

RFP-11-6
SECTION ONE
GENERAL INFORMATION AND REQUESTED PRODUCTS/SERVICES

1.1 INTRODUCTION

In accordance with Indiana statute, including IC 5-22-9, the Indiana Department of Administration (IDOA), acting on behalf of the Indiana Office of Technology, requires Long Distance Services for Indiana state agencies and other governmental bodies. It is the intent of IDOA to solicit responses to this Request for Proposals (RFP) in accordance with the statement of work, proposal preparation section, and specifications contained in this document. This RFP is being posted to the IDOA website (<http://www.IN.gov/idoa/2354.htm>) for downloading. A nominal fee will be charged for providing hard copies. Neither this RFP nor any response (proposal) submitted hereto are to be construed as a legal offer.

1.2 DEFINITIONS AND ABBREVIATIONS

Following are explanations of terms and abbreviations appearing throughout this RFP. Other special terms may be used in the RFP, but they are more localized and defined where they appear, rather than in the following list.

IAC	The Indiana Administrative Code.
IC	The Indiana Code.
Full Time Equivalent (FTE)	The State defines FTE as a measurement of an employee's productivity on a specific project or contract. An FTE of 1 would mean that there is one worker fully engaged on a project. If there are two employees each spending 1/2 of their working time on a project that would also equal 1 FTE.
Implementation	The successful implementation of Long Distance Services at the Indiana Government Center as specified in the contract resulting from this RFP.
Installation	The delivery and physical setup of products or services requested in this RFP.
Other Governmental Body	An agency, a board, a branch, a bureau, a commission, a council, a department, an institution, an office, or another establishment of any of the following: (1) The judicial branch. (2) The legislative branch.

- (3) A political subdivision (includes towns, cities, local governments, etc.)
- (4) A state educational institution (including charter schools)

Products	Tangible goods or manufactured items as specified in this RFP.
Proposal	An offer as defined in IC 5-22-2-17.
Respondent	An offeror as defined in IC 5-22-2-18. The State will not consider a proposal responsive if two or more offerors submit a joint or combined proposal. One entity or individual must be clearly identified as the Respondent who will be ultimately responsible for performance of the contract.
Services	Work to be performed as specified in this RFP.
State	The State of Indiana
State Agency	As defined in IC 4-13-1, “state agency” means an authority, board, branch, commission, committee, department, division, or other instrumentality of the executive, including the administrative, department of state government.
Vendor	Any successful Respondent selected as a result of the procurement process to deliver the products or services requested by this RFP.
MySoft	The IOT billing system used to provide monthly invoices and detail reports to State Agencies for Voice and Data Services.

1.3 PURPOSE OF THE RFP

The purpose of this RFP is to select a vendor that can satisfy the State’s need for the following services.

- Long Distance
- 800# Toll Free
- Calling cards
- Directory Assistance
- PRI procurements
- Audio/Web conferencing.

It is the intent of the Indiana Office of Technology to contract with a vendor that provides these services at a discounted rate and meets the requirements for all authorized users.

1.4 SUMMARY SCOPE OF WORK

The intent of the RFP is to establish a contract that will provide services, with additional savings and reduced rates from current. Estimated contract value, based on current rates is 3.5m.

Current Rates and volume

Long Distance Service Rates

Dedicated	.0121	per minute
	.0209	per minute
Switched	.0304	per minute
International	15%	Discount off regular rates
Dedicated Toll Free	.0199	per minute
Switched Toll Free	.0304	per minute
Calling Card	.0304	per minute (no surcharge)
Directory Assistance		
Interstate	.5100	per call
Intrastate	.5870	per call
PRI	Free	(when used for dedicated LD)

Current count

ANI's	88,411
Calling Cards	12,021
800	1,713
PRI's	135
Directory Assistance	728 – Calls per month

Estimated Volume per Month

Service	Usage in Minutes
SWITCHED INTRALATA	1,062,076.7
SWITCHED INTERLATA	2,647,461.1
SWITCHED 8XX INTRALATA	558,441.8
SWITCHED 8XX INTERLATA	815,950.7
CALLING CARD DOMESTIC	28,009.9
CALLING CARD INTERNATIONAL	271.2
DEDICATED INTRALATA	677,783.2
DEDICATED INTERLATA	2,591,542.6
DEDICATED 8XX INTRALATA	1,117,891.0
DEDICATED 8XX INTERLATA	4,058,655.0
SWITCHED INTERNATIONAL	4,917.3
DEDICATED INTERNATIONAL	30,984.2

Estimated IntraState Volume

	Usage in Minutes
TRAVEL CARD DOMESTIC SWITCHED	30,036.3
DOM INB INTERLATA TOLLFREE SWITCHED	784,136.3

DOM INB INTRALATA TOLLFREE SWITCHED	625,617.4
DOM INB INTERLATA TOLLFREE DEDICATED	3,047,128.7
DOM INB INTRALATA TOLLFREE DEDICATED	1,075,769.0
SW DOM OUT INTRALATA DOMESTIC INTRALATA	1,030,127.1
SWITCHED DOM OUT INTERLATA	2,187,249.2
DED DOM OUT INTRALATA	696,388.8
DED DOM OUT INTERLATA	1,543,727.5

Estimated InterState Volume	Usage in Minutes
SWITCHED INTRALATA DOMESTIC	27,521.6
SWITCHED INTERLATA DOMESTIC	552,452.0
SWITCHED 8XX INTRALATA	6,711.4
SWITCHED 8XX INTERLATA	215,319.2
CALLING CARD DOMESTIC SWITCHED	13,414.1
DEDICATED INTRALATA DOMESTIC	27,077.3
DEDICATED INTERLATA DOMESTIC	1,194,236.0
DEDICATED 8XX INTRALATA	10,679.6
DEDICATED 8XX INTERLATA	645,392.3

Audio/Web Conferencing Service Rates

Reservationless Tollfree	0.04380	Per Minute/Per Participant
Reservationless Toll	0.05	Per Minute/Per Participant
Automated Passcode Toll	0.067	Per Minute/Per Participant
Automated Passcode Tollfree	0.075	Per Minute/Per Participant
Multimedia	0.06260	Per Minute/Per Participant
Web-sharing	0.07920	Per Minute/Per Participant
Operator Assisted Toll	0.170	Per Minute - Operator Assisted
Operator Assisted Tollfree	0.150	Per Minute - Operator Assisted
Operator Dial Out Domestic	0.160	Per Minute/Per Participant
Operator Dial Out Inter.	0.170	Plus outbound rate for the country
Reservationless Audio Replay	0.220	For Recording & replay charges
Reservationless Dial Out - Domestic	0.160	Per Minute/Per Participant
Reservationless Dial Out - Intl	0.160	Plus outbound rate for the country
Event Audio Tollfree Dial In	0.222	Per Minute/Per Participant
Event Audio Toll Dial In	0.210	Per Minute/Per Participant
Event Audio Dial Out (Domestic)	0.222	Per Minute/Per Participant
Event Audio Dial Out (International)		Standard pricing for each country
Streaming - live call	\$500	Minimum Charge**
**(includes 500 participants & 2 hours' call duration)		

Current count

User Accounts 74

Estimated Volume per Month

Reservationless Tollfree

Usage in Minutes

197,079

1.5 RFP OUTLINE

The outline of this RFP document is described below:

Section	Description
Section 1 – General Information and Requested Products or Services	This section provides an overview of the RFP, general timelines for the process, and a summary of the products/services being solicited by the State/Agency via this RFP
Section 2 – Proposal Preparation Instruction	This section provides instructions on the format and content of the RFP including a Letter of Transmittal, Business Proposal, Technical Proposal, and a Cost Proposal
Section 3 – Proposal Evaluation Criteria	This sections discusses the evaluation criteria to be used to evaluate respondents’ proposals
Attachment A	M/WBE Participation Plan Form
Attachment B	Sample Contract
Attachment C	Indiana Economic Impact Form

1.6 QUESTION/INQUIRY PROCESS

All questions/inquiries regarding this RFP must be submitted in writing by the deadline of **3:00 p.m. Eastern Time on August 10, 2010**. Questions/Inquiries may be submitted via fax (**317-234-1281**) or email rfp@idoa.IN.gov and must be received by Procurement Division by the time and date indicated above.

Following the question/inquiry due date, Procurement Division personnel will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website according to the RFP timetable established in Section 1.23. The question/inquiry and answer link will become active after responses to all questions have been compiled. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Inquiries are not to be directed to any staff member of the Indiana Office of Technology. Such action may disqualify Respondent from further consideration for a contract resulting from this RFP.

If it becomes necessary to revise any part of this RFP, or if additional information is necessary for a clearer interpretation of provisions of this RFP prior to the due date for proposals, an addendum will be posted on the IDOA website. If such addenda issuance is necessary, the Procurement Division may extend the due date and time of proposals to accommodate such additional information requirements, if required.

1.7 DUE DATE FOR PROPOSALS

All proposals must be received at the address below by the Procurement Division no later than **3:00 p.m. Eastern Time on September 1, 2010**. Each Respondent must submit **one original hard-copy** (marked "Original"), **one original CD-ROM (marked "Original")** and **one (1) complete copy on CD-ROM** of the proposal, including the Transmittal Letter and other related documentation as required in this RFP. The **original CD-ROM** will be considered the official response in evaluating responses for scoring and protest resolution. **The respondent's proposal response on this CD may be posted on the IDOA website, (<http://www.in.gov/idoa/2462.htm>) if recommended for selection.** Each copy of the proposal must follow the format indicated in Section Two of this document. Unnecessarily elaborate brochures or other presentations, beyond those necessary to present a complete and effective proposal, are not desired. All proposals must be addressed to:

James Osborne
Indiana Department of Administration
Procurement Division
402 West Washington Street, Room W478
Indianapolis, IN 46204

If you hand-deliver solicitation responses:

To facilitate weapons restrictions at Indiana Government Center North and Indiana Government Center South, as of **July 21, 2008**, the public must enter IGC buildings through a designated public entrance. The public entrance to Indiana Government Center South is located at 302 W. Washington St. (the eastern-most Washington St. entrance). This entrance will be equipped with metal detectors and screening devices monitored by Indiana State Police Capitol Police.

Passing through the public entrance may take some time. Please be sure to take this information into consideration if your company plans to submit a solicitation response in person.

If you ship or mail solicitation responses: United States Postal Express and Certified Mail are both delivered to the Government Center Central Mailroom, and not directly to the Procurement Division. It is the responsibility of the Respondent to make sure that solicitation responses are received by the Procurement Division at the Department of Administration's reception desk on or before the designated time and date. Late submissions will not be accepted. The Department of Administration, Procurement Division clock is the official time for all solicitation submissions.

