



# IRVINE UNIFIED SCHOOL DISTRICT

**RFP No. 18/19-01IT**  
**VoIP Telecommunications System**  
**PROPOSAL DEADLINE: November 30, 2018, 12:00pm**

**Contact: Michelle Bennett, Purchasing Dept.**  
Irvine Unified School District  
5050 Barranca Parkway, Irvine, California 92604  
Telephone: (949) 936-5022 Fax (949) 936-5219  
Email: MichelleBennett@iusd.org

All dates subject to change at the sole discretion of IUSD. Please continue to check our website throughout the proposal and selection periods for updates.

<https://iusd.org/about/departments/business-services/purchasing/current-bids-rfps>

NOTICE CALLING FOR PROPOSALS

DISTRICT: **IRVINE UNIFIED SCHOOL DISTRICT**  
PROPOSAL DEADLINE: November 30, 2018 at 12:00 pm  
PLACE OF RECEIPT: Irvine Unified School District  
Purchasing Department  
Attn: Michelle Bennett  
5050 Barranca Parkway  
Irvine, California 92604-4652

NOTICE IS HEREBY GIVEN that the Irvine Unified School District of Orange County, California, acting by and through its Governing Board, hereinafter referred to as "District" will receive up to, but no later than, the above stated Proposal Submission Deadline, sealed Proposals at the place identified above for its upcoming **RFP No. 18/19-01IT, VOIP TELECOMMUNICATIONS SYSTEM.**

Request for Proposal documents can be downloaded on October 22, 2018 at <https://iusd.org/about/departments/business-services/purchasing/current-bids-rfps>.

Time is of the essence. The District reserves the right to reject any and all submissions, to negotiate with any or all responsible Proposers, and to waive any deficiencies, irregularities or informalities in any proposal or during the evaluation process. The award of the Contract, if made by the District, will be by action of the Governing Board.

**Pre-Proposal Vendor Conference:** The District will conduct a non-mandatory pre-proposal vendor conference on November 1, 2018 at 12:00pm pacific time at Irvine Unified School District Learning Center, 3387 Barranca Parkway, Room 1, Irvine, CA 92606. Vendors who wish to attend this meeting should RSVP to Michelle Bennett at [MichelleBennett@iusd.org](mailto:MichelleBennett@iusd.org).

Any questions regarding the Request for Proposals shall be directed to Michelle Bennett at [MichelleBennett@iusd.org](mailto:MichelleBennett@iusd.org), via e-mail **only** by **12:00 pm on November 13, 2018**. All responses will be posted on the District's website.

Irvine Unified School District  
Governing Board

Publish: Orange County Register – October 22 – 29, 2018

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## **1. Background and Overview**

### **1.1 Overview**

The Irvine Unified School District (“IUSD”, “District” or “The District”) is comprised of a community of learners, committed to the highest quality educational experience it can envision. IUSD educates a diverse student population numbering over 35,000 (Pre-K through 12), in one (1) early childhood learning center, twenty-three (23) elementary schools, four (4) K-8 schools, six (6) middle schools, five (5) comprehensive high schools, and one (1) continuation high school. IUSD’s outstanding programs, large size, and rapid enrollment growth make it a standout school district. The District's strategic initiatives are driven by its mission of enabling all students to become contributing members of society, empowered with the skills, knowledge, and values necessary to meet the challenges of a changing world.

IUSD is renowned for its nationally recognized schools, student performance well-above state and national comparisons, and comprehensive programs in academics, the arts, and athletics. The District benefits immensely from a deeply engaged and supportive community.

### **1.2 Requested Services**

This solicitation is intended to provide a mechanism for Irvine Unified School District to procure a new or upgraded Voice over Internet Protocol (VoIP) Telecommunications System to serve the staff and administrative operations of the District. The District is seeking a state-of-the-art telecommunications system to meet the needs of its varied facilities and programs. IUSD is soliciting qualified service Vendors, (hereafter referred to as “Vendor”, “Contractor” or “Provider”) for one solution. Under this solution, the Vendor shall submit a proposal for the purchase, implementation and ongoing services for a VoIP Telecommunications System. IUSD priorities for the solution and services include:

- VoIP Telecommunications System that supports:
  - All required Call Processing
  - Voice and Unified Messaging
  - System Services
  - Centralized and efficient management
  - Administrative Feature Requirements
  - Additional requirements as defined in this RFP.
- Hardware and equipment to support the proposed System
- Maintenance

### **1.3 Current Environment**

Irvine Unified School District currently has a number of Mitel digital and IP telecommunications systems serving roughly 3,500 stations across 42 District locations. The majority of the systems are older digital systems. The District has determined that the existing systems are end-of-life, obsolete and no longer supported. This hardware and software obsolescence requires the District to upgrade the existing systems or replace them with new products.

The data network uses Cisco data network routers and switches. The District has centralized voicemail and all of the Mitel systems are networked together to allow 4 digit dialing between all phones on the system(s).

Voice communications services today for the facilities are primarily provided through PRI service. The District currently has a total of 10 PRI's installed centrally at the District Office. The District intends to install the new VoIP telephone system in its two data centers and will implement new SIP services terminated in its 2 data center locations.

The District currently has 47 locations connected with a private fiber Wide Area Network (WAN). All District buildings are connected with a wide area network that provides the needed data network connections. It is the District's intent to obtain a new telecommunications system that will continue to allow direct connectivity and enhanced communications.

The District network can provide Power over Ethernet (POE) and Quality of Service (QOS) features and capabilities. The District has also prepared the network to provide the needed IP addressing and subnet approach. Vendors should assume the District's data network will provide the needed POE and QOS capabilities for VoIP Deployment.

The data network is AT&T ASE and network connections to schools are 1Gb. There are no bandwidth or latency issues within the data network at this time.

There is a 10Gb connection between the Sand Canyon data center and District Office (the two primary VoIP locations).

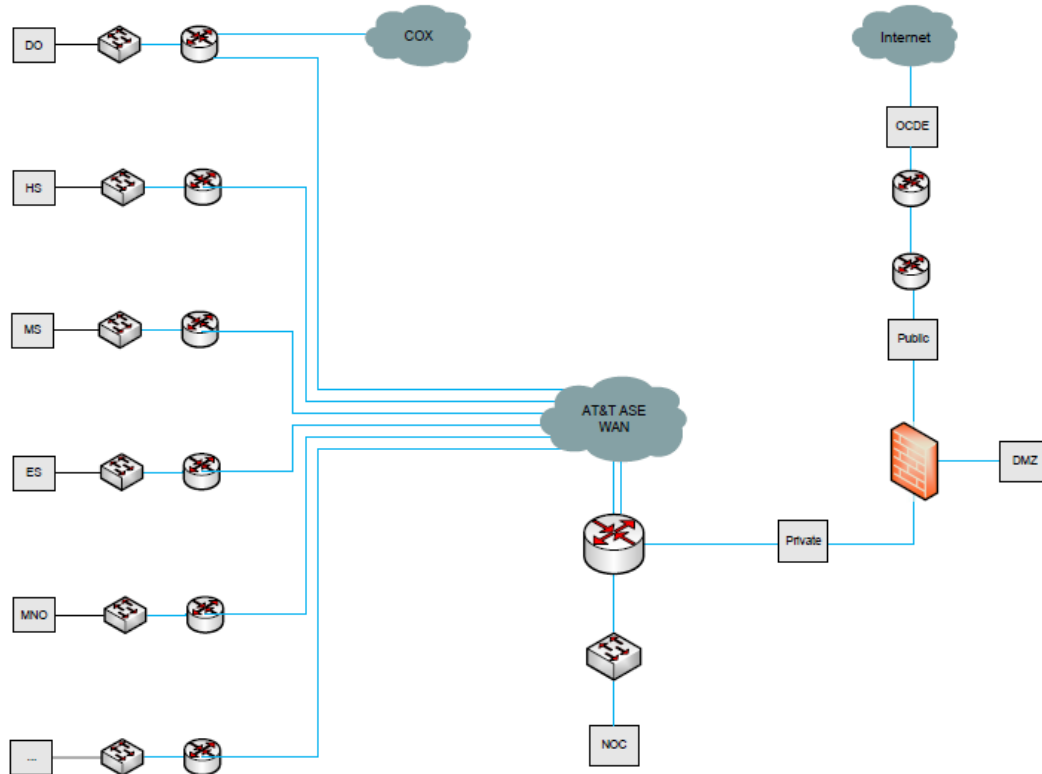
The District has standardized on the following Cisco local area network configuration (in varying sizes) at each school:

<b>IUSD Network Hardware</b>	
<b>Device</b>	<b>Model</b>
Router	Cisco ISR 4451
L3 Switch	Cisco Catalyst 4500X
L2 PoE Switch	Cisco Catalyst 2960-X
Indoor AP	Aruba 225
Outdoor AP	Aruba 275

Since the District already utilizes VoIP at some facilities, VLANs, prioritization and tagging are in place and fully functional for those facilities.

The District has designed the existing data network using a common design and hardware approach for each site. For the most part, each District site has similar hardware and network connectivity.

Following is a drawing of the current District data network:



Existing IUSD Data Network



## PAGING SYSTEMS

The District has existing external paging systems in each of the buildings. There is a wide range in the age of the systems. Following is a summary of the available details regarding the existing paging systems:

<b>SITE</b>	<b>PA Bell</b>	<b>Clock</b>
RANCHO	* DUKANE	SYMPLEX
TURTLE ROCK	* DUKANE	SYMPLEX
CANYON VIEW	RAULAND	LATHEM
UNIVERSITY HIGH	RAULAND	RAULAND
EL CAMINO	SIMPLEX	PRIMEX
SOUTH LAKE	* DUKANE	LATHEM
LAKESIDE	* DUKANE	DUKANE
LEGACY CREEKSIDE	SIMPLEX	PRIMEX
WESTPARK	* DUKANE	Dukane/Lathem
SPRINGBROOK	* DUKANE	DUKANE
IRVINE HIGH	* DUKANE	Lathem/Primex
WOODBURY	* DUKANE	DUKANE
SANTIAGO HILLS	* DUKANE	DUKANE
NORTHWOOD HIGH	* DUKANE	DUKANE
MEADOW PARK	* DUKANE	DUKANE
BRYWOOD	* DUKANE	SIMPLEX
CREEKSIDE @ H/B	* DUKANE	DUKANE
DEERFIELD	* DUKANE	DUKANE
EASTSHORE	* DUKANE	DUKANE
BONITA CANYON	* DUKANE	DUKANE
NORTHWOOD EL	* DUKANE	DUKANE
STONE CREEK	* DUKANE	DUKANE
WOODBIDGE HIGH	* DUKANE	PRIMEX
STONEGATE	* DUKANE	DUKANE
UNIVERSITY PARK	* DUKANE	SIMPLEX
TURTLE ROCK	* DUKANE	SIMPLEX
GREENTREE	* DUKANE	DUKANE
CULVERDALE	* DUKANE	DUKANE
COLLEGE PARK	* DUKANE	DUKANE
RANCHO	* DUKANE	SIMPLEX
OAK CREEK	BOGEN	DUKANE
VENADO	* DUKANE	PRIMEX
SIERRA VISTA	* DUKANE	DUKANE
JEFFERY TRAIL	* DUKANE	DUKANE
ALDERWOOD	* DUKANE	DUKANE
VISTA VERDE K-8	* DUKANE	DUKANE
WESTWOOD	* DUKANE	PRIMEX
UNIVERSITY STADIUM	Crown/QSC	
PLAZA VISTA K-8	* DUKANE	DUKANE
E.C.L.C.	SIMPLEX	
IHS STADIUM	QSC	
M&O	BOGEN	PRIMEX
CYPRESS VILLAGE	* DUKANE	DUKANE
PORTOLA SPRINGS	ATLAS	ATLAS
BEACON PARK	ATLAS	ATLAS



<b>SITE</b>	<b>PA Bell</b>	<b>Clock</b>
PORTOLA HIGH	ATLAS	ATLAS
EASTWOOD	ATLAS	ATLAS

The District desires a new telecommunications system that uses VoIP technology. The District intends to use best practices approach to the deployment of VoIP and integrate voice and data onto the same data network.

Any proposal for a new telecommunications system must use survivable remote technology for the telecommunications system. In the event of a loss of the WAN connection, the VoIP telecommunications system shall allow ALL system users to access local analog Plain Old Telephone Service (POTS) lines that will be available in each District site.

Vendors may propose an upgrade/update to the existing Mitel systems if there are reasonable upgrade approaches. Vendors proposing an upgrade that assumes the use of any existing Mitel hardware, software or phones must provide detailed information regarding the specific equipment that will be reused/retained. It is the responsibility of Vendors to perform any needed inventory or system review.

#### **1.4 Period of Performance**

The term of the contract resulting from this RFP shall be two (2) years, including the initial installation, equipment purchases, software and related services, and any necessary maintenance during this time frame. The District shall have the option to execute three (3) additional one-year extensions. The original contract and extensions shall include equipment purchases at the same discount level of the original Proposal, software and related services, as well as maintenance. The target implementation timeline shall begin summer 2019 (with planning and testing in spring 2019).

## **2. Instructions to Vendors**

### **2.1 Proposal Contact and Correspondence**

All correspondence related to the RFP must be directed to the following designated District RFP contact:

Michelle Bennett, Purchasing Department  
MichelleBennett@iusd.org  
Irvine Unified School District  
5050 Barranca Parkway  
Irvine, CA 92604

There will be no verbal understandings recognized by the District.

No Vendor should attempt to contact or obtain information from any other District representative.

All official records will be posted on the District website (<https://iusd.org/business-services/purchasing/current-bids-rfps>) or sent in writing by the official contact listed on the RFP or Amendments.

