

REQUEST FOR PROPOSAL #219

VOICE COMMUNICATION SYSTEM

This is a Request for Proposal (“RFP”) to purchase hardware, software and services to help the Office of the Auditor General of Canada (“OAG”) upgrade and/or replace its main telephone system with the intention replacing the core, end of life, call controller before December 31, 2013; and reusing as much of the other existing equipment as functionally possible. The OAG **will not** acquire a managed service and/or a hosted solution.

The OAG will consider entering into a contract with the proponent that provides the proposal rated as best value as determined using the evaluation criteria described in Section 4, “Basis and Method of Evaluation”.

This Request for Proposal, in addition to this covering note, consists of the following:

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Should you have any questions, please contact the undersigned by telephone at 613-952-0213 extension 4284 or by email at trevor.clark@oag-bvg.gc.ca

Yours sincerely,

Trevor Clark

Senior Contracting Officer

SECTION 1

1 RFP GENERAL INSTRUCTIONS AND CONDITIONS

1.1 The proposal **must** be received at the following address no later than 2:00 p.m., Ottawa time on **21 August 2013**. Note that proposal packages must be received at the Mail Scanning Room in the CD Howe Building and proponents should make appropriate time allowances for this process.

Office of the OAG of Canada
Contract & Procurement Services
240 Sparks Street—CD Howe Building
Main Scanning Room S-143; S-1 Level
Ottawa, Ontario K1A 0G6

Contracting Authority:
Trevor Clark
Contract and Procurement Services
Telephone: 613-952-0213 extension 4284
Fax: 613-957-9735
Email: trevor.clark@oag-bvg.gc.ca; gx-contracting-c@oag-bvg.gc.ca

1.2 Format of Proposal

- 1.2.1 Five (5) copies of the Technical Proposal and one (1) copy of the Financial Proposal **must** be submitted. The medium for all original proposal data should be 8 ½" x 11" paper, printed double-sided. Fonts used shall not be smaller than 11 point with margins of a minimum size of 1 inch top, bottom, left and right.
- 1.2.2 One (1) additional copy of the Technical Proposal and one (1) additional copy of the Financial Proposal are to be submitted in electronic format. Copy should be in PDF format on an electronic storage medium (e.g., memory stick, CD ROM).
- 1.2.3 Financial Proposals are to be submitted in a separate, easily identified envelope. Both the Financial and Technical Proposals shall be submitted together as one package. The outside of the package is to clearly identify the name and address of the submitting firm. The package should be clearly labelled "**RFP No. 219 – Voice Communication System**".
- 1.2.4 Proponents have the sole responsibility for the timely receipt of the proposal by OAG. Late proposals will be returned unopened. Proponents shall prepare a proposal addressing all the requirements as stated within this RFP.

1.3 As part of Appendix A of their proposal, Proponents **must** certify the following:

- a. Proponent's Procurement Business Number (PBN) and/or GST/HST number;
- b. Legal name of Proponent, company address, telephone and fax number;
- c. Point of contact for proposal: the name of the point of contact, telephone, fax number and email address.

- d. Confirmation that the proposal submitted in response to this RFP is valid in all respects, including price, for a period of not less than one hundred and twenty (120) days from the closing date of the RFP.

1.4 The proposal **must** be organized as prescribed, and use the proposed numbering scheme, as described in Section 3.1.

1.5 The use of Internet-links to answer RFP questions is prohibited. Links to websites and other Internet information will not be reviewed and hence not be evaluated by the OAG.

1.6 Electronic transmission of the proposal by such means as electronic mail or facsimile will not be accepted.

1.7 The OAG may cancel the proposal call at any time without further obligation to the proponents.

1.8 The OAG may ask the proponents to substantiate any claims made in their proposals.

1.9 If a proponent feels that the requirements stipulated are unnecessarily restrictive in any way and wishes to deviate from the requirements, the proponent must give a detailed explanation as to why such a deviation is being proposed. The OAG is not obligated to accept any proposed deviations.

1.10 The cost of preparing the proposal will not be reimbursed by the OAG.

1.11 Any amendment by the OAG to this RFP shall be in writing.

1.12 The proposal will be evaluated as described in Section 4. The proponent **must** comply with the mandatory and rated requirements. Failure to comply with any mandatory requirement will render the proposal non-compliant and it will receive no further consideration.

1.13 The requirements of the Federal Proponent's Program for Employment Equity may apply to this RFP (refer to Appendix A of this RFP).

1.14 Proposals received in response to this request shall become the property of the OAG and will not be returned.

1.15 Enquiries:

1.15.1 All enquiries concerning this procurement **must** be submitted in writing by facsimile or electronic mail to the OAG Contracting Authority identified previously (sub-section 1.1)

1.15.2 Enquiries **must** be received by the OAG Contracting Authority no less than fifteen (15) working days prior to the bid closing date (per sub-section 1.1 above) to ensure sufficient time to provide a response. The OAG will not reply to any enquiries received after that time.

1.15.3 Proponents should reference as accurately as possible the numbered item or section of the RFP to which the question applies. Care should be taken by the proponents to explain each question in sufficient detail in order to enable the OAG to provide an accurate answer.

1.15.4 To ensure consistency and quality of information provided to proponents, the Contracting Authority will simultaneously provide, through buyandsell.gc.ca, any information with respect to significant enquiries received and the replies to such enquiries without revealing the sources of the enquiries.

1.15.5 All enquiries and other communications with OAG officials pertinent to the Request for Proposal throughout the solicitation period are to be directed **ONLY** to the Contracting Authority named herein (per sub-section 1.1). Noncompliance with this condition during the bid solicitation period may, for that reason alone, result in disqualification of a proponent's proposal.

1.16 Should sufficient questions be raised, a Proponent's conference may be held on OAG premises. Should a Proponent's conference be held, notification will be provided on buyandsell.gc.ca of the date, time and location of the conference.

1.17 This RFP constitutes the entire understanding of the work required; in the event of any differences between the RFP and proponent submitted documents, the RFP will govern. Submitting a bid with terms and conditions that differ from the expectations set out in this RFP may cause the OAG to consider the bid non-responsive.

1.18 After the successful proponent is selected, a contract will be entered into (issued) based on the services described in this RFP.

1.1 DEFINITIONS AND ACRONYMS

1.1.1 DEFINITIONS

Definitions are capitalized throughout and are for the purposes of this document and RFP process only and not for any other purpose.

"Equipment" means all hardware, firmware and/or software necessary to Implement the Voice Communication System.

"Implement"/"Implementation"/"Implemented" means design, manage project, pilot, document, install, configure, program, test, certify and/or commission or any other activity to ensure the delivery of item in question is fully functional to the OAG's satisfaction and industry standards. The cost of all Implementation activities is the responsibility of the Successful Proponent.

"include" /"includes"/"including" means "include without limitation", "includes without limitation" and "including without limitation", respectively, and the words following "include", "includes" or "including" will not be considered to set forth an exhaustive list.

"Proponent" means an individual, a corporation, proponent, joint venture, association, pension fund or a consortium of any of the foregoing that may submit or that has submitted a Proposal.

"Services" means the services required to Implement the Equipment for the Voice Communication System.

"Solution" means Equipment and Services.

"Successful Proponent" means the Proponent who has entered into the Contract with the OAG to Implement the Voice Communication System.

"Voice Communication System" is comprised of, but not limited to, the Equipment and Services necessary to Implement the Voice Communication System Project as prescribed by the requirements of this RFP.

1.1.2 Acronyms

"EOL" means end of life.

“LAN” means local-area-network.

“IP” means internet protocol.

“MD” means manufacturer discontinued.

“MTBF” means mean time between failures.

“OAG” means the Office of the Auditor General of Canada.

“PBX” means Private Branch Exchange.

“QoS” means quality-of-service.

“SLA” means service level Agreement.

“SMDR” means station message detail recording.

“VLAN” means virtual LAN.

“VCS” means Voice Communication System.

“WAN” means wide area network.

SECTION 2

2 STATEMENT OF WORK

2.1 BACKGROUND

2.1.1 The Office of the Auditor General of Canada (OAG) is an independent and reliable source of the objective, fact-based information that the Parliament of Canada needs to fulfill one of its most important roles: holding the federal government accountable for its stewardship of public funds. The OAG audits departments and agencies, most Crown Corporations, and many other federal organizations; it is also the auditor for the governments of Nunavut, the Yukon, and the Northwest Territories. The OAG has approximately 530 staff in Ottawa and 90 staff in regional offices, located in Vancouver, Edmonton, Montreal and Halifax.

2.1.2 The OAG is organized into one (1) Executive Office, ten (10) audit groups, one (1) Professional Practices group and one (1) audit services group (i.e. Finance, HR, IT). The standard office hours are Monday to Friday, 7AM to 6PM – except federal holidays. The OAG expects little to no organizational growth over the next few years. The OAG has a standard set of telephony and telephony-related requirements to drive its business.

2.1.3 The OAG audits federal government operations and provides Parliament with independent information, advice, and assurance regarding the federal government's stewardship of public funds. We conduct performance audits of federal departments and agencies, annual financial audits of the government's financial statements, and special examinations and annual financial audits of Crown corporations. Since 1995, the OAG has also had a specific environmental and sustainable development mandate, established through amendments to the Auditor General Act. Our audit findings—which include good practices, areas requiring attention, and recommendations for improvement—are reported to Parliament.

2.2 CURRENT ENVIRONMENT

2.2.1 Telephony

2.2.1.1 From a telephony environment perspective, the OAG corporate phone network is a mixture of analogue and digital phones, controlled by a Mitel SX200 private-branch-exchange telephone switch, and hard lines (e.g., Centrex) servicing the regions, some Ottawa staff and other legacy OAG telephone and fax needs. Although the system “works”, the corporate phone network has a variety of challenges associated with it, in the areas of optimized workflow, configuration, administration, and life-cycle/maintenance. In particular, the Mitel call control equipment is virtually unsupportable/ un-maintainable and the regional Centrex services are not only a significant “sunk cost” but they do not integrate well to provide the OAG with a comprehensive, homogenous, corporate phone system (e.g., numbering plan and voice-mail). Voice-mail services are provided to the Ottawa staff via a modern IP-based system. Apart from the call controller, the OAG would like to maximize the value and extend the life of some of the other equipment (including licenses).

2.2.1.2 On the staff mobility front, the OAG has 315 Blackberry devices in operation; these devices are largely deployed to senior staff, the offsite audit teams and some service staff. Related to this, and not widely deployed, the OAG have a few “rocket-sticks” to allow staff to connect their lap-tops computers to the internet while at (remote) client sites. On a daily basis The OAG has 50 to 100 users connected via VPN.

2.2.1.3 These factors drive up the risk profile, costs and staff effectiveness of continued operations using the existing phone system. The current telephony environment includes the following equipment:

- 1 Mitel SX-2000 Light PBX
- 1 SX-2000 Light DSU Node
- 2 Mitel SX-2000 Peripheral Nodes
- 1 Mitel Nupoint Standard Edition (voicemail)
- 600 phone lines – Superset 4025 – Ottawa Office
 - 560 Desk Phones
 - 25 Meeting Room Phones
 - 15 Public Phones
- 100 Centrex and other phone lines (at the regional locations)
- 46 Digital Line Cards
- 4 COV Line Cards
- 3 Superconsoles 2000
- 3 Interalia RAD (Auto-attendant & Help Desk Messages)
- 18 Ports Nupoint 70IP (voicemail)
- ~300 Blackberries
- 10 Polycom HDX 8000 HD (including one CMA 4000 and RMX 2000) – Video Conferencing
- Maintenance services for the Mitel SX-2000 and Mitel Nupoint

2.2.1.4 The Mitel SX2000 is connected to 2 PRI's with 46 trunks for inbound/outbound traffic connected to 10 analogue trunks for overflow.

2.2.2 Information Technology

2.2.2.1 The OAG Local Area Network is composed at its edge of HP ProCurve 2910 al (non-PoE1Gb/s interfaces) that service over 500 clients in the Ottawa 240 Sparks office. The OAG has another 100 clients in four regional offices (Montreal, Halifax, Edmonton, and Vancouver). The server infrastructure consists of mostly Microsoft Windows Server 2008 R2, virtualized at about 80% with VMWare 5.0. The OAG has a disaster recovery site that hosts a subset of the environment in case of disaster.