All proposal packages must be clearly marked with the RFP number, due date, and time due. Any proposal received by the Department of Administration, Procurement Division after the due date and time will not be considered. Any late proposals will be returned, unopened, to the Respondent upon request. All rejected proposals not claimed within 30 days of the proposal due date will be destroyed.

No more than one proposal per Respondent may be submitted.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.

All proposals submitted to the State should be double-sided and printed on 30% post-consumer recycled content paper or tree-free paper. When possible, soy ink should be used.

1.8 PRE-PROPOSAL CONFERENCE

It is the decision of the State that no pre-proposal conference is required for this RFP.

1.9 MODIFICATION OR WITHDRAWAL OF OFFERS

Modifications to responses to this RFP may only be made in the manner and format described in Section 1.6 and clearly identified as a modification.

The Respondent's authorized representative may withdraw the proposal, in person, prior to the due date. Proper documentation and identification will be required before the Procurement Division will release the withdrawn proposal. The authorized representative will be required to sign a receipt for the withdrawn proposal.

Modification to, or withdrawal of, a proposal received by the Procurement Division after the exact hour and date specified for receipt of proposals will not be considered.

1.10 PRICING

Pricing on this RFP must be firm and remain open for a period of not less than 180 days from the proposal due date.

Please refer to the Cost Proposal sub-section under Section 2 for a detailed discussion of the proposal pricing format and requirements.

1.11 PROPOSAL CLARIFICATIONS AND DISCUSSIONS, AND CONTRACT DISCUSSIONS

The State reserves the right to request clarifications on proposals submitted to the State. The State also reserves the right to conduct proposal discussions, either oral or written, with Respondents. These discussions could include request for additional information,

request for cost or technical proposal revision, etc. Additionally, in conducting discussions, the State may use information derived from proposals submitted by competing respondents only if the identity of the respondent providing the information is not disclosed to others. The State will provide equivalent information to all respondents which have been chosen for discussions. Discussions, along with negotiations with responsible respondents may be conducted for any appropriate purpose.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

A sample contract is provided in Attachment B. Any requested changes to the sample contract must be submitted with your response (See Section 2.3.5 for details). The State reserves the right to reject any of these requested changes. It is the State's expectation that any material elements of the contract will be substantially finalized prior to contract award.

1.12 BEST AND FINAL OFFER

The State may request best and final offers from those Respondents determined by the State to be reasonably viable for contract award. However, the State reserves the right to award a contract on the basis of initial proposals received. Therefore, each proposal should contain the Respondent's best terms from a price and technical standpoint.

Following evaluation of the best and final offers, the State may select for final contract negotiations/execution the offers that are most advantageous to the State, considering cost and the evaluation criteria in this RFP.

1.13 REFERENCE SITE VISITS

The State may request a site visit to a Respondent's working support center to aid in the evaluation of the Respondent's proposal. Site visits, if required will be discussed in the technical proposal.

1.14 TYPE AND TERM OF CONTRACT

The State intends to sign a contract with one or more Respondent(s) to fulfill the requirements in this RFP.

The term of the contract shall be for a period of four (4) years from the date of contract execution. There may be four (4) one year renewals for a total of eight (8) years at the State's option.

1.15 CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 *et seq.*, and, after the contract award, the entire

RFP file may be viewed and copied by any member of the public, including news agencies and competitors. Respondents claiming a statutory exception to the APRA must place all confidential documents (including the requisite number of copies) in a sealed envelope clearly marked “Confidential” and must indicate in the Transmittal Letter and on the outside of that envelope that confidential materials are included. The Respondent must also specify which statutory exception of APRA that applies. The State reserves the right to make determinations of confidentiality. If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. If the State does not agree that the information designated is confidential under one of the disclosure exceptions to APRA, it may seek the opinion of the Public Access Counselor. Prices are not confidential information.

1.16 TAXES

Proposals should not include any tax from which the State is exempt.

1.17 PROCUREMENT DIVISION REGISTRATION

In order to receive an award, you must be registered as a bidder with the Department of Administration, Procurement Division. Therefore, to ensure there is no delay in the award all Respondents are strongly encouraged to register prior to submission of their response. Respondents should go to www.in.gov/idoa/2464.htm .

1.18 SECRETARY OF STATE REGISTRATION

If awarded the contract, the Respondent will be required to register, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. Information concerning registration with the Secretary of State may be obtained by contacting:

Secretary of State of Indiana
Corporation Division
402 West Washington Street, E018
Indianapolis, IN 46204
(317) 232-6576
www.in.gov/sos

1.19 COMPLIANCE CERTIFICATION

Responses to this RFP serve as a representation that it has no current or outstanding criminal, civil, or enforcement actions initiated by the State, and it agrees that it will immediately notify the State of any such actions. The Respondent also certifies that neither it nor its principals are presently in arrears in payment of its taxes, permit fees or other statutory, regulatory or judicially required payments to the State. The Respondent agrees that the State may confirm, at any time, that no such liabilities exist, and, if such liabilities are discovered, that State may bar the Respondent from contracting with the

State, cancel existing contracts, withhold payments to setoff such obligations, and withhold further payments or purchases until the entity is current in its payments on its liability to the State and has submitted proof of such payment to the State.

1.20 EQUAL OPPORTUNITY COMMITMENT

Pursuant to IC 4-13-16.5 and in accordance with 25 IAC 5, it has been determined that there is a reasonable expectation of minority and woman business enterprises subcontracting opportunities on a contract awarded under this RFP. Therefore a contract goal of 8 % for Minority Business Enterprises and 8 % for Woman Business Enterprises have been established and all respondents will be expected to comply with the regulation set forth in 25 IAC 5.

Failure to meet these requirements will affect the evaluation of your proposal.

1.21 MINORITY & WOMEN'S BUSINESS ENTERPRISES RFP SUBCONTRACTOR COMMITMENT

In accordance with 25 IAC 5-5, the respondent is expected to submit with its proposal a MWBE Subcontractor Commitment Form. The Form must show that there are, participating in the proposed contract, Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) listed in the Minority and Women's Business Enterprises Division (MWBED) directory of certified firms located at <http://www.in.gov/idoa/2352.htm>. If participation is met through use of vendors who supply products and/or services directly to the Respondent, the Respondent must provide a description of products and/or services provided that are directly related to this proposal and the cost of direct supplies for this proposal. Respondents must complete the Subcontractor Commitment Form in its entirety.

Failure to meet these goals will affect the evaluation of your Proposal. The Department reserves the right to verify all information included on the MWBE Subcontractor Commitment Form.

Respondents are encouraged to contact and work with MWBED at 317-232-3061 to design a subcontractor commitment to meet established goals as referenced in this solicitation.

Prime Contractors must ensure that the proposed subcontractors meet the following criteria:

- Must be listed on the IDOA Directory of Certified Firms
- Each firm may only serve as once classification – MBE or WBE
- A Prime Contractor who is an MBE or WBE must meet subcontractor goals by using other listed certified firms. Certified Prime Contractors cannot count their own workforce or companies to meet this requirement.

- Must serve a commercially useful function. The firm must serve a value-added purpose on the engagement.
- Must provide goods or service only in the industry area for which it is certified as listed in the directory at <http://www.in.gov/idoa/2352.htm>
- Must be used to provide the goods or services specific to the contract
- National Corporate Diversity Plans are generally not acceptable

**MINORITY & WOMEN’S BUSINESS ENTERPRISES RFP SUBCONTRACTOR
LETTER OF COMMITMENT**

A signed letter(s), on company letterhead, from the MBE and/or WBE must accompany the MWBE Subcontractor Commitment Form. Each letter shall state and will serve as acknowledgement from the MBE and/or WBE of its subcontract amount, a description of products and/or services to be provided on this project and approximate date the subcontractor will perform work on this contract. The State will deny evaluation points if the letter(s) is not attached, not on company letterhead, not signed and/or does not reference and match the subcontract amount and the anticipated period that the Subcontractor will perform work for this solicitation.

By submission of the Proposal, the Respondent acknowledges and agrees to be bound by the regulatory processes involving the State’s M/WBE Program. Questions involving the regulations governing the MWBE Subcontractor Commitment Form should be directed to: Minority and Women’s Business Enterprises Division at (317) 232-3061 or mwbe@idoa.in.gov.

1.22 AMERICANS WITH DISABILITIES ACT

The Respondent specifically agrees to comply with the provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 *et seq.* and 47 U.S.C. 225).

1.23 SUMMARY OF MILESTONES

The following timeline is only an illustration of the RFP process. The dates associated with each step are not to be considered binding. Due to the unpredictable nature of the evaluation period, these dates are commonly subject to change. At the conclusion of the evaluation process, all Respondents will be informed of the evaluation team’s findings.

Key RFP Dates:

Activity	Date
Issue of RFP	July 27, 2010
Deadline to Submit Written Questions	August 10, 2010
Response to Written Questions/RFP Amendments	August 18, 2010

Submission of Proposals	September 1, 2010
<i>The dates for the following activities are target dates only. These activities may be completed earlier or later than the date shown.</i>	
Proposal Evaluation	TBD
Proposal Discussions/Clarifications (if necessary)	TBD
Oral Presentations (if necessary)	TBD
Best and Final Offers (if necessary)	TBD
Contract Award	November 31, 2010 (tentative)

1.24 EVIDENCE OF FINANCIAL RESPONSIBILITY (25 IAC 1.1-1-5)

Evidence of financial responsibility, in the amount of \$500,000, will be required to guarantee the performance of the selected respondent after the contract is signed. The evidence of financial responsibility, which is due within 10 calendar days after the execution of the contract, must be made payable to “Indiana Department of Administration” and must be in the form of an irrevocable letter of credit, certified check, cashier's check, or a bond acquired from a surety company registered with the Indiana Department of Insurance, or other evidence deemed acceptable by the State. The evidence of financial responsibility must remain in effect for the duration of the contract including any/all renewals. Notwithstanding any other provisions relating to the beginning of the term, the contract shall not become effective until the evidence of financial responsibility required by the contract is delivered in the correct form and amount to IDOA Procurement. The evidence of financial responsibility must be submitted to the following address:

Procurement Division
Indiana Department of Administration
402 West Washington Street, W468
Indianapolis, IN 46204

SECTION TWO PROPOSAL PREPARATION INSTRUCTIONS

2.1 GENERAL

To facilitate the timely evaluation of proposals, a standard format for proposal submission has been developed and is described in this section. All Respondents are required to format their proposals in a manner consistent with the guidelines described below:

- Each item must be addressed in the Respondent's proposal.
- The Transmittal Letter must be in the form of a letter. The business and technical proposals must be organized under the specific section titles as listed below.

2.2 TRANSMITTAL LETTER

The Transmittal Letter must address the following topics except those specifically identified as "optional."

2.2.1 Agreement with Requirement in listed in Section 1

The Respondent must explicitly acknowledge understanding of the general information presented in Section 1 and agreement with any requirements/conditions listed in Section 1.

2.2.2 Summary of Ability and Desire to Supply the Required Products or Services

The Transmittal Letter must briefly summarize the Respondent's ability to supply the requested products and/or services that meet the requirements defined in Section 2.4 of this RFP. The letter must also contain a statement indicating the Respondent's willingness to provide the requested products and/or services subject to the terms and conditions set forth in the RFP including, but not limited to, the State's mandatory contract clauses.

2.2.3 Signature of Authorized Representative

A person authorized to commit the Respondent to its representations and who can certify that the information offered in the proposal meets all general conditions including the information requested in Section 2.3.4, must sign the Transmittal Letter. **In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone and fax number as well as an e-mail address, if that contact is different than the individual authorized for signature.**

2.2.4 Respondent Notification

Unless otherwise indicated in the Transmittal Letter, Respondents will be notified via e-mail.

It is the Respondent's obligation to notify the Procurement Division of any changes in any address that may have occurred since the origination of this solicitation. The Procurement Division will not be held responsible for incorrect vendor/contractor addresses.

2.2.5 Other Information

This item is optional. Any other information the Respondent may wish to briefly summarize will be acceptable.

2.3 BUSINESS PROPOSAL

The Business Proposal must address the following topics except those specifically identified as "optional."

2.3.1 General (optional)

This section of the business proposal may be used to introduce or summarize any information the Respondent deems relevant or important to the State's successful acquisition of the products and/or services requested in this RFP.

2.3.2 Respondent's Company Structure

The legal form of the Respondent's business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization are to be included in this section. If the organization includes more than one product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization.

2.3.3 Company Financial Information

This section must include the Respondent's financial statement, including an income statement and balance sheet, for each of the two most recently completed fiscal years. The financial statements must demonstrate the Respondent's financial stability. If the financial statements being provided by the Respondent are those of a parent or holding company,

additional financial information should be provided for the entity/organization directly responding to this RFP.

2.3.4 Integrity of Company Structure and Financial Reporting

This section must include a statement indicating that the CEO and/or CFO has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The particular areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

The Sarbanes Oxley Act of 2002, H.R. 3763, is NOT directly applicable to this procurement; however, its goals and objectives may be used as a guide in the determination of corporate responsibility for financial reports.

2.3.5 Contract Terms/Clauses

A sample contract that the state expects to execute with the successful Respondent(s) is provided in Attachment B. This contract contains both mandatory and non-mandatory clauses. Mandatory clauses are listed below and are non-negotiable. Other clauses are highly desirable. It is the State's expectation that the final contract will be substantially similar to the sample contract provided in Attachment B.

In your Transmittal Letter please indicate acceptance of these mandatory contract terms (see section 2.2.2). In this section please review the rest of the contract and indicate your acceptance of the non-mandatory contract clauses. If a non-mandatory clause is not acceptable as worded, suggest specific alternative wording to address issues raised by the specific clause. If you require additional contract terms please include them in this section. To reiterate it's the State's strong desire to not deviate from the contract provided in the attachment and as such the State reserves the right to reject any and all of these requested changes.

The mandatory contract terms are as follows:

- Authority to Bind Contractor
- Duties of Contractor, Rate of Pay, and Term of Contract
- Compliance with Laws
- Drug-free Workplace Provision and Certification
- Funding Cancellation
- Indemnification

- Governing Laws
- Non-discrimination clause
- Payments
- Penalties/Interest/Attorney's Fees
- Non-collusion and Acceptance
- Information Technology

Any or all portions of this RFP and any or all portions of the Respondents response may be incorporated as part of the final contract

2.3.6 References

The Respondent must include a list of at least five (5) clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. References for any other state government and other governments should be included. Information provided should include the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information.

2.3.7 Registration to do Business

Secretary of State

If awarded the contract, the Respondent will be required to be registered, and be in good standing, with the Secretary of State. The registration requirement is applicable to all limited liability partnerships, limited partnerships, corporations, S-corporations, nonprofit corporations and limited liability companies. The Respondent must indicate the status of registration, if applicable, in this section of the proposal.

Department of Administration, Procurement Division

Additionally, respondents must be registered with the IDOA. This can be accomplished on-line at <http://www.in.gov/idoa/2464.htm> .

The IDOA Procurement Division maintains two databases of vendor information. The Bidder registration database is set up for vendors to register if you are interested in selling a product or service to the State of Indiana. Respondents may register on-line at no cost to become a Bidder with the State of Indiana. To complete the on-line Bidder registration, go to <http://www.in.gov/idoa/2464.htm>. The Bidder registration offers email notification of upcoming solicitation opportunities, corresponding to the Bidder's area(s) of interest, selected during the registration process. Respondents do need to be registered to bid on and receive email notifications. Completion of the Bidder registration will result in your

name being added to the Bidder's Database, for email notification. The Bidder registration requires some general business information, an indication of the types of goods and services you can offer the State of Indiana, and locations(s) within the state that you can supply or service. There is no fee to be placed in Procurement Division's Bidder Database. To receive an award, you must be registered as a bidder.

Problems or questions concerning the registration process or the registration form can be e-mailed to Amey Redding, Vendor Registration Coordinator, aredding@idoa.in.gov, or you may reach her by phone at (317) 234-3542.

2.3.8 Authorizing Document

Respondent personnel signing the Transmittal Letter of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement.

2.3.9 Subcontractors

The Respondent is responsible for the performance of any obligations that may result from this RFP, and shall not be relieved by the non-performance of any subcontractor. Any Respondent's proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.

Any subcontracts entered into by the Respondent must be in compliance with all State statutes, and will be subject to the provisions thereof. For each portion of the proposed products or services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor's related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State's evaluation. The Respondent must furnish information to the State as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.

The Respondent must list any subcontractor's name, address and the state in which formed that are proposed to be used in providing the required products or services. The subcontractor's responsibilities under the proposal, anticipated dollar amount for subcontract, the subcontractor's form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority or Women Owned Business under IC 4-13-16.5-1. See Section 1.21 and Attachment A for Minority and Women Business information.

2.3.10 Evidence of Financial Responsibility

This section will indicate the ability to provide the mandatory evidence of financial responsibility. See Section 1.24 for details.

Notwithstanding any other provisions relating to the beginning of the term, any contract will not become effective until the evidence of financial responsibility is delivered in the correct form and amount to the address indicated in Section 1.24.

2.4 TECHNICAL PROPOSAL

The Technical Proposal must be divided into the sections as described below. Every point made in each section must be addressed in the order given. The same outline numbers must be used in the response. RFP language should not be repeated within the response. Where appropriate, supporting documentation may be referenced by a page and paragraph number. However, when this is done, the body of the technical proposal must contain a meaningful summary of the referenced material. The referenced document must be included as an appendix to the technical proposal with referenced sections clearly marked. If there are multiple references or multiple documents, these must be listed and organized for ease of use by the State.

2.4.1 Qualification of Bidder

2.4.1.1 You must be a tier 1 provider capable of providing Long Distance services, Inter and IntraLATA, as well as Inter and IntraState on facilities and services you own. The state understands that traffic must traverse other carriers to reach its destination at times, but the proposer must show that they can provide said services as a tier 1 provider.

2.4.1.2 Bidders are advised that the State's intent in listing the following requirements is to ensure that only qualified and reliable vendors submit proposals and be considered for contract award. The State recognizes that there may be equally qualified, reliable Vendors who do not meet all of the requirements specifically as stated, but may in fact

meet the objectives, and criteria intended in the RFP in some other manner. Bidders submitting proposals shall have the burden of demonstrating to the State's satisfaction that they can in fact perform the work in order to be considered for contract award.

2.4.1.3 Proof of these qualifications shall be in the form of written statements as to the bidder's experience, references, listing of contracts performed, sales, financial statements, human resources, or ability to respond such that IOT can evaluate the bidder's ability. All statements made must be able to be independently verified by IOT.

- 2.4.1.3.1 Bids will be accepted only from established Service providers:
 - 2.4.1.3.1.1 Bidders must submit with their bid satisfactory evidence that they have had previous experience, adequate financial resources, and organization as herein specified to perform the type, magnitude, and quality of Lot and Categories bid. This information is to be provided in Executive Summary format and included in the proposal.
 - 2.4.1.3.1.2 Bidders must have at least 3-years in continuous operation and experience in the service being bid or provide acceptable evidence of experience and expertise in the Lot and Categories bid. Experience information must be provided in Executive Summary format and inserted in the proposal.
- 2.4.1.3.2 Bidders must meet and provide the following Sales Volume Requirements:
 - 2.4.1.3.2.1 For Statewide Contract Award Minimum of \$750,000 in verifiable total sales or completed projects in the past 24 months or since inception of the company for the total sales for the various types of services bid.
NOTE: this requirement is for total sales not for sales by category or lot bid.

2.4.2 LONG DISTANCE SERVICES

2.4.2.1 Bidders must provide the long distance calling services offered in its proposal, including but not necessarily limited to: Outbound Intrastate, Outbound Interstate and Outbound International. For each Calling Service, indicate specific billing timing increments – 1/1, 6/6(Maximum non-International), 18/6(Maximum International Only). (E.g. the International component price for the first 18 seconds and for the next and additional 6 seconds increments)

2.4.2.2 Bidders must provide details on the Long Distance service offering, availability information and all pricing components. Bidders must respond to the specifications in this section of the RFP document. All costs associated with the proposed Long Distance Service must be included in the Cost Tables in Attachment C.

2.4.2.3 Types of Toll Service

2.4.2.3.1 Bidders must propose outgoing toll services that accommodate the following types of traffic:

- 2.4.2.3.1.1 Intra-LATA Calling
- 2.4.2.3.1.2 Intra-State, Inter-LATA Calling
- 2.4.2.3.1.3 Inter-State, Inter-LATA Calling
- 2.4.2.3.1.4 International Calling

2.4.2.3.2 Bidders must provide intra-LATA and inter-LATA toll service that conforms to the standard 10-digit North American Dialing Plan.

2.4.2.3.3 Bidders must provide toll services that conform to the international dialing plan of the ITU for all international calls.

2.4.2.4 On-Net/Off-Net Traffic Description

2.4.2.4.1 For the purpose of this RFP, an on-net call is a toll call that originates and terminates with an Authorized User. An off-net call is a toll call that originates with an Authorized User and terminates at a non-Agency location or vice versa.

2.4.2.4.2 It is desirable that the Bidders provide toll service rates that are lower for on-net calls (switched and dedicated access) than for off-net calls. All costs associated with on and off-net toll calls must be provided in the Cost Tables in Attachment C.

2.4.2.5 Dedicated/Switched Access

2.4.2.5.1 Bidders must describe, in their proposal, their definition of a switched access toll call and a dedicated access toll call.

2.4.2.6 Dialing Requirements

2.4.2.6.1 Bidders must provide outgoing toll services that allow for Direct Distance Dialing (DDD) and International Direct Distance Dialing (IDDD).

2.4.2.7 Call Answer Supervision

2.4.2.7.1 Bidders must propose a toll service network that provides full call and answer supervision for both domestic United States and International calling. The Bidder must briefly state how this supervision is provided (hardware, software, etc.) and what measures are in place to ensure that the erroneous billing of calls will not happen.

2.4.2.8 Authorization Codes

2.4.2.8.1 Bidders must propose outgoing toll service which provides end user authorization codes for outgoing toll calling. These authorization codes must be “forced”

and “verified,” denying call completion until a valid code is entered and verified. The Bidder must describe, in their proposal, how code validity is verified.

2.4.2.9 Account Codes

2.4.2.9.1 Bidders must provide “optional” account codes for outgoing toll calling. These account codes would be used to identify a department or project against which the call would be billed.

2.4.2.9.2 Code Customization

- 2.4.2.9.2.1 It is desirable that the Authorized User be able to customize the authorization and account codes provided for use with the Bidder’s toll service. For example, the Authorized User may wish to provide codes according to a current billing numbering plan, office location identification code, etc.
- 2.4.2.9.2.2 The Bidder must state if this function is available and describe, in their proposal, any limitations to this capability.

2.4.2.9.3 Maintenance of Codes

- 2.4.2.9.3.1 Bidders must provide the following information regarding the authorization and account codes required:
 - 2.4.2.9.3.1.1 Process for adding and deleting codes
 - 2.4.2.9.3.1.2 Timeframe for adding and deleting codes
 - 2.4.2.9.3.1.3 Responsibility for retaining/updating the code database
 - 2.4.2.9.3.1.4 Capability for customer to add and delete

2.4.2.10 Implementation Timeframes

2.4.2.10.1 Bidders must state within their proposal the maximum time to implement the proposed toll services via the following accesses:

- 2.4.2.10.1.1 Analog Business Lines/Trunks
- 2.4.2.10.1.2 ISDN Basic Rate Interface
- 2.4.2.10.1.3 ISDN Primary Rate Interface
- 2.4.2.10.1.4 DS-1 Circuit

2.4.2.10.2 Bidders are required to meet the listed implementation timeframes provided for the proposed toll services unless other timeframes have been negotiated with the contracting Agency.

2.4.2.11 Pricing of Outgoing Toll Service

2.4.2.11.1 Bidders must provide all costs associated with the proposed outgoing toll services in the Cost Tables in Attachment C. Bidders must describe, in their proposal, the criteria for billing its toll services (i.e., per minute, etc.). It is desirable that the proposed intra-LATA and inter-LATA toll services be billed in a postalized format that provides for a single per minute rate regardless of distance, time-of-day or day-of-week.

2.4.2.11.2 Bidders must state the initial (minimum) and subsequent billing increments for its proposed intra-LATA, interLATA and international toll services. It is desirable that the Bidder provide intra-LATA, inter-LATA and international toll services that are billed in 6 second initial then 6 second increments, International 18 second initial then 6 second increments.

2.4.2.12 Management Reports

2.4.2.12.1 Bidders must describe, in their proposal, all management reports available to the Authorized Users with the proposed Long Distance service. These management reports must be available to the Agency upon request.

2.4.2.13 Network Management

2.4.2.13.1 Bidders must describe, in their proposal, all network management services available to the Authorized Users with the proposed Long Distance service. Bidders must provide all associated costs for these management services in the Cost Tables in Attachment C.

2.4.2.13.2 Bidders must describe, in their proposal, how real-time monitoring of the Long Distance network is conducted (i.e., alarm notification, performance statistics, etc.)

2.4.2.13.3 Bidders must describe, in their proposal, how proactive monitoring, trouble ticketing and user notification is performed on its Long Distance network. Bidders must describe, in their proposal, all management reports available to the Authorized User with the proposed Long Distance service. These management reports must be available to the Agency upon request.

2.4.3 TOLL FREE SERVICES

2.4.3.1 Bidders must respond to the specifications in this section of the RFP document. All costs associated with the proposed incoming toll free service must be included in the Cost Tables in Attachment C.

2.4.3.2 Types of Toll Free Service

2.4.3.2.1 Bidders must propose incoming toll free services that accommodate the following types of traffic:

- 2.4.3.2.1.1 Intra-LATA Calling
- 2.4.3.2.1.2 Intra-State, Inter-LATA Calling
- 2.4.3.2.1.3 Inter-State, Inter-LATA Calling
- 2.4.3.2.1.4 International

2.4.3.2.2 Bidders must propose incoming toll free services that include, at a minimum, the current geographic codes of 800, 888, 877, 866, and 855.

2.4.3.2.3 Bidders must describe, in their proposal, how it will continue to update the toll free options available to the Authorized Users during the period of this contract.

2.4.3.2.4 Bidders must describe, in their proposal, any incoming toll free service offerings it provides as options to the traditional geographic codes listed above.

2.4.3.2.5 Bidders must provide RESPORG services for all Toll Free numbers currently under contract with the State.

2.4.3.3 Local Service Provider Interface

2.4.3.3.1 Describe any interaction necessary to provision your network when new lines are added at the Local Service Provider level, or when lines are disconnected by the Local Service Provider. Be specific as to the communications, authorizations, correspondence, workday intervals and any other interfacing necessary to accomplish provisioning on your network.

2.4.3.3.2 Long Distance services must be compatible with the following serving central offices: #2ESS, #5ESS and DMS-100 and with C.O. CENTREX service (loop-start circuits), Session Initiation Protocol (SIP) service, Primary Rate Interface (PRI) trunks and flat-rate business lines (1FB).

2.4.4.3.3.3 It must accommodate all signaling and features associated with the local services rendered by the local serving central office. Long distance calls may be routed using the existing Automatic Route Selection (ARS) in the CENTREX or other Premise Based Exchange (PBX) services, and the Advanced Intelligent Network (AIN) to automatically route in-state and out-of-state calls without user action other than standard dialing practices. Authorization codes are optionally used upon request.

2.4.3.4 Toll Free Service Access

2.4.3.4.1 Bidders must be capable of providing incoming toll services on a switched and dedicated access basis. Bidders must propose toll services that are available from all domestic United States locations.

2.4.3.4.2 Bidders must provide toll services that, at a minimum, are available from the following:

- 2.4.3.4.2.1 Analog Business Lines/Trunks
- 2.4.3.4.2.2 Cellular/PCS Telephones
- 2.4.3.4.2.3 Pay Telephones
- 2.4.3.4.2.4 Calling Card
- 2.4.3.4.2.5 ISDN Basic Rate Interface
- 2.4.3.4.2.6 ISDN Primary Rate Interface
- 2.4.3.4.2.7 DS-1 Circuit

2.4.3.4.3 Bidders must provide toll services that are available through pre-subscription from all of the above circuit types.

2.4.3.5 Virtual Toll Free Access

2.4.3.5.1 Bidders must be capable of providing incoming toll free services on a virtual access basis. For the purposes of this RFP, virtual toll free service is that service which allows any call placed to the toll free number to be routed or “ring onto” an existing network service such as local exchange service, DID service, etc.

2.4.3.5.2 Bidders must provide virtual toll free services that may be routed to the following circuits, at a minimum:

- 2.4.3.5.2.1 Analog Business Lines/Trunks
- 2.4.3.5.2.2 ISDN Basic Rate Interface (Local Number Identification)
- 2.4.3.5.2.3 ISDN Primary Rate Interface (DID Number)
- 2.4.3.5.2.4 DS-1 Circuit (DID Number or Local Exchange Service)
- 2.4.3.5.2.5 DS-3 Circuit (DID Number or Local Exchange Service)

2.4.3.5.3 It is desirable that the Bidder provide virtual toll free services that may be routed to a wireless telephone numbers or service.

2.4.3.6 Toll Free Calling Area

2.4.3.6.1 Bidders must provide toll free service, regardless of access, that allows calls to be received from all domestic United States LATAs.

2.4.3.7 Call Answer Supervision

2.4.3.7.1 Bidders must propose a toll free service network that provides full call and answer supervision for domestic United States calling. Bidders must briefly state how this supervision is provided (hardware, software, etc.) and what measures are in place to ensure that erroneous billing of calls will not happen.

2.4.3.8 Multiple Toll Free Numbers

2.4.3.8.1 Bidders must provide toll free service, regardless of access, that allows for multiple toll free numbers to be directed to the same destination access line.

2.4.3.9 Toll Free Number Portability

2.4.3.9.1 Indiana utilizes toll free numbers with several carriers. Bidders must state how it will allow Authorized Users to retain these existing toll free numbers with their proposed toll free service. Portability must be provided at no additional charge. Portability must allow for the movement of any single telephone number in a series, or block of numbers between providers. There can be no limitations to this functionality.

2.4.3.10 Incoming Call Restriction

2.4.3.10.1 Bidders must provide toll free service, regardless of access, however allows Authorized Users to restrict incoming calls by Area Code (NPA) and Exchange (NXX) of its choice.

2.4.3.11 Automatic Number Identification (ANI)

2.4.3.11.1 Bidders must provide toll free service that provides Automatic Number Identification (ANI) to be delivered, in real time, on dedicated access facilities. Bidders must briefly describe, in their proposal, its ANI offering. Bidders must include any costs associated with providing ANI service in the Cost Tables in Attachment C.

2.4.3.12 Dialed Number Identification Service (DNIS)

2.4.3.12.1 Bidders must provide toll free service that allows Dialed Number Identification Service (DNIS) to be delivered on dedicated access facilities. This function allows for the internal routing of incoming toll free callers to specific groups within the particular Authorized Users location.

2.4.3.13 Blocked Call Reports

2.4.3.13.1 Bidders must provide toll free service that provides monthly “reports” indicting the number of calls that were blocked due to all toll free accesses being in use (busy condition) at no cost to the Authorized User.

2.4.3.14 Advanced Routing Features

2.4.3.14.1 It is desirable that the proposed toll free service provide advanced routing features for use by the Authorized User. Bidders must indicate which of the features listed are available with its proposed toll free service and provide a brief description of the feature offering. Bidders must indicate whether the feature is available via dedicated access, virtual access or both.

2.4.3.14.2 Bidders must include all costs associated with the activation and use of these advanced features in the Cost Tables in Attachment C:

- 2.4.3.14.2.1 Alternative Location - The ability to route incoming toll free calls to alternate 3rd party locations for call center backup, etc. This routing must be available on a per toll-free number basis as well as available at peak usage times, time-of-day, day-of-week, etc.
- 2.4.3.14.2.2 Alternative Trunk Group - The ability to route incoming toll free calls from one trunk group to another trunk group regardless of location of the second trunk group. This routing must be available at peak usage times, time-of-day, day-of-week, etc.

- 2.4.3.14.2.3 Area Code Routing - The ability to route incoming toll free calls to a particular Authorized Users location or party location based on the area code of the caller.
- 2.4.3.14.2.4 Area Code/Exchange Routing - The ability to route incoming toll free calls to a particular Authorized Users location or 3rd party location based on the area code and exchange of the caller.
- 2.4.3.14.2.5 Time-of-Day Routing - The ability to route incoming toll free calls to a particular Authorized Users location or party location based on the time of day.
- 2.4.3.14.2.6 Day-of-Week Routing - The ability to route incoming toll free calls to a particular Authorized Users location or party location based on the day of the week.
- 2.4.3.14.2.7 Day-of-Year Routing - The ability to route incoming toll free calls to a particular Authorized Users location or party location based on the day of the year.
- 2.4.3.14.2.8 Call Percentage Routing - The ability to route calls based on a percentage of total calls. This percentage must pre-program and selected by the Authorized Users.
- 2.4.3.14.2.9 Routing on Command - The ability for the Authorized Users to designate various routing patterns for incoming toll-free service. These patterns are then activated by the Authorized Users by calling the Bidder. Describe, in their proposal, in detail, in your response, the process by which routing can be altered by the Agency.
- 2.4.3.14.2.10 Load Balance Routing - The ability of the Bidder's network to "monitor" incoming toll free call volume and re-route calls as necessary to other Authorized Users locations or 3rd party's locations. Describe the parameters by which such load balancing may be achieved, as well as the process for altering such parameters.
- 2.4.3.14.2.11 Alternative Routing Tracking - The ability for the Authorized Users to obtain management reports or statistical data detailing the number of calls and minutes and other pertinent data of those callers that are re-routed from the original service called.

2.4.3.14.3 Bidders must describe, in their proposal, its ability to provide the Authorized Users with the capability to control the activation of the above features/functions from any Agency location using a direct online mechanism or via toll free access to a Customer Service Representative.

2.4.3.14.4 Bidders must state, in its response, the activation time for changes made via its online mechanism. (Real time, one hour, 24 hours, etc.) as well as activation time for changes made via toll free access to a Customer Service Representative.

2.4.3.15 Incoming Local Exchange Calls

2.4.3.15.1 Bidders must state, in its response, if its toll free service offering is capable of identifying an incoming call from the local calling area and re-route that call to the

Authorized Users local exchange service thereby eliminating the necessity of the Authorized Users expending charges on the Bidder's toll free service.

2.4.3.16 Network-Based Call Processing Function

2.4.3.16.1 Bidders must provide toll free service that allows for a network call processing function. This network call processing feature must provide for the following at a minimum:

- 2.4.3.16.1.1 Call Processing Menus
- 2.4.3.16.1.2 Information or Audio Text Capabilities
- 2.4.3.16.1.3 Routing to Any Local Telephone Number
- 2.4.3.16.1.4 Routing to Any Toll Free Number
- 2.4.3.16.1.5 Routing by the Calling Party's Area Code
- 2.4.3.16.1.6 Routing by the Calling Party's Area Code and Exchange

2.4.3.16.2 Bidders must describe, in their proposal, its network call processing function.

2.4.3.17 Single Number Service

2.4.3.17.1 Bidders must provide toll free service that furnishes "single number" access by the caller for all domestic United States locations regardless of LATA.

2.4.3.18 Implementation Timeframes

2.4.3.18.1 Bidders must state the maximum time to implement the proposed toll free services via the following accesses:

- 2.4.3.18.1.1 Virtual Toll Free Service
- 2.4.3.18.1.2 Dedicated Toll Free Access

2.4.3.18.2 Bidders must include a list of appropriate dedicated access types and associated installation timeframes for each. Bidders are required to meet the listed implementation timeframes provided for the proposed toll free services unless other timeframes have been negotiated with the Authorized User.

2.4.3.19 Pricing of Incoming Toll Free Service

2.4.3.19.1 Bidders must provide all costs associated with the proposed incoming toll-free services in the Cost Tables in Attachment C. Bidders must describe, in their proposal, the criteria for billing its toll free services (i.e., per minute, distance sensitive, time-of-day, etc.).

2.4.3.19.2 It is desirable that the proposed intra-LATA and inter-LATA toll free services be billed in a postalized format that provides for a single per minute rate regardless of distance, time-of-day or day of-week.

2.4.3.19.3 It is desirable that the Bidder provide intra-LATA, inter-LATA toll free services that are billed in timing increments of 1/1 second is preferred; 6/6 second is acceptable.

2.4.3.20 Management Reports

2.4.3.20.1 Bidders must describe, in their proposal, all management reports available to the Authorized Users with the proposed Toll Free service. These management reports must be available to the Agency upon request.

2.4.3.21 Network Management

2.4.3.21.1 Bidders must describe, in their proposal, all network management services available to the Authorized Users with the proposed Toll Free service. Bidders must provide all associated costs for these management services in the Cost Tables in Attachment C.

2.4.3.21.2 Bidders must describe, in their proposal, how real-time monitoring of the Toll Free network is conducted (i.e., alarm notification, performance statistics, etc.) Bidders must describe, in their proposal, how proactive monitoring, trouble ticketing and user notification is performed on its Toll Free network.

2.4.3.21.3 Bidders must describe, in their proposal, all management reports available to the Authorized User with the proposed Toll Free service. These management reports must be available to the Agency upon request.

2.4.4 CALLING CARD SERVICES

2.4.4.1 Service Description

2.4.4.1.1 Presently the State has issued approximately 12,021 Calling Cards. Bidder must be able to provide a universal toll-free number 1+800, 866, 877, 888 for access by remote users. Authorized Users must have capability of completing a call from either touch-tone, rotary or reader (magnetic stripe) telephone.

2.4.4.1.2 Bidders must describe, in their proposal, their proposed system. Bidder's calling card system must have the capability of assigning definable restrictions to an individual card.

2.4.4.1.2.1 For example, a card assigned to one Authorized User will have its own set of calling capabilities and restrictions which may be different from a second Authorized User.

2.4.4.1.2.2 The capabilities and restrictions must be definable to allow or restrict by items such as: dollar amount of calls, definable time periods, restrictions accessing network services such as 900, international calling, restricting locations and specific NPA's and NXX's.

2.4.4.1.3 Bidder must provide detailed descriptions of the dialing procedural sequence for dialing domestic and international calling. The procedures are to be step-by-step instructions that include the exact number of digits required for each step (e.g. area code, pin number, telephone number), progress tones, and all steps or actions required by the Authorized User to complete the call. If there is a difference in the exact steps and/or the digits dialed for making the different types of domestic calls, a detailed procedure is required for each.

2.4.4.1.4 Bidder must include copies of all instructional material to be distributed to the end user.

2.4.4.1.5 Bidder must have the capability to provide electronic, media, and/or web based access, for the management of all authorization codes for all users of the contract (i.e. state agencies, county government and local governments).

2.4.4.1.6 The Bidders calling card service must allow international calling from overseas to United States or to another international location. Describe how calls will be made and how they will be billed to the calling card customer of record.

2.4.4.1.7 Bidders must describe, in their proposal, Outbound or Inbound Calling Card rates and their application.

2.4.4.1.8 Bidder must provide the ability to allow Authorized Users of the calling card service to place an additional call after terminating the first call without hanging up and redialing. This feature must also apply if the user dialed a number and it was busy.

2.4.4.1.9 Bidder must describe, in their proposal, how a caller can disconnect from voice mail, auto attendant, or FAX system.

2.4.4.1.10 Bidder's calling card service must allow Authorized Users who mis-dial a number the ability, assuming the incorrect number was not completely dialed, to redial the correct number without starting over again. Bidder must describe in their proposal this process, in detail.

2.4.4.1.11 Bidder must describe, in their proposal, the process and procedures for calling card administration for both manual and electronic, with a web based system being the most desirable to perform issuance, discontinuation and Security.

2.4.4.1.12 Bidders must describe, in their proposal, how all calling cards issued will be sent at no cost and in a secure manner to the Authorized User.

2.4.4.1.13 Bidders must explain in detail how their calling card system will allow a user to do three-way calling with or without operator intervention.

2.4.4.1.14 The Bidder's calling card system must offer speech recognition at no additional cost for a user who wishes to place a call.

2.4.4.1.15 Bidder must provide Braille calling cards at no additional cost. Instructions for use of cards must be provided for both blind and sighted individuals.

2.4.4.1.16 Bidder must provide calling cards including Braille cards with a magnetic strip on a hard card so it can be used in "SWIPE" phones.

2.4.4.1.17 Bidder must have and describe, in their proposal, billing arrangements in place with all local exchange and major long distance carriers for the billing of all calling card calls.

2.4.4.1.18 Bidder must provide a list of all international countries that can be direct dialed, and a list of all international countries that require operator assistance to complete the call.

2.4.4.1.19 Bidder must inform the State within 30 days after new international calling capability becomes available, and provide an updated rate list for such countries. All system must provide the ability to complete calls to all domestic NPAs including 700 numbers as well as all international numbers.

2.4.4.1.20 Bidders must allow Authorized Users to designate a customer administrator at no additional cost that will have web based access to on-line call and billing detail data in real time. Describe this service in full detail. It is desirable that Authorized Users be able to re-activate calling cards that have been deactivated in the last 30 days.

2.4.4.1.21 Options

2.4.4.1.21.1 Bidders must provide customized or private logo on calling cards. Identify any additional cost and state what is the minimum number of cards that can be ordered.

2.4.4.2 Management Reports

2.4.4.2.1 Bidders must describe, in their proposal, all management reports available to the Authorized Users with the proposed Calling Card service. These management reports must be available to the Agency upon request.

2.4.4.3 Network Management

2.4.4.3.1 Bidders must describe, in their proposal, all network management services available to the Authorized Users with the proposed Calling Card service. Bidders must provide all associated costs for these management services in the Cost Tables in Attachment C.

2.4.4.3.2 Bidders must describe, in their proposal, how real-time monitoring of the Calling Card network is conducted (i.e., alarm notification, performance statistics, etc.)

2.4.4.3.3 Bidders must describe, in their proposal, how proactive monitoring, trouble ticketing and user notification is performed on its Calling Card network.

2.4.4.3.4 Bidders must describe, in their proposal, all management reports available to the Authorized User with the proposed Calling Card service. These management reports must be available to the Agency upon request.

2.4.5 DIRECTORY ASSISTANCE SERVICES

2.4.5.1 Service Description

2.4.5.1.1 Bidder must agree to provide White Pages Information, both residential and business, and Government listings (Blue Pages) for the Continental United States, including all independent telephone companies, to all calling parties. At a minimum, Bidder must agree to update Operator database(s) daily and identify the source(s) of the data to be used to update the directory information database(s).

2.4.5.1.2 Bidder must agree to provide Authorized Users with the information their operators will require to provide the caller with directory assistance (e.g. city, state, area code, LATA, etc.).

2.4.5.1.3 Bidder must agree to provide a Toll Free number to access directory assistance, and provide, at a minimum, directory assistance services for both residential and business for the Continental United States to all calling parties.

2.4.5.1.4 Bidder must identify how operators will handle calls when the requested information is not in their database.

2.4.5.1.5 Bidder must identify if Directory Assistance can be provided for International calls.

2.4.5.1.6 Bidder must identify the make and model of the switching equipment they utilize to handle calls, its maximum call handling capacity and its current busy hour load.

2.4.5.1.7 Bidder must identify access method to be used from Authorized User's systems (e.g. 800 number, 10XXX or dedicated facility).

2.4.5.1.8 Bidder must agree to allow Authorized Users to aggregate traffic at one or more sites for delivery to the Bidder. The decision to do so will be at the discretion of the Authorized User.

2.4.5.1.9 Bidder must identify alternate routing options for Authorized Users using dedicated facilities.

2.4.5.1.10 Bidder must agree in their proposal that all calls will be answered by a Directory Assistance Operator within three rings or forwarded to the appropriate provider

(either the LEC or PIC) at no additional cost to the Authorized User. Describe in detail how this will be accomplished.

2.4.5.1.11 Bidder must identify how multiple requests will be handled from a single caller.

2.4.5.1.12 Bidder must agree in their proposal to block Operator call completion for each location requested by Authorized Users.

2.4.5.1.13 Bidder must identify if their operators utilize a script when answering calls. If one is used a copy must be provided and approved by IOT for use under the contract.

2.4.5.1.14 Bidder must identify in their proposal current and projected operator staffing levels at locations handling the traffic.

2.4.5.1.15 Bidder must identify if multilingual operators are available. If so, identify which languages and when these positions are staffed in the proposal.

2.4.5.1.16 Bidder must identify if address and zip code information is available to callers. Provide a response in the proposal.

2.4.5.1.17 Bidder must be able to provide switched or dedicated directory assistance service to any Authorized User within Indiana. Describe, in their proposal, how switched access is provided.

2.4.5.1.18 Bidder must provide a description of any additional features or enhancements their Directory Assistance service can provide. All costs associated with the proposed Long Distance Service must be included in the Cost Tables in Attachment C.

2.4.5.1.19 Bidder must agree to provide traffic reports to IOT and Authorized Users of the contract on a monthly basis. These reports must be provided for each location and include at a minimum date, time, originating telephone number, area code called, location called, length of call and cost with subtotals for number of IntraLATA, Intrastate and Interstate calls. A copy of the report must be provided as part of Bidder's proposal.

2.4.5.1.20 Bidder must agree to provide overflow reports, which identifies by location, calls that overflow to another service provider. These reports must be provided for each location and include at a minimum date, time, area code called, with subtotals for each location and monthly total. A copy of the report must be provided in Bidder's proposal.

2.4.5.1.21 Bidder must agree to provide a summary report of all locations to IOT on a monthly basis. This report must include subtotals for number of IntraLATA, Intrastate and Interstate calls and their associated costs, for each location and total calls for the month.

2.4.5.2 Management Reports

2.4.5.2.1 Bidders must describe, in their proposal, all management reports available to the Authorized Users with the proposed Directory Assistance service. These management reports must be available to the Agency upon request.

2.4.5.3 Network Management

2.4.5.3.1 Bidders must describe, in their proposal, all network management services available to the Authorized Users with the proposed Directory Assistance service. Bidders must provide all associated costs for these management services in the Cost Tables in Attachment C.

2.4.5.3.2 Bidders must describe, in their proposal, how real-time monitoring of the Directory Assistance network is conducted (i.e., alarm notification, performance statistics, etc.).

2.4.5.3.3 Bidders must describe, in their proposal, how proactive monitoring, trouble ticketing and user notification is performed on its Directory Assistance network.

2.4.5.3.4 Bidders must describe, in their proposal, all management reports available to the Authorized User with the proposed Directory Assistance service. These management reports must be available to the Agency upon request.

2.4.6 AUDIO/WEB CONFERENCING SERVICES

2.4.6.1 Bidders must propose non-premised based audio/web conferencing services that meet the minimum requirements outlined in this section. Authorized Users may wish to take advantage of certain audio/web conferencing services available from bidders.

2.4.6.2 Service Description

2.4.6.2.1 Bidder must agree to provide audio/web conferencing service on request to any Authorized User within Indiana.

2.4.6.2.2 Bidder must provide each of the following types of conference calls:

- 2.4.6.2.2.1 Dial-In Conference - participants dial a ten digit number over their long distance carrier.
- 2.4.6.2.2.2 Dial-In 800 Conference - 800 call is part of the conference charge.
- 2.4.6.2.2.3 Dial Out Conference – Contractor’s conference coordinator dials out to each participant.
- 2.4.6.2.2.4 Multi-media – Allow participants to access a website for document sharing, PowerPoint presentation, desktop sharing, training, etc. Service must allow for synchronization with audio services.

2.4.6.2.3 Bidder must describe, in their proposal, the services and associated costs available on an agent-assisted call (e.g. roll call, list of participant names, taping, etc.). Provide the cost in Appendix C.

2.4.6.2.4 Bidder must provide both conventional and toll free (universal number 1+800, 866, 877, 888) access to the audio/web conferencing bridge. Authorized User must have the capability of completing a call from either touch-tone, rotary or reader (magnetic stripe) telephone.

2.4.6.2.5 Bidder's audio/web conferencing service must allow Authorized Users to have international calling capabilities based on customer defined parameters.

2.4.6.3 Service Availability

2.4.6.3.1 Bidders must list all geographic areas where it provides the proposed audio/web conferencing service. It is desirable that bidders be capable of providing audio/web conferencing Service to all geographic areas of Indiana and the United States.

2.4.6.3.2 Bidders must describe, in their proposal, any geographic areas within United States where it cannot provide audio/web conferencing service. It is desirable that the same prices are provided across the entire geographic area of the State of Indiana. To meet this specification bidders must describe, in their proposal, how the costs change or do not change across Indiana.

2.4.6.3.3 Bidders must in their proposal:

- 2.4.6.3.3.1 Describe how an Authorized User makes a reservation for a conference call;
- 2.4.6.3.3.2 Describe and identify the maximum and minimum number of people who can participate in a conference call as well as the maximum number of simultaneous but separate conference calls that the bidders service can accommodate;
- 2.4.6.3.3.3 Describe how an Authorized User can include participants on a conference call who are not presubscribed to your company;
- 2.4.6.3.3.4 Describe whether it is possible to combine different features on a single call (e.g. can some participants be called while others use a Toll Free number to call in?) ;
- 2.4.6.3.3.5 Describe any language translation services available. Identify any associated charges. Provide cost in Appendix C.

2.4.6.4 Customer Premise Equipment Requirements

2.4.6.4.1 Bidders must describe, in their proposal, all Customer Premise Equipment (CPE) requirements for the proposed Audio/Web Conferencing service. Bidders must provide all costs associated with the required CPE in the Cost Tables in Attachment C.

2.4.6.4.2 Note: CPE must ONLY be provided, obtained or purchased as required for the provisioning and operation of the proposed Audio/Web Conferencing service. No individual purchases of CPE may be made under this contract.

2.4.6.5 Standards Compliance

2.4.6.5.1 The services proposed by bidders must conform to all required national and international standards. Bidders must guarantee that the proposed service meets or exceeds these standards and include a list of such standards in its response.

2.4.6.5.2 Bidders must describe, in their proposal, the measures they will take to ensure they will comply with all industry standards.

2.4.6.6 Hours of Operation

2.4.6.6.1 Conference Calling must be available 24 hours per day, 7 days per week.

2.4.6.6.2 Bidders must describe, in their proposal:

- 2.4.6.6.2.1 Identify the minimum lead-time required to set up a conference call.
- 2.4.6.6.2.2 Describe the process to add new participants to a conference call already in progress.

2.4.6.7 Session Reservation Procedures

2.4.6.7.1 Bidders must describe, in their proposal, how a reservation for its audio/web conferencing service is performed including any requirements for advanced reservations.

2.4.6.8 Session Support Services

2.4.6.8.1 Bidders must in their proposal:

- 2.4.6.8.1.1 Describe the support services it offers during a audio conferencing session;
- 2.4.6.8.1.2 Describe assistance available for technical problems during a conference call;
- 2.4.6.8.1.3 Describe the minimum training an Authorized User will receive;
- 2.4.6.8.1.4 Describe the security your company's conference call services provide;
- 2.4.6.8.1.5 Explain the various ways a conference call may be monitored;
- 2.4.6.8.1.6 Specify whether an Authorized User can determine which departments are using the service so as to assign costs internally. Indicate whether the billing reflects the departmental charges i.e. centralized, individual, departmental, etc;
- 2.4.6.8.1.7 List all optional management reports available to the Authorized Users and indicate charges, if applicable in Appendix C;
- 2.4.6.8.1.8 Describe any penalties for call changes or cancellations prior to a scheduled conference call;

- 2.4.6.8.1.9 Identify any additional features available with your proposal that may offer additional features/enhancements to the Authorized Users.

2.4.6.9 Management Reports

2.4.6.9.1 Bidders must describe, in their proposal, all management reports available to the Authorized User with the proposed Audio/Web Conferencing service. These management reports must be available to the Agency upon request.

2.4.6.10 Performance

2.4.6.10.1 The proposer shall be responsible for all aspects of service quality, reliability, interconnectivity, and interoperability for all services offered as part of this RFP.

2.4.6.10.2 The availability of required services and features shall be at least 99.999 percent. The Proposer must describe, in detail, the process by which they will demonstrate to the State, on a monthly basis, the required service and feature availability objectives were met.

2.4.6.10.3 The proposer shall report to the State's designated project manager the monthly availability for each service provided under the contract. Availability shall be calculated as $100 * (M - T) / M$, where M is the number of minutes in the regular working hours of the reporting period and T is the number of minutes the service was in a network-related trouble condition. The report shall explain any service that did not meet the required availability.

2.4.6.11 Security of Proposed Infrastructure

2.4.6.11.1 The proposer shall provide security-related services within all its services. Security-related service support is directed at ensuring availability of service, confidentiality, and data integrity of both the transmission systems and databases being maintained by the proposer in support of the State's interests. Best commercial practices are expected relative to the security requirements of this section.

2.4.6.11.2 The proposer shall immediately respond to remedy any security breach, whether identified by the proposer or the State. Upon proposer identification of a security breach, the State and all affected agencies shall be immediately notified. All costs associated with the failure to immediately respond to remedy any security breach, whether identified by the proposer or State, during the term of this contract shall be the sole responsibility of the proposer.

2.4.6.11.3 The proposer shall, at a minimum, conduct a semiannual analysis of its system(s) supporting the State to determine if any security breaches have occurred that could adversely result in unwarranted charges. The results of each analysis shall be presented, in writing, to the State and any affected agency within 30 days of analysis completion.

2.4.6.11.4 All remedial actions must be approved by the State before their implementation. Following State approval, failure to complete an order for remedial action within the time permitted will result in the proposer being responsible for all costs incurred as a result of the breach.

2.4.6.11.5 The proposer shall protect State information from both disclosures to unauthorized persons and unauthorized modification during its transmission.

2.4.6.11.6 The proposer shall provide confidentiality protection for sensitive information maintained in the network such as subscriber profiles, billing data, network performance statistics, and network vulnerabilities. The proposer will hold confidential all database information and not supply any such information to other parties. The proposer will also indemnify the State against any third-party billing associated with the system that the State has not specifically authorized in writing.

2.4.6.11.7 The proposer shall provide mechanisms to identify and authenticate proposer personnel and State personnel who are authorized to access network management information.

2.4.6.11.8 The proposer shall provide access controls to protect the network management systems and switching systems from attacks via publicly accessible ports on “end” devices, such as PBXs, routers, and packet switches or from ports on end devices that may be accessed via the public switched network (e.g., maintenance ports).

2.4.6.11.9 The proposer shall provide access controls to ensure that only authorized proposer personnel and State personnel have access to network management information. Further, proposer will provide systems to ensure that orders for moves, changes, additions and deletions to the system will be accepted from only individuals authorized by the State.

2.4.6.11.10 The proposer shall be responsible for identifying, reporting, and resolving all security violations and breaches. The proposer shall report all security breaches to the affected agency and to the State.

2.4.6.11.11 The proposer shall provide audit and alarm mechanisms that log all security-related events and report critical events to the State immediately. The proposer shall protect its facilities from entry by unauthorized persons.

2.4.6.11.12 The proposer shall work with the State on an ongoing basis to enhance and certify security. The security plan shall describe planned enhancements to network security and shall be updated annually, as a minimum, after contract award.

2.4.6.11.13 Post-award activities shall include, but not be limited to, the following:

- 2.4.6.11.13.1 Provide the State with quarterly summaries of security-related events, including the number of attempted break-ins and changes to security practices and procedures.

- 2.4.6.11.13.2 Work with the State to reassess the severity of perceived threats and to take countermeasures to ensure the specified network availability in accordance with the security plan.
- 2.4.6.11.13.3 Work with the State to conduct quarterly security certification and accreditation audits on the networks and systems provided by proposer.
- 2.4.6.11.13.4 Provide information on procedures and systems to prevent unauthorized PIC changes, often referred to as “slamming”.

2.4.7 Billing

2.4.7.1 Clearly describe, and provide printed examples, of available billing formats. The State will require:

- 2.4.7.1.1 Paper Invoices – Summary of charges per location and agency. Guaranteed to match the electronic in dollar amounts.
- 2.4.7.1.2 Electronic Billing Feed - Detail per agency in multiple sub-sets (e.g. by Bureau, Division, street address, floor location, etc.) depending on individual agency requirements. Feed Files need to be as follows for the State’s MySoft Billing System:
 - 2.4.7.1.2.1 Ascii (containing all details)
 - 2.4.7.1.2.2 FTP’d (to our server). Real time is desired.
 - 2.4.7.1.2.3 Bill of record (guaranteed to match paper bill in dollar amounts).
- 2.4.7.1.3 All charges and credits will be reported at the work station level.
- 2.4.7.1.4 Payphone charges need to be associated with the phone station being charged.
- 2.4.7.1.5 Clear detail of all cost information. The State is not interested in dealing with acronyms, and/or undefined “miscellaneous” billing categories. USOC designations must be accompanied by clear, written descriptions.
- 2.4.7.1.6 A single invoice by billing entity, as defined by the State. The specific billing detail used to compile the single invoice must be available by station number and purchase order number where applicable.
- 2.4.7.1.7 Dedicated billing support person for the State of Indiana account. Provide a copy of your billing issues escalation process.
- 2.4.7.1.8 Billing data is due to the State by the 15th of each month.

2.4.7.2 Describe in detail how your company computes billable call duration for domestic and international calls by service type being proposed. Include timing and rounding in this response.

2.4.7.3 Describe in detail if your company invoices for incomplete call attempts by service type being proposed.

2.4.7.4 Describe in detail if your company invoices minimum usage fees or penalty fees for any of the service types being proposed.

2.4.7.5 Specify the billing (flat rates, distance bands, special discounts etc) you are prepared to make available to the State for each service type being proposed. If more than one rate is available explain in detail, and recommend a plan you feel would be in the best interest of the State.

2.4.7.6 The State requires that call detail records for all proposed services be made available to the State in electronic format. Describe in detail which types of media, and formats, the billing invoices can be made available for each of the service types being proposed.

2.4.7.7 The records will be uploaded to the State's MySoft billing system for rebilling to state agencies. Describe in detail how this will be accomplished for each service type being proposed. This detail should be provided in an industry standard format. Please provide a small sample of call record detail and note whether the format is proprietary or an industry standard.

2.4.7.8 Is the use of E-mail a viable option to deliver billing invoices or notification of invoice posting to an online portal from your company to the State? The State requires that the offeror be able to end the monthly billing period so that the offeror can deliver the billing data to the State by the 15th of each month. Describe in detail your company's ability to comply with this requirement for each of the service types being proposed. Billing for a given month must include all charges and discounts for that month, and any additional charges such as: taxes, surcharges, regulatory fees, etc. must be explicitly referenced.

2.4.7.9 Describe in detail your company's billing process, and provide examples of your invoices showing how these additional charges and discounts are clearly referenced for each service type being proposed.

2.4.7.10 One of the primary goals in administering this contract is to keep accurate records regarding its actual value. This information is essential in order to update the contents of the contract and to establish proper bonding levels if they are required. The integrity of future contracts revolves around our ability to convey accurate and realistic information to all interested bidders. A monthly report shall be furnished by the successful contractor, electronically and in Excel format, detailing the purchasing of all items on this contract.

2.4.7.11 The format to be followed is described herein and shall be filed within fifteen (15) days after the end of each reporting period. Any exception to this mandatory requirement may result in cancellation of the award. Failure to provide the report with the minimum required information may also negate any contract extension clauses. Additionally, contractors who are determined to be in default of this mandatory report requirement may have such conduct considered against them, in assessment of responsibility, in the evaluation of future proposals. Vendors not having activity during a specific month, shall reply with a "no activity" if there is no activity during the reporting period.

2.4.8 Operator Services

2.4.8.1 Describe your proposed Operator Services and Directory Assistance as provisioned under the networks in this bid. Be prepared to describe the organization and operation in place to provide Directory Assistance and Operator Services. If no organization now exists, describe how these services will be provided. You should describe how changes to the Directory Assistance operation are to be requested and implemented.

2.4.9 Migration

2.4.9.1 Define the following:

- 2.4.9.1.1 The subscription and provisioning process for new accounts, for additions to existing accounts, and for disconnecting accounts.
- 2.4.9.1.2 Provide an implementation plan that insures the smooth transition from the existing long distance, toll free and calling card services to the services your company proposes.
- 2.4.9.1.3 Identify the Team Leader and members of the team who will be responsible for implementing the service(s).
- 2.4.9.1.4 Describe what resources and tasks that will be required of the State to implement your plan.
- State what clerical and technical assistance your company will provide in the process of implementation.
- 2.4.9.1.5 Describe your company's network architecture in detail as it would be implemented for Indiana. This should include the number and location of Points of Presence (POPs) serving the State and the number of routes to the interexchange carriers network switch.
- 2.4.9.1.6 Detail your network reliability and provide simple maps, indicating how traffic will be carried. Include all single points of failure which could interrupt service. Also describe network redundancy plans for the State's call traffic, and provide call completion rates and call setup times.
- 2.4.9.1.7 State the expected Mean Time To Repair (MTTR) on your network and describe your methods to insure a minimal MTTR.
- 2.4.9.1.8 Provide FCC network outage reports relative to number of calls carried over the last 12 months, if available.
- 2.4.9.1.9 List the network connection steps to integrate your proposed service with existing flat-rate business lines, CO CENTREX lines, ISDN/PRI and BRI trunks, PBX Automatic Route Selection (ARS) systems and Advanced Intelligent Network (AIN). The State expects any non-recurring charges accrued as a result of any vendor provisioning with the local service provider to be assumed by the contractor.

2.5 COST PROPOSAL

The baseline for this RFP is \$3,500,000 per year. State usage represents \$2,500,000 of the baseline. The remaining \$1,000,000 is the approximate contract value of K-12 schools, libraries, cities, towns, etc.

2.5.1 The state is requiring that each bid must provide 2 cost proposals for the services requested. Bidders not providing the following will be considered non-compliant and therefore eliminated from the evaluation process. Each bid must include the following:

2.5.1.1 Cost Proposal 1

- 2.5.1.1.1 Charges for each service should include all surcharges (USF, FARF, URT, UCC, etc.) applicable to the state, which are not exempt.
- 2.5.1.1.2 Each bidder must be responsible for any costs associated with migrating services to the winning bidder. The bidder should not include fees associated with PICC or any other fees related to migrating services to the winning bidder.

2.5.1.2 Cost Proposal 2

- 2.5.1.2.1 Charges for each service should exclude all surcharges (USF, FARF, URT, UCC, etc.) applicable to the state, which are not exempt.
- 2.5.1.2.2 Each bidder must be responsible for any costs associated with migrating services to the winning bidder. The bidder should not include fees associated with PICC or any other fees related to migrating services to the winning bidder.

2.5.2 Universal Service Fund (USF), E-Rate, and Rural Health Care Program

2.5.2.1 All services and products requested within this RFP will be made available to schools, libraries and other interties that are eligible for E-Rate reimbursement statewide and must therefore meet all E-Rate guidelines for eligible services and products, service providers, and contracts.

2.5.2.2 A provider's failure to prove eligibility for E-Rate will eliminate them from consideration for this contract. A provider's failure to commit to all required participation guidelines will eliminate them from consideration. The E-Rate program is of great value to those that file for those benefits within the State of Indiana and therefore cannot be jeopardized by introducing problems with the contracts and/or providers resulting from this RFP.

2.5.2.3 Service Provider Responsibilities

- 2.5.2.3.1 To provide, as part of the RFP response, the name, phone number, fax number, and e-mail address of the person responsible for E-Rate within the Service provider's company.
- 2.5.2.3.2 To provide, as part of the RFP response, the Service provider's SPIN.
- 2.5.2.3.3 To maintain the Service Provider Annual Certification Form.

- 2.5.2.3.4 To notify the State in the event the Service provider has been subjected to the “Red Light Rule”.
- 2.5.2.3.5 To ensure, to the best of the Service Provider’s ability, that all services for which E-Rate discount is sought are indeed eligible services as described in the Eligible Services List
<http://www.sl.universalservice.org/reference/eligible.asp>.
- 2.5.2.3.6 To abide by all E-Rate rules, regulations, and limitations as described by FCC, USAC, and SLD. For complete program overview, please visit <http://www.universalservice.org/default.asp>.

2.5.2.4 E-Rate Funding

2.5.2.4.1 The E-Rate funding year starts July 1st and ends June 30th of the following year. SLD generally is unable to issue Funding Commitment Decision Letters (FCDL), before the July 1st start date. Therefore, service providers will be unable to get USAC reimbursements until sometime later in the year; in some cases even in the last quarter.

2.5.2.4.2 The State understands the effect that the Universal Service Fund, E-Rate, and Rural Health Care Program have on both the Local Exchange Carriers (LEC) and the Interexchange Carriers (IXC). The offerors should detail any and all costs related to USF, E-Rate, and Rural Health Care Program, i.e., USF percentage. Information provided should specifically detail the offeror’s intent to either absorb all access reform related costs or pass these charges to the State.

- 2.5.2.4.2.1 Failure to detail these costs will prevent the Contractor from having the opportunity to pass these charges to the State as part of the proposer’s rates.
- 2.5.2.4.2.2 Offeror will merit higher scores in the evaluation process if they are able to absorb these costs as a part of doing business.
- 2.5.2.4.2.3 Contractors not electing to absorb these costs must provide a price cap on (USF) and (PIC-C) charges to be honored throughout the length of the contract.
- 2.5.2.4.2.4 All respondents will verify their familiarity with Federal and State statutory and regulatory requirements regarding the provision of telecommunications services in accordance with the Universal Service Administrative Company and the Schools & Libraries Division as it relates to the provisions of the E-Rate Program.

2.6 INDIANA ECONOMIC IMPACT

All companies desiring to do business with state agencies must complete an “Indiana Economic Impact” form (Attachment C). The collection and recognition of the information collected with the Indiana Economic Impact form places a strong emphasis on the economic impact a project will have on Indiana and its residents regardless of where a business is located. The collection of this information does not restrict any company or firm from doing business with the state.

2.7 BUY INDIANA INITIATIVE/INDIANA COMPANY

It is the Respondent's responsibility to confirm its Buy Indiana status for this portion of the process. If a Respondent has previously registered its business with IDOA, go to <http://www.in.gov/idoa/2464.htm> and click on the link to update this registration. Click the tab titled Buy Indiana. Select the appropriate category for your business. Respondents may only select one category. Certify this selection by clicking the check box next to the certification paragraph. Once this is complete, save your selection and exit your account.

Respondents that have not previously registered with IDOA must go to <http://www.in.gov/idoa/2464.htm> and click on the link to register. During the registration process, follow the steps outlined in the paragraph above to certify your business' status. The registration process should be complete at the time of proposal submission.

Defining an Indiana Business:

“Indiana business” refers to any of the following:

- (1) A business whose principal place of business is located in Indiana.
- (2) A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
- (3) A business that employs Indiana residents as a majority of its employees.

Respondents claiming this status must indicate which of the provisions above qualifies them as an Indiana business. They must also fully complete the Indiana Economic Impact Form (Attachment C) and include it with their response.

The following is the policy concerning items 4 & 5 described below. Appropriate documentation must be provided with your proposal response supporting either claim made below:

- (4) A business that makes significant capital investments in Indiana.
- (5) A business that has a substantial positive economic impact on Indiana.

Substantial Capital Investment:

Any company that can demonstrate a minimum capital investment of \$5 million or more in plant and/or equipment or annual lease payments of \$2.5 million or more shall qualify as an Indiana business under category #4. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

Substantial Indiana Economic Impact:

Any company that is in the top 500 companies (adjusted) for one of the following categories: number of employees (DWD), unemployment taxes (DWD), payroll

withholding taxes (DOR), or Corporate Income Taxes (DOR); it shall qualify as an Indiana business under category #5. If a Respondent needs assistance in determining if its business qualifies under this criterion, please send an email inquiry to buyindianainvest@idoa.in.gov and you will receive a response within forty-eight (48) hours. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

SECTION THREE PROPOSAL EVALUATION

3.1 PROPOSAL EVALUATION PROCEDURE

The State has selected a group of personnel to act as a proposal evaluation team. Subgroups of this team, consisting of one or more team members, will be responsible for evaluating proposals with regard to compliance with RFP requirements. All evaluation personnel will use the evaluation criteria stated in Section 3.2. The Commissioner of IDOA or his designee will, in the exercise of his sole discretion, determine which proposals offer the best means of servicing the interests of the State. The exercise of this discretion will be final.

The procedure for evaluating the proposals against the evaluation criteria will be as follows:

- 3.1.1 Each proposal will be evaluated for adherence to requirements on a pass/fail basis. Proposals that are incomplete or otherwise do not conform to proposal submission requirements may be eliminated from consideration.
- 3.1.2 Each proposal will be evaluated on the basis of the categories included in Section 3.2. A point score has been established for each category.
- 3.1.3 If technical proposals are close to equal, greater weight may be given to price.
- 3.1.4 Based on the results of this evaluation, the qualifying proposal determined to be the most advantageous to the State, taking into account all of the evaluation factors, may be selected by IDOA and IOT for further action, such as contract negotiations. If, however, IDOA and IOT decide that no proposal is sufficiently advantageous to the State, the State may take whatever further action is deemed necessary to fulfill its needs. If, for any reason, a proposal is selected and it is not possible to consummate a contract with the Respondent, IDOA may begin contract preparation with the next qualified Respondent or determine that no such alternate proposal exists.

3.2 EVALUATION CRITERIA

Proposals will be evaluated based upon the proven ability of the Respondent to satisfy the requirements of the RFP in a cost-effective manner. Each of the evaluation criteria categories is described below with a brief explanation of the basis for evaluation in that category. The points associated with each category are indicated following the category name (total maximum points = 105). Negative points may be assigned in the cost score. Additionally, there is an opportunity for a bonus of five points if certain criteria are met.

For further information, please reference Section 3.2.3 below. If any one or more of the listed criteria on which the responses to this RFP will be evaluated are found to be inconsistent or incompatible with applicable federal laws, regulations or policies, the specific criterion or criteria will be disregarded and the responses will be evaluated and scored without taking into account such criterion or criteria.

Summary of Evaluation Criteria:

Criteria	Points
1. Adherence to Mandatory Requirements	Pass/Fail
2. Management Assessment/Quality (Business and Technical Proposal)	25 points
3. Cost (Cost Proposal)	-30 to +30 available points (5 bonus points are available if certain criteria is met)
4. Indiana Economic Impact	15
5. Buy Indiana	10
6. Minority (10) and Women Business (10) Subcontractor Commitment	20
Total	100 (105 if bonus awarded)

All proposals will be evaluated using the following approach.

Step 1

In this step proposals will be evaluated only against Criteria 1 to ensure that they adhere to Mandatory Requirements. Any proposals not meeting the Mandatory Requirements will be disqualified.

Step 2

The proposals that meet the Mandatory Requirements will then be scored based on Criteria 2 and 3 ONLY. This scoring will have a maximum possible score of 55 points with a potential of 5 bonus points if certain criteria are met. All proposals will be ranked on the basis of their combined scores for Criteria 2 and 3 ONLY. This ranking will be used to create a “short list”. Any proposal not making the “short list” will not be considered for any further evaluation.

Step 2 may include one or more rounds of proposal discussions focused on cost and other proposal elements.

Step 3

The short-listed proposals will then be evaluated based on all the entire evaluation criteria outlined in the table above.

If the State conducts additional rounds of discussions and a BAFO round which lead to changes in either the technical or cost proposal for the short listed Respondents, their scores will be recomputed.

The section below describes the different evaluation criteria.

3.2.1 Adherence to Requirements – Pass/Fail

Respondents passing this category move to Phase 2 and proposal is evaluated for Management Assessment/Quality and Price.

3.2.2 Management Assessment/Quality - 25 points

3.2.3 Price – 30 points available

Price will be measured against the State's baseline cost for this scope of work. The cost that the State is currently paying or its best estimate will constitute the baseline cost. Cost scoring points will be assigned as follows:

- Respondents who meet the State's current baseline cost will receive zero (0) cost points.
- Respondents who propose a decrease to the State's current costs will receive positive points at the same rate as bid increasing cost.
- Respondents who propose an increase to the State's current cost will receive negative points at the same rate as bid lowering cost.
- Respondents who propose a 10% decrease to the State's current baseline cost will receive all of the available cost points.
- If multiple Respondents decrease costs below 10% of the current baseline, an additional 5 points will be added to the Respondent proposing the lowest cost to the State.

3.2.4 Indiana Economic Impact (15 points)

See Section 2.6 for additional information.

The total number of full time equivalent (FTE – please see Section 1.2 for a definition of FTE's) Indiana resident employees for the Respondent's proposal (prime contractor and subcontractors) will be used to evaluate the Respondent's Indiana Economic Impact. Points will be awarded based on a graduated scale. The Respondent with the most Indiana FTEs will be awarded 15 points. Points will then be awarded to the remaining Respondents proportionately.

3.2.5 Buy Indiana Initiative – 10 points

Respondents qualifying as an Indiana Company as defined in Section 2.7 will receive 10 points in this category.

3.2.6 Minority (10 points) & Women's Business (10 points) Subcontractor Commitment - (20 points).

The following formula will be used to determine points to be awarded:

The commitment factor for each proposal will be calculated by multiplying the commitment percentage by one hundred. The RFP score ratio will be determined by dividing the maximum allowable points by the highest commitment factor. The proposal with the highest commitment factor will be given the maximum allowable points. The points awarded to the other proposals will be calculated by multiplying the score ratio by the proposed commitment factor.

Commitment percentage * 100 = commitment factor

Maximum allowable points/highest commitment factor = score ratio

Commitment factor * score ratio = points awarded

The Commissioner of IDOA or his designee will, in the exercise of his sole discretion, determine which proposal(s) offer the best means of servicing the interests of the State. The exercise of this discretion will be final.