table>
<thead>
<tr>
<th>Current Wisconsin UC Assessments</th>
<th>Future Wisconsin UC Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Cisco hosted and on premise solutions</td>
<td>• Offer a highly scalable and full-function UC service offering</td>
</tr>
<tr>
<td>• Microsoft Lync online via Office 365</td>
<td>• Voice over IP (VoIP)</td>
</tr>
<tr>
<td>• Hybrid UC Voice and Microsoft Lync</td>
<td>• Unified Messaging (Voicemail to email)</td>
</tr>
<tr>
<td>• Managed UC Voice Services</td>
<td>• Presence and Instant Messaging</td>
</tr>
<tr>
<td></td>
<td>• Web Sharing and Collaboration Tools</td>
</tr>
</tbody>
</table>

1.3 Resource Categories and Deliverables

<table>
<thead>
<tr>
<th>Resource Category</th>
<th>Deliverables and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Services</td>
<td>• Managed services for VoIP and UC deployments including hosted, UC as a service, hybrid and on premise solutions</td>
</tr>
<tr>
<td></td>
<td>• Market analysis of industry trends and vendor products</td>
</tr>
<tr>
<td></td>
<td>• Vendor performance and quality of service assessments</td>
</tr>
<tr>
<td></td>
<td>• Business case development for individual customers and projects</td>
</tr>
<tr>
<td></td>
<td>• Return on investment (ROI) assessment including software, hardware, licensing, staff and responsibility transfers</td>
</tr>
<tr>
<td></td>
<td>• Project management services and methodology</td>
</tr>
<tr>
<td></td>
<td>• Integration with agency support and DET ITIL based processes</td>
</tr>
<tr>
<td></td>
<td>• Risk management and mitigation strategy</td>
</tr>
<tr>
<td>Technology</td>
<td>• Technical architecture and Engineering expertise for VoIP and UC service infrastructure configuration including hosted, UC as a service, hybrid and on premise solutions</td>
</tr>
</tbody>
</table>
|                   | • Develop interoperability strategies and technical
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>Project plan template, Project management methodology, VOIP and UC project experience</td>
</tr>
<tr>
<td>Communications</td>
<td>Standard communication plan framework</td>
</tr>
<tr>
<td>Process Management</td>
<td>Service support framework</td>
</tr>
<tr>
<td>IT Contracts and IT Budget</td>
<td>Provide analysis and recommendations for optimized state telephony contracts, Assist in the development of a rate structure which maintains predictable costs for service</td>
</tr>
</tbody>
</table>

1.4 Procuring and Contracting Agency
This RFP is issued by the DOA, State Bureau of Procurement, which is the sole point of contact for the State of Wisconsin during the selection process. The person responsible for managing the procurement process is Karl Kearns.

1.5 Clarifications and/or Revisions to Specification and Requirements
If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the Proposer should immediately notify Karl Kearns at karl.kearns@wisconsin.gov via e-mail (no phone calls)

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, supplements or revisions will be provided to all Proposers via VendorNet.

Proposers are encouraged to log into the RFP website on VendorNet periodically during the RFP process. The person who is registered for the Proposer on VendorNet should get an email any time a change is made to the website. However, this only applies to the person who is registered on VendorNet on the date that the RFP is released. Anyone who registers after the release date of the RFP will not receive any automatic emails from VendorNet for this RFP.

1.6 Contact with State Personnel
From the date of release of this RFP until a notice of intent to award the Contract is issued, all contacts with state employees, and other personnel performing official business for the state under contract, regarding this RFP shall be made through Karl Kearns. Contact with other state personnel regarding this RFP is not permitted during the procurement process and violation of these conditions may be considered sufficient cause for automatic rejection of a Proposal.
1.7 News Releases
News releases pertaining to the RFP or to the acceptance, rejection, or evaluation of Proposals shall not be made without the prior written approval of the State.

1.8 Proposer Conference and Site Visit
A Proposer conference may be conducted. Dates and times have not been determined.

1.9 Reasonable Accommodations
The State will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you need accommodations, contact Karl Kearns at karl.kearns@wisconsin.gov.

1.10 Calendar of Events
Listed below are important dates and times by which actions related to this RFP shall be completed. In the event that the State finds it necessary to change any of these dates and times it will do so by issuing a supplement to this RFP.

<table>
<thead>
<tr>
<th>DATE</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 6, 2015</td>
<td>RFP Issuance</td>
</tr>
<tr>
<td>March 19, 2015, 5:00pm CST</td>
<td>Due date for vendor written questions</td>
</tr>
<tr>
<td>Week of March 23, 2015</td>
<td>State response to vendor written questions</td>
</tr>
<tr>
<td>April 14, 2015, 2:00pm CST</td>
<td>Proposals due</td>
</tr>
<tr>
<td>May Be Conducted (TBD)</td>
<td>Proposer Conference and Site Visit</td>
</tr>
</tbody>
</table>

1.11 Contract Term
The Contract shall be a three (3) year period (initial term) and may be renewed for up to two (2) additional one (1) year periods if mutually agreeable to the Contractor and the State. All conditions remain unchanged during any renewal period(s) unless changes are mutually agreed to by the State and Contractor in writing.

1.12 Incurring Costs
The State of Wisconsin is not liable for any cost incurred by a Proposer in the process of responding to this RFP.

1.13 Retention of Rights
The State retains the right to accept or reject any or all Proposals if deemed to be in its best interests.

All Proposals become the property of DOA upon receipt. All rights, title and interest in all materials and ideas prepared by the Proposer for the Proposal to DOA shall be the exclusive property of DOA and may be used by the State at its option.

1.14 No Obligation to Contract
This State reserves the right to cancel this RFP for any reason prior to the issuance of a notice of intent to award. The State does not guarantee to purchase any specific quantity or dollar amount. Proposals that stipulate that the State shall guarantee a specific quantity or dollar amount will be disqualified.
1.15 VendorNet Registration

Only proposers registered with the State of Wisconsin’s VendorNet will receive future official notice for this service/commodity. The State of Wisconsin’s purchasing information and proposer notification service is available to all businesses and organizations that want to sell to the State. Anyone may access VendorNet on the Internet at http://VendorNet.state.wi.us/VendorNet/default.asp to get information on state purchasing practices and policies, goods and services that the State buys, and tips on selling to the State. Proposers may use the same Web site address for inclusion on the Proposers list for goods and services that the organization wants to sell to the State. A subscription with notification guarantees the organization will receive an e-mail message each time a State agency, including any campus of the University of Wisconsin System, posts a request for bid or a request for proposal in their designated commodity/service area(s) with an estimated value over $50,000. Organizations without Internet access receive paper copies in the mail. Increasingly, State agencies also are using VendorNet to post simplified bids valued at $50,000 or less. Proposers also may receive e-mail notices of these simplified bid opportunities.

1.16 Appeals Procedures

The appeals procedure applies to only those requests for bids or proposals for services that are greater than $50,000. Notices of intent to protest must be made in writing. Protestors should make their protests as specific as possible and shall identify statutes and Wisconsin Administrative Code provisions that are alleged to have been violated.

The written notice of intent to protest the intent to award a contract must be filed with:

<table>
<thead>
<tr>
<th>USPS ADDRESS</th>
<th>COMMON CARRIER ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rick S. Hughes, Director</td>
<td>Rick S. Hughes, Director</td>
</tr>
<tr>
<td>DOA/Bureau of Procurement</td>
<td>DOA/Bureau of Procurement</td>
</tr>
<tr>
<td>PO Box 7867</td>
<td>101 E Wilson Street, 6th Floor</td>
</tr>
<tr>
<td>Madison, WI 53707-7867</td>
<td>Madison, WI 53703</td>
</tr>
</tbody>
</table>

and received in his office no later than five (5) working days after the notice(s) of intent to award are issued.

The written protest must be received in his/her office no later than ten (10) working days after the notice(s) of intent to award are issued.

The decision of the head of the procuring agency may be appealed to the Secretary of the Department of Administration within five (5) working days of issuance, with a copy of such appeal filed with the procuring agency, and provided the appeal alleges a violation of a statute or a provision of the Wisconsin Administrative Code.

2.0 PREPARING AND SUBMITTING A PROPOSAL:

2.1 General Instructions

The evaluation and selection of a Contractor will be based on the information submitted in the Proposal plus references, and any on-site visits or best and final offers (BAFOs) where requested. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.
2.2 Submitting a Proposal
Proposer shall submit a total of five (5) hard copies of their Proposal with one (1) copy labeled original; one (1) cost sheet shall be submitted as a separate, sealed document and also labeled original. Include one electronic copy via CD.

All materials required for acceptance of the Proposal by the deadline must be sent to:

<table>
<thead>
<tr>
<th>USPS ADDRESS</th>
<th>COMMON CARRIER ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karl Kearns, Procurement Manager</td>
<td>Karl Kearns, Procurement Manager</td>
</tr>
<tr>
<td>State Bureau of Procurement</td>
<td>State Bureau of Procurement</td>
</tr>
<tr>
<td>Wisconsin Department of Administration</td>
<td>Wisconsin Department of Administration</td>
</tr>
<tr>
<td>PO Box 7867</td>
<td>101 East Wilson Street, 6th Floor</td>
</tr>
<tr>
<td>Madison, Wisconsin 53707-7867</td>
<td>Madison, Wisconsin 53703-3405</td>
</tr>
</tbody>
</table>

Proposals shall be received by the above office no later than 2:00 p.m. CST on April 14, 2015. All Proposals shall be date and time-stamped in by the State Bureau of Procurement Office on or prior to the stated opening date and time. Proposals not so stamped will be considered late. Late proposals will not be evaluated and shall be returned to the proposer unopened.

Receipt of a Proposal by the State mail system does not constitute receipt of a Proposal by the State Bureau of Procurement for purposes of this RFP.

All Proposals shall show the following information on the outside of the package:

- **Proposer's** (Company) Name and Address
- **RFP Title**: Unified Communications Consulting & Managed Services
- **RFP Number**: 28173-KK
- **Name of Procurement Manager**: Karl Kearns
- **RFP Due Date and Time**: April 14, 2015 at 2:00 p.m. CST

No mention of the cost proposal is permissible in the response to any other section of the Proposal.

2.3 Proposal Organization and Format
Proposers responding to this RFP must comply with the following format requirements. The State reserves the right to exclude any responses from consideration that do not follow the required format as instructed below.

Proposals shall be organized and presented in the order and by the numbers assigned in the RFP with each heading and subheading should be separated by tabs or otherwise clearly marked.

**Tab 1 - Table of Contents**
Provide a table of contents for the proposal.

**Tab 2 - RFP Signature Page**
Complete and sign the Signature Page – (DOA-3261(R05/2014)).

**Tab 3 - Transmittal Letter**
RFP #28187-KK Unified Communications Consulting and Managed Services
The transmittal letter must be written on the Proposer’s official business stationery and signed by an official authorized to legally bind the Proposer. Include in the letter:

1. Name and title of Proposer representative;
2. Name and address of company;
3. Telephone number, fax number, and email address;
4. RFP number and title;
5. An itemization of all materials and enclosures submitted in response to the RFP;
6. A confirmation that all RFP amendments have been reviewed by the Proposer; if none have been posted, include a statement to that effect;
7. A statement that the Proposer believes its Proposal meets all the requirements set forth in the RFP;
8. A statement indicating that the Proposer understands and agrees that it has an affirmative duty to inquire about and seek clarification of any question or other item in the RFP that Proposer does not fully understand or that Proposer reasonably believes is susceptible to more than one interpretation;
9. A statement that the Proposer's organization or an agent of the Proposer's organization has arrived at the prices and discounts without consultation, communication or agreement with any other respondent or with any competitor for the purpose of restricting competition;
10. A statement that the prices, discounts, or margins quoted in the response have not been knowingly disclosed by the Proposer's organization or by any agent of the Proposer's organization and will not be knowingly disclosed by same, directly or indirectly, to any other respondent or to any competitor;
11. A statement that no attempt has been made or will be made by the Proposer's organization or by any agent of the Proposer's organization to induce any other person or firm to submit or not to submit a response for the purpose of restricting competition;
12. A statement acknowledging the Proposal conforms to all rights of the State including procurement rules and procedures articulated in this RFP, all rights terms and conditions specified in this RFP;
13. A statement acknowledging that the Proposer agrees to adhere to all terms and conditions of this RFP;
14. A statement that the individual signing the Proposal is authorized to make decisions as to the prices quoted and that she/he has not participated and will not participate in any action contrary to the RFP;
15. A statement of the Proposer’s assurance the Proposal will remain in full force and effect for at least one hundred eight (180) days from the Proposal due date.
16. A statement that the Proposer is an expert in the types of systems, functions and tasks proposed and understand that the State will be relying on this expertise.
17. A statement that the Proposer will be making a number of representations outside of its formal Proposal document in, possibly, discussions, presentations, negotiations, demonstrations, sales
or reference material and other information-providing interactions and as such hereby warrants that the State can rely on these as inducements into any subsequent contract, and be made a part thereof.

**Tab 4 - Response to Mandatory Requirements**
Include here Attachment A: Response to Mandatory Requirements.

**Tab 5 - Response to General Requirements**
Provide a point-by-point response to each requirement specified in Section 4.0 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in this RFP.

**Tab 6 - Response to Technical Requirements**
Provide a point-by-point response to each requirement specified in Section 6.0 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in this RFP.

**Tab 7 – Service Level Agreements (SLA)**
Provide sample SLA’s your organization has used on similar projects for consulting and managed services. SLA’s will be agreed upon during contract negotiations.

**Tab 8 – Contract**
Review and respond to the Contract the State expects to execute with awarded vendors provided as Attachment B – Contract Terms & Conditions. **Vendors may not submit their own agreement as a substitute for responding to Attachment B.**

**Tab 9 – Required Forms: Section 8.**
Include here the completed forms required in the RFP.

**Under Separate Cover - Cost Proposal Information**
Provide all cost information on Attachment D: Cost Sheet according to the instructions provided. Include all costs for furnishing the product(s) and/or service(s) included in this proposal. Identify all assumptions. Failure to provide any requested information in the prescribed format may result in disqualification of the proposal. Identify on a separate word document attached to your cost sheet a detailed description of each category that you are submitting a price on.

No mention of the cost proposal is permissible in the response to any other section of this Request for Proposal.

**2.4 Multiple Proposals**
Multiple Proposals from a Proposer will be permissible; however, each Proposal must conform fully to the requirements for proposal submission. Each such Proposal must be submitted separately and labeled as Proposal #1, Proposal #2, etc. on each page included in the response.

**2.5 Withdrawal of Proposals**
Proposals shall be irrevocable until contract award unless the proposal is withdrawn. Proposers may withdraw a proposal in writing at any time up to the proposal closing date and time if received by the RFP manager. To accomplish this, the written request must be signed by an authorized representative of the Proposer and submitted to the RFP manager. If a previously submitted proposal is withdrawn
before the proposal due date and time, the Proposer may submit another proposal at any time up to the proposal closing date and time.

2.6 Security Procedures, Bid Receipt
The Department of Administration has established new building security policies and procedures at the 101 East Wilson Street address in Madison. There is a security checkpoint in the first floor lobby. All visitors are required to provide current identification and sign in for a visitor’s pass. Security personnel will call the intended state employee prior to the visitor being allowed to proceed to their destination in the DOA building.

This new policy will affect the timing for hand-deliveries of bids, proposals and other time-sensitive packages. However, properly credentialed package delivery couriers (e.g. UPS, FedEx, etc) will be allowed to proceed without obtaining a pass. If you intend to hand-deliver your bid or proposal, please plan additional time to account for the security process to be completed. Packages cannot be date/time stamped at the security desk on the lobby level and security personnel will not sign for deliveries; the package must be date/time stamped by the office identified in the bid/proposal. The bid due date and time will not be adjusted to accommodate tardiness due to the new processes, nor will any exceptions to the due date and time be made. The State is not responsible for deliveries that do not reach their destination by the required due date and time.

2.7 Proposer References
Using the attached form, DOA-3478, provide at least three (3) references for organizations with whom your company has provided similar services over the last five (5) years. Include a contact name, telephone number, and a clear, concise description of the project.

The SBOP will determine which, if any, references are contacted to assess the quality of work performed. The results of any reference checks will be provided to the evaluation committee for this RFP and will be used when scoring the written proposal.

3.0 EVALUATION AND CONTRACT AWARD

3.1 Preliminary Evaluation
The proposals will first be reviewed to determine if they contain the required forms, meet the submittal instructions and meet all mandatory requirements. Failure to meet mandatory requirements will result in proposal rejection. In the event that no proposer meets a specified requirement(s), the State reserves the right to continue the evaluation of the proposals and to select the proposal most closely meeting the requirements specified in this RFP.

3.2 Proposal Scoring
Accepted proposals will be reviewed by an evaluation team and scored against the stated criteria. A proposer may not contact any member of an evaluation team except at the State’s direction. Proposals from certified Minority Business Enterprises (MBE) and/or Disabled Veteran Owned Businesses (DVB) may have points weighted by a factor of 1.00 to 1.05 to provide up to a five percent (5%) preference to these businesses (s. 16.75 (3m), Wis. Stats., 2001-02). The evaluation team’s scoring shall be tabulated and proposals ranked based on numerical scores received.

Should the State conduct any oral presentations or demonstrations, the evaluation team will review the initial scoring and make adjustments based on the information obtained in the oral presentation or RFP #28187-KK Unified Communications Consulting and Managed Services
demonstration, site visits and reference checks to determine final scoring. The State will select the highest scoring proposal(s).

The evaluation committee must award at least 560 points for the General and Technical Requirements Sections prior to having the cost proposal scored. A proposal that receives less than 560 points on these sections will be ineligible for further consideration and their cost proposals will not be opened.

### 3.3 Evaluation Criteria

The proposals will be scored using the following criteria:

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Requirements</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td>Technical Requirements</td>
<td>600</td>
<td>60%</td>
</tr>
<tr>
<td>Cost</td>
<td>200</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,000</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Results of reference checks will be used to clarify and substantiate information in the written proposals. The reference results shall then be considered when scoring the responses to the general and technical requirements in the RFP.

The points stated above are the maximum amount awarded for each category. Evaluation guidelines have been established for each of these sections.

The lowest cost proposal will receive the maximum number of points available for the cost category. Other cost proposals will receive prorated scores based on the proportion that the costs of the proposals vary from the lowest cost proposal.

Calculation of points awarded to subsequent proposals will use the lowest average hourly rate as a constant numerator and the average hourly rates of other proposer’s being scored as the denominator. The result is then multiplied by 200 points to calculate a cost score.

\[
\text{Lowest Proposed Average Hourly Rate (Constant)} \times \frac{\text{Other Proposer’s Average Hourly Rate (Denominator)}}{} = \text{awarded points}
\]

### 3.4 Proposer Presentations

Top scoring proposer(s) based on an evaluation of the written proposal may be required to participate in interviews and/or site visits to support and clarify their proposals if requested by the State. The State will make every reasonable attempt to schedule each presentation at a time and location agreeable to the proposer. Failure of a proposer to interview or permit a site visit on the date scheduled may result in rejection of the proposer’s proposal.

### 3.5 Award and Final Offers

The State will compile the final scores for all sections of each responsive proposal. Multiple awards will be granted in one of two ways. The awards will be granted to the highest scoring responsive and responsible proposers. Alternatively, the highest scoring proposer or proposers may be requested to RFP #28187-KK Unified Communications Consulting and Managed Services
submit final and best offers. If final and best offers are requested by the State and submitted by the proposers, they will be evaluated against the stated criteria, scored and ranked by the evaluation committee. Multiple awards then will be granted to the highest scoring Proposers. However, a Proposer should not expect that the State will request a final and best offer.

3.6 Offer in Effect for 180 Days
A Proposal may not be modified, withdrawn or canceled by the proposer for a 180-day period following the deadline for proposal submission as defined in the Calendar of Events, or receipt of best and final offer, if required, and Proposer so agrees in submitting the proposal.

3.7 Right to Reject Proposals and Negotiate Contract Terms
The State reserves the right to negotiate the terms of the contract, including the award amount, with the selected Proposer prior to entering into a contract. If substantial progress is not made in contract negotiations with the highest scoring Proposer, the State may choose to cancel the first award and commence negotiations with the next highest scoring respondent.

3.8 Notification of Intent to Award
Proposers will be notified in writing of the State's intent to award the contract resulting from this RFP.

4.0 GENERAL PROPOSAL REQUIREMENTS:
The purpose of this section is to provide the State with a basis for determining a Proposer’s capability to undertake this Contract.

Responses to this Section 4.0 will be scored.

4.1 Staff Qualifications and Processes

4.1.1 Provide an organizational chart that identifies key personnel from your company who will be assigned to these projects. For each staff person of the key personnel, attach a resume and brief description of experience with a project similar to that described in this RFP.

4.1.2 Provide an organizational chart that identifies appropriate staff for issue escalation to resolve problems between the State and the Contractor during the Contract. For each staff person in the escalation, attach a resume and brief description of experience with a project similar to that described in this RFP.

4.2 Organizational Capabilities

4.2.1 Describe your company’s experience providing telephony, VoIP and UC consulting services and managed services similar to those required by this RFP to customers of comparable size, scope and circumstance.

4.2.2 Describe your company’s experience with up to 5 clients (public and/or private sector) with over 1,000 employees where the scope of work performed was similar to that requested in this RFP.

4.3 Staff Deficiencies
4.3.1 Describe how your organization will mitigate staffing or subject matter expertise deficiencies.

5.0 MANDATORY REQUIREMENTS:
The following requirements in Sections 5.1 and 5.2 are mandatory and the Proposer must satisfy them at no additional cost to the State. Responses to mandatory requirements in Sections 5.1 and 5.2 must indicate that the Proposer either “YES” we can certify we can meet mandatory requirements or “NO” we cannot certify we can meet mandatory requirements using Attachment A: Response to Mandatory Requirements. No explanation is required, as non-compliance with any of the following requirements will result in proposal rejection and remove that Proposal from further consideration.

In the event there is an individual mandatory requirement that no Proposer is able to meet, the State reserves the right to eliminate that individual mandatory requirement; in such case, the State shall continue the evaluation of Proposals and select the Proposal that most closely meets the remaining requirements specified in the RFP. All mandatory requirements are minimums that must be followed with each project unless otherwise stated.

5.1 Mandatory Proposer Qualifications

5.1.1 Proposer must have at least five (5) years of experience in telephony, Unified Communication industries and consulting services.

5.1.2 Proposer must have experience with 1,000+ seat VoIP implementations.

5.1.3 Staff involved within the scope of any project must have at least three years of experience in one or more telephony, VoIP, UC related services including network and voice application technical architecture, market trends and industry standards, business case development, ROI analysis or project management.

5.1.4 Proposer must have knowledge and three years’ experience managing Microsoft Lync and/or Cisco Unified Communications Manager implementations.

5.2 Mandatory Contract Performance Requirements

5.2.1 Pursuant to 2009 Wisconsin Act 136 [§16.705(1r), Wis. Stats.], these services must only be performed within the boundaries of the United States. The inability to perform services in the United States shall be grounds for disqualifying your proposal for this contract.

5.2.2 Contractor must agree to provide deliverables and services within the resource categories identified in Section 1.3 Resource Categories, Deliverables and Services.

5.2.3 Contractor must assist the State to complete information gathering process and analysis of the business requirements, processes, practices, roles and responsibilities for each project.
5.2.4 Contractor must work with the DET project management team to develop and carry out a communication plan to announce projects to key agency stakeholders. The communication plan must include, at a minimum, best practices to encourage technology adoption, ensure minimal disruption and to build trust with State personnel.

5.2.5 Contractor must maintain regular and ongoing communication with the State project team and provide advice, consultation and written opinions/recommendations as needed.

5.2.6 Contractor must agree that any work products developed as part of the project (e.g. all written reports, drafts, presentation and meeting materials, survey data, tools and associated methodologies, etc.) will remain the property of the State.

5.2.7 Contractor must provide on-site services for each project/engagement, at a minimum:
- Initial kick-off meeting
- Up to two (2) additional presentations if requested
- Final meeting and presentation, summarizing all project activities and recommendations

6.0 TECHNICAL REQUIREMENTS
A critical objective of this engagement is to produce a repeatable methodology DET can use to successfully onboard agencies to UC technologies.

Responses to this Section 6.0 will be scored.

6.1.1 Describe the managed services your company offers and the UC technology and products provided to customers.

6.1.2 Describe the technical expertise your company offers in the fields of VoIP, UC and supporting network designs. Provide example(s) of the technical roles offered to customers and description of the solution or outcome.

6.1.3 Provide an example of an infrastructure deployment your company managed indicating the service model (hosted, UC as a service, hybrid or on premise) and the size and type of customer.

6.1.4 Provide an example where your company developed an interoperability strategy and technical solution to integrate with another application platform (i.e. directory, email, voicemail, SharePoint).

6.1.5 Does your organization have experience with early detection and mitigation of TDoS/DDoS attacks to the communications environment? Describe situations where you have used this experience or expertise?

6.1.6 Does your organization have experience integrating SIP providers into the VoIP/UC solutions? Describe your experience and advantages and disadvantages of SIP vs. PRI interfaces for the PSTN.
6.1.7 Provide one (1) example each of a project charter, business requirement assessment and technical solution proposal produced on behalf of another client organization with needs similar to those described in this RFP.

6.1.8 Describe the methods your company uses to identify risks to a project’s success and the strategies to mitigate them. Include a brief, illustrative example where these methods and strategies have been applied.

6.1.9 Describe your company experience to develop use cases and adoption strategies with needs similar to those described in this RFP.

6.1.10 Provide one (1) example of a communication plan produced on behalf of another client organization with needs similar to those described in this RFP.

6.1.11 Provide a detailed illustrative example(s) of work products provided to clients with similar needs (e.g. website screen shots, Frequently Asked Questions (FAQs), etc.).

6.1.12 Describe the support services your company offers to managed service customers. Include examples of integrated support procedures with a customer service desk, tracking response time to tickets, escalation process, and methods for contacting the company for assistance and/or requests (phone, email, web interface, etc.).

6.1.13 Describe your experience providing vendor contract, licensing and budget analysis on behalf of customers.

6.1.14 Describe your company’s consulting areas of expertise. What makes your company an expert in your respective field(s), and how do you differentiate yourself in the market?

6.1.15 Describe your company’s experience developing service models, rates and billing/invoicing structures for service providers (i.e. on premise solutions).

7.0 COST PROPOSAL

7.1 General Instructions for Preparing Cost Proposals
Proposer must use Attachment D: Cost Sheets to submit the cost proposal as instructed in Section 2.3.

7.2 Project Cost
Contractor’s and any subcontractors’ travel expenses (e.g. airfare, lodging, and meals, insurance) and other miscellaneous expenses related to the provision of on-site services must be included in the proposed cost and cannot be an additional charge.

Contractor’s expenses related to providing on-site services (e.g. computer, printer, miscellaneous equipment) must be included in the proposed cost and cannot be an additional charge.

DET will coordinate and provide any requisite meeting space for on-site services.
Proposer is required to complete all fields on the cost sheet. Failure to properly complete the cost sheet will result in disqualification of the proposal.

### 7.3 Price Clarifications
The State reserves the right to clarify any pricing discrepancies related to assumptions on the part of the Proposers. Such clarifications will be solely to provide consistent assumptions from which an accurate cost comparison can be achieved.

### 8.0 REQUIRED FORMS
The following forms shall be completed and submitted with the Proposal in accordance with the instructions given in Section 2.3.

- Vendor Information (DOA-3477)
- Vendor Reference (DOA-3478)
- Designation of Confidential and Proprietary Information (DOA-3027)
- Cooperative Agreement Form (DOA-3333)
- Attachment A – Response to Mandatory Requirements
- Attachment B – Contract Terms & Conditions
- Attachment C - RFP Signature Page (DOA-3261)
- Attachment D: – Cost Sheet