## **2.2 Proposal Deadline and Submission**

Proposals must be received no later than **12:00 pm PST on November 30, 2018.**

Vendor to submit:

- (1) Master Bound Hardcopy Proposal
- (4) Additional Bound Hardcopy Proposals
- (1) Electronic Proposal on CD or Flashdrive

Proposals shall be clearly marked: "Response to RFP 18/19-01IT: VoIP Telecommunications System."

### **Proposals shall be submitted to:**

Irvine Unified School District  
Purchasing Department  
Attn: Michelle Bennett  
5050 Barranca Parkway  
Irvine, California 92604

## **2.3 Delivery to District**

Written Proposals must be received at the District Office, no later than the Proposal Submission Deadline specified in the Calendar of Events. No telegraphic, facsimile, or emailed Proposal will be accepted. The District assumes no responsibility for late delivery.

If discrepancies between two (2) or more copies of the Proposal are found, the Proposal may be rejected. If, however, the Proposal is not rejected, the master copy will provide the basis for resolving such discrepancies.

## **2.4 Withdrawal, Resubmission or Modification**

Vendor may withdraw the Proposal at any time prior to the Proposal Submission Deadline specified in the Calendar of Events, by submitting a written request for its withdrawal to the designated District RFP contact, signed by the Vendor or authorized agent. Vendor may thereafter submit a new or modified Proposal prior to the Proposal Submission Deadline. Modification offered in any other manner, oral or written, will not be considered. A Proposal cannot be changed, corrected, or withdrawn after the Proposal Submission Deadline.

## 2.5 Calendar of Events

Event	Details	Date
Advertisements - RFP Posting	OC Register & IUSD Website	October 22, 29, 2018
Pre-Proposal Vendor Conference (Non Mandatory)	3387 Barranca Pkwy, Room 1, Irvine, CA 92606	November 1, 2018 12:00pm – 2:00pm,
Last Day to Submit Questions (RFIs)	MichelleBennett@iusd.org	November 13, 2018 by 12:00pm
Response to Questions Posted	IUSD Website	November 20, 2018
Proposals Due	Attn: Michelle Bennett 5050 Barranca Parkway Irvine, CA 92604	November 30, 2018 by 12:00 pm
Evaluation and Selection of Finalists		December 3, 2018 – February 1, 2019
Board of Education Action		February 19, 2018
Estimated Testing/Proof of Concept		Spring 2019
Estimated Launch		Summer 2019

All dates subject to change. Amendments to these dates, and other aspects of the RFP, will be posted at <https://iusd.org/about/departments/business-services/purchasing/current-bids-rfps>.

## 2.6 Pricing Methodology

Due to variable telecommunication needs and school enrollments, this RFP is constructed as a unit-cost RFP. Vendors must provide specifications and pricing for proposed products meeting each equipment performance level defined in the requirements and the pricing forms in Appendix C.

The Pricing Forms are divided into the following sections:

- (1) Component Pricing Form
- (2) E-911 Station Locator Capability Form
- (3) Optional Equipment Form
- (4) Additional Telephone Station Pricing Form
- (5) Summary of One Time Costs Form
- (6) Annual Recurring Costs Form

IUSD shall select the most advantageous solution for the District. Vendors **must** submit their proposals and pricing forms on documents and forms provided in the RFP documents. Requests for clarification or modification to the form must be submitted through the RFI process.

## **2.7 Preparation**

Proposals must follow the District-prescribed format, including all required forms and response templates. Vendors must include all documents and forms indicated in the Proposal Submission Checklist provided in Appendix B.

A Proposal should be prepared in such a way as to provide a straightforward description of Vendor capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, and completeness and clarity of content.

The completed document(s) should be without interlineations, alterations, or erasures. The Proposal should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely. It is more desirable to give additional information than less when the answer could be misinterpreted.

The contents of Vendor's proposal to the District, including technical specifications for hardware and software and software maintenance fees, shall remain valid for a minimum of ninety (90) calendar days from the Proposal due date. If selected, Vendor's Proposal pricing shall remain valid for the duration of the contract term including the original contract and all extensions.

Vendor shall include sample contracts for all applicable goods, services, and software in its proposal. All Vendor contracts are subject to negotiation.

## **2.8 False and Misleading Statements**

A Proposal which contains false or misleading statements, or which provides references which do not support an attribute or condition contended by the Vendor, may be rejected. If, in the opinion of the District, such information was intended to mislead the District in its evaluation of the Proposal and the attribute, which is a condition or capability of a requirement of this RFP, the Proposal shall be rejected.

## **2.9 Request for Information (RFI)**

Vendors are encouraged to ask questions during the open RFP period. All questions shall be in writing and submitted to the listed District contact person. Questions must be received by the deadline specified in the Calendar of Events. There shall be no verbal understandings or clarifications recognized by the District. All responses shall be in writing by an authorized District employee or their designated representative. Responses to all RFIs received will be posted on the District Website. It is Vendor's responsibility to monitor the District website for RFI Responses, RFP Amendments, changes, updates, revisions and/or uploaded documents.

## **2.10 Amendments to the RFP**

During the RFP period, the District may amend the RFP. Amendments to the RFP and/or calendar of events will be posted at <https://iusd.org/about/departments/business-services/purchasing/current-bids-rfps>.

**2.11 Limits of the RFP**

IUSD reserves the right to reject all proposals and will determine what future action, if any, will be taken. All costs incurred in the preparation or submission of a proposal shall be entirely the responsibility of the Vendor and shall not be chargeable directly or indirectly to the District.

**2.12 Public Records Act**

All records, documents, drawings, plans, specifications and other materials submitted by Vendor in its proposal and during the course of any work awarded shall become the exclusive property of IUSD and may be deemed public records and subject to the provisions of the California Public Records Act (Government Code, sections 6250 et seq.). IUSD's use and disclosure of its records are governed by this Act. IUSD will accept information clearly labeled "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" as determined by the submitting party in accordance with the Act. IUSD will endeavor to inform Vendor of any request for the disclosure of such information. However, under no circumstances will IUSD be responsible or liable to Vendor or any other party for the disclosure of any such labeled information. Vendors that indiscriminately identify all or most of their proposal as exempt from disclosure without justification may, at IUSD's discretion, be deemed non-responsive. IUSD will not advise as to the nature or content of documents entitled to protection from disclosure under the California Public Records Act, including interpretations of the Act or the definitions of "Trade Secret," "Confidential" or "Proprietary." If litigation is brought under the Public Records Act concerning documents submitted in response to this RFP, Vendor shall indemnify, defend and hold harmless IUSD in such litigation.

**2.13 Other Agencies' Purchases**

Other public agencies in the State of California may purchase identical items of equipment, materials and supplies at the same price and upon the same terms and conditions pursuant to Sections 20118 and 20652 of the Public Contract Code. District waives its right to require other public agencies to draw their warrants in favor of District as provided in said code sections. Vendor may specify on the "Piggyback Clause" form included in the Required Forms section of this RFP whether Vendor will permit other public agencies to use the resulting contract, to the extent allowable under the law.

### **3. Evaluation and Award**

#### **3.1 General Information**

Award will be made to the Vendor offering the most advantageous proposal for a VoIP Telecommunications System and related services. Irvine Unified School District shall not be obligated to accept the lowest priced proposal, but will make an award in the best interest of the District after all factors have been evaluated. All proposals received in response to this RFP will receive a fair and impartial evaluation by the District. In conducting this evaluation, the District may obtain and use information, in addition to that contained in the proposals, from any source desired. Customers on each Vendor's reference list will be contacted, as may other customers selected by the District and listed by the Vendor as a reference.

The District shall make its evaluation in its sole discretion and its decision shall be final. Public Contracts Code section 20118.2 shall govern the evaluation of proposals, selection of vendor, and contract negotiations associated with this Request for Proposals.

#### **3.2 Requirements**

Vendors must meet all of the minimum requirements defined in this RFP, including compliance with performance, licensing requirements, ability to deliver specified services, conformance to the terms and conditions of this RFP, meeting mandatory system requirements, performance expectations, contract requirements and general terms. Vendors that do not meet the minimum requirements may be disqualified.

This RFP document describes the requirements of Irvine Unified School District for an Internet Protocol (IP)-based telecommunication system. All features/functions discussed in this RFP shall be provided in the proposed solution unless specifically noted. The proposed IP telecommunications system shall support all the required call processing, voice, and unified messaging, system services, management, and administrative feature requirements stated in this RFP.

This RFP is intended to provide a standard base from which to evaluate alternatives for the telecommunications system and to allow Vendor flexibility in proposing the most appropriate and cost-effective system.

This RFP contains the system specifications and the requested format for vendor proposals. If additional features or equipment are believed to be appropriate for the District's operations, Vendors shall quote them as options and include supporting justification and cost detail.

#### **3.3 Scoring**

The VoIP Telecommunications System RFP Process and evaluation components were approved by the Board of Education at the July 31, 2018 School District Board meeting, per Resolution No. 18-19-12.

Qualifying Vendors will be evaluated on their complete proposal, based on the following considerations:

<b>Factor</b>	<b>Weight</b>
<b>Vendor Support and Ability to Perform</b>	<b>30%</b>
<b>Technology Requirements</b>	<b>30%</b>
<b>Price</b>	<b>40%</b>

**Interviews/Vendor Presentations:**

The District reserves the right to conduct in-person interviews and/or require a formal presentation for all or a portion of the responding Vendors.

**Site Visit:**

The District reserves the right to visit one (1) or more of Vendor’s current customer sites.

**Discussions:**

Discussions may, at the District’s sole option, be conducted with responsible representatives who submit proposals determined to be reasonably susceptible of being selected for an award. Discussions may be for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Vendors shall be given fair and equal treatment with respect to any opportunity for discussion and written revision of proposals. Revisions may be permitted after submissions and before award for obtaining best and final proposals. In conducting discussions, The District will not disclose information derived from proposals submitted by competing firms.

**3.4 Award**

The District will make a “Notice of Intent to Award” available to all Vendors on the District website. The Award of the RFP will be voted on by the Board of Education at a public meeting. Any Vendor protesting the award of a contract to another Vendor must do so, in writing, within five (5) days of the Intent to Award posting.

**3.5 Contract and Warranties**

Following the Award of the RFP, the District will prepare and negotiate its own Agreement with the selected Vendor to deliver the proposed products and services. The resulting agreement shall conform to the terms and conditions set forth in this RFP and The District’s standard agreement (included in Appendix A of this document). Any exceptions or proposed alterations to conditions and requirements defined in this document and the District’s standard agreement must be included in Vendor’s proposal.

The Selected Vendor will guarantee that the proposed products and services shall conform in all material respects to the District’s specifications in this RFP and the Selected Vendor’s documentation accompanying or referred to in this RFP.

If a contract is awarded as a result of this procurement process all warranties made by the Selected Vendor, including the Vendor's response to the RFP, this RFP and any bulletins or addenda to the RFP shall be incorporated into the Agreement and shall be binding upon the Selected Vendor. This RFP, and Addenda issued, the Selected Vendor's Proposal, and all supporting documentation will become a part of the Agreement. Any Proposal attachments, documents, letters, and materials submitted by the Vendor shall be binding and may be included as part of the Agreement. Submission of a successful Proposal is not the end of the contractual process; further negotiation over the Agreement terms and conditions will be necessary, which, in and of itself, could change the Selected Vendor.



## **4. Implementation Process**

### **4.1 Project Timeline**

Within thirty (30) days of contract execution, the selected Vendor shall provide the District with a project plan that details the proposed implementation approach and timeline for the VoIP Telecommunications System. The plan shall minimally include infrastructure and data network configuration recommendations, VoIP system installation, any applicable application integration, training and post-implementation support and project evaluation. The District expects the timeline to conform to a Summer 2019 launch of the new telecommunications system, with testing and/or proof of concept in the Spring of 2019.

For added sites: The District will release location(s) or site(s) for upgrade based on the needs of the District which will always be subject to the availability and approval of funding. The District expects to add approximately one new site each school year due to enrollment growth and new school construction. Upon approval and funding an authorized representative of the District will request services to the Vendor outlining locations/sites where work is to be performed.

### **4.2 Site Access and Work Hours**

Access to each site will be coordinated through the District representative at least five (5) work days in advance. Site access schedule and work plan must be submitted and approved by IUSD prior to the Vendor arriving onsite.

Vendor may not have workers on any site when there are students present, during school hours or during school events. All work will be performed after operational hours, on non-instructional days, or on weekends. Exceptions to this schedule must be approved by District personnel.

### **4.3 DOJ Clearance**

All Vendor personnel working on any District site shall have attained the proper Department of Justice (DOJ) clearance. Vendor must demonstrate this green light clearance for all personnel to IUSD prior to being allowed onsite. Those who are not cleared or are red-lighted are not allowed on the project.