2.2.2.2 The OAG's corporate applications are located and managed centrally from the Ottawa Office and serve the Regions through dedicated high-speed wide area network links between the Regional Offices. All Internet connections request from the Regional Offices are channelled through our InterGov connections to Ottawa and then to the Internet. All connections between the Main Office, the Regional Offices and the Internet are done through the Government of Canada SCNet. The bandwidth access is as follow:

- Ottawa Main Office (appx. 530 employees)
 - 20 Mbps connection to the Internet
 - 40 Mbps connection to InterGov
- Disaster Recovery Site

- 20 Mbps connection to the Internet
- 30 Mbps connection to InterGov
- Halifax (10 employees)
 - 10 Mbps connection to InterGov
- Montreal (25 employees)
 - 10 Mbps connection to InterGov
- Edmonton (12 employees)
 - 10 Mbps connection to InterGov
- Vancouver (20 employees)
 - 10 Mbps connection to InterGov

2.2.2.3 As the cost of adding bandwidth is fairly prohibitive, the Proponent must **clearly** indicate the bandwidth requirements of the proposed solution. In cases where the Proponent's Solution requires additional bandwidth, the OAG will add the cost of the additional bandwidth into the Proponent's final financial proposal.

2.2.2.4 The OAG is currently migrating from Windows XP to Windows 7. The office suite is Microsoft Office 2007, soon to be migrated to Office 2010. The Auditor General runs Microsoft Lync 2010 as its unified messaging product of choice and all OAG internal users authenticate to the network through Microsoft Active Directory (AD). The OAG currently has the following Microsoft Client Access License Profile:

- 80 - LyncSVrEnCAL SNGL SA MVL UsrCAL
- 570 – LyncSVrEnCAL SNGL LicSAPk MVL UsrCAL
- 80 - LyncSVrPlusCAL SNGL SA MVL UsrCAL
- 650 - LyncSvrStdCAL SNGL SA MVL UsrCAL
- 1 – LyncSvrStd LicSA SNGL MVL

2.3 PURPOSE

2.3.1 The purpose of this RFP is to acquire hardware, software, maintenance support and Implementation services. The OAG **will not** acquire a managed service and/or a hosted solution.

This RFP covers two distinct purposes:

1. VCS Project which is an upgrade and/or a replacement of the main telephone system in Ottawa.
 - Reusing any equipment (hardware, software and/or licenses) that may help lower capital cost, minimize migration risk yet meets the requirements, including long-term viability, as outlined in this RFP.
2. For the OAG to *understand* the Proponent's solution to:
 - integrate the OAG regional offices using the VCS, and;
 - provide value-added applications for unified communications, teleworkers, mobile workers, and conferencing (audio and video) using the VCS or any other existing software.

2.3.2 This document describes the Voice Communication System Project with a detailed scope outlined in Section 3 and mandatory requirements in Section 4. All Proponents must respond to

the mandatory and rated criteria as outlined in this RFP to ensure their proposal is deemed compliant. While the OAG will not consider a managed service and/or a hosted solution, Proponents are encouraged to provide other alternate solutions that meet the intent of requirements where better value or increased operational effectiveness can be realized.

2.3.3 Any resulting contract from this RFP for hardware, software and maintenance services is expected to be valid for 5 years. The OAG reserves the right to purchase maintenance for up to two (2) additional two (2) year periods.

2.4 DESCRIPTION AND SCOPE OF WORK

2.4.1 Voice Communication System

2.4.1.1 The Voice Communication System (VCS) Project includes all of the Equipment and Implementation services necessary to provide a Voice-over-IP communications network serving the staff, meeting rooms and public spaces at the Ottawa location – 240 Sparks Street. Any prospective Proponent must be authorized /certified to provide and Implement the required Equipment from the manufacturer.

2.4.1.2 The OAG expects that the Equipment will be functional and be fully integrated into its current architecture once the proponent completes its work. The proponent is to provide for sufficient training to end-users and administrators so that OAG staff can effectively use and maintain the proposed solution.

2.4.2 Security and Privacy

2.4.2.1 A *Threat and Risk Assessment (TRA)* and a *Privacy Impact Assessment (PIA)* will be conducted in respect of the winning solution during the Pilot phase. The OAG reserves the right to validate the compliance with security standards for encryption methodology and secure deployment of the winning solution prior to authorizing payment. The OAG also reserves the right to **reject** the proposed solution or to require correction by the proponent should any part of the solution provided not be to the OAG's satisfaction. The Proponent shall also assume all costs associated with the correction(s).

2.4.3 Accessibility, Accommodations and Adaptive Technology

2.4.3.1 As per Treasury Board of Canada Secretariat (TBS) Policy on the Duty to Accommodate Persons with Disabilities in the Federal Public Service, the OAG is dedicated to assist in the integration into the workplace of employees with disabilities, injuries and ergonomic requirements who require access to systems, programs, information, computers and computer resources. Consequently, any proposed solution **must** also incorporate Adaptive Technology, which '*consists of work-related devices or equipment that allow employees with disabilities to participate as fully as possible in the workplace and include items such as magnification software and hardware, voice recognition software and augmentative communication devices*'.¹

2.4.3.2 In the current environment, the OAG provides a Centrex-based TeleTYpe service (TTY), which is offered to the people calling into the Office who are culturally deaf, orally deaf, deafened and/or hard of hearing.

¹ <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12541§ion=text>

2.4.4 Demonstration

2.4.4.1 Proponents meeting the Mandatory Requirements (Section 4.1) will be invited to demonstrate their proposed solution. The demonstration will consist of two (2) phases:

Phase 1: Proponents must prove in the demonstration that their proposed solution meets all of the Mandatory Technical Requirements as stated in their proposal (see Section 2.5).

Phase 2: Proponents are to demonstrate how their proposed Solution performs against the following Rated Technical Requirements (Section 2.6.2): TR-01 to TR-26. For greater clarity, the Proponents will be asked to present their Solution against the following agenda:

- Solution Overview
- Demonstration of the Solution Additions: Value Added Applications (TR-23 to TR-26)
- Review and validate Pilot approach
- Review project plan as presented by the project manager
- Review and validate the migration strategy
- Further clarifications to Proponent's RFP submission

2.4.4.2 Demonstrations will be limited to 3 hours and will take place on OAG premises. Should this not be possible, special arrangements may be considered, for example the demonstration could be held via web conference.

2.4.4.3 Demonstrations are expected to take place during the two weeks following the request closing date. The OAG will provide proponents a minimum of 5 days notice of when their demonstration will take place. The OAG will have limited flexibility with the schedule once it has been established. As part of their proposal, proponents are encouraged to indicate any limitations to their calendars.

2.4.5 Pilot Phase

2.4.5.1 In order to ensure that the best possible solution is selected and to minimize disruptions to the staff, the OAG intends to roll-out the new system in phases. Consequently, as part of the proposal, the Successful Proponent is expected to implement a Pilot, which is a scaled down version of the VCS, to prove functionality and integration with the OAG's IT systems. The intention is to choose one (1) OAG group among the ten (10) audit groups to pilot the new system. The pilot is expected to last a minimum of three (3) weeks. During this period, users will provide feedback on the usability of the system and the OAG technical team will assess the responses and perform tests against the mandatory requirements, the requirements listed in Appendix C, and the Acceptance criteria listed in Appendix D.

2.4.5.2 The Successful Proponent must document all results of the pilot. To pass the pilot phase, the Successful Proponent must achieve a score of **at least 75% (225/300)** against the Acceptance criteria listed in Appendix D. As part of the documentation, the Successful Proponent must also include a resolution plan for any VCS Implementation issues arising from the pilot.

2.4.5.3 The OAG reserves the right **to terminate** the contract with the Successful Proponent if major and/or irresolvable issues arise from the pilot. Should this occur, the OAG reserves the right to ask the second runner-up to pilot their proposed solution. All costs associated with the pilot, including integration of other components, shall be borne by the Proponent.

2.4.5.4 The goals of the pilot are, but are not limited, to evaluate the proposed solution's voice quality, feature richness and network integration. The OAG expects the pilot to provide the Successful Proponent with a platform to "showcase" device options. In addition, it is expected that migrating to VoIP service should be a seamless and efficient transition. Consequently, the Successful Proponent should be able to easily integrate the OAG's existing service with VoIP so that our network operations are minimally affected during the migration process.

2.4.5.5 Once a successful pilot phase has been completed, the OAG, with support from the Successful Proponent, will determine how the final product should be delivered to the rest of the organization (i.e. in distinct phases or in just one phase).

2.4.6 Solution Overview

2.4.6.1 Hi-Level VCS Architecture

2.4.6.1.1 The VCS will provide all IP-based voice call processing and telephony features for OAG Staff, meeting rooms and house phones. The main controller, located in Ottawa, will connect to the LAN to aggregate all internal VoIP OAG traffic; and connect to the outside telephony circuits for external access to the public switched telephone network (PSTN). The long-term vision is that the VCS will form part of an overall system for all Ottawa-based and regional staff at the OAG's offices across Canada. The eventual solution will naturally harmonize the number plan, have a common voice-mail system and simplify telephony-based administration and operations.

2.4.6.2 The VCS Design Narrative

The Base Voice Communication System

2.4.6.2.1 The proposed solution for the OAG is an IP-based VCS that includes a variety of highly resilient and virtualized corporate-wide telephony services, which will be controlled from the main data centre in Ottawa; and distributed by the OAG's existing LAN infrastructure (refer to Section 2.2.2). Considerations have been made in this RFP for a virtualized PBX for resiliency in-case the main voice/call controller fails. The VCS Implemented in Ottawa will connect to the PSTN via existing PRI circuits and digital services delivered by Bell Canada – all corporate traffic destined to the (PSTN) will route through these circuits. For added resiliency, the OAG is currently investigating SIP-trunks to connect the virtual-PBX to the PSTN. The Proponent will be asked to provide input to these requirements during the Implementation of the VCS. For added reliability all controllers shall come with dual power supplies and fan units. Analog lines will be provisioned in-case of WAN (PSTN and/or Internet) issues.

2.4.6.2.2 The VCS solution shall include a high-value full-featured and flexible unified messaging solution, which has the capability to eventually extend to the regional sites for a harmonized messaging solution. The solution should allow users to manage all forms of messages, including voicemail, email and fax, from the interface that suits them best: desk phone, mobile device or computer. The solution should improve call flow and can offload reception from routine calls with auto-attendant. Some other features the messaging solution should have include: personal call routing; the ability to send, receive, forward, save, and sort voice and fax messages from the user's computer; and integrates with the existing Microsoft Active Directory infrastructure.

2.4.6.3 VCS Value Added Applications

Regional Office Voice Communication System

2.4.6.3.1 As noted in Paragraph 2.2.1.1, the OAG has four regional sites mainly using Centrex for voice communication services. The Proponent will be asked to describe how the VCS can be extended to service these regions creating an overall, nation-wide, voice communications

system. A natural by-product of the overall voice communications system, including the regional sites, is a common numbering/dialing plan. A common dialing plan, centralized management and access to advanced application have clear benefits to optimize the communications-related workflow and to save costs. The successful Proponent will work with the OAG to define the global numbering plan and assign phone extensions. Work will also be required to deal with (and port) existing direct dial phone numbers to direct-inward-dial (DID) numbers used by the OAG. The OAG is also expecting other economies of scale (e.g., single voice-mail system) that the Proponent is expected to elaborate on.

Unified Communications

2.4.6.3.2 The OAG would like to understand the Proponent’s unified communication solution that provides a single access point for all business communication and collaboration needs; providing real-time access to staff in the OAG’s organization, on or off the premises, and enhancing the effectiveness of dynamic communications. The unified communication solution should deliver the following types of features: presence and availability, deskphone and softphone integration, corporate directory access, visual voice mail, detailed call history, secure instant messaging, point-to-point video, Integration with Microsoft® Outlook and Office.

Mobility Solution

2.4.6.3.3 The OAG is looking for a solution to integrate its existing Blackberry devices (and future smartphones) into the VCS. The solution should have unified communications-type features (e.g., allowing access to the corporate directory, automatic presence updating, call routing preferences). Ultimately, the OAG is looking to reduce the number of overall devices they manage and believe this type of solution may assist this reduction.

Teleworker/Remote-worker Solution

2.4.6.3.4 The OAG would like to understand how the VCS can be extended to allow employees access to the corporate voice and data network from home or on the road, seamlessly retaining all of the features and functionality used at the office. The solution should enable employees to work remotely with full access to voice mail, conferencing, and other features of the VCS. The solution should be secure and be able to turn any IP-Phone into a teleworker set. Related to this, the solution should have the capability to deliver a secure, full, “in-office” unified communications experience to remote and home-based employees.

Audio and Web Conferencing

2.4.6.3.5 The OAG is considering a simple, cost-effective and scalable audio and web conferencing system which can support several hundred ports (audio and web); connecting staff together quickly, simply and seamlessly, regardless of their location. The solution should have the benefits of a feature-rich audio conferencing solution with easy-to-use, intuitive web conferencing facilities enabling users to enhance a conference call or meeting through the use of shared documents, presentations, chat and video.

2.5 MANDATORY TECHNICAL REQUIREMENTS

2.5.1 The proposed solution **must** possess the following eleven (11) technical characteristics at the time of acquisition. Proponents are to provide in their technical proposals a complete description of how their product meets each of these characteristics. The OAG will verify claims through consultations with the supplied references and through the on-site demonstration as indicated in Section 2.4.4.

Identifier	Description
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MR-01	<p>All proposed Equipment must be “Off-the-Shelf”, meaning that each Equipment is commercially available and requires no further research or development and is part of an existing product line with a field-proven operational history (that is, it has not simply been tested in a laboratory or experimental environment). If any of the Equipment proposed is a fully compatible extension of a field-proven product line, it must have been publicly announced on or before the date that the proposal is submitted. By submitting a proposal, the Proponent is certifying that all the software proposed is off-the-shelf.</p>
MR-02	<p>The proposed solution must be fully functional in French and English. Specifically, all user interfaces (UI) must be available in both languages. Additionally, all user Help/Instructional materials and support must be available in both French and English. (Certification A7 in Appendix A).</p>
MR-03	<p>As part of the proposed solution, if any software and/or middle-tier components need to be deployed on a server and/or virtualized, they must be able to operate on the OAG standard server platform:</p> <ul style="list-style-type: none"> • Windows Server 2008 R2 or later on a 64 bit platform. • VMWare v5.0.
MR-04	<p>As part of the proposed solution, if any software must operate on user's laptop/desktop, the solution must operate on the following minimum configuration:</p> <ul style="list-style-type: none"> • Windows XP, 7 (32,64-bit OS) • Core 2 Duo • 1 GB RAM • 40 GB Hard Drive. <p>Any software solution must provide for Single-Sign-On (SSO) authentication with Microsoft Active Directory, without the use of an intermediary directory for all users within the Office.</p> <p>SSO is defined as follows: a user connects to the OAG network using a supplied username/password. Once logged into the OAG network, a user never has to supply a username or password to access business applications. For greater clarity, the users should be logged in automatically on all the interfaces provided by the proposed Solution and not be asked to enter username and password. This must also include the automatic provisioning of users from Microsoft AD without any manual intervention.</p>
MR-05	<p>Voice Communication System General: The Proponent must describe the <i>proposed solution</i> and how the Proponent will Implement the Voice Communication System to connect to the PSTN and meet the capacity, functionality and feature requirements outlined in Sections 2.2; 2.3; and 2.4, which includes a fully functional voice communication</p>

	<p>system and redundant virtual controller configured with the following specifications:</p> <ul style="list-style-type: none"> • 700 base users • 750 voice-mailboxes • 700 single number reach for ringing multiple extensions • 4 T1 PSTN Connectivity Interfaces • 12 loop-start trunk interfaces • 50 Analogue User Devices <p>In addition, the Proponent must clearly describe how the proposed solution can be deployed as a limited pilot while still maintaining interoperability with the existing system and network infrastructure, as per Section 2.4.5.</p>
MR-06	<p>The proposed solution must provide a complete backup and restore capability itself, through an integrated database or be integrated through the OAG's backup software: CommVault.</p>
MR-07	<p>Phone Devices: The Proponent's proposed solution must provide the specification sheet for all models phones and accessories (e.g., headsets, conference pods) compatible with and supported by the Base and Regional systems (see TR-22 for Regional system requirements).</p> <p>The new phones must have the following, minimum, base features:</p> <ul style="list-style-type: none"> • two-line appearances • a full-duplex hands-free speakerphone • bilingual graphic display and function keys (French and English) • multi-line backlit display and programmable feature keys • multi-character backlit graphics display with contrast control and auto-dimming • 12 programmable multi-function keys with dual-color LED indicators (for speed dialing, line appearances, feature access) • 8 function keys: hold, menu, message, speaker, mute, transfer / conference, redial, cancel • voice mail access • a message indicator lamp that will indicate that the phone is ringing as well as indicate the presence of voice mail at the extension. • conference call setup • headset capable - either a headset jack (separate from the handset jack) or the ability to support a wide array of headsets by intercepting the handset cord; document the top five (5) headsets that are compatible with the proposed IP telephone sets. • the ability of the IP telephone to be powered using the IEEE standard PoE or PoE+ as well as locally powered using an AC to DC transformer. • 10/100Mbps switch port for pass-thru network device
MR-08	<p>Decommissioning: The Proponent must certify that the existing Mitel call controller will be decommissioned before December 31, 2013, and</p>

	must demonstrate how this will be achieved..
MR-09	Technical Support: The Proponent must provide technical support, including issue/problem reporting and assistance with response within 24 hours of the issue being reported. Any costs for support must be included in the costs specified in the cost summary chart in Section 3.5.3.
MR-10	Experience: The Proponent must have at least ten (10) years of experience Implementing similar solutions.
MR-11	Additional Bandwidth: The Proponent must identify any additional bandwidth requirements to implement Solution to the Regional Offices.

2.6 RATED REQUIREMENTS

The Rated Requirements listed in Appendix C shall be completed by all Proponents. For these requirements, proponents are to provide clear statements describing their corporate capabilities. The OAG will assess these responses using the evaluation criteria listed in Appendix C.

2.7 DELIVERY SCHEDULE

2.7.1 The Pilot phase of the proposed solution must be installed, configured and tested within 30 business days after contract award. The OAG technical team will conduct User Acceptance Testing based on the Acceptance criteria listed in Appendix D. The proponent is responsible to address installation or configuration issues identified by the OAG technical team within that 30 business day's period.

2.7.2 After a successful Pilot and with support from the Successful Proponent, the OAG technical team will determine how the final product should be delivered to the rest of the organization (i.e. in distinct phases or in just one phase). Notwithstanding any issues, the proposed solution shall be deployed before the end of December 2013.

2.7.3. The training shall occur within 20 business days after the solution is accepted.

SECTION 3

3 RFP REQUIREMENTS

3.1 PROPOSAL STRUCTURE AND PAGE LIMIT

3.1.1 The proponent's proposal must be organized using the content numbering scheme and is subject to the maximum page limit described below.

3.1.2 The Technical Proposal is limited to a maximum of 60 pages. This includes the sections related to mandatory and rated technical requirements but excludes the Appendices. Any information provided in excess of the stipulated maximum within the core body of the Technical Proposal will not be taken into account in the evaluation of the proposal. Title pages, table of contents, and tabbed dividers are not included in this limit, and therefore must not include material intended for evaluation.

Required Structure of Proposals and Content Numbering

Technical Proposal

Description of Product Being Proposed

Response to Mandatory Requirements

2.1. Contracting Requirements – Table from Section 4.3

2.2 Technical Requirements – Statements of Capability in Response to Mandatory Technical Requirements from Section 2.5

Response to Rated Requirements

3.1. Corporate

3.2 Migration Strategy

3.3. Technical Solution

3.4 Project Management and Implementation

3.5. Training and Transition Support

3.6 Post Implementation Support and Maintenance

3.7 Solutions Additions: Regional Offices

3.8 Solutions Additions: Value Added Applications

3.9 References

Appendices

A. Certifications

B. Sample Maintenance/Support Agreement

C. Supplementary Product Information (Optional)

Financial Proposal (submitted in a separate envelope)

The following provides additional guidance on the required content of the different sections of the proposals.

3.2 PRODUCT DESCRIPTION

3.2.1 Proponents are to provide a complete description of the Equipment they are proposing to meet the OAG's requirements. This description is to provide specific version numbers, product, part and/or item numbers describing all of the hardware and/or software components that comprise the proposed solution. The description should also briefly describe the capabilities and the function of the hardware and/or software including options, potential additions, etc. Proponents may include brochures, testimonials and other support materials as Appendix C of their proposal.

3.3 MANDATORY REQUIREMENTS

3.3.1 Proponents' proposals **must** meet **all** of the RFP mandatory requirements in order for their proposals to be considered for evaluation. Failure on the part of the proponent to meet any one (1) or more of the mandatory requirements will result in their proposal being deemed non-compliant and given no further consideration.

3.3.2 There are two types of mandatory requirements: Contracting Mandatory Requirements and Technical Mandatory Requirements.

3.3.3 Contracting Mandatory Requirements are indicated in Section 4.3 and Appendix B. Proponents **must** complete the table in Section 4.3 and include it as part of the technical proposal. In the table, proponents are to indicate beside each of the requirements the relevant page number(s) from their proposal where they are addressed (Mandatory Item M-5).

3.3.4 Technical Mandatory Requirements are indicated in Section 2.5. In their technical proposals, proponents are to provide a brief description of how their proposed hardware and/or software meet each of the mandatory technical requirements.

3.4 RATED REQUIREMENTS

3.4.1 Technical Proposals meeting **all** of the Mandatory Requirements (Contracting & Technical) will have their technical proposal evaluated by the evaluation committee.

3.4.2 In their technical proposals, proponents are to clearly describe how their proposed VCS solution meets each of the rated technical requirements.

3.4.3 As indicated in Section 2.4.4, the OAG will assess qualifying proposed solutions through the use of a demonstration. As part of that demonstration, the OAG evaluation team will ask the proponents questions during the demonstration to determine how the proposed VCS solution delivers the required capabilities detailed in Section 2.4.4.

3.4.4 During the demonstration (Step 3 of Section 4.2), the OAG evaluation committee may adjust points awarded in Step 2 of Section 4.2.

3.5 FINANCIAL REQUIREMENTS

3.5.1 As indicated in Section 2.3.3, the OAG expects that the solution acquired as a result of this RFP will be effective for at least five (5) years. The OAG reserves the right to purchase maintenance for up to two (2) additional two (2) year periods, at the OAG's discretion subject to budgetary limitations.

3.5.2 The OAG wishes to understand and evaluate the **full** cost of the proposed Solution. To do so, proponents are to use the chart below. Detailed descriptions of each of the potential cost elements are included in Section 3.5.4.

3.5.3 Provide a five (5) year cost summary using the following chart. The total cost for the three years of the agreement will be used to evaluate the financial proposals.

Five Year Total Cost Summary						
Line Item	Description	Year 1 Cost	Year 2 Cost	Year 3 Cost	Year 4 Cost	Year 5 Cost
Equipment – provide the itemized cost for the following:						
1	VCS and miscellaneous equipment (e.g., software, hardware)	\$				
2	Network management system	\$				
3	At least Twenty-Five (25) to Three Hundred (300) phone devices ²	\$				
4	At least Twenty-Five (25) Three Hundred-Fifty (350) basic soft phones ³	\$				
5	Six Hundred-Fifty (650) voice mail users	\$				
6	Attendant Solution (three stations)	\$				
	Total for all Equipment (items 1 to 5)	\$				
7	Implementation Services	\$				
8	Licensing	\$				
9	Training (system and user)	\$				
10	Transition Support	\$				
11	Warranty and maintenance support (hardware and	\$				

² The minimum of 25 can be priced if existing equipment can be utilized.

³ The minimum of 25 can be priced if existing equipment can be utilized.

	software)					
12	Documentation	\$				
13	Other cost: (if any, please describe)	\$				
Total		\$				
Additional Bandwidth		\$				
Grand Total		\$				

3.5.4 The following describe some of the potential cost elements.

- a. **VCS Equipment:** List and describe all Equipment costs. List all phone devices and accessory costs by model (e.g., soft, desk-sets and conference units). It also includes:
 - i. **Miscellaneous Equipment:** The Proponent must provide costs for all miscellaneous Equipment (e.g., power cables, mounting hardware, equipment specific patch panels, and patch cables) necessary to implement the VCS.
- b. **Licensing:** List, describe, and record the licensing, implementation, maintenance, support, and training fees associated with your proposed software. It also includes add/remove costs for all license-types and:
 - i. **Third-Party Software (Middleware):** List, describe, and record the costs of additional third party software that is required to optimally run the software.
 - ii. The Proponent must include the add/remove price for all licenses.
- c. **Implementation Services** means design, manage project, pilot, document, install, configure, program, test, certify and/or commission or any other activity to ensure the delivery of item in question is fully functional to the OAG's satisfaction and industry standards. The cost of all Implementation activities is the responsibility of the Successful Proponent. This includes:
 - **Installation:** Describe any labor, equipment, supplies, or other costs associated with installing, configuring or adapting the proposed Equipment to the OAG IT environment.
 - **Integration:** Describe any labor, equipment, supplies, or other costs associated with integrating the proposed Equipment into the OAG's current IT architecture.
 - **Project Management:** If there are project management fees associated with the proposed Solution, list and describe them here.
- d. **Transition Support:** Any costs associated with assisting the OAG with post cut-over support activities, Help Desk readiness and business continuity planning.
- e. **Warranty & Maintenance:** Describe and cost out any other ongoing costs associated with the operation and maintenance of the proposed Solution.

- f. **Documentation:** If there are fees associated with user or technical documentation, list them here.
- g. **Training:** If there are any fees for training the OAG personnel to manage the VCS (e.g. end users and operational people).
- h. **Other (specify):** List and describe any other costs associated with the proposed Solution. The Proponent shall include any other costs they consider relevant to the OAG for the successful Implementation of the proposed VCS configuration.
- i. **Additional Bandwidth:** As per MR-11, if the solution requires additional bandwidth to the existing OAG's WAN (Section 2.2.2), this cost will be added to the Proponent's Financial proposal. The bandwidth cost is dictated by Shared Services Canada for all federal organizations connecting to SCNet.

3.5.5 It is not necessary for Proponents to charge or list a cost for each element, only those that apply to their pricing model. If, for example the cost of documentation is included in the price of the Equipment, proponents can indicate that.

3.5.6 As indicated in Section 2.3.3, the OAG reserves the right to purchase maintenance for the Equipment for up to two (2) additional two year periods after the original five (5) years. Accordingly, proponents are to provide a cost for each of the option years in the following chart.

Option Year Cost Summary				
Costs	Year 6	Year 7	Year 8	Year 9
Maintenance Support				
Other (specify)				

3.5.7

Price Competiveness: The RFP Proponent shall apply similar discount levels used in their pricing of this RFP to other Equipment and Services necessary to Implement the RFP Proponent's Solution and any Solution Additions the OAG may pursue in the future. The discounts shall be valid from one-year of Contract Agreement signing and validated using the manufacturers price book as a reference.

3.5.8 Payment will be made after final acceptance of the VCS. Other payments may be made upon satisfactory delivery of the other costed elements. For example, payment of any training costs will only be payable upon the successful training of OAG staff. Maintenance and support will be paid on a yearly basis.

SECTION 4

4 BASIS AND METHOD OF EVALUATION

4.1 EVALUATION PROCESS

4.1.1 A technical evaluation committee composed of OAG officials will evaluate the proposals. The OAG will use a step-by-step approach to selecting the successful proponent. The approach will consist of the steps described in Section 4.2 below. Only proposals that meet the requirements of a particular stage will progress to the following steps.

4.1.2 Failure of a proposal to provide information in sufficient detail and depth to permit evaluation against criteria may render a proposal non-responsive. Proponents are advised that only listing capabilities without providing any supporting explanation or description about the capability will not be considered to be “demonstrated” for the purposes of the evaluation.

4.2 METHOD OF SELECTION

4.2.1 **Step 1:** The technical evaluation team will confirm compliance with all mandatory requirements identified in Section 4.3 and 4.4.

4.2.2 **Step 2:** Proposals deemed compliant in Step 1 will then be evaluated by the evaluation team as per the rated requirements CR-01 to CR-04 and TR-01 to TR-26, using the criteria and point structure described in Section 4.8 and Appendix C.

4.2.3 **Step 3:** The **top 3 scoring proposals** deemed compliant following Steps 1 and 2 will be invited to demonstrate their proposed solution for the technical evaluation team as per Section 2.4.4. This demonstration will be evaluated in accordance with point structure identified in Section 4.8 and Appendix C. During the demonstration, the OAG evaluation team committee may adjust points, awarded in Section 4.2.2.

4.2.4. **Step 4:** Those technical proposals deemed compliant in Steps 1, 2 and 3 (including meeting the minimum point requirements described in Section 4.6) will have their financial proposals evaluated by the OAG Contracting Group following the process described in Section 4.7.

4.2.5 **Step 5:** The highest scoring solution in Step 4 will be deemed the Successful Proponent. At this point and as per Section 2.4.5, the Successful Proponent shall implement a Pilot, which is a scaled down version of the VCS, to prove functionality and integration with the OAG’s IT systems. The Pilot will be evaluated using the criteria and point structure described in Appendix D. To pass the pilot phase, the Successful Proponent must achieve a score of at least 75% (218/290) as per Appendix D.

4.3 MANDATORY REQUIREMENTS - CONTRACTING

4.3.1 Proponents **must** complete the following table and provide it as part of their technical proposal. Proponents are to indicate beside each of the requirements the relevant page number(s) from their proposal where they are addressed (see MC-5).

Item	MANDATORY REQUIREMENTS	Compliant?		Location in Proposal
		Yes	No	
MC-1	Proposals must be received as per the instructions in Section 1.1.			N/A

MC-2	Proponents must submit five (5) copies of their technical proposal, one (1) copy of their financial proposal, and an electronic (soft) copy of their proposals as per the instructions in Section 1.2.			N/A
MC-3	Proponents must complete and sign all certifications required in Appendix A of this RFP and attach them as Appendix A of their technical proposal.			
MC-4	Proposals must be organized and comply with the proposal structure and page limit (60 pages), as described in Section 3.1.2.			
MC-5	Proponents must complete and include this table as part of their Technical Proposal.			
MC-6	Proponents must provide the full cost of their proposed Equipment (including option years) using the chart formats provided in Sections 3.5.3 and 3.5.6.			
MC-7	Proponents must provide three (3) references as required in CR-04.			

4.4 MANDATORY REQUIREMENTS – TECHNICAL

4.4.1 The proposed Equipment **must** possess the characteristics described in Section 2.5 at time of acquisition. As indicated in Sections 2.5 and 3.1, proponents are to provide in their technical proposals a brief description of how their product meets each of the ten (10) mandatory technical requirements. The OAG will verify claims through consultations with the supplied references and through the on-site demonstration.

4.4.2 It is vital that Proponents proposal provide detailed and comprehensive responses to the requirements in this RFP while at the same time ensuring that responses are precise and to the point. Proponents shall use the document structure defined below for their responses including the financial template, to facilitate equitable evaluation.

4.4.3 Responses shall not make references to corporate literature or website information and any literature that is provided shall exist merely to supplement the response and not to replace it.

4.4.4 Proponents shall conform to the required format proposed below. Failure to conform, at the sole discretion of the OAG, may result in the Proponent’s proposal being rejected. All Requirements in this RFP have unique identifiers and are presented in the following format example:

Requirement Identifier	Requirement Description
ABC-01 (Example)	(Example) XXXXXXXXX : xx.

4.4.5 The original order and identification of the requirements shall be maintained in the RFP Submission. All requirements can be interpreted to include the stated requirement but need not be limited to the requirement as stated. Therefore should the Proponent consider that it is possible to exceed the requirement and enhance the benefit, this should be stated.

4.4.6 Each requirement should be answered as comprehensively as possible. If the requirement is not understood the Proponent should take the necessary steps to understand and clarify the requirement. Proponents shall respond to all mandatory and rated requirements. The Proponent response shall be inserted into the requirements table below each requirement as a new row.

Requirement Identifier	Requirement Description
XX-01 (Example)	(Example) XXXXXXXXX : xx.
Response XX-01	<Insert proponent response to requirement xx-01>

4.4.7 For the VCS, the Proponent shall respond to the requirements by providing the solution, which the Proponent will implement, rather than against what could be implemented but has not been included in the solution. Proponents will be contractually bound to deliver the solutions contained in their responses to this RFP.

4.5 RATED REQUIREMENTS

4.5.1 Proposals meeting **all** of the Mandatory Requirements will be evaluated and rated based on the rated requirements categories described in Section 2.6. All the rated technical requirements will be rated against the written proposal using the scoring template attached as Appendix C.

4.5.2 The rated requirements will also be scored during the demonstration using the same evaluation criteria and scoring template attached as Appendix C. Unless otherwise indicated, for each requirement, the evaluation team will use the following rating criteria:

- Excellent = 100% of available points
- Very Good = 80% of available points
- Good = 60% of available points
- Average = 40% of available points
- Fair = 20% of available points

Poor = 0% of available points

4.5.3 The score for each rated requirement is determined by the percentage score assigned multiplied by the weight assigned for each requirement. The sum of the scores for each requirement provides the score for each category.

4.6 MINIMUM TECHNICAL SCORES

4.6.1 Proponents which receive a minimum of score of 70 % of the available points for the proposed solution will be considered compliant. See the Scoring Table matrix in Section 4.8 and Appendix C for details.

4.7 FINANCIAL EVALUATION

4.7.1 Those proposals that have met all of the Mandatory Requirements and met or exceeded the minimum technical score will have their Financial Proposal evaluated by the OAG Contracting Group.

4.7.2 The total cost for the first five (5) years of the agreement will be used to evaluate the financial proposals, see Section 3.5.3. Full points (960/960) will be awarded to the proposal with the lowest combined cost. Fewer points will be awarded to all other qualifying proposals based on the percentage differential between their combined cost and that of the proposal with the lowest combined cost; using the following formula:

$$\frac{\text{Lowest Combined Cost (\$)}}{\text{Proponent's Combined Cost (\$)}} \times 960 = \text{Points for Proponent's Financial Proposal}$$

4.8 SCORING SYSTEM

4.8.1 The scoring table below summarizes the points available for each of the rated requirements. It also identifies the applicable minimum point requirements.

Rated Requirements	Maximum Score	Minimum Points Required
Corporate Requirements		
CR-01 Escalation	25	NA
CR-02 Quality System	25	NA
CR-03 Financial Stability, Experience and Support Capabilities	150	NA
CR-04 References	100	NA
Technical or Operational Requirements		
C1) Migration Strategy	350	NA
C2) Technical Solution	450	NA
C3) Project Management and Implementation	120	NA
C4) Training and Transition Support	60	NA
C5) Post Implementation Support and Maintenance	90	NA
C6) Solutions Addition: Regional Offices	50	NA

C7) Solutions Addition: Value Added Applications	180	NA
Total Technical Score (including any adjustments during the Demonstration)	1600	1120
Financial Evaluation	960	NA
OVERALL TOTAL SCORE (technical score + financial evaluation)	2560	NA

4.8.2 The proposal receiving the highest overall score (Technical + Financial) will be deemed best value to the OAG, and will be recommended for contract award.

4.8.3 In the event that two or more proposals receive the same overall score, the proposal with the lowest total cost will be deemed best value to the OAG, and will be recommended for contract award.

SECTION 5

5 CONTRACT TERMS AND CONDITIONS

The contract issued as a result of this RFP will incorporate the following key terms and conditions.

5.1 SECURITY CLEARANCE

All contractor personnel accessing OAG networks and/or accessing OAG physical office space **must** possess a valid Government of Canada Security Clearance at a minimum level of **Reliability** status. **Clearance must be in place prior to accessing OAG premises and systems.** Contractors will be expected to understand and adhere to the OAG Code of Professional Conduct and the OAG Security Policy. Contractors will sign an undertaking of non-disclosure of information that will require, among other things; that all files and other OAG information are to remain the property of the OAG; that no copies or transcripts of any kind will be made of this information, and that information obtained during the course of the engagement will not otherwise be disclosed. It may be necessary to restrict contractor access to particularly sensitive information.

The OAG will confirm and/or arrange for the security clearance of contractor personnel as required prior to contract award.

5.2 CONTRACT PERIOD

The contract period will commence upon contract award and terminate on xx Month 2018. The OAG may exercise any and/or all of the option years as indicated in Sections 2.2.3 and 3.5.5.

5.3 LOCATION OF WORK

Although some work could be done remotely, it is expected that the work will be conducted on site and in the OAG's Ottawa location at 240 Sparks Street, Ottawa, Ontario. There is no requirement for travel in the completion of work under the contract.

5.4 LANGUAGE

The OAG is under the obligation to respect the spirit and letter of the *Official Languages Act*. The contractor's reports or deliverables may be submitted in the Official Language(s) of choice of the contractor.

5.5 PRIORITY OF DOCUMENTS

The documents specified below form part of and will be incorporated into the resulting contract. If there is a discrepancy between the wording of one document and the wording of any other document which appears on the list, the wording of the document which first appears on the list shall prevail over the wording of any document which subsequently appears on the list:

The contract document;

This Request for Proposal;

The proponent's proposal; and then

The Pilot Phase Acceptance Agreement.

5.6 OTHER CONTRACT CONSIDERATIONS

- i. The OAG will pay to the contractor the Applicable Taxes on the supply of services. The contractor will remit to the Receiver General, in accordance with the provisions of the Excise Tax Act, the Applicable Taxes on the supply of services received in respect of the supply of services under this agreement.
- ii. The agreement is a contract for the performance of a service, and the contractor is engaged under the contract as an independent contractor for the sole purpose of providing a service. Neither the contractor nor the contractor's personnel, if applicable, is engaged by the contract as an employee, servant or agent of Her Majesty. The contractor agrees to be solely responsible for any and all payments and/or deductions required to be made, including those required for Canada or Quebec Pension Plans, Employment Insurance, Workers' Compensation, or Income Tax.
- iii. The contractor shall treat all information that comes to his/her attention by virtue of carrying out the work under this agreement as privileged and confidential and will not disclose it to any third party either during the course of or after termination of this agreement except as may be necessary to perform the duties hereunder. The contractor shall secure all information according to its sensitivity and related OAG security policy and guide.
- iv. The contractor agrees to abide by the laws of Canada, including laws relating to copyright and specifically agrees not to transfer or copy by any electronic or other means any software owned by or licensed to the OAG. The contractor also agrees that such software is only to be used for the purposes of work carried out on behalf of the OAG and for no other purpose.
- v. The contractor declares that, on or before entering into the contract, he/she has not, directly or indirectly, paid or agreed to pay and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or to obtain the contract if the payment of the fee requires the individual to file a return under Section 5 of the *Lobbyists Registration Act*.
- vi. The contractor declares that, on or before entering into the contract, he/she has not been convicted of an offence, other than an offence for which a pardon has been granted, under Section 121, 124 or 418 of the *Criminal Code*.
- vii. The contractor consents, in the case of a contract with a value in excess of \$10,000 (including taxes), to the public disclosure of basic information, other than information described in any of paragraphs 20(1)(1) to (d) of the *Access to Information Act*, relating to the contract.
- viii. If the contractor makes a false declaration under paragraphs v or vi above or fails to comply with the terms set out in paragraph vii, the contractor agrees to immediately return any advance payments and the contracting authority may terminate the contract.
- ix. The Contractor agrees that his/her activities in any workplace of the OAG shall not endanger the health and safety of employees of the OAG.
- x. No Member of the House of Commons shall be admitted to any part of this agreement or to any benefit arising there from.
- xi. The contractor acknowledges having received and read the "Code of Values, Ethics & Professional Conduct for the Office of the OAG of Canada" and agrees to be bound to its terms. In accordance with the Code, the contractor agrees that he/she has discussed with the OAG all actual and potential conflicts of interest that may affect his/her work with the OAG.
- xii. The contractor shall not assign the benefit or burden of this agreement to any other person, firm or company.

- xiii. This agreement shall for all purposes be governed by and construed in accordance with the laws of the Province of Ontario.
- xiv. In accordance with the Financial Administration Act, payment under the contract is subject to there being an appropriation for the particular service for the fiscal year in which any commitment hereunder would come in course of payment.
- xv. The Contractor shall provide all manufacturers' terms and conditions for all Equipment Implemented as part of the VCS. The Contractor shall include all manuals necessary to manage (e.g., configure, operate) the VCS.
- xvi. The Contractor must provide for all miscellaneous Equipment (e.g., power cables, mounting hardware, equipment specific patch panels, and patch cables) necessary to implement the VCS.
- xvii. The Contractor shall guarantee the VCS, or portions thereof, will not be discontinued by the manufacturer for at least 5 (five) years, and that support will be continued by the manufacturer for at least 9 (nine) years. Any VCS Equipment that is discontinued by the manufacturer within 5-years of this start of this Agreement shall be replaced by the Contractor, and the cost of replacement shall be borne solely and entirely by the Contractor.
- xviii. The Contractor shall be responsible for all VCS upgrades (features and fixes) for the term of the contract. This includes hardware, software and/or firmware upgrades to keep the VCS working to the OAG's expectations.
- xix. The Contractor shall ensure the VCS is designed to manufacturers' specification, industry standards, and/or local codes. The design will be reviewed by the OAG before any Equipment is procured.
- xx. The Contractor shall adhere to the OAG's direction with respect to shipping/receiving and storage logistics of VCS Equipment intended to be sent to the OAG.
- xxi. The Contractor shall adhere to the OAG's rules for accessing the OAG locations for VCS Implementation.
- xxii. The Contractor shall ensure any VCS Implementation activities do not compromise the integrity of OAG property. Any costs to repair damages made to the OAG property by the Contractor will be borne solely and entirely by the Contractor.
- xxiii. The Contractor shall ensure all resources directly responsible for managing the Implementation of the VCS portion are certified project managers or have equivalent experience. The Contractor shall utilize trained, experienced and properly credentialed personnel to install and test the services. Industry accepted standards shall be followed. The Contractor shall collaborate with the OAG, including the OAG contractors, and any others to develop a master schedule for the Implementation of the VCS.
- xxiv. The Contractor shall ensure the VCS is Implemented by manufacturer certified technicians or specialists. The Contractor shall ensure the VCS is Implemented to manufacturers' specifications, industry standards, and/or local codes.
- xxv. Contractor shall be responsible for all insurance on the Equipment until the Equipment has been accepted using the Acceptance Agreement by the OAG.
- xxvi. The Contractor shall provide all training to the OAG to manage the VCS (e.g., end user and operational).
- xxvii. The Contractor shall keep the VCS service escalation process and contact information current and update the OAG when changes occur. The service escalation process allows the OAG to effectively interface with the Contractor for service, support, maintenance or any other activity with respect to keeping the VCS working to OAG's expectations.

APPENDIX A: CERTIFICATIONS (MANDATORY)

The following declarations **must** be completed as appropriate and **must** be signed by an authorized official. This appendix must be submitted as part of the Proponents' technical proposal. The OAG **WILL** declare any proposal non compliant if it is not complete or signed.

A1. PROPONENT'S BUSINESS INFORMATION

As required by Section 1.3 of this RFP, Proponent's **must** supply the following information:

Legal Name of Proponent	
Proponent Business Address (including street address, city, country and postal code or their equivalents).	
Proponent Telephone & Fax Numbers	
Point of Contact for Proposal and any resulting contract (name, telephone and fax numbers and email address).	
Proponents Business Number (PBN) and/or GST/HST number.	

A2. PROPOSAL VALIDITY PERIOD

As required in Section 1.3 of this RFP, the Proponent certifies that their proposal is valid in all respects for a period of not less than 120 days from the closing date of the RFP.

A3. EMPLOYMENT EQUITY

The Federal Contractors Program for Employment Equity requires that some organizations bidding for federal government contracts make a formal commitment to implement the employment equity, as a pre-condition to the validation of their bids. All Proponents must check the appropriate box(es) below. Failure to do so **WILL** render the proposal non-responsive.

Program requirements do not apply for the following reason(s):

- bid is less than \$200,000.00;
- this organization has fewer than 100 permanent part-time and/or full-time employees;
- this organization is a federally regulated employer;

or, program requirements do apply:

- copy of signed Certificate of Commitment is enclosed; or

Certificate number is:

Note: The Federal Contractors Program for Employment Equity applies to Canadian-based Proponents only.

A4. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Proponent certifies that all statements made with regard to the education and the experience of individuals proposed for completing the subject work are accurate and factual, and we are aware that the OAG reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive or in other action which the OAG may consider appropriate.

A5. CERTIFICATION OF AVAILABILITY AND STATUS OF PERSONNEL

A5.1 Availability of Personnel:

The Proponent certifies that, should it be awarded a contract as a result of this solicitation, the Proponent's resources who are to be assigned to a given project will be available to commence performance of the work within seven (7) days, and will remain available to perform the work.

A5.2 Status of Personnel:

If the Proponent has proposed any person in fulfillment of this requirement who is not an employee of the Proponent, the Proponent hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work to be performed in fulfillment of this requirement and to submit such person's résumé to the OAG. As well, the Proponent hereby certifies that the proposed person is aware that overtime may be required and is willing to comply.

During the bid evaluation, the Proponent **MUST**, upon the request of the OAG, provide a copy of such written permission, in relation to any or all non-employees proposed. The Proponent agrees that failure to comply with such a request may lead to disqualification of the Proponent's proposal from further consideration.

A6. CERTIFICATION OF FORMER PUBLIC SERVANT IN RECEIPT OF A PENSION

Is the Bidder a former public servant (FPS) in receipt of a pension under the Public Service Superannuation Act (PSSA)?

Yes () No ()

If so, the Bidder must provide the following information:

- Name of public servant

Date of termination of employment or retirement from the Public Service

The successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on the OAG website as part of the published proactive disclosure reports in accordance with *Contracting Policy Notice: 2012-2* and the *Guidelines on the Proactive Disclosure of Contracts*.

A former public servant under PSSA (*) is defined as:

- An individual,
- An individual that has incorporated,
- A partnership made of former public servants in receipt of PSSA pensions

- A sole proprietorship or entity where the affected individual has a controlling (**What's this**) or major (50% + 1) interest in the entity,

(*) It does not include pensions payable pursuant to Canadian Forces Superannuation, Defence Services Pension Continuation, Royal Canadian Mounted Police Superannuation, Members of Parliament Retiring Allowances and Canada Pension Plan

What's this: For this purpose, “controlling” includes everyone, but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, where individuals or directors, directly or indirectly either controls or has the power to control the other(s).

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **Yes () No ()**

If so, the Bidder must provide the following information:

- Name of public servant
- Conditions of the lump sum payment incentive
- Date of termination of employment
- Amount of lump sum payment
- Rate of pay on which lump sum payment is based
- Period of lump sum payment including start date, end date and number of weeks
- Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program

A *lump sum payment* period means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

By submitting a proposal, the Proponent certifies that the information submitted in response to the above requirements is accurate and complete

A7. LANGUAGE OF PRODUCT

The proposed Equipment must provide multi-language support. Specifically, all user interfaces (UI) must support both the French and English languages. Additionally, all user Help/Instructional material and support must be available in both French and English.

All proponents must check the appropriate box(es) below. Failure to do so will render the bid non-responsive. As described above, Equipment:

- is available in both French and English; or
- the Equipment will be available in both French and English within 6 months of award of a contract.

AUTHORIZED SIGNATORY

By submitting a proposal and signing below, the Proponent certifies that the information submitted in response to the above requirements is accurate and complete. Proposals must be signed to be evaluated.

Signature:

Date:

Name of Official:

APPENDIX B: MANDATORY REQUIREMENTS CHECKLIST—CONTRACTING

Item	MANDATORY REQUIREMENTS	Compliant?		Location in Proposal
		Yes	No	
MC-1	Proposals must be received as per the instructions in Section 1.1.			N/A
MC-2	Proponents must submit five (5) copies of their technical proposal, one (1) copy of their financial proposal, and an electronic (soft) copy of their proposals as per the instructions in Section 1.2.			N/A
MC-3	Proponents must complete and sign all certifications required in Appendix A of this RFP and attach them as Appendix A of their technical proposal.			
MC-4	Proposals must be organized and comply with the proposal structure and page limit (60 pages), as described in Section 3.1.2.			
MC-5	Proponents must complete and include this table as part of their Technical Proposal.			
MC-6	Proponents must provide the full cost of their proposed Equipment (including option years) using the chart formats provided in Sections 3.5.3 and 3.5.5.			
MC-7	Proponents must provide one or more references as described in CR-04			

APPENDIX C: EVALUATION CRITERIA AND SCORING GRID

Proposals meeting the mandatory requirements will be evaluated using criteria and scoring systems described below.

Points Available for the Rated Requirements		
Req. Identifier	Description	Maximum Points Available
CR-01	Assessment of Escalation Process	25
CR-02	Assessment of Quality System	25
CR-03	Assessment of the Proponent's Financial Stability, Experience and Support Capabilities	150
CR-04	Assessment of the Reference Sites	100
	Rated Technical Requirements	
C1)	Migration Strategy (TR-01)	350
C2)	Technical Solution (TR-02 to TR-11)	450
C3)	Project Management and Implementation (TR-12 to TR-15)	120
C4)	Training and Transition Support (TR-16 to TR-17)	60
C5)	Post Implementation Support and Maintenance (TR-18 to TR-21)	90
C6)	Solution Additions: Regional Offices (TR-22)	50
C7)	Solution Additions: Value Added Applications (TR-23 to TR-26)	180
	Total	1600

The above point rated requirements are further described below:

Req. Identifier	Point Rated Requirements	Maximum Points	Score
CR-01	<p>Assessment of Escalation Process. The Proponent shall describe its support model, escalation process and contact information to be used in the event of problems (during Implementation and post-Implementation of the VCS) or any other OAG requests.</p> <p>The description of the support model must clearly identify the key elements required to provide user support.</p>	25	
CR-02	<p>Assessment of Quality System. Proponents must have a rigorous Quality Assurance methodology to ensure the accuracy, ease of use, security and quality of the proposed solution. Proponents are to describe how they ensure the quality of the Equipment provided in their solution including maintenance fixes and updates.</p> <ul style="list-style-type: none"> • Quality Assurance encompasses the entire software/hardware development process, which includes processes such as requirements definition, software design, coding, source code control, code reviews, change management, configuration management, testing, release management, and product integration. <p>Proponents are to demonstrate how they ensure the quality of the Implementation</p> <p>A measurement of process maturity that determines effectiveness in delivering quality product (hardware/software) is in use; for example, Information Technology Infrastructure Library (ITIL) or International Organization for Standardization (ISO)</p>	25	
CR-03	<p>Assessment of Proponent's Financial Stability, Experience and Support Capabilities. The Proponent shall provide a brief history of the company, including financial stability and experience in the manufacturing, implementation and support of the proposed Solution. In addition:</p> <ul style="list-style-type: none"> • If the Proponent does not manufacture the proposed Solution, the Proponent must provide the manufacturer's name and Proponent/manufacturer relationship. • If the Proponent does not provide installation, warranty or maintenance services, the Proponent must explain the Proponent/manufacturer/subcontractor responsibilities including future support for proposed Solution. 	25	
	<p>The Proponent shall explain the experience gained implementing like voice communications solutions in other projects for similar types of environments. The Proponent shall provide details on how the experience gained during these projects will enhance the successful delivery of this Solution. The Proponent shall provide a narrative of the scope of the OAG</p>	75	

Req. Identifier	Point Rated Requirements	Maximum Points	Score
	<p>VCS project in the context of their experience.</p> <p>The Proponent shall describe their previous experience Implementing the Solution.</p> <ul style="list-style-type: none"> • 75 points for greater than 12 similar Solutions Implemented • 50 points for 6 -12 similar Solutions Implemented • 25 points for 3 - 6 similar Solutions Implemented • 0 points for <3 similar Solutions Implemented 		
	<p>The Proponent shall provide strategic direction for solution proposed with emphasis on areas such as investment protection, applications enhancement, etc.</p>	25	
	<p>The Proponent must summarize availability for 24-hour, 7 day a week support and describe remote and on-site capabilities.</p>	25	
	<p>Total for CR-03</p>	150	
CR-04	<p>Assessment of the Reference Sites. The Proponent shall provide detailed information on three reference sites whose requirements are similar to the voice communications solution the OAG is requesting. The response should include the following information: name, telephone number and e-mail address of the project authority and year the solution was implemented.</p> <p>Note: References may be contacted to help validate the Proponent's claim as stated in their Proposal. References may be contacted during any phase of the evaluation process.</p>	30	
	<p>Describe in detail the components and/or functionality of the solution that has been deployed elsewhere.</p> <ul style="list-style-type: none"> • 70 points if all three (3) references have implemented similar Solutions to the OAG • 40 points if only two (2) references have implemented similar Solutions to the OAG • 10 if only one (1) reference has implemented similar Solution to the OAG • 0 point if no reference has implemented similar Solution to the OAG 	70	
	<p>Total for CR-04:</p>	100	

Migration Strategy

Maximum Points	Score
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TR-01 Migration Strategy			
	<p>The Proponent shall describe in detail the strategy to migrate the existing telephone system to their VCS solution. The Proponent should consider a phased approach, if there are clear benefits and the migration risk is minimized.</p> <p>The response should include, but not be limited to, end-user optimization opportunities, downtime, abort strategy, contingencies and utilization of existing OAG equipment (hardware, software and/or licenses).</p> <p>The migration strategy must provide for minimum impact on the OAG user population, minimum downtime and provide for a smooth transition to the proposed solution.</p> <p>The ideal solution has the following characteristics:</p> <ul style="list-style-type: none"> • Less than 2 days for on-site equipment implementation • less than or equal to 30 minutes impact to all users for cut-over user and system • an abort that takes less than or equal to 30 minutes to return to original state • the proposed solution re-uses existing OAG equipment: hardware, software, licenses, voice-mail system, desk phones. 	300	
	<p>The Proponent shall clearly demonstrate that the proposed solution can be deployed in a limited Pilot environment as per Section 2.4.5.</p>	50	
Total for Migration Strategy:		350	

Technical Solution

Maximum Points	Score
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TR-02 Virtualization			
	<p>The Proponent shall describe what components of their solution can be virtualized utilizing the OAG virtual server environment described in Section 2.2.2. Ideally, the complete solution can be virtualized.</p> <p>The Proponent should include details on what Solution Additions as described in TR-23 to TR-25 can be virtualized.</p>	100	
	A virtualized PBX for resiliency in-case the main voice/call controller fails.	50	
Total for Virtualization:		150	
TR-03 Quality of Service			
	The Proponent shall describe how QoS for prioritizing and high-quality delivery of voice traffic is accomplished by the VCS. Included in this shall be the LAN configurations requirements (e.g., VLAN) the Proponent requires to deliver voice services.	20	
	The Proponent shall describe how the proposed solution handles VoIP overflow traffic. For example, if available WAN circuits connecting the various OAG locations are busy, call admission control levels are reached or QoS levels are not satisfied, voice traffic must be able to automatically overflow to PSTN trunk circuits. Indicate if overflow traffic can revert back to the WAN if conditions permit.	10	
Total for Quality of Service:		30	
TR-04 High Availability			
	<p>The Proponent shall include their strategy for Implementing the solution for high service availability. Proponent shall highlight any single points of failure, for major components, in the VCS and the strategy for the expeditious resolution of failures of these system components.</p> <p>Note: a single point of failure is any component of the VCS, which can fail causing service unavailability to an end-user.</p> <ul style="list-style-type: none"> It is expected that all system components of the solution must be tolerant of system faults. There can be <i>no single point of failure within any system component that would</i> 	30	

	<p><i>interrupt call-flow or degrade voice quality or system features.</i> In particular, all system components shall implement the following at a minimum:</p> <ul style="list-style-type: none"> • Redundant call processing (dual packet switched processing fabrics) • Dual 10/100/1000Mbps network interface ports with either load sharing (ideal) or failover behavior • Redundant storage media; hard disks, flash memory, must be able to tolerate storage failure and still operate • Multiple power supply units (PSUs) must be provided <p>Multiple fan units to provide adequate cooling of all system components shall be provided</p>		
TR-05 Backup and Recovery			
	The Proponent shall demonstrate, for each major component of the VCS, the mechanism (and storage medium) for backing-up the software and configuration files; the time (duration) of the back-up should also be included. The Proponent shall describe how the VCS is restored from back-up files. The Proponent shall include Implementation services to assist the OAG in setting up these back-ups; using existing OAG data storage equipment.	10	
	The Proponent shall describe the process (including durations) to recover the VCS from a complete power outage situation.	10	
	<p>The proponent shall describe how all configuration aspects of the proposed Solution including voicemail, logging data, call detail reporting data and licensing must be allowed to be backed up to a storage location other than that contained within the proposed solution. This information must also be able to be restored.</p> <p>Both backup and recovery shall allow for full and incremental notions of backup to reduce the time and backup media requirements needed to perform storage of system state information. Incremental and full backup images of system state information can be stored on the proposed solution, but must be able to be downloaded from the system for storage external to the solution and to support off-site storage of backup images.</p>	10	
Total for Backup and Recovery:		30	
TR-06 Unified Messaging Features			
	The Proponent shall describe their proposed unified messaging	10	

	<p>solution. The OAG expects that the proposed solution will allow and support flexible licensing for various types of functionality on a user-by-user, team-by-team or group-by-group. For example, the OAG may require 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.</p>		
	<p>The proposed messaging system shall integrate to the OAG email client application, which is Microsoft Outlook, as well as email service applications using IMAP, POP, and MAPI.</p>	10	
	<p>The unified messaging solution shall support unified inbox functionalities, allowing voice, email and fax messages to be accessed and retrieved from a single mailbox.</p>	10	
	<p>The unified messaging solution shall provide the unified messaging subscriber media flexibility and the ability to choose the most appropriate medium to receive and reply to their messages.</p>	10	
	<p>Some other features the messaging solution should have include: personal call routing; the ability to send, receive, forward, save, and sort voice and fax messages from the user's computer; and shall integrate with the existing Microsoft Active Directory infrastructure.</p>	10	
Total for Unified Messaging Features:		50	
TR-07 Network Management and Administration			
	<p>The Proponent shall describe and demonstrate the network management system of the VCS including role based system administration functionality.</p> <p>The proposed management system shall provide support for open protocols, such as LDAP and SNMP. The proposed management system should use open encoding schemes, such as XML and HTML.</p>	5	
	<p>The proposed solution shall allow for different logical functional components to be administered by different <i>levels</i> of administration. These different administration levels should be defined, and different functional components of the system associated with these different levels, for the purposes of their administration. The different levels of administration can encompass administrators from different geographic locales, different roles within the organization, or both.</p> <p>Ideally, the proposed solution would let the system administrator define as many levels of administration as needed.</p>	5	

	The proposed solution shall support at least two (2) concurrent system administrators. The proposed solution shall allow for easier administration of the solution as well, allowing telephony administrators to modify all aspects of the solution including call routing, automatic call distribution, dial-plan configuration, etc.	10	
	The management tools shall provide maximum flexibility, for rapid, efficient and cost effective configuration changes and centralized management control. The proposed systems management solution shall support, but not limited to the following: station user moves, adds, and changes; trunk group definitions and individual trunk circuit programming; voice terminal parameters; call restriction assignments; class of service definitions and assignments; password resets; customer profile database; ARS routing tables; group definitions and assignments; first digit tables; dial plan; feature access codes; paging/code call zone assignments.	10	
	The proposed Solution must support end-user administration and the Proponent should describe what components of the phone system are configurable by the end-user and the degree to which system administrators can control which of these components end-users can configure. Components such as and end-user's voice mail password, their personal speed-dials, and their name as it appears in a directory listing or when they call another extension within the system; all of these items need to be administered.	10	
	The manner in which an end-user accesses the phone system to perform the administration (e.g. web-based, windows forms application based, RIA-based, etc.) must be explained along with any restrictions on web browser type, operating system type, java virtual machine versions, etc. The proposed solution provides a common interface for managing system and endpoint client configurations. The management system should be operated using GUI tools, formatted screens, pull down menus, valid entry choices, templates, batch processing & transactions scheduling, and database import/export. In general, the proposed solution should support a user interface set for each functional area: Fault, Configuration, Performance and Security.	10	
Total for Network Management and Administration:		50	
TR-08 Remote Support and Configuration			
	The Proponent shall demonstrate and confirm that the major components of the VCS have the capability to be monitored, configured and supported remotely; the Proponent shall include a complete list of VCS components and whether or not the components can be supported and configured remotely. The	20	

	Proponents shall briefly describe the remote monitoring capability.		
TR-09 Monitoring and Diagnostics			
	The Proponent shall ensure that the VCS network management system is implemented to continuously (24 hours/day x 7 days/week), in real-time, monitor the network, network usage/traffic and anomalies. The Proponent shall provide details of the reports available to view the monitoring results.	10	
	<p>The VCS shall support active logging of changes and faults within the solution components. These logs should be human readable with accurate date and time stamps that are wall-clock times. When possible, duration of an event should also be logged as well as location of the event, both in terms of the system component and any geographic information associated with the device or devices being affected.</p> <p>Logging details shall also include capacity metrics allowing administrators to understand when system capacity limits are being reached, have been reached, or have crossed a low/high-watermark as set by the administrator. Also, the event logging must include notifications of any upcoming licensing renewals to the administrator so that system features can be kept current without a lapse in licensed system solution components.</p> <p>The Proponent shall describe this functionality.</p>	10	
	<p>Internal logging is the minimum requirement, but logging to an external logging system (such as a consolidated syslog facility) should also be supported. Individual logged events, as well as the entire log for a given date range, or the entire log itself, must be exportable in a recognized usable format; such as comma separated value, excel, tab delimited value, xml, etc.</p> <p>The Proponent shall describe this functionality.</p>	5	
	<p>A notion of event severity shall be a part of the proposed solution logging facility and a notification configuration for each level of severity shall be supported allowing different events occurring at different severity levels to notify different responsible groups.</p> <p>The Proponent shall describe this functionality.</p>	5	
Total for Monitoring and Diagnostics:		30	

TR-10 Quality of Language			
	Proponents shall ensure the quality of the language (i.e. French and English) used in any documentation material or user interface provided to the OAG as part of their proposed solution. Proponents are to describe how they ensure the quality of the languages provided in their solution including maintenance fixes and updates.	20	
TR-11 VoIP Security			
	<p>The Proponent's proposal shall:</p> <ol style="list-style-type: none"> 1. Demonstrate that the cryptographic processes (e.g., symmetric and asymmetric key establishment/management, digital signatures, encryption, and hashing functions) enforce and maintain the use of CSEC-approved algorithms. 2. Demonstrate that access to device configuration is password protected enforcing minimum password complexity based on the industry best practices, including but not limited to a mix of upper and lower case, numbers, special characters and a minimum password length of at least 8 characters. 3. Demonstrate that the solution enforces password changes on a regular basis, which includes password strength, characters modified and validity start/end dates. 4. Demonstrate that the VCS and future addition conform to FIPS 140-2. 	20	
	<p>The Proponent's proposal demonstrate that the VCS and future addition conforms to common secure VoIP implementation guidelines (e.g. CSEC-ITSG 29), specifically, the solution shall interoperate with the OAG LAN has follow:</p> <ul style="list-style-type: none"> • Provide layer 2 VLAN ACLs on access switches • Provide the capability to enable DHCP Snooping on the network switch. • Provide link layer authentication (e.g. IEEE 802.1x) for IP phones connecting to the network. The IP Phones and the access switches must be capable of supporting 802.1x. • Demonstrate that port security is enabled on all layer 2 data link (physical addressing) access switches in the VoIP environment. • Provide for port security with MAC filter on layer 2 switches (i.e. access switch ports are configured to only allow known MAC addresses). • Provide Static Port Security. The layer 2 access switch must use static port security for the phone and must not allow the MAC address to be learned. • Provide a dynamic ARP Inspection to block inconsistent ARP and GARP replies that do not have the correct MAC to IP address mapping. • Provide the capability to implement a switched network to prevent broadcast to all connected devices. 	20	

	<ul style="list-style-type: none"> • Disable port mirroring/SPAN ports on network access switches. 		
Total for VoIP Security:		40	

Project Management and Implementation		Maximum Points	Score
TR-12 Project Management			
	The Proponent shall provide a dedicated project manager for the duration of the Implementation of the VCS; The Proponent should provide credentials and references of similar complexity projects that the project manager has been involved with.	30	
TR-13 High Level Project Plan			
	The Proponent shall provide, in their response, a project plan, showing the high level activities, key dates, time frames, resources and dependencies for procuring and Implementing the VCS. The project plan will be used as a basis to establish the mutually agreed upon schedule for delays discounts.	40	
TR-14 Testing Process			
	The Proponent shall have a test methodology and documented process for testing the VCS. The Proponent shall provide a high-level test plan including the types of tests and measurements that will be performed to validate the VCS. Included in the test plan should be the expected outcome of the tests to be performed.	15	
	The Proponent shall provide the OAG with a written Test Notification. The Test Notification shall describe the proposed test(s) to be demonstrated and the telephony solution component(s) to be tested.	15	
Total for Testing Process:		30	
TR-15 Commissioning Process			
	The Proponent shall have a methodology and documented process for commissioning the VCS. The Proponent shall provide a high-level plan including the types of activities that will be performed to	10	

	commission the VCS.		
	The plan shall have defined steps with specific milestones covering all critical elements of the commissioning process. Included in the commissioning plan should be the expected outcome of the activities to be performed.	10	
Total for Commissioning Process:		20	

Training and Transition

Maximum Points	Score
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TR-16 Training Program and Documentation			
	<p>The Proponent is to describe their training program and documentation process. As a minimum, the proponent is to include descriptions of the following subjects in their proposal:</p> <ul style="list-style-type: none"> • How the quality of hardware/software documentation is assured; • How technical training is provided to both end-users and personnel (network and telephony administrators) who will be administering the solution. 	5	
	The Proponent shall conduct end-user training, tailored specifically to the audience (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.	5	
	<p>Proponent shall 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. The OAG intends to use this facility to provide for new system training and ongoing refresher or new-hire training.</p> <p>Additional and separate training sessions should be provided by the Proponent to cover additional specialized features and equipment, including, but not limited to, VCS console equipment, automatic call distribution users, and main office staff.</p>	10	
	For administrators, the Proponent shall support both online training and off-site classroom training. The Proponent shall describe online and off-site training capabilities. The Proponent shall also indicate any recommended administrator classes.	5	

	<p>The vendor shall provide the OAG a copy of the system drawings necessary for the proper utilization of the telephony solution. These shall include but not limited to:</p> <ul style="list-style-type: none"> • System drawing including appropriate IP addressed for critical components and troubleshooting. • Operating procedures and methods including diagnostic and test procedures. 	5	
Total for Training and Documentation:		30	
TR-17 Transition Support Program			
	<p>The Proponent shall describe their transition support program. Transition support includes assisting the OAG with post cut-over support activities, help desk readiness and business continuity planning.</p>	30	

Post Implementation Support and Maintenance

		Maximum Points	Score
TR-18 Warranty			
	<p>The Proponent shall describe the warranty program included as part of the VCS.</p> <p>The OAG expects that all maintenance during the warranty period and under any maintenance agreements shall be performed by the Successful Proponent using qualified personnel at no additional cost to the OAG other than those charges identified in the applicable warranty/maintenance agreement.</p>	10	
TR-19 Maintenance and Support			
	<p>The Proponent shall be responsible for maintaining all VCS Equipment and any Equipment added to the network during the life of the contract. The Proponent shall include the cost of a 5-year + 4 optional years maintenance program (hardware and software), as per Section 3.5.6.</p> <p>The proponent shall describe their approach.</p>	10	

	The Proponent shall provide their standard service level agreement including hardware replacement time frames (e.g., mean-time-to-acknowledge, mean-time-to-respond and mean-time-to-repair).	10	
	The OAG expects that the Successful Proponent will provide a 24-hour a day, 7-day a week support center, as well as online service capabilities. As a minimum, the proponent shall include descriptions of the following subjects in their proposal: <ul style="list-style-type: none"> a. Toll-free telephone support; b. Any online (web) service request capabilities available to the OAG; c. On-site support when required; d. Technical support for upgrading the solution; e. Versions\updates are released at regular intervals. 	10	
Total for Maintenance and Support:		30	
TR-20 Hardware Replacement and Sparing			
	The Proponent shall describe the impact to end-user service availability when replacing faulty major VCS hardware components.	10	
	The Proponent shall provide the Equipment sparing strategy, for the VCS that balances on-site purchased spares versus a managed spare replacement (and Implementation) service.	10	
Total for Hardware Replacement and Sparing:		20	
TR-21 Scheduled Maintenance			
	The Proponent shall list, for each major system component of the VCS, the expected scheduled maintenance activity and the impact to service or service feature availability of this activity.	20	
	The Proponent shall include the estimated time and/or manual effort involved in the scheduled maintenance activity in question (e.g., software upgrades, software fix/feature applications, hardware replacement/upgrades, and configuration changes).	10	
Total for Scheduled Maintenance:		30	

Solutions Additions: Regional Offices

Maximum Points	Score
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TR-22 Regional Locations

	<p>The Proponent shall describe their solution, including WAN connectivity options, to provide voice services to the regional locations using the VCS. The solution should have, at minimum, the following specifications:</p> <ul style="list-style-type: none"> • Phones and voice-mail (as listed in Section 2.2.2.2) • Local survivability • Loop-start trunk interfaces • Analogue lines (e.g., fax and for disaster recovery) <p>The proposed VCS can be extended to service Regional Locations creating an overall, nation-wide, voice communications system.</p> <p>The proposed VCS, including the service to Regional Locations, offers a common numbering/dialing plan, centralized management and access to advanced applications.</p>	50	
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Solutions Additions: Value Added Applications

Maximum Points	Score
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TR-23 Conferencing

	<p>The Proponent shall describe additional conferencing capability (e.g., audio, web-video) that is available to extend the VCS.</p> <p>The proposed solution shall be a simple, cost-effective and scalable audio and web conferencing system, which can support several hundred ports (audio and web); connecting staff together quickly, simply and seamlessly, regardless of their location.</p> <p>Note: the Proponent shall provide the system requirements (e.g., virtual server specifications) to support this functionality.</p>	10	
	<p>The solution shall have the benefits of a feature-rich audio conferencing solution with easy-to-use, intuitive web conferencing facilities enabling users to enhance a conference call or meeting through the use of shared documents, presentations, chat and video.</p>	10	
	<p>The establishment of a conference call shall be easy to accomplish with few steps for end-users. Third-party establishment of conference calls, especially from phone system consoles, and established conference calls transferred to any extension within the enterprise</p>	10	

	phone system shall be supported. The Proponent shall also clearly define any LAN and WAN protocols that need to be supported to facilitate conference calling.		
	The OAG also has a need for some devices to support conference room settings. Therefore, the Proponent shall describe any optional conferencing accessory units that can be used to facilitate this requirement for the following set-up: <ul style="list-style-type: none"> • 18 small conference rooms (2-8 pers.) • 11 medium conference rooms (10-30 pers.) • One (1) large conference room (15-65 pers.) 	10	
Total for Conferencing:		40	
TR-24 Mobility			
	The Proponent shall describe the capability to extend the capability of the VCS to OAG mobile devices (e.g., Blackberry). The intent of this capability is to have the OAG mobile devices integrated into overall OAG ICT system. Note: the Proponent shall provide the system requirements (e.g., virtual server specifications) to support this functionality.	5	
	The proposed VCS shall integrate to our existing Blackberry devices (and future smartphones).	15	
	The proposed solution shall have unified communications-type features (e.g., allowing access to the corporate directory, automatic presence updating, call routing preferences).	10	
	The proposed solution shall help employees communicate better and work more productively by offering support for user mobility through single-number access from a user's desk phone, soft phone and wireless devices.	10	
Total for Mobility:		40	
TR-25 Teleworker/Remote Worker			
	The Proponent shall describe the capability to extend the VCS to allow OAG teleworker's employees to seamlessly retain some or all of the features and functionality of the VCS while away from the office (but connected to the corporate data network).	5	

	Note: the Proponent shall provide the system requirements (e.g., virtual server specifications) to support this functionality.		
	The proposed solution shall contain sufficient call distribution features and allow for sophisticated modification of the system's dial plan to implement varied and diverse call routing and distribution.	10	
	The solution shall enable employees to work remotely with full access to voice mail, conferencing, and other features of the VCS.	10	
	The solution shall be secured and be able to turn any IP-Phone into a teleworker set. Related to this, the solution must have the capability to deliver a secure, full, "in-office" unified communications experience to remote and home-based employees.	10	
Total for Teleworker/Remote Worker:		35	
TR-26 Unified Communication (UC)			
	<p>The Proponent shall describe the capability to extend the capability of the VCS to deliver unified communication features to the OAG users. The proposed UC solution shall integrate with Microsoft Outlook, Office and Active Directory.</p> <p>Ideally, the proposed UC solution is compatible with the Microsoft Lync Server 2010 (OCS) solution. Otherwise, the Proponent shall describe any hardware/software requirements and options required to integrate with the Microsoft solutions.</p> <p>Consequently, the Proponent shall provide an overview of the UC offering.</p> <p>This includes, but is not limited to:</p> <ul style="list-style-type: none"> • presence and availability, • deskphone and softphone integration, • corporate directory access, • visual voice mail, • detailed call history, • secure instant messaging, • point-to-point video, • integration to MS Outlook/Lync). <p>Note: the Proponent shall provide the system requirements (e.g., virtual server specifications) to support the UC solution.</p>	20	
	The Proponent shall confirm that the proposed UC solution can support an integrated UC option that satisfies the general requirements and capabilities outlined above. The Proponent shall:	10	

	<ul style="list-style-type: none"> • Confirm that presence management is fully integrated into the available UC solution. Include a brief description of presence features and functions included with the offering. The Proponent shall indicate if presence management requires a dedicated server or gateway with middleware. • Confirm that Instant Messaging (IM) is fully integrated into the available UC solution. The Proponent shall include a brief description of IM features and capabilities, and also indicate if the integrated IM offer is interoperable with public IM services and indicate if IM recording is supported? • Confirm that the proposed solution supports hoc and meet me audio/video conferencing. • Confirm that the proposed solution provides the capability for an individual station user schedule an audio/video conferencing session and reserve conferencing services as needed. • Confirm that the proposed solution provides the capability for web collaboration and application sharing. 		
	<p>The proposed UC solution should allow the host of an audio conference to access and implement, at minimum, the following features/functions:</p> <ul style="list-style-type: none"> • View conference participants. • Play roll call of participants. • Mute all lines. • Mute select lines. • Disconnect select participants. • Dial out to bring new participants into the call. • Record conference. • Lock conference. • Initiate a sub-conference. 	10	
	<p>The Proponent shall clearly describe the types of UC-based desktop clients that are supported by the available UC solution. The proponent shall indicate if a SIP-based client is supported. The Proponent shall identify the PC's technical specifications required to support the UC client and provide as an attachment a graphical illustration of a typical UC screen shot that is representative of the UC offering.</p>	5	
	<p>The Proponent shall clearly explain how the voice messaging systems physically and logically integrate with the available UC solution.</p>	5	
	<p>The proposed UC solution shall support a text-to-speech feature that converts text messages to speech format for access from various voice terminal devices such as desktop telephones and mobile handsets.</p>	5	
	<p>The Proponent shall indicate if the proposed UC solution supports Blackberry and/or other mobile clients.</p>	10	

Total for Unified Communication:	65	
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APPENDIX D: ACCEPTANCE CRITERIA AND SCORING GRID FOR THE PILOT PHASE

The results of the pilot will also validate the Rated Requirements from Appendix C:

	Score	Remarks
<p>1. Base Features: The pilot VCS shall support, but not be limited to, the following base features: call display, call forward, call transfer, conference call (up to 8 way), follow-me (to at least eight phone numbers), phone book, speed dial, line appearance, Ring tones, call pickup groups.</p> <p>The selected solution shall also support the ability to forward calls to off-system telephone numbers (e.g. Blackberry).</p> <p>The solution shall offer system-wide speed dials to allow the administrator to associate special dial-codes with frequently dialed telephone numbers, either external to the system or internal to the system. In this way, end-users need only be able to lookup the system speed dial for a given contact without having to remember the telephone number.</p> <p>The solution offers automated directory, which allows callers to look up a phone system users' extension by entering the first few letters of their last name, or some other unique identifying information.</p>	30	
<p>2. Call Recording: The pilot VCS shall support call recording.</p> <p>All recordings shall be easily accessible and historical information shall also be obtained from Call Recording.</p> <p>Note: The Proponent shall collaborate with the OAG on implementing a solution to archive call recordings.</p>	10	
<p>3. Attendant Solution: The pilot VCS shall demonstrate that an attendant console shall have, but not be limited to, the following features:</p> <ul style="list-style-type: none"> • call display (e.g., calling in through auto-attendant, main number or being rerouted to attendant by pressing "0" and name/telephone number), • call forwarding, phone book & updates, • conference calls, • staff whereabouts, • call hold, headset/handset capability, • night and day service (with time of day 	20	

<p>greetings),</p> <ul style="list-style-type: none"> • remote directory listing, • compatible with Microsoft Outlook 2010 & Windows 7. 		
<p>4. Monitoring Extensions: The pilot VCS shall support supervisor listen and silent monitor features of the VCS.</p>	10	
<p>5. IP Fax and Fax to E-Mail: The pilot VCS shall support IP fax capability to support media redirect to a specified user e-mail account and desktop faxing.</p>	10	
<p>6. Conferencing: The pilot VCS shall demonstrate the native conferencing capability of the VCS. See TR-23.</p> <p>Established conference calls shall be able to be transferred intact from one extension to another across the OAG, whether the destination extension is local to the origin extension or remote. The transferring should not introduce music on hold while the conference call is being transferred.</p> <p>The ability to drop any individual conference call participant from an intact conference call shall be supported and shall be easy to accomplish within a few steps. The operation must not interrupt the conference call or introduce music on hold into the conference call audio stream. If all but two parties are dropped from an intact conference call, the proposed solution must “demote” the call back to that of a station-to-station call.</p> <p>In order for any individual to receive and place calls to individuals not part of the enterprise telephony solution one or more gateways to the public switched telephone network (PSTN) must be a system component of the solution.</p>	20	
<p>7. Multiple Greetings: The pilot VCS shall allow the user to store multiple voice mail greetings (e.g., internal, external).</p>	10	
<p>8. Voice-Mail to E-Mail: The pilot VCS shall support voice-mail media redirect to a specified user e-mail account.</p> <p>The proposed voice messaging system shall integrate to the OAG email client application, which is Microsoft Outlook, as well as email service applications using IMAP, POP, and MAPI.</p>	20	
<p>9. Language Support: The pilot VCS shall demonstrate full support in both English and French languages. This includes but not limited to devices and operational interfaces.</p>	20	

<p>10. Call Information: The Proponent shall collaborate with the OAG to Implement a data feed of VCS call detail records to the OAG's IT systems.</p> <p>Call detail reporting shall be provided with the selected telephony solution. The reporting must be able to be searched by date range, extension, extension range, and/or site location.</p> <p>The call detail should show flow of the call from origination point in the system to destination point within the system even if that destination is a voice mail box or an off-system call forward location.</p> <p>Call detail records shall be presented in human readable reports and the data must be exportable to file formats for ingestion into Microsoft Excel for post processing of data.</p> <p>The VCS shall support the presentation of automatic call distribution (ACD) details and statistics within the call detail reporting. The selected solution vendor shall make explicit the ACD call details and statistics that will be exposed in the call detail reporting.</p> <p>The ACD reporting system shall be able to support a wide variety of report categories, including, as a minimum, the following:</p> <ul style="list-style-type: none"> Single Agent Reports Agent Group Reports ACD Queue Reports Abandoned Calls Report Trunk Reports Daily Total Reports Ongoing Status Reports 	30	
<p>11. LAN Compatibility: The pilot VCS shall demonstrate that the VCS is compatible and interoperable with the LAN described in Section 2.2.2. This includes future evolution to IPv6.</p> <p>As Per MR-04 - Any software solution shall provide for Single-Sign-On (SSO) authentication with Microsoft Active Directory, without the use of an intermediary directory for all users at the OAG.</p>	30	
<p>12. Dial-Plan capabilities: The dial-plan of the proposed solution shall be extremely flexible, allowing the OAG's designated telephony administrators the ability to manage how their calls are routed between the different logical and physical devices.</p> <p>The VCS shall have the ability to map DID numbers to any system extension and allow telephony administrators to manage this mapping. Modifying this mapping should not interrupt the operation of the phone system. Exceptions to these capabilities should be noted.</p>	20	

<p>The VCS shall have the ability to allow telephony administrators to route outbound calls to disparate trunking locations within the telephony solution as needed and without unreasonable restriction.</p> <p>The VCS shall have the ability to present to any trunk connected to the telephone system any properly formatted telephone number and associate that telephone number with any extension of a logical or physical device of the phone system.</p> <p>Call routing within the dial-plan must be configurable by telephony system administrators to route to different destinations based on the <i>time of day</i>.</p> <p>The VCS' dial-plan shall have the ability to route calls based on the calling party's telephone number. The routing within the dial-plan must be configurable by the OAG's telephone administrators.</p> <p>The VCS shall be able to support at least four (4) different system states and allow the OAG telephone administrators to define these states and configure routing based on these states, such as "Open", "Closed", "Lunch", "Vacation/Holiday", etc.</p>		
<p>13. Overall: The results of the Pilot shall meet manufacturer and industry standards for IP-based telephony systems, including feature functionality, acceptable voice quality, reliability and failover:</p> <ul style="list-style-type: none"> • minimum latency (i.e. delay) and allowing for fast connections • Mean Opinion Score (1 - unacceptable and 5 excellent). A typical range for Voice over IP would be from 3.5 to 4.2 using a G.711 Codec. The OAG is aiming for a minimum score of 4.0 for VoIP and 3.0 for smartphones/cells. • Features richness such as call waiting, call forwarding, 3 way calling, speed calling, pre-established teleconferencing, video-conferencing, etc. • Seamless network integration <p>The VCS itself shall provide highly reliable operational characteristics, tolerate hardware system component faults, software system component faults, provide a solution architecture that is both scalable and extensible, and have a pricing model that scales well with the enhancement and expansion of the solution.</p> <p>The VCS shall provide efficiencies at the desktop; in other words, helping employees communicate better and work more productively through:</p> <ul style="list-style-type: none"> • The support of robust, full feature set across digital and IP endpoints and IP soft-clients 	70	

<ul style="list-style-type: none"> Support for user mobility through single-number access and wireless devices <p>Testing: As per the requirement TR-14, a field test plan shall be submitted by the vendor for the OAG's approval that will demonstrate the telephony solution is properly installed and working according to design.</p> <p>All services shall be tested and accompanied by documents explaining exactly what tests were conducted, what tests were demonstrated, and what results were achieved; and signed statements indicating that the tests have been satisfactorily accomplished.</p> <p>The Successful Proponent shall perform these tests when the telephony solution has been installed and adjusted for optimum performance. Satisfactory test results are a prerequisite to acceptance of the solution.</p>		
Total	300	MIN Score: 225
<p>Responses of the proponents for all of acceptance criteria above will be scored on the basis of the following scale:</p> <ul style="list-style-type: none"> Excellent = 100% of available points Very Good = 80% of available points Good = 60% of available points Average = 40% of available points Fair = 20% of available points Poor = 0% of available points <ul style="list-style-type: none"> 		

The Successful Proponent shall provide the OAG with positive, industry standard test and commissioning results, before the VCS can be migrated into the OAG production environment. Consequently, the Successful Proponent shall also provide measures of the ACD (Average Call Duration), ASR (Average Success Ratio), and PDD (Post-Dial Delay), which shall be used to evaluate QoS (Quality of Service) against industry standard.

All test and commissioning activities, including the expected outcome or result of said activity, shall be documented to form a mutually determined acceptance agreement (herein called the "Acceptance Agreement"). The Acceptance Agreement will be verified by the OAG before the VCS is deemed ready for production use. A copy of the completed and agreed upon Acceptance Agreement shall remain the property of the OAG.