### **4.4 Interpretation of Plans and Documents**

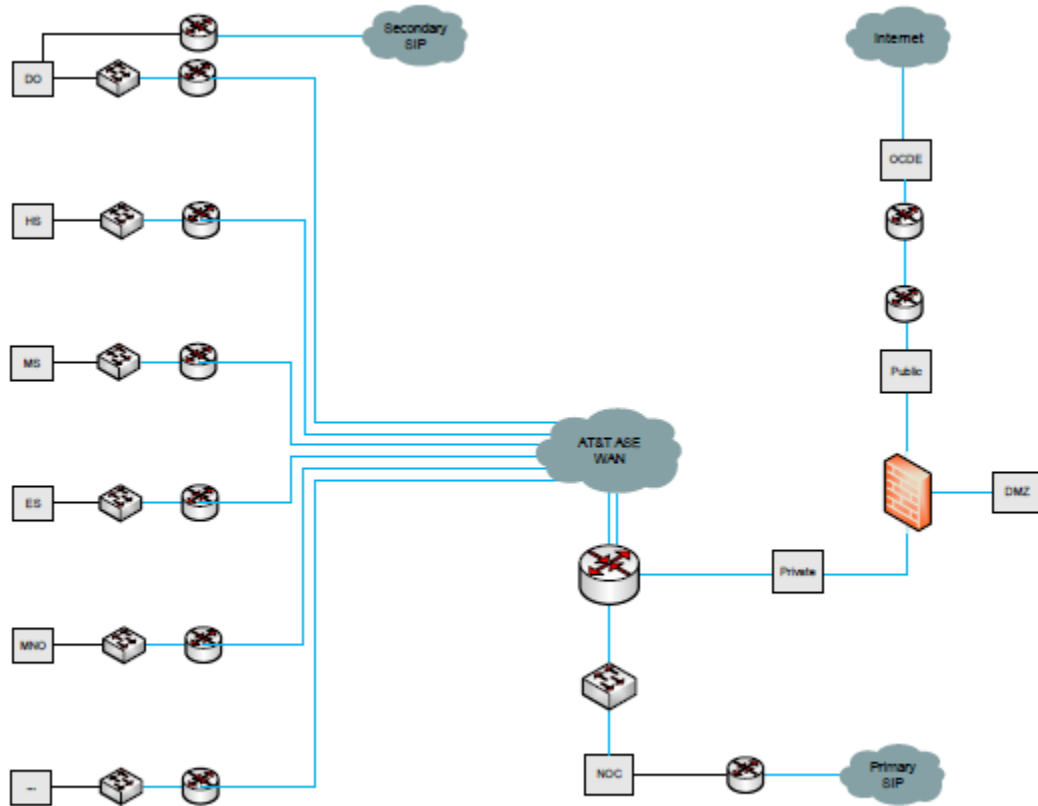
The interpretation of the plans, specifications, forms, and all project documentation shall be determined by the District. It is the Vendor's responsibility to verify existing conditions and assumptions. Vendor must verify all such information prior to response. Requests for clarification of intention, interpretation, and understanding shall be submitted in writing prior to the RFI deadline specified in the Calendar of Events.

## **4.5 Data Network Requirements**

### **4.5.1 Network Configuration**

4.5.1.1 the District's current network configuration is described in Section 1.3 Current Environment

4.5.1.2 The proposed VoIP network design SIP Deployment approach, and supporting data network is pictured in the diagram below:



Future IUSD Telecom SIP

4.5.1.3 The selected vendor shall provide any suggested configurations for the following devices:

- 4.5.1.3.1 Routing updates or VLAN recommendations
  - 4.5.1.3.1.1 Network priorities, tagging and other VoIP network functionality
- 4.5.1.3.2 Network Closet Switching
- 4.5.1.3.3 Data Center Switching

4.5.1.4 In conjunction with the District Project Manager and Key Stakeholders, the selected vendor’s Professional Services team will participate in the development of an overall installation schedule, which will incorporate the following:

- 4.5.3.4.1 Recommended configurations \*provided by selected vendor
- 4.5.3.4.2 Data network installation and Implementation \*provided by District

- 4.5.3.4.3 Review and testing of completed configurations for proper functionality \* provided by selected vendor
- 4.5.3.4.4 Revisions after vendor review \*provided by District
- 4.5.3.4.5 Finalist testing by selected vendor for proper functionality

4.5.2 Design and Discovery Phase – Selected Vendor Responsibilities.

Selected vendor shall perform the following tasks:

VoIP Telecommunications System Project Overview

- Kickoff
  - Resource Scheduling
  - Project Management Introduction
  - Engineering Introduction
  - Presales Design handoff to Deployment Engineering
  - Project Review
- Planning Workshop
  - Holistic Project Review
  - Project Goals
  - Projected Timelines
  - Project Risk Discussion

Network Design Review Workshop/Discussion

- Discuss expected business-level and technical outcomes across all technologies to be implemented
- Collaborate closely on District-provided design documentation and direction with the District staff and designated contacts.
- Provide configuration recommendations for best practices, especially in regards to VoIP implementations (including QoS, prioritization, and other factors).
  - Provide review of Routing, QoS, and VLAN design and configuration with the District and its designated contacts.
  - Recommend VoIP-related VLAN and QoS configurations on existing and replacement equipment, with input from the District and its designated contacts.

Review and discuss Network Routing and Switching Plan from the District and provide recommendations as needed.

- Recommend configuration objectives, which may include the following:
  - VLAN design
  - Utilization of 802.1Q to transfer VLAN between Layer 2 devices
  - QoS configuration requirements
  - Implementation of SNMPv3 strings to communicate with the network management station

Plan for Datacenter Telecommunications System VoIP Core Switching

- Selected vendor will recommend and discuss any additional data network Core equipment capabilities and features.

\* The District will deploy and configure the equipment for the data network.

Plan for Datacenter Telecommunications System Cutover schedule by site. Allow time for the following:

- Configuration modifications recommended by the selected vendor  
\*configured by District
- Selected vendor review of completed VoIP configurations for proper functionality
- Selected vendor to discuss network functionality with District IT staff. Selected vendor to recommend network configuration changes to resolve any network issues
- District to perform network configuration changes, if needed
- Additional testing by the selected vendor (if required) for proper VoIP functionality
- Additional testing by District (if required) for proper network functionality
- Additional configuration changes by selected vendor (VoIP equipment) and District (network equipment), if required
- Repeat steps vii, viii and ix until VoIP and network equipment performs properly with new VoIP equipment and new network configurations, to the satisfaction of both the selected vendor and the District.

Perform Facilities Survey of all site MDF and IDF closets to verify the following parameters (this section is for the installation of **VoIP equipment - phone gateways, servers and related equipment.** District to install any other network equipment):

- Evaluation rack space availability
- District to be responsible for patch cable lengths, dressing issues, or cable management improvements
- Identify and remove existing obsolete telephone equipment for district disposal
- Determine VoIP installation labor effort
- Propose adjustments to the Bill of Materials, or other needs based on assessment of actual conditions, pending review and approval by the District as Change Order(s) – only if needed

#### 4.5.3 Network Design and Switch Installation – District Responsibilities

District shall perform the following tasks, and selected Vendor will provide any necessary information and assistance:

- Provide overall design goals and objectives for the project
- Provide the following design assets:
  - Standard switch configuration requirements per site
  - IP address and Subnet information

- DHCP scopes and methodology
- Data Center and remote site VLAN definition and priorities
- Network Diagrams
- Port Mapping guidelines (existing to new)
  - \* Note: The District does not currently utilize port level security.
- Provide VLAN & subnet information for all network components and segments
- Provide new, appropriately-sized patch cables, with exceptions to this term reviewed and agreed to by all parties
- Recommend sufficient Power and Power Outlets for all VoIP equipment. District Electrician to perform the electrical work. District to coordinate between District electrician and vendor regarding installation schedule
  - \*Vendor to notify District of required electrical work
- Provide HVAC for all equipment
- Confirm that purchased equipment meets 110V or 208V power, based on availability

## 5. Proposal Format

### 5.1 General

These instructions prescribe the **mandatory** Proposal format and the approach for the development and presentation of Proposal information. Proposal format instructions must be adhered to, all questions must be answered, and all requested data must be supplied. Vendor response to each of the minimum requirements in this RFP is required. Failure to respond or non-adherence to any minimum requirement in this section may be cause for the Proposal to be rejected.

Vendor shall submit a Proposal with **all** information requested. The Proposal should be as clear, complete, and consistent as possible. Some items in this section request a direct response or supporting information from the Vendor. Other items are written as statements of compliance. Vendor must confirm compliance/conformance to all statements in their response. All sections and subsections must be addressed. All documents requiring Vendor signature shall be executed by a duly authorized representative of Vendor.

In addition to responding to the defined minimum requirements, IUSD encourages Vendor to submit information about additional functionality or services not specifically requested in the RFP and documentation to support the claims in the proposal. Vendor's proposal should be constructed to provide a complete picture of the features of the proposed solution, the Vendor's ability to perform, and functionality or services that may distinguish the proposed solution from other competitive offerings. Proposals will be evaluated both on the satisfaction of the District's minimum requirements, as well as the additional information submitted by Vendors to depict their complete solutions.

## 5.2 Proposal Content and Sequence

The completed Proposal must include the following items, with format and content as described.

### Part 1: Vendor Experience and Ability to Perform

This section should provide background information that supports Vendor's ability to provide the requested services effectively and reliably. Please respond to each requirement directly and provide additional documentation as needed to support the Proposal.

#### Vendor Background/Qualifications

- P1.1 Provide a brief description of Vendor's firm(s), as well as any other firms joining with Vendor to provide services. This description should include:
- 1.1.1 A history of the firm(s)
  - 1.1.2 Age of the firm(s)
  - 1.1.3 Number of employees
  - 1.1.4 Organizational structure of the firm(s)
  - 1.1.5 Length of time in the telecommunications industry
  - 1.1.6 Number of office locations
  - 1.1.7 Address of the location nearest to the District
  - 1.1.8 Address of the local office responding to this RFP
  - 1.1.9 If the firm(s) has experienced a workforce reduction in the past five (5) years.
- P1.2 Provide a list of company contacts. For each contact include:
- 1.2.1 Description of role
  - 1.2.2 Background
  - 1.2.3 Detailed experience information
- P1.3 List the proposed project manager, and Vendor's proposed primary contact for ongoing maintenance and support for the District, and provide the following:
- 1.3.1 Experience statement
  - 1.3.2 Resume
- P1.4 Provide a brief overview of Vendor's technical experience, qualifications, and background in providing and maintaining VoIP Telecommunications Systems and related services for similarly sized customers. Indicate the prior experience of Vendor that is relevant to this contract. Include sufficient detail to demonstrate the relevance of such experience. Please provide specific examples of recently completed, K-12 projects similar in size, scope and timeline to this project. Proposal should evidence Vendor's awareness of and support for the unique needs of education clients.
- P1.5 Provide evidence of long-term fiscal stability. Artifacts may include fiscal reports or recent audit results that demonstrate consistent and current financial security.
- P1.6 Describe Vendor's relationship with the manufacturer of the proposed system. Vendor must have a primary full dealership status with the proposed manufacture. Vendors who are dependent on secondary distributor arrangements to obtain product and direct

access to manufacturer level engineers are not acceptable.

- P1.7 Make a written commitment to make available maintenance spares, trained personnel, and software support to fully maintain the system for a period of ten years from the date of cutover. **If Vendor is other than the manufacturer, then a letter of similar commitment from the manufacturer must be included in the proposal.**
- P1.8 Confirm the ability to meet insurance requirements specified in Appendix E. List any insurance requirements Vendor will request a waiver for, if selected as the prevailing vendor. If the selected vendor fails to maintain the required insurance coverages, without a waiver approved by District staff, the District may declare Vendor in breach of the final contract.
- P1.9 The selected vendor will be responsible for acquiring any permits, fees, inspections, and construction administrative requirements. A copy of all applicable permit applications shall be provided to the District prior to submission. A copy of the approved permit(s) shall be provided to the District upon issuance.

### **Subcontractors**

- P1.10 Subcontractors Information: Any subcontractors performing services against this agreement must be fully listed and detailed in the proposal submitted by Vendor. State any work proposed to be provided by a subcontractor, and provide evidence of each subcontractor's capability and willingness to carry out the work. For each proposed subcontractor, include:
- Firm name
  - Address
  - Management contact person
  - Complete description of work to be subcontracted
  - Descriptive information concerning subcontractor's organization and abilities.
- P1.11 Subcontractor Oversight/Responsibility: Vendor must agree to bind every subcontractor by the terms and conditions of this agreement, including licensing and experience qualifications, as far as such terms and conditions are applicable to the subcontractor(s) work. If Vendor subcontracts any part of this agreement/contract, Vendor shall be fully responsible to the District for acts and omissions of its subcontractor and of persons either directly or indirectly employed by Vendor. Nothing contained in these contract documents shall create any contractual relation between any subcontractor and The District.

### **References**

- P1.12 Provide customer references for at least five (5) K-12 or government organizations of similar size to IUSD currently serviced by the Vendor. At least two (2) of the references must be for customers that have worked with the proposed project manager. At least three (3) of the references must have a similar installed system. Installations should be similar in scope, timeline and technical design to Vendor's Proposal for IUSD. All references must be for VoIP Enabled or VoIP system installations, multi-location

customers, with a minimum of six hundred (600) telephone stations, and a centralized voicemail system. Each reference must include the following information:

- Organization/Customer Name.
- Name, Title, and Contact Information of an organization contact who has ongoing involvement in the system and is knowledgeable about the implementation.
- Length of time from contract execution to full implementation for the referenced project.
- Installation date of the telecommunications system.
- Description of telecommunications system – please include details, including but not limited to, number of locations and phones. Please note if the system installed is comparative to the system proposed for IUSD. (References must be from organizations using the same or similar products and services).
- Vendor Project Manager(s) for implementation and ongoing use of products and services

<b>Reference #1</b>	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Implementation length	
Installation Date of Telecommunications System	
Description of Telecommunications System *include number of locations and phones	
Vendor Project manager	

<b>Reference #2</b>	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Implementation length	
Installation Date of Telecommunications System	
Description of Telecommunications System *include number of locations and phones	
Vendor Project manager	

<b>Reference #3</b>	
Organization/Customer Name	



Name, Title & Contact information for company contact	
Implementation length	
Installation Date of Telecommunications System	
Description of Telecommunications System *include number of locations and phones	
Vendor Project manager	

<b>Reference #4</b>	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Implementation length	
Installation Date of Telecommunications System	
Description of Telecommunications System *include number of locations and phones	
Vendor Project manager	

<b>Reference #5</b>	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Implementation length	
Installation Date of Telecommunications System	
Description of Telecommunications System *include number of locations and phones	
Vendor Project manager	

### **Implementation**

- P1.13 Acknowledge and confirm compliance with all processes and requirements defined in Section 4 Implementation Process of this RFP. Identify any exceptions or deviations from the proposed project approach, site access requirements and Vendor expectations.
- P1.14 The District anticipates cutover of all locations to be completed by August 2020 or before. Please indicate whether this schedule can be met and identify the tasks, including site preparation that the District and Vendor will perform and/or be responsible for in order to accomplish delivery and installation of the system in this time frame. It will be assumed that any task not specifically stated to be District's responsibility would be that of Vendor.
- P1.15 Provide a project plan that includes implementation of the new VoIP Telecommunications System at all sites. Include tentative dates and a general outline of essential tasks/milestones and the overall timeline for implementation. Assume no

work may be performed prior to the Board Approval date specified in the Calendar of Events.

- P1.16 Describe Vendor’s proposed project approach, including the roles and responsibilities of project team members, required tasks and any necessary onsite work. Include a detailed list of District and Vendor responsibilities during the implementation process. Describe how Vendor will work with the existing telecommunications vendors to remove current equipment and minimize time between removal and new install. Define and explain expectations of IUSD staff, including any requirements related to ordering processes, room readiness, testing and installation.
- P1.17 Describe Vendor’s expectations for the physical condition of the installation areas. In other words, what does the Vendor define as a “room-ready” or acceptable space for the installation of equipment necessary to deliver proposed equipment? Be sure to include floor spacing, floor loading, wall space, environmental factors such as air conditioning and ventilation, minimum size door opening require for equipment movement, and specify the electrical and grounding requirements for the prosed system. Indicate what modifications will be needed, if any, at the site to meet those requirements. Unless otherwise stated, Vendor will be responsible for any necessary modifications.
- P1.18 Prior to the commencement of any work, Vendor shall provide detailed shop drawings, where needed, for District review/approval. This will include drawings for the mounting of equipment, floor plans, wall elevations, grounding and bonding details, conduit sleeve and fire-stop details, fiber diagrams, and the surface raceway detailed diagram for each varying scenario, etc. For any work affecting structure, Vendor will have the shop drawing signed off by a structural engineer prior to submission to the District for review and approval.
- P1.19 The new telecommunications equipment shall be installed in locations designated by IUSD project coordinator and tested within one business day of removal of the previous equipment.
- P1.20 Should the awarded vendor be a new vendor, the vendor shall coordinate with the previous vendor to ensure that installation of new equipment occurs within one day of removal of old equipment.
- P1.21 The selected vendor will be responsible for making necessary arrangements with District staff for delivery of equipment to the premises. The selected vendor must comply with all District and City regulations regarding hours, any delivery rigging and method and location of equipment delivery.
- P1.22 All equipment and supplies delivered during the duration of the Contract shall be F.O.B.- Place of Destination, inside delivery-Freight Prepaid to the designated sites throughout Irvine Unified School District. Delivery will be to sites designated on the purchase order and/or District-approved project documents. Delivery charges, fuel surcharges or any additional costs associated with delivery will not be accepted or paid by District. Tailgate deliveries will be not be accepted. Actual delivery of the products shall be coordinated

with the District or the representative(s) designated by the District in accordance with the contract. Pallets and boxes must be broken down and disposed of by Vendor.

- P1.23 All supplies and products delivered to the District shall be in good condition at the time of delivery and are subject to inspection and rejection by the District. The District may return, at Vendor's expense, any supplies or equipment which fail to meet the conditions of the RFP or fail to perform properly. Such supplies and/ or equipment shall be considered as rejected and shall be promptly replaced by Vendor at no additional cost to District. No payment shall be required until replacement is complete. Any merchandise damaged in shipment may be refused by the District and may be returned at Vendor's expense. Vendor shall trace any merchandise lost in shipment. Vendor has no more than thirty (30) days to remedy defective or damaged equipment or services that do not meet the requirements outlined in this RFP
- P1.24 Describe Vendor's process, guaranteed timeline, and available inventory for the following:
- Replacing equipment that is dead-on-arrival (does not function from the time of delivery),
  - Providing replacement parts/components for equipment that is identified as faulty within 30 days of installation,
  - Repairing or replacing components and equipment under the maintenance agreement (more than 30 days after installation).
- P1.25 Risk of Loss - Please state when the District assumes risk of loss or damage.
- P1.26 Vendor shall provide the IUSD project coordinator a signed delivery receipt showing the models, serial numbers, site locations, and date of delivery within three (3) working days of delivery and installation.
- P1.27 Identify Vendor resources/staff that will be assigned to the implementation, including estimated availability and anticipated time commitment, years of experience with the company, and recent projects similar in scope to IUSD's implementation.
- P1.28 Vendor's delivery and maintenance employees shall wear distinctive company clothing and display company/employee identification, including the employee photograph and name. All employees who will be on site must have received Department of Justice clearance. All Vendor employees must check in at the administration office of each site prior to any delivery or site work
- P1.29 Describe any assumptions or constraints impacting Vendor's project timeline. If any feature or component of the system will be phased in on a later timeline (e.g., historical data importing), identify those constraints here.
- P1.30 Vendor must agree to contract language allowing mutual contract termination in whole or in part, in the event that IUSD does not allocate funding for the continuation of this

contract or any portion thereof. Both parties shall be held without fault and there shall be no financial consequences assessed as a penalty on either party.

- P1.31 Explain any penalty or liability charge for reducing equipment or telephone instrument prior to and after installation of the proposed system.
- P1.32 The selected vendor shall produce a short version of the user guide to be provided to each system user. This guide should be customized to provide steps to use the features specific to the District's system design and selected feature group.
- P1.33 The selected vendor will develop and execute a test plan and final walk through with the District's project manager in attendance. The test plan and walk through will include:
- Testing of failover scenarios between the two core sites.
  - Integration between Voicemail and Office 365 – Unified Communications.
  - Integration of desktop and mobile collaboration and presence tools as procured in this RFP.
  - Installation and testing of all gateways and survivable remotes.
  - Testing of E-911 at each facility.
  - Conducting a final walk through inspection of the installation with the District's project manager and the preparation of a punch list of items that need attention prior to final acceptance.
  - Completion of the punch list items and the request for a final acceptance walk through with the District's project manager.
  - Final acceptance of the installation.

### **Training**

- P1.34 Provide an overview of the recommended implementation training approach. Describe whether Vendor approaches training through a train-the-trainer approach, turn-key implementation, or other strategy. Be specific about the number of staff that will be directly trained by Vendor personnel under the proposal. Define whether training will be conducted in person, remotely (synchronous) or via on-demand tools. Provide an outline of the proposed training content and sample supporting materials.
- P1.35 Include a detailed explanation of the training Vendor will provide for site telephone leads/management and system administrators. Please indicate on which functions the system administrator will be trained.
- P1.36 Include the recommend training approach and associated costs for all users. Provide cost options for direct, vendor-led training for end-users, train-the-trainer and on-demand/self-paced (video or document tutorials) alternatives.

- P1.37 Please describe additional system administration and technical training that is available. Please include the projected costs for the training classes, where they are held, who provides them and if and what certifications would be provided if District staff completes various levels.

### **Support and Maintenance**

- P1.38 Confirm that unlimited support is available 24/7/365 through a toll-free phone number and online ticketing system. Define any restrictions on support hours (e.g., after hours support limitations).
- P1.39 Provide full-time, local, company-employed customer service professionals who are trained specifically to support the products and configuration recommended for IUSD. Please describe the size, work location and organizational structure of the support team.
- P1.40 Provide response and resolution times to tickets/reported incidents. Include the severity/type of incident, the average response and resolution time for similar incidents over the past two years and the target and guaranteed response and resolution times included in Vendor's proposal.
- P1.41 Provide data to show the number of support requests, median response time, and customer satisfaction metrics used to evaluate the responsiveness and effectiveness of Vendor's support team.
- P1.42 Describe the process for submitting service requests. Explain how service requests are tracked. Describe how the original requestor as well as centralized District support personnel (IT contact and contract administrator) can view service request history.
- P1.43 Confirm that all support Vendors undergo required background checks.
- P1.44 Provide assurance that Vendor does not outsource customer support.
- P1.45 Describe the escalation procedures for issues. Identify whether support requests are automatically escalated based on severity and/or time-lag.
- P1.46 Describe the process for submission, review, escalation and development for new feature requests.
- P1.47 Describe systems in place to capture customer feedback and how that feedback is used to inform development and organizational priorities.

## Part 2: Technology Requirements

This section should evidence Vendor's ability to implement the VoIP Telecommunications System in the required timelines, while meeting all technical and program compliance requirements of the RFP. The Technology Requirements section should demonstrate the security, reliability, and scalability of the proposed platform. Vendor should explain how its proposed solution meets each of the criteria.

### General

Irvine Unified School District is seeking a state-of-the-art, highly reliable telecommunications system that will provide enhanced features and provide the District with superior service at a reasonable cost.

- P2.1 Any proposal for a new telecommunications system must use survivable remote technology for all locations from the primary District telecommunications system.
- P2.2 System Proposals - Under this procurement, the District will accept proposals for replacement equipment for the locations mentioned in this document. The District is interested in evaluating both Hosted/Cloud and on-premise solutions.
- P2.3 Please complete the Component Pricing Form in Appendix C listing each location separately, showing proposed equipment and costs.
- P2.4 Vendors may propose Voice over Internet Protocol (VoIP) systems. The system shall provide the following high-level features and applications:
  - 2.4.1 Capable of supporting Primary Rate Interface (PRI) services for inbound and outbound Public Switched Telephone Network (PSTN) services.
  - 2.4.2 Capable of supporting Session Initiation Protocol (SIP) services for inbound or outbound Public Switched Telephone Network (PSTN) Services.
  - 2.4.3 Capable of supporting analog PSTN services.
  - 2.4.4 Capable of providing a single centralized voice mail system accessible to serve all users.
  - 2.4.5 Capable of providing duplicate survivable core systems (Voice and Voicemail) to connect the 2 major locations. The intended operation is that the system provides redundant Communications Processor Unit (CPU), Power supplies and software operation services between the 2 major core sites and can provide the needed active fail-over. All of the systems must function as if they were one.
  - 2.4.6 Capable of providing shared access to local inbound and outbound and long distance inbound and outbound services provided by carriers selected by the District.
  - 2.4.7 The District's IT Operations are currently virtualized using VMWare. The District is open to both virtualized and non-virtualized solutions.
    - 2.4.7.1 As part of the base proposal, please propose the system with all needed servers and hardware. This can be using conventional servers for system deployment or the vendor building their own vendor provided VMWare environment for voice system operations.
    - 2.4.7.2 As an option, please provide information and the financial impact of integrating the proposed VoIP system into the District's existing VMWare Environment.

- 2.4.7.3 Please provide detailed information regarding the proposed system regarding current or future plans to operate in a virtual environment using VMWare.
- 2.4.8 The existing network equipment includes Cisco data switches. These switches are fully operational and provide the needed network throughout for the existing telecommunications system. The District anticipates retaining these same data switches.
- 2.4.9 Unified Messaging: The proposed system should provide the ability for the District to integrate voicemail and email Office 365 features and services. The District utilizes MS Office 2016. It is the responsibility of Vendor to define its offering, and to provide a solution that addresses the convergence of voicemail, email, fax, and other messaging systems. Systems to be addressed will include those provided under this RFP, and messaging systems maintained by the District.
- 2.4.10 Integration with Clock/Bell/Loudspeaker: The proposed system shall integrate with the current clock/bell/loudspeaker system (outlined in Section 1.3). If the proposed system requires any changes to the current setup list each required change and provide the corresponding cost.
- 2.4.11 Telephone System Paging Function: The proposed system should also provide the ability for users with the appropriate rights to perform paging through the speakers on the telephones. The System shall include the feature and ability for a user to dial a code and page through all phone speakers or a zoned subset of speakers on the phones installed in the specific location.
- 2.4.12 External Paging System Access: The System shall include the feature and ability for a user to dial a code, access the external paging system and page through all speakers or a zoned subset of speakers.
- 2.4.13 System Administration: A single point of management from any point on the network for all components including the Private Branch Exchange (IP-PBX), voicemail, auto attendant, ACD and unified messaging system, and other ancillary systems is preferred. The management interface shall provide the capability and flexibility for rapid, efficient, and cost-effective configuration changes to user profiles and IP telephone equipment through a standard browser-based interface. System "Self Diagnostics" and trouble reporting shall also be described.
- 2.4.14 Capable of providing unified messaging services.
- 2.4.15 Capable of providing analog telephone station, fax, modem, and overhead voice paging connectivity.
- 2.4.16 Capable of providing auto-attendant and dial-directory functionality for all locations.
- 2.4.17 Capable of providing the hardware and software tools necessary to allow effective management of all communications systems from one location.
- 2.4.18 The District is also seeking maintenance and ongoing enhancement and other support services from the selected vendor; however, the District wishes to manage the day-to-day adds, moves, and changes internally. The District may wish to manage the system remotely, please describe how this application would work and how you would address security.
- 2.4.19 Quantities described in the RFP are estimated for the RFP period. The District reserves the right to purchase more or less of the units specified at the unit cost

provided in Vendor's Proposal. Vendor must list any minimum requirements that affect quantities ordered by the District. Requirements noted by the Vendor, or exceptions to terms contained in this RFP, deemed excessive or restrictive by the District, shall be cause for rejection.

P2.5 Configuration

- 2.5.1 This specification section provides further sizing, component, feature and function specifications necessary for Vendor to develop system pricing that must be detailed. However, all vendors should note the following:
- 2.5.2 The component quantities detailed are not necessarily the final quantities the District will purchase. Exact quantities may increase or decrease subsequent to the release of this document.
- 2.5.3 While the pricing information provided in Vendor's Proposal will be used to evaluate the various proposals received, the District will not enter into a contract for those quantities upon contract award, however the detailed component pricing must be valid for a minimum of 90 days from date of the proposal. Component price decreases are acceptable, but price increases will not be allowed.
- 2.5.4 After the contract is awarded by the District to the successful vendor, the selected vendor must conduct a thorough and complete on-site station review. This station review process, performed by the selected vendor, will identify the following:
  - 2.5.4.1 The type and quantity of all telephone stations, by District location, to be installed for District users during the implementation process.
  - 2.5.4.2 The telephone station programming, by user, including, but not limited to, telephone numbering, programmed features, call flow, recordings, detailed automated attendant operation, and voice mail capability.
  - 2.5.4.3 Detailed voice system security plan that addresses the liabilities of the proposed system. Each system may require different protection measures; the selected vendor will provide recommendations regarding protection of this system in the District's environment.
  - 2.5.4.4 The Public Switched Telephone Network (PSTN) network interface information by customer location to provide for local, long distance, E911, and intra-organization calling.
  - 2.5.4.5 The information developed through the station review process will be provided to the District both electronically and in hard copy. The selected vendor will detail the design to the District and gain the District's acceptance before proceeding. Phased implementation will follow.
  - 2.5.4.6 The selected vendor is required to provide complete system documentation regarding the installed equipment. This information shall include system programming binders, password listings, one-line drawing of system connectivity with the data network and WAN, etc.
  - 2.5.4.7 The District will not be responsible for any equipment order placed by the vendor prior to the completion and acceptance of the station review process.



### Voice Requirements

P2.6 Confirm that Vendor is proposing a VoIP solution from a manufacturer capable of meeting both the voice and data communications requirements detailed in this proposal.

School site	Service Address	WAN CIR Mbps	Survivable
Data Center	100 NIGHTMIST	4X10000 Mb	Yes
District Office	5050 BARRANCA PKWY	10000 Mb	Yes
Alderwood ES	2005 KNOLLCREST	1000 Mb	Yes
Beacon Park K8	200 CULTIVATE ST	1000 Mb	Yes
Bonita Canyon ES	1 SUNDANCE	1000 Mb	Yes
Brywood ES	1 WESTWOOD	1000 Mb	Yes
Cadence Park K8	750 BENCHMARK	1000 Mb	Yes
Canyon View ES	12025 YALE CT	1000 Mb	Yes
College Park ES	3700 CHAPARRAL AVE	1000 Mb	Yes
Creekside Education Center	3387 BARRANCA PKWY	1000 Mb	Yes
Culverdale ES	2 PASEO WESTPARK	1000 Mb	Yes
Cypress Village ES	355 RUSH LILLY	1000 Mb	Yes
Deerfield ES	2 DEERFIELD AVE	1000 Mb	Yes
Early Childhood Learn. Ctr.	1 SMOKETREE	1000 Mb	Yes
Eastshore ES	155 EASTSHORE	1000 Mb	Yes
Eastwood ES	99 MEANDER	1000 Mb	Yes
El Camino Real ES	4782 KAREN ANN LN	1000 Mb	Yes
Greentree ES	4200 MANZANITA	1000 Mb	Yes
Irvine HS	4321 WALNUT AV	1000 Mb	Yes
Jeffrey Trail MS	155 VISIONS	1000 Mb	Yes
Lakeside MS	3 LEMONGRASS	1000 Mb	Yes
Legacy Creekside	311 W YALE LOOP	1000 Mb	Yes
Loma Ridge ES (Opens 2019)	500 TOMATO SPRING	1000 Mb	Yes
Meadow Park ES	50 BLUE LAKE SOUTH	1000 Mb	Yes
Northwood ES	28 CARSON	1000 Mb	Yes
Northwood HS	4515 PORTOLA PKWY	1000 Mb	Yes
Oak Creek ES	1 DOVECREEK	1000 Mb	Yes
Plaza Vista K8	670 PASEO WESTPARK	1000 Mb	Yes
Portola HS	1001 CADENCE	1000 Mb	Yes
Portola Spring ES	12100 PORTOLA SPGS	1000 Mb	Yes
Rancho San Joaquin MS	4861 MICHELSON DR	1000 Mb	Yes
Santiago Hills ES	29 CHRISTAMON W	1000 Mb	Yes
Sierra Vista MS	2 LIBERTY	1000 Mb	Yes

School site	Service Address	WAN CIR Mbps	Survivable
South Lake MS	655 W YALE LOOP	1000 Mb	Yes
Springbrook ES	655 SPRINGBROOK	1000 Mb	Yes
Stone Creek ES	2 STONE CREEK S	1000 Mb	Yes
Stonegate ES	100 HONORS	1000 Mb	Yes
Turtle Rock ES	5151 AMALFI DR	1000 Mb	Yes
University HS	4771 CAMPUS DR	1000 Mb	Yes
University Park ES	4572 SANDBURG WAY	1000 Mb	Yes
Venado MS	4 DEERFIELD AVE	1000 Mb	Yes
Vista Verde K8	6 FEDERATION WAY	1000 Mb	Yes
Westpark ES	25 SAN CARLO	1000 Mb	Yes
Westwood Training Center	1 LIBERTY	N/A - Connected thru Sierra Vista	Yes
Woodbridge HS	2 MEADOWBROOK	1000 Mb	Yes
Woodbury ES	125 GREAT LAWN	1000 Mb	Yes

P2.7 System Configuration: The proposed system must be configured to provide the quantities detailed in the Table below. This information is provided for reference only. These quantities are estimates of the required quantities. The District makes no warranties that required quantities shall remain as listed.

School site	Station - Type 1 Analog Port	Station - Type 2 Admin-DO Staff	Station - Type 3 Teacher/Classroom	Station - Type 4 Side-Car	Station - Type 5 Conf Room Phone	Paging Access	SIP	Analog Trunks/POTS
Data Center					1		150	4
District Office	9	77	93	1	7	1	150	4
Alderwood ES	2	5	54	0	1	1	0	2
Beacon Park K8	1	5	54	0	1	1	0	1
Bonita Canyon ES	2	5	39	0	1	1	0	2
Brywood ES	1	6	39	0	1	1	0	2
Cadence Park K8	1	5	40	0	1	1	0	2
Canyon View ES	1	5	56	0	1	1	0	2
College Park ES	1	5	47	0	1	1	0	2
Creekside Education Center	8	5	82	0	6	1	0	2
Culverdale ES	1	7	50	0	1	1	0	2
Cypress Village ES	1	7	59	0	1	1	0	2
Deerfield ES	1	8	57	0	1	1	0	2
Early Childhood Learn. Ctr.	2	12	28	0	1	1	0	2
Eastshore ES	2	0	43	0	1	1	0	2
Eastwood ES	1	0	54	0	1	1	0	2

School site	Station - Type 1 Analog Port	Station - Type 2 Admin-DO Staff	Station - Type 3 Teacher/Classroom	Station - Type 4 Side-Car	Station - Type 5 Conf Room Phone	Paging Access	SIP	Analog Trunks/POTS
El Camino Real ES	1	5	39	0	1	1	0	2
Greentree ES	1	5	34	0	1	1	0	2
Irvine HS	8	19	173	0	3	1	0	7
Jeffrey Trail MS	5	10	121	0	1	1	0	2
Lakeside MS	1	9	51	0	1	1	0	4
Legacy Creekside	4	3	47	0	2	1	0	2
Loma Ridge ES (Opens 2019)								
Meadow Park ES	1	8	46	0	1	1	0	2
Northwood ES	1	5	42	0	1	1	0	2
Northwood HS	6	18	205	0	3	1	0	5
Oak Creek ES	1	8	64	0	1	1	0	2
Plaza Vista K8	1	5	58	0	1	1	0	2
Portola HS	2	18	144	0	3	1		2
Portola Spring ES	1	7	62	0	1	1	0	2
Rancho San Joaquin MS	1	10	63	0	1	1	0	3
Santiago Hills ES	2	5	43	0	1	1	0	2
Sierra Vista MS	1	9	65	0	1	1	0	2
South Lake MS	1	9	47	0	1	1	0	3
Springbrook ES	1	5	42	0	1	1	0	2
Stone Creek ES	1	5	37	0	1	1	0	2
Stonegate ES	1	6	48	0	1	1	0	2
Turtle Rock ES	2	5	47	0	1	1	0	2
University HS	6	17	202	0	3	1	0	4
University Park ES	1	5	44	0	1	1	0	2
Venado MS	1	10	56	0	1	1	0	4
Vista Verde K8	1	5	59	0	1	1	0	2
Westpark ES	1	7	44	0	1	1	0	2
Westwood Training Center	2	5	39	0	1	1	0	2
Woodbridge HS	8	20	176	0	2	1	0	6
Woodbury ES	1	7	55	0	1	1	0	2
Spares								
<b>Total</b>	<b>94</b>	<b>387</b>	<b>2830</b>	<b>1</b>	<b>62</b>	<b>41</b>	<b>300</b>	<b>103</b>

- P2.8 Telephone station requirements:
- 2.8.1 Type 1 – Single-line analog station ports - These Ports will terminate in existing Modems, Fax Machines, and Postage Machines.
  - 2.8.2 Type 2 – Administrative and DO Employees - - A minimum of 5-lines and display plus 8 programmable features, plus fixed or flexible feature keys for message retrieval, conference, forward, transfer and hold capabilities, message waiting notification, headset connectivity, a multi-line display, and a speakerphone.
  - 2.8.3 Type 3 – Teacher Phones - A minimum 2 line telephone with a multi-line display plus 8 programmable features plus fixed or flexible feature keys for conference, transfer, forward and hold capabilities with a speakerphone.
  - 2.8.4 Type 4 – Side Cars – Provide Busy Lamp Field (BLF) and Direct Station Selector (DSS) functionality. Button functionality 48 Button capacity.
  - 2.8.5 Type 5 – Conference Room Station. High quality wireless speaker phone designed to provide communication services in conference rooms of various sizes throughout District locations. Wireless phone to base application preferred. (i.e. Polycom Sound Station 2W – type of operation).
  - 2.8.6 Please note – Vendor is not required to propose only the Polycom example. This example was used to illustrate the operation the District prefers. If other speakerphones are proposed, their operation will be reviewed accordingly.
  - 2.8.7 Vendors are asked to make sure the count of any type of ports for these conference room phones are included in the system design, regardless whether they are IP or Analog stations.
  - 2.8.8 Telephone sets must be provided with a minimum of a 10/100/1000 switch port.
  - 2.8.9 The pricing section requires pricing on all models of currently available station equipment.
  - 2.8.10 Please provide detailed description of the digital displays included with the proposed station hardware. Specifically, the District is interested in station sets that provide easily viewable displays with contrasting shades or colors for easy viewing.
  - 2.8.11 Wireless Headset Tools – Please provide the operational details and cost for a wireless headset solution to potentially be deployed in various departments in the District in the Optional Equipment form (Appendix C). Please describe the headset’s functionality as it relates to providing the ability to answer calls, place callers on hold, and transfer calls using controls on the headset itself.
  - 2.8.12 802.11 Certified Wireless Handset – The District is interested in the potential use of telephones that can provide wireless handset mobility. Please describe the capability and whether the proposed system can provide this capability.
  - 2.8.13 Vendors are required to include all new telephone sets in the proposal as included with the proposed system. As a separately quoted option, vendors may propose refurbished telephone sets. Please use the Component Pricing Form in the Appendix C for all proposed telephone sets.
- P2.9 PSTN Trunking Requirements
- 2.9.1 The proposed system must allow both SIP and Primary Rate Interface (PRI) circuits to terminate directly into proposed equipment. The intent is to utilize

PRI or SIP as the primary inbound / outbound local service facility. The quantities and locations of PRI/SIP terminations are detailed in the equipment Table above.

- 2.9.2 The systems must be configured to provide analog trunking, as detailed by location in the Table above. The analog trunks will provide back-up connectivity in the event of a PRI or WAN failure. The analog trunks, regardless of their location, must be able to work interactively with the PRI services such that the analog facilities are part of the normal inbound/outbound traffic pattern.
  - 2.9.3 The systems must be configured to provide analog trunking, as detailed by location in the Table above. These lines will also be used to provide local address information to the Public Safety Answering Point (PSAP) in the event 911 is dialed. The proposed server or gateway for each location must be able to use these local lines for this 911 location identification function.
  - 2.9.4 Each location as indicated in the Table above will have additional analog facilities to provide PSTN access in the event of a PRI, WAN, call processor, router, or any other hardware or software failure of the system. The District is only interested in systems that can provide survivability using these lines.
  - 2.9.5 All Data Service Unit/Channel Service Unit (DSU/CSU) hardware (if needed) must be included under the Component Pricing Form in Appendix C.
- P2.10 Required Features – the following features are required
- 2.10.1 The District requires the proposed system to provide the following required features. **For each feature listed, indicate if the feature is “standard” or “optional”.** In the table below, please provide a separate, detailed itemization of any feature listed as “optional” and the price to provide the feature.

FEATURE	STANDARD OR OPTIONAL	COST
Abbreviated Dial with Off-Hook Indications		
Account Codes		
Alarm Indication on Attendant Console		
Attendant Camp-on		
Attendant Console Silent button		
Attendant Console Join key		
Automatic Attendant Recall		
Automatic Call Back		
Automatic Hold		
Automatic Route Selection (ARS)		
Call Accounting System and Call Detail Reporting		
Call Coverage		
Call Forward-Busy		
Call Forward-No Answer		
Call Forward-Variable		
Call Forward-External Telephone Number		
Call Forward-All Calls		

FEATURE	STANDARD OR OPTIONAL	COST
Call Hold		
Outbound Caller ID		
Incoming Caller ID		
Call Park		
Call Pickup (Directed and Group)		
Call Routing		
Call Transfer		
Call Waiting Indication (Visual and Audible)		
Camp-On (from Other Extensions)		
Class of Service (COS)		
Standard Conferencing		
Conference Bridge		
DNIS Compatibility		
Distinctive Ringing		
Directory		
Do Not Disturb		
Executive Busy Override		
Incoming Line Identification		
Hot Desk Operation		
Paging and Intercom Operation		
Last Number Redial		
Line Privacy		
Music on Hold		
Mute key		
Night Answer Mode		
Outbound Caller ID		
Paging Access		
Priority Queuing		
Remote Call Forwarding		
Remote Diagnostics/Remote Maintenance		
Save/Repeat Dialing		
Speed Dialing (System, Group, and Station – specify quantities)		
Station – to – Station Intercom		
Station-to-Station Paging		
Hands Free Answer Back		
Station Hunting – Circular		
Station Hunting – Distributed		
Traffic Measurement/Traffic Reports		
Transfer Call back to Attendant		
Twinning		
Unassigned Numbers		

FEATURE	STANDARD OR OPTIONAL	COST
Variable Ring-tones on Telephone Stations		
Voice Announce Intercom		
Variable Call Recording		

- 2.10.2 **Also, include any feature indicated as “optional” in the itemized pricing in the Optional Equipment form in Appendix C.** The feature descriptions are intentionally generic. If the proposed system is incapable of providing a specific functionality as described, provide a detailed explanation on any alternatives available in the proposed system to provide similar functionality.
- 2.10.3 Abbreviated Dial with Off-Hook Indications - Capability to have a visual indication of the off-hook condition of another station and then automatically dial that station through the depression of an associated key.
- 2.10.4 Account Codes
- 2.10.5 Alarm Indication on Attendant Console
- 2.10.6 Attendant Camp-on
- 2.10.7 Attendant Console Silent button
- 2.10.8 Attendant Console Join key
- 2.10.9 Automatic Attendant Recall – Describe the options available to the District.
- 2.10.10 Automatic Call Back - Describe the trunking application of this service. Will auto-callback queue for a trunk group? Must all callers accessing the trunk group be offered callback queuing?
- 2.10.11 Automatic Hold - On a multi-line telephone, when a called party on an active line answers a second line, the first call is put automatically put on hold without the called party depressing a hold button.
- 2.10.12 Automatic Route Selection (ARS)
- 2.10.13 **Call Accounting System and Call Detail Reporting** – Please provide a proposal for a call accounting system. Please itemize the cost of the system in the Optional Equipment Form in Appendix C. Please provide the following information regarding the proposed Call Accounting System:
- 2.10.13.1 Describe Vendor’s specific relationship with the manufacturer.
- 2.10.13.2 Reports for the proposed call accounting system should provide the ability for the District to obtain reports providing calling activities for all stations, allocate calling expenses to various departments, length of calls, frequency of calls to a specific number, internal station to station calling, etc. Please describe the functions of both the proposed system(s).
- 2.10.13.3 The proposed telecommunications system and Call Accounting System should provide the ability for the District to obtain call accounting information for both outgoing and incoming calls. Please provide a description regarding how the system can provide this function.
- 2.10.13.4 The District would also like to be able to gather information regarding internal station-to-station calling. Please describe the proposed system’s capabilities to provide this capability.
- 2.10.13.5 Vendor’s description should also include any monthly costs. Please provide details.

- 2.10.14 Call Coverage
- 2.10.15 Call Forward-Busy
- 2.10.16 Call Forward-No Answer
- 2.10.17 Call Forward-Variable
- 2.10.18 Call Forward-External Telephone Number:
  - 2.10.18.1 How is this feature activated?
  - 2.10.18.2 Can a remote user deactivate the feature?
  - 2.10.18.3 Can a remote user invoke the feature?
  - 2.10.18.4 Can a remote user program a new external target?
  - 2.10.18.5 Can the system detect a busy/do not answer condition at the external target, and then route to a different, pre-defined, internal or external target?
- 2.10.19 Call Forward-All Calls
- 2.10.20 Call Hold
- 2.10.21 Outbound Caller ID – Please describe the proposed system’s capabilities to allow the District to define the telephone number provided when individuals place calls outside the system.
- 2.10.22 Incoming Caller ID – Please define the proposed system’s capabilities to provide incoming caller ID.
- 2.10.23 Call Park
- 2.10.24 Call Pickup (Directed and Group) - Please describe any limitations regarding the number of telephones that can be included in a single pick up group. Please describe any limitations on the number of pick up groups the system can provide.
- 2.10.25 Call Routing:
  - 2.10.25.1 Describe in detail the programming sequence for routing busy and unanswered calls.
  - 2.10.25.2 How many destinations or targets (i.e., if A is busy go to B, if B is busy go to C, if C is busy go to D, etc.) can be programmed for external calls?
  - 2.10.25.3 How many destinations or targets (i.e., if A is busy go to B, if B is busy go to C, if C is busy go to D, etc.) can be programmed for internal calls?
  - 2.10.25.4 Can the routing be different for external and internal calls?
  - 2.10.25.5 Can different routing sequences be employed dependent on time-of-day?
  - 2.10.25.6 Can different routing sequences be employed dependent on day-of-week?
  - 2.10.25.7 Can a routing sequence have first an external target, and if that target is busy or does not answer, then look to an internal target?
    - 2.10.25.7.1 Can routing to voicemail greetings be different for internal and external calls?
- 2.10.26 Call Transfer (Screened and Unscreened) - Specify any limitations on the retention of caller ID, trunk group ID, or DNIS ID information in transferring. That is, will there ever be a loss of caller identification because of multiple transfers of a single call? If so, specify the information that will be lost and after how many transfers will the loss occur.
- 2.10.27 Call Waiting Indication (Visual and Audible)



- 2.10.28 Camp-On (from Other Extensions)
- 2.10.29 Class of Service (COS) - The system should allow a system manager to set access privileges for each extension.
- 2.10.30 Standard Conferencing:
  - 2.10.30.1 What is the total number of callers that can participate in a conference call?
    - 2.10.30.1.1 How many internal callers?
    - 2.10.30.1.2 How many external callers?
  - 2.10.30.2 Is there a limit on the number of conferences occurring simultaneously in the proposed system?
    - 2.10.30.2.1 If so, what is the limit?
- 2.10.31 Conference Bridge – Please include a proposal for a Conference Bridge including the needed equipment and operational software to provide a conference bridge to allow 8 to 10 conference participants. Please itemize the cost of the system in the Optional Equipment Form in Appendix C.
- 2.10.32 DNIS Compatibility
- 2.10.33 Distinctive Ringing – Is there a different ring tone for internal vs. external call?
- 2.10.34 Directory:
  - 2.10.34.1 Describe the capability of the proposed digital/IP station sets to provide a name database look-up through the display.
  - 2.10.34.2 Is there a single key depression dialing of a name appearing in the display?
  - 2.10.34.3 Is this functionality transparent between systems?
- 2.10.35 Do Not Disturb
- 2.10.36 Executive Busy Override
- 2.10.37 Incoming Line Identification
- 2.10.38 Hot Desk Operation – Allow system users to log in and log out of telephones throughout the system.
  - 2.10.38.1 Initially, the District anticipates 50 users throughout the District who will use this feature. These users could be logging into the system at all locations.
- 2.10.39 Paging and Intercom Operation – The system should provide the ability for the District to define specific stations to be included in an intercom.
  - 2.10.39.1 This system should also provide the ability for the District to perform pages throughout the system. The page groups would be defined for each location. Please explain the limitations (if any), additional software needed to enable this function and proposed system capabilities.
- 2.10.40 Last Number Redial
- 2.10.41 Line Privacy - When active, this feature should prevent all other parties from breaking into a call.
- 2.10.42 Music on Hold - Music-on-hold must be applied on station selective basis. System must support .wav, .mp3, .wmv, .m4a files as the music source.
- 2.10.43 Mute key
- 2.10.44 Night Answer Mode
- 2.10.45 Outbound Caller ID – Ability to assign outgoing caller ID individually by station. For example, the customer service group may need to send out the main list number, while the accounting and finance groups may choose to send out their

own DID number on outgoing calls.

- 2.10.46 Paging Access
- 2.10.47 Priority Queuing
- 2.10.48 Remote Call Forwarding – Ability to invoke or change call forward target from a remote location. That location may be either another phone on the system or at a location not on the system.
- 2.10.49 Remote Diagnostics/Remote Maintenance
- 2.10.50 Save/Repeat Dialing
- 2.10.51 Speed Dialing (System, Group, and Station – specify quantities)
- 2.10.52 Station – to – Station Intercom - Capability to depress a specific key, dial a two-digit code, activate a line associated with a specific key on another station, and on answer establish a talk-path.
- 2.10.53 Station-to-Station Paging – Please describe the options and limitations regarding the proposed system’s ability to provide paging functionality through the speakers on the proposed phones.
- 2.10.54 Hands Free Answer Back – **Optional Feature** - Please describe the proposed systems ability to provide this feature. When a page or intercom call is placed to a specific room or phone, the calling person’s voice is heard through the speaker on the phone that was called. Please advise if the system can allow the called party to respond to the page or intercom call by just talking back to the phone, without lifting the receiver or pushing a button on the phone.
- 2.10.55 Station Hunting – Circular – A Busy station has a specific station to which calls are routed and hunting sequence is identical each time a call occurs. That is, station A hunts to B, which hunts to C, which hunts to D.
- 2.10.56 Station Hunting – Distributed – A Busy station hunts to a group of stations, and the hunting sequence are random. That is, A hunts to B, C, or D based on random selection.
- 2.10.57 Traffic Measurement/Traffic Reports - The proposed system should provide basic traffic information and make this information available through the System Management device provided. This information should be sufficiently detailed so that the proposed administration system can produce traffic reports.
  - 2.10.57.1 Blockage per trunk
  - 2.10.57.2 Blockage per trunk group
  - 2.10.57.3 Specific hunt group information
  - 2.10.57.4 Feature utilization
  - 2.10.57.5 Internal station to station calling
  - 2.10.57.6 For the traffic measurement information listed above, please answer the following questions:
    - 2.10.57.6.1 How is this information made available?
    - 2.10.57.6.2 Can the District develop customized reports? How long can the system store the information before customer retrieval?
    - 2.10.57.6.3 If data storage is limited can the data be moved to another media type and archived?
    - 2.10.57.6.4 Please describe the recommended solution to address this need.

- 2.10.57.6.5 What database or software tool format is used for this data?
- 2.10.58 Transfer Call back to Attendant
- 2.10.59 Twinning – Please include the ability for the system to provide twinning to interact with the District’s mobile devices. The operation should allow District system users, while on a cell phone call, to be able to arrive back at the office, dial a code on the cell (or desk phone) and move the call to/from the desk phone.
  - 2.10.59.1 Please quote the cost for 50 optional twinning licenses in the Optional Equipment Form (Appendix C). These will be used within various District locations.
  - 2.10.59.2 If the proposed system includes this feature for all users, please provide a confirmation statement here.
- 2.10.60 Unassigned Numbers:
  - 2.10.60.1 What happens when an internal caller dials an unassigned telephone number?
  - 2.10.60.2 What happens when an external caller dials an unassigned DID number?
  - 2.10.60.3 Please detail all options.
- 2.10.61 Variable Ring-tones on Telephone Stations:
  - 2.10.61.1 How many ring-tones are available on the proposed digital and/or IP telephones?
  - 2.10.61.2 Can the user change the ring-tones?
  - 2.10.61.3 The system must be able to add custom ring tones by user.
- 2.10.62 Voice Announce Intercom – Ability to dial a one or two digit number and automatically connect to another phone in a hands free mode.
- 2.10.63 Variable Call Recording – Ideally, the District would like the system to allow internal or external calls to stations be recorded On Demand from any station on the system and allows easy access to retrieving these recordings. Please describe any options for the proposed system to provide various levels of recording dynamically vs. recording all calls.
  - 2.10.63.1 Please include the costs for recording in the Optional Equipment form (Appendix C).
  - 2.10.63.2 Please describe how the proposed system stores the recording, how recordings are indexed and how the District would retrieve various call recordings.
  - 2.10.63.3 Please describe the retention capabilities of the recording system. Can recordings be set to be retained for X number of days and automatically purged?
- P2.11 Disaster Recovery Issues
  - 2.11.1 System Outages
    - 2.11.1.1 When software maintenance is performed on the system, is a restart required?
    - 2.11.1.2 Typically, what will the duration of a system restart be for a system of this size?
    - 2.11.1.3 What, if any manual intervention is required for a restart?
    - 2.11.1.4 In the event of a primary processor failure, is the system configured

- with a backup processor? If so, describe the processor failover procedure.
- 2.11.2 Disaster Backup Service
    - 2.11.2.1 Please indicate what resources are available to restore service promptly if the equipment is damaged by a disaster such as fire, flood, etc., or after a total system failure.
  - 2.11.3 Software Back-up and Restoration
    - 2.11.3.1 Describe the process for downloading the system software to a back-up media.
    - 2.11.3.2 What is the recommended media?
    - 2.11.3.3 Does Vendor provide the media?
    - 2.11.3.4 Is the back-up process manual or automatic?
    - 2.11.3.5 Does Vendor provide a remote back up for the telephony programming?
    - 2.11.3.6 Does Vendor provide a remote back up for the voice mail?
    - 2.11.3.7 Can the telephony programming and voicemail be backed-up simultaneously?
    - 2.11.3.8 Can the telephony programming and voicemail be backed-up on the same media?
    - 2.11.3.9 As part of a maintenance contract will Vendor's personnel perform the back up and keep off-site spare?
- P2.12 911 Compatibility
- 2.12.1 The District requires the proposed telecommunications system to provide the needed station locator information to West Safety Services to allow the first responders to identify the specific office/cube/floor/building/address for each telephone on the proposed system throughout all District locations
    - 2.12.1.1 Vendors should plan to include any vendor-provided labor required to program the proposed telecommunications system and associated data base to provide the District with this capability and this level of granularity.
  - 2.12.2 Describe how the proposed system will provide street address information to the local Public Safety Answering Point (PSAP). Include any costs - software, equipment and/or telephone utility – required to accomplish this notification in the E-911 Locator Capability Form (Appendix C). It will be the responsibility of the selected vendor to provide for this capability and demonstrate to the District, through live testing, this capability is operative prior to system cutover.
  - 2.12.3 Provide specific documentation indicating how the proposed system complies with all 911 regulations of the FCC, the State of California. How can the proposed system provide for 911-location notification by station number? As an option, provide the necessary hardware and software to provide this feature in the E-911 Station Locator Capability Form (Appendix C). Please include all relevant telephone utility costs.
- P2.13 System Management - The following System Administration features and capabilities, or functional equivalents, must be provided as part of the proposed system. These features must be available at all location.
- 2.13.1 Multiple Users - The system must interface to the Local Area Network (LAN) and allow for access and change capability for multiple, simultaneous users.
  - 2.13.2 Printing Faceplates – If Vendor requires faceplates to be printed Vendor and the

- proposed system **will be disqualified**.
- 2.13.3 Inventory Information - The system must provide inventory information on the number and type of telephone stations.
  - 2.13.4 Trunking Information – the system must provide access to the information required.
  - 2.13.5 Alarm Notification – System must provide for an alarm system that notifies both the remote maintenance center and the District if certain District-programmed system performance thresholds are exceeded.
  - 2.13.6 Recent and Past Change History - The proposed system must provide documentation on both recent changes to an element of the system (station, trunks, etc.) and all past changes to an element of the system.
  - 2.13.7 Network Diagnostic Tools – The proposed system must provide tools to assist the District in troubleshooting VoIP call quality related issues. Please describe these tools in detail.
- P2.14 Acceptance: The District requires an acceptance period of at least 30 days subsequent to the completion of the Cutover. During this 30-day period the system must perform without interruption of services and in compliance with all representations offered in Vendor’s proposal. Should the system or other associated devices fail to perform satisfactorily, the 30-day time frame for acceptance will start over until such time as the system performance is satisfactory for a period of 30 consecutive days. Final payment (including change orders) will be withheld, and the warranty period will not begin, until system acceptance.

### **Voicemail System**

- P2.15 System Configuration
- 2.15.1 The District estimates a requirement for approximately 3,500 initial users of the voice system. Clearly indicate the number of simultaneous calls the system will support as configured and the overall storage capacity, in hours, as the system is configured.
  - 2.15.2 Of the total number of Voicemail boxes approximately 50 are voicemail only. Confirm that these boxes will have email integration.
  - 2.15.3 The District provides Voicemail Boxes for many users throughout the District operation that do not have specific phones and will be using the Hot Desking operation to log in and log out of the system. Please describe the operation of the voicemail system in this environment.
  - 2.15.4 The District prefers a non-blocking system, but requires no less than 24 simultaneous calls.
- P2.16 Specify the maximum capacity the proposed system provides.
- P2.17 Features - Specifically, the proposed system must have the following features:
- 2.17.1 Announcement Boxes
  - 2.17.2 Immediately light a message-waiting lamp on the appropriate telephone when a message has been taken. This message waiting indication must be noticeable.
  - 2.17.3 Automatically turn the message-waiting lamp off when all the messages have been heard and/or delivered.
  - 2.17.4 Provide for automatically forwarding calls from a busy, unanswered, or call forward telephone to the appropriate mailbox without requiring the caller to dial a mailbox number or any additional codes.

- 2.17.5 If the caller does not wish to leave a message, the proposed system must allow the caller to escape from the voice mail system to a pre-programmed extension number. The system must allow for multiple targets for these “escape” calls. Does the proposed system have any limitation on the number of targets per system? Can the target be a telephone number outside the proposed system?
- 2.17.6 Allow an external caller to finish a message by simply hanging up. Systems that require the caller to touch a key on the telephone pad to save a **message will not be considered.**
- 2.17.7 Archive Messages - Describe the options for archiving stored messages and the process to accomplish this function. Clearly define the tasks of both station users and system administrators in the archiving function.
- 2.17.8 Check Receipt of Delivered Messages.
- 2.17.9 Does the proposed voicemail system capture caller ID allowing the user to optionally hear the calling number?
- 2.17.10 Forms – The District has interest in potentially using Forms functions in voicemail to direct callers who leave a message to leave specific information.
- 2.17.11 Changeable Passwords
  - 2.17.11.1 Can the user change passwords?
  - 2.17.11.2 Can the user be forced to change passwords?
  - 2.17.11.3 If so, can the administrator establish the frequency of the change?
  - 2.17.11.4 If so, by system or by station?
  - 2.17.11.5 What is the minimum password length? Maximum?
  - 2.17.11.6 Will the system provide a “lock-out” after input of invalid passwords?
  - 2.17.11.7 If so, is the number of invalid entries programmable by the user? Or is it system controlled?
  - 2.17.11.8 Can the voice mail password be the same as the user’s network password?
- 2.17.12 Forward and Backward while Listening to a Message - Does the proposed system provide the capability to allow a user, when listening to a message, to skip ahead to a later part of the message, or backward to a past part of the message? Please be specific.
- 2.17.13 Guest Mailboxes
- 2.17.14 Group Mailboxes
- 2.17.15 Message Save
- 2.17.16 Message Delete
- 2.17.17 Message Pause
- 2.17.18 Message Privacy
- 2.17.19 Message Replay – explain the options available
- 2.17.20 Message Redirect and Comment
- 2.17.21 Message Respond
- 2.17.22 Message Retrieval Greeting - Explain the available options for the system greeting the caller hears upon retrieving messages. For instance, does the system indicate the number of messages not yet heard?
- 2.17.23 Message Rewind
- 2.17.24 Message Speed - Does the proposed system provide the user the capability to speed up or slow down the replay of the message?
- 2.17.25 Message Undelete

- 2.17.26 Mirrored Mailbox - Does the system provide the capability to store the same message in more than one mailbox?
- 2.17.27 Outbound Notification of Messages - This feature must include notification to a radio paging device, cellular telephone, email, or other telephony equipment.
- 2.17.28 Priority Notification of messages - This feature must allow a caller to select a priority or urgent status for message notification, and then provide for an alternative notification capability. For instance, a normal message may light a message-waiting lamp, while a priority message will out-call to a radio pager.
- 2.17.29 Priority Queuing of Messages
- 2.17.30 Recent and Past Change History - Describe the capabilities of the proposed system to provide documentation on both recent changes to an element of the system (mailbox, port, etc.) and all past changes to an element of the system.
- 2.17.31 Skip Forward Through Messages
- 2.17.32 Personalized Greetings – Multiple – Provide (at a minimum) the system users with the ability to have a greeting when there is no answer at their phone and another different greeting when they are on the phone, and explain any other options available.
- 2.17.33 Specifically, the District uses Temporary Absence Greetings throughout the operation. Please describe the proposed system’s capabilities regarding this specific feature.
- 2.17.34 Personalized Greetings – Menu - Will the system provide a menu of options in an individual user’s greeting? For instance, “If your call is about A, press 1. If your call is personal matter, press 2.” If the caller selects 1, the message is recorded simultaneously in two pre-selected mailboxes, or routed to a different mailbox than if the caller selects 2.
- 2.17.35 Scheduled Delivery of Message
- 2.17.36 Speech Recognition - Can the proposed system provide command access through user speech? If so, clearly describe the functionality, features, limitations, and as an option provide pricing for all required system hardware and software components to implement this feature.
- 2.17.37 Message Distribution Lists:
  - 2.17.37.1 Please provide a detailed explanation of the procedure for creating and broadcasting a voice mail message to voice mail users in a distribution list.
  - 2.17.37.2 Clearly define any limitations on the number of distribution lists per user and the number of users per distribution list.
  - 2.17.37.3 Can distribution list be “chained” to effectively increase the number of users per list?
  - 2.17.37.4 Is there a system-wide broadcast capability? If so, how is it controlled and managed for sending and receiving?
- 2.17.38 Remote Access - The system must allow users to access their mailbox from outside of the system without the assistance of an operator.
- 2.17.39 System Administrator Reports - Please indicate what types of management reports are available with the proposed equipment. Also, indicate if additional hardware/software is required to generate the management reports.
- 2.17.40 The District requires these reports to be obtained in both printed and electronic format. Please indicate if this is included and what the electronic format used. If the reports are in a proprietary form, please describe any conversion process.



- 2.17.41 Please indicate whether the proposed voicemail system will provide District with the ability to review voicemail box activity and when each box was accessed. This feature may provide a valuable tool to determine if voicemail boxes are being checked and managed.
- 2.17.42 Variable Settings for Maximum Message Length
- 2.17.43 Time-of-Day Stamp
- P2.18 Automated Attendant Function – The District will use various Automated Attendant functions for departments throughout the District to handle various types of incoming calls. Direct Inward Dialing will be used in conjunction with this function. The automated attendant should provide functions for the following:
  - 2.18.1 After Hours Announcement and options
  - 2.18.2 Preprogrammed Alternative for Holidays
  - 2.18.3 Custom greetings for special events
    - 2.18.3.1 The District desires the ability to prerecord messages and/or greetings for holidays, office closings, etc. and to change from one greeting to another from a remote location, not on the system. Please explain in detail how this would be accomplished.
  - 2.18.4 Provide various exits from the Automated Attendant
  - 2.18.5 The system must allow the caller to dial his or her choice at any time during the message
  - 2.18.6 Does the proposed system require callers to end all commands using the # sign? Please describe what the operation is and if there are options regarding this item.
  - 2.18.7 The District also uses the Automated Attendant at each location as over-flow coverage in the event that local District Administrative support is busy on another telephone call, the Automated Attendant for that specific location answers the incoming call and offers the standard choices defined by that location.
    - 2.18.7.1 This is a required feature. Please describe the function and how the proposed system provides this feature.
- P2.19 Message Integration
  - 2.19.1 Describe the proposed system’s capability to provide for “unified messaging”. The District utilizes Office 365 messaging system. Pricing for unified messaging for all voice mail users must be included.
  - 2.19.2 Does the proposed unified messaging software integrate directly with Outlook, Exchange and Office 365? Does it provide direct dialing from the Contact list? If so, please describe how the products integrate.
  - 2.19.3 Does the proposed unified messaging software integrate directly with Outlook and Office 365? If so, please describe how the products integrate and what mail protocol options are available.
  - 2.19.4 Which electronic mail protocol(s) does the Unified Messaging system support?
    - 2.19.4.1 IMAP, POP3, SMTP, others?
    - 2.19.4.2 Please discuss the pros and cons of each in a Unified Messaging environment with Office365.
  - 2.19.5 When a voice message is received in a Unified Messaging environment, will the entire voice message be transmitted to Office 365 in addition to header information? If not, what will users see in Outlook and Office 365 when they have received a voice message?



- 2.19.6 Please describe where the voicemail messages will be stored and whether the messages will be stored on a voicemail appliance or the Office 365 Environment.
- 2.19.7 Will users be able to listen to voice messages through Outlook and Office 365?
- 2.19.8 In the experience of Vendor, on average, how much disk space does an average message consume within Office 365? Are any compression algorithms available to reduce disk utilization?
- 2.19.9 Click to Dial Operation – Optional - Please describe how the system can provide click to dial operation from various sources including Outlook, Exchange and Office 365 contacts and other sources.
- 2.19.10 VMWare View Compatibility – The proposed desktop client should be compatible with VMWare.

### **Redundancy and Disaster Recovery Issues**

- P2.20 Redundant Operation – Confirm that the proposed system will be designed to provide the ability to terminate newly installed SIP in the District Office and Sand Canyon data center.
- P2.21 Confirm that the system will be designed to provide the District with redundant operations allowing these locations to be fail-over sites for each other both for telephone operations and SIP.
  - 2.21.1 Confirm that the system will also be configured to provide redundant power supplies, CPUs, and Disk/Drive Operation for the telephone and voicemail system.
  - 2.21.2 Ideally the system should provide Hot-Swappable Disk Drives. Please state if this is included in the proposed design.
- P2.22 Premise-Based Solution
  - 2.22.1 It is the intent of this RFP to install the core of the new systems in the Sand Canyon data center with the District Office as an active failover. Confirm that this has been incorporated into the proposed system.
    - 2.22.1.1 Confirm that Vendor will plan and design the proposed system to allow the proposed system to be able to be failed over from one data center location to the other automatically.
    - 2.22.1.2 Please provide an explanation of the proposed systems capability to provide the active operation.
    - 2.22.1.3 It is the intent of the District that, in the event of a failure of one of the core system servers, no calls would be lost and stations would re-register to the available server automatically. Confirm that the proposed system will meet this qualification.
    - 2.22.1.4 The selected vendor will be required to test, to the satisfaction of the District, failover scenarios between these two sites.
    - 2.22.1.5 Can the servers be virtualized using VMWare? The District only uses VMWare in its Data Centers.
  - 2.22.2 System Outages
    - 2.22.2.1 When software maintenance is performed on the system, is a restart required?
    - 2.22.2.2 Typically, what will the duration of a system restart be for a system of this size?
    - 2.22.2.3 What, if any manual intervention is required for a restart?

- 2.22.2.4 In the event of a primary processor failure, is the system configured with a backup processor? If so, describe the processor failover procedure.
- 2.22.3 Disaster Back-up Service - Please indicate what resources are available to restore service promptly if the equipment is damaged by a disaster such as fire, flood, etc., or after a total system failure.
- 2.22.4 Software Back-Up & Restoration:
  - 2.22.4.1 Describe the process for downloading the system software to a backup media.
  - 2.22.4.2 What is the recommended media?
  - 2.22.4.3 Does Vendor provide the media?
  - 2.22.4.4 Is the back-up process manual or automatic?
  - 2.22.4.5 Does Vendor provide a remote back up for the telephony programming, the voice mail, or both?
  - 2.22.4.6 Can the telephony programming and voicemail be backed-up simultaneously?
  - 2.22.4.7 Can the telephony programming and voicemail be backed up on the same media?
  - 2.22.4.8 As part of a maintenance contract will Vendor’s personnel perform the backup and keep the off-site spare?

**Upgrades, Maintenance, and Warranty**

- P2.23 Provide a copy of the warranty on the proposed system or a narrative description of the provisions of the warranty.
- P2.24 Vendor must guarantee all of the installation work to be performed and materials to be furnished under this contract against defects in materials and workmanship for a minimum period of one (1) year from the date of final acceptance of the completed work. Vendor shall, at its own expense and without cost to the District and within a reasonable time after receiving a written notice thereof, make good any defect in materials and/or workmanship of the installation which may develop during the guarantee period. Any associated damage to other items and/or finished surfaces caused by the defect shall also be corrected by the Vendor to the satisfaction of the District and at no additional cost.
- P2.25 Indicate the number of service personnel within the areas specified below that are qualified to maintain the proposed system, including the name, street addresses of the service locations. This should include factory-trained personnel, personnel trained by Vendor and all other individuals who can perform technical services on the system.
  - 2.25.1 Within 25 Miles of Irvine Unified School District.

NAME	STREET ADDRESS	NUMBER OF PERSONELL

2.25.2 Within 60 Miles of Irvine Unified School District.

NAME	STREET ADDRESS	NUMBER OF PERSONELL

- P2.26 Provide the locations and hours of operation of the service centers to be utilized.
- P2.27 The District reserves the right to conduct a site visit to Vendors' Service Center.
- P2.28 Provide a general listing of the spare parts available from each of these service centers.
- P2.29 Provide details on maintenance service arrangements for the proposed system and the cost for any alternative available including maintenance contracts and per-call maintenance in the Annual Recurring Costs Form (Appendix C).
- P2.30 Provide Vendor's standard Maintenance Agreement in Appendix D.
- P2.31 Specify the amount of lead-time required for moves, changes, additions, and deletions.
- P2.32 Describe the expected and guaranteed response time for "regular" and "emergency" services. Indicate what Vendor defines to be "regular" and "emergency" service. Guaranteed response times of greater than 4-hours for emergency services, and next business day for regular services, will not be acceptable.
- P2.33 Indicate the provisions for service and spare parts if Vendor's business terminates, is subjected to a strike, or shutdown for any reason.
- P2.34 State what recourse is available if the proposed system does not perform as quoted and the District is faced with loss or interruption of service. Be advised that some form of liquidated damages for non-performance and/or system failure will be required in any final agreement.
- P2.35 Clearly identify if Vendor or a third party will provide maintenance services. The District will require the right to reject any third parties or sub-contractors under this agreement and in any event Vendor will be responsible for all maintenance services.
- P2.36 Remote Maintenance
  - 2.36.1 Provide information on the capabilities of the system to interact with the Remote Maintenance Center (RMC) of the proposer.
  - 2.36.2 How does the system notify the RMC of a trouble?
  - 2.36.3 What diagnostic capabilities does the RMC have?
  - 2.36.4 Can the District communicate directly with RMC personnel?
  - 2.36.5 How frequent is the proposed system polled by the RMC for routine maintenance?
- P2.37 Describe Vendor process for testing and releasing software updates, and providing for business continuity during major upgrades.
- P2.38 Please describe the following regarding available software upgrades:
  - 2.38.1 How is the District notified of new software upgrades and tools available for **ALL** the systems proposed?
  - 2.38.2 Does Vendor require software updates at these intervals or are they included/optional?
  - 2.38.3 Are software updates included in the maintenance contract?
  - 2.38.4 In the case of VoIP solutions, does Vendor provide recommended/required

software updates for all network hardware in addition to the proposed system?

2.38.5 Please provide typical frequency of software updates on an annual basis.

- P2.39 The system shall be available 24/7, 365 days per year. Provide details related to scheduled maintenance windows and precautions taken to ensure high availability.

### **Security**

- P2.40 Confirm that Vendor's information security policies are documented and available to clients upon request.
- P2.41 Provide a description of Vendor's policy regarding storage, retention, and distribution of customer data. State the company data non-release policy.
- P2.42 Vendor must allow the District to review internal and/or 3<sup>rd</sup> party audits.
- P2.43 Vendor must certify that it employs and will continue to employ a dedicated Certified Information Systems Security Professional (CISSP) certified security manager or the equivalent in certification to test the system and run ongoing checks/improvements.
- P2.44 Vendor must be able to provide access limitations based upon District roles, and give the site system administrator a tool to modify access rights at the individual level. Vendor's system must be configurable to provide specific user rights and roles and to restrict data access and administrative oversight to the appropriate personnel.
- P2.45 Vendor agrees that, even if the proposed solution is hosted by Vendor, data housed in the system shall remain the sole property of IUSD and cannot be used in any way not explicitly approved by The District.
- P2.46 Vendor agrees that no third-party shall be given access to District data for any reason without explicit, written authorization from the District. Any third party used to support the system must be identified as a designated subcontractor in the RFP response.

## Part 3: Price

**Vendors must complete the Pricing Forms (Appendix C).** Detail all costs associated with the proposed solution, including, but not limited to, the implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products. Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. Vendor must provide a narrative explanation of its pricing proposal.

P3.1 The response MUST INCLUDE an itemized schedule of all equipment and software for the proposed system. The pricing quoted must include all activities necessary for a complete, turn-key system, including, but not limited to:

- 3.1.1 Complete installation of all system components and software.
- 3.1.2 Complete programming of all system components and software.
- 3.1.3 Complete testing of all system components and software prior to system cutover, including Quality of Service (QOS) testing.
- 3.1.4 PSTN coordination including:
  - 3.1.4.1 Coordination of PRI and/or SIP trunk installation with the PSTN service Vendor selected by the District.
  - 3.1.4.2 Coordination of calling plan to allow for five-digit dialing between stations. (Currently, the District uses four digits. Due to growth, the District expects to move to five digits with this implementation).
- 3.1.5 On-site station reviews and determination of user requirements.
- 3.1.6 Full system configuration documentation provided to the District to include all station features and function, complete trunking configuration information, and complete call flow information by station.

P3.2 Include a recommended payment schedule. The District will not consider any proposal with a final payment, due on acceptance of the system, of less than 25%.

P3.3 Cost detail for any non-standard features and optional items as detailed in the system specifications in the Optional Equipment Table.

P3.4 Provide a detailed description of the proposed Maintenance.

P3.5 Maintenance costs for the system for Years 1, 2, 3, 4 and 5 as configured. Please show each year separately. Maintenance costs should be itemized by component. A specific maintenance cost must be clearly itemized for business day service on all proposed equipment and software. Provide details on how this price is computed.

P3.6 The District is capable of performing some basic maintenance routines. Please explain any charges associated with customer-provided maintenance and provide information on the Annual Recurring Costs Form.

P3.7 Please describe any Parts and Labor Warranty included in the proposal in Component Pricing Form in Appendix C. Clearly specify the warranty period for all hardware and software components.

P3.8 Maintenance cost for the system, as configured, after the warranty period. Clearly specify the warranty period for all hardware and software components.

P3.9 Maintenance and support quotes should include software assurance protection for the District. Please itemize this cost in the Annual Recurring Costs Form.

P3.10 Indicate the hourly rate the District can expect for services not covered by warranty or service contract(s) for each of the proposed systems.

- P3.11 Provide the rate at which the maintenance contract costs are escalated including any contractual limits in escalation of costs.
- P3.12 The maintenance and licensing fee shall not begin until the solution has been tested and accepted by the District. Please describe payment milestones and expectations.
- P3.13 Provide details for any additional charges which apply for shipping and handling. Please specify dollar amounts in the Summary of One Time Costs Form in Appendix C.
- P3.14 Describe any assumptions based on quantities that affect pricing. Provide details for any additional or increased costs for all additions or deletions for all system components, software, and station equipment - details on addition or deletion of all network components must be included. Include both pre-cut and post-cut prices. Indicate how long the post-cut prices will remain in effect. Pre-cut component pricing must remain in effect through system acceptance.
- P3.15. IUSD is a growing district. Enrollment will increase and school sites may be added during the period of performance of this project. Please describe how growth and site changes will impact the price. Be specific about components and timelines.
- P3.16 Provide a narrative explanation of the pricing proposal in Appendix C. Describe in detail any limitations of (e.g., length of term, service quantities) that apply to the proposed pricing. Note, limitations or terms that are unfavorable to the District may be cause for rejection of the Proposal.
- P3.17 Confirm that all costs, including, but not limited to, implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products and any other anticipated costs to the District have been included in the completed Appendix C: Pricing Forms. Taxes may be listed as an approximate percentage where appropriate. *Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.*
- P3.18 Should the system be down or performance degraded to render the system unusable for longer than 30 minutes (outside of a scheduled maintenance window), Vendor agrees to refund the portion of the contract equivalent to that outage window.
- P3.19 Pricing provided by Vendor (whether associated with a purchase, lease, or maintenance agreement) must include **all** costs associated to the project including, but not limited to, complete delivery, installation, configuration, maintenance, repairs, parts and all works related to this RFP and scope of work. Vendors must specify any costs excluded from the agreement on the pricing forms. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation. During the period of delivery under a contract resulting from this RFP, if the price of an item decreases, IUSD shall receive a corresponding decrease in price on the balance of deliveries. During the term of the contract maintenance costs shall not be increased.

## **Part 4: Exceptions**

Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the District's standard agreement. For each exception, propose acceptable alternative language and/or provide rationale to support the exception. Exceptions that are contrary to the District's best interests, do not meet the needs of our staff and students, or conflict with regulations related to public contracts and procurement will not be accepted by the District and may be cause for rejection of the proposal.

## **Part 5: District Standard Agreement (Appendix A)**

Please acknowledge that Vendor agrees to the terms in District Agreement.

- Independent Contractor Agreement

## **Part 6: Required Forms (Appendix B)**

All required forms must be submitted as part of the Vendors complete proposal on or before the Proposal Deadline specified in the calendar of events. Required Forms are included in Appendix B of this document and listed below.

- Proposal Submission Checklist
- Purchase Agreement
- Acknowledgment of Amendments to RFP
- Vendor Representation and Certification
- Noncollusion Declaration
- Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
- Certification on Restrictions on Lobbying
- Piggyback Clause

## **Part 7: Pricing and Proposed System Forms (Appendix C)**

Complete the Pricing Forms in Appendix C and insert into Response as Part 7.

- Component Pricing Form (provide both a **PDF and Excel** copy with electronic proposal)
- E-911 Station Locator Capability Form
- Optional Equipment Form
- Additional Telephone Station Pricing Form
- Summary of One Time Costs Form
- Annual Recurring Costs Form

## **Part 8. Required Supplementary Materials (Appendix D)**

All required forms must be submitted as part of the Vendor's complete proposal on or before the Proposal Deadline specified in the calendar of events. Required Supplementary Materials are listed below.

- Draft Project Plan
- Sample Contract
- Service Level Agreement
- Maintenance Agreement
- Station User's Manual
- Voicemail User's Manual
- Sample Reports and Training Materials
- Additional Resources that Support the Proposal

## **Part 9: Optional Forms (Appendix E)**

Optional Forms are not required to be submitted with the Vendors proposal. However, Optional Forms listed below must be submitted by the selected Vendor within ten (10) days of the notification of the District's Intent to Award. Optional Forms are included in Appendix D of this document and listed below.

- Workers' Compensation Certificate
- Drug Free Workplace Certification
- Tobacco Use Policy
- Notice to Vendors Regarding Criminal Records Check
- Criminal Records Check Certification by Vendor
- W-9
- Certificate of Liability Insurance, including an Additional Insured Endorsement



## 6. District Rules and General Terms

District Rules and General Terms are written as statements of compliance. Vendor must confirm compliance/conformance to all statements in its response.

### 6.1 Rules and Regulations

The following rules and regulations must be followed by every Vendor/Vendor/Vendor doing business with Irvine Unified School District. All Sub-Vendors must also follow all rules and regulations. Failure to comply may result in the removal of Vendor and/or members of Vendor's crew from the job, and possible back charges for District's direct costs.

- 6.1.1 IUSD is a tobacco free school district. IUSD Board Policy 3513.3 prohibits the use of tobacco or tobacco products on any part of the District grounds.
- 6.1.2 All of the City of Irvine's laws relating to hours and noise of construction work must be followed. If Vendors wants to work other than, 7:00 am - 6:00pm or dusk (whichever is earlier) Monday through Friday, or 9:00am - 5:00pm Saturday, Vendor must get a waiver from the City.
- 6.1.3 Anyone not directly involved in the scope of work shall not be on the job site, or IUSD property. Vendor assumes full responsibility for all parties on the site who are there as a result of their direct or indirect involvement with the Vendor.
- 6.1.4 No music, i.e. radios, cassettes, CD's, iPods, headphones, or other electronic or acoustical device, etc.
- 6.1.5 No pets are allowed on District property.
- 6.1.6 Fraternalization or other contact with students is strictly forbidden.
- 6.1.7 Any Vendor working on a site where students are present must supply the District with certification that all employees on the project have been fingerprinted and approved per state law.
- 6.1.8 The Vendor shall supply prior to the start of work Certificate of Insurance coverages, as outlined in Optional Forms (Appendix E).
- 6.1.9 Vendor is required to collect, haul and dispose of all debris, trash and spoilage associated to this project. Keep all items secured and maintained in a safe manner until properly disposed of.
- 6.1.10 Care must be taken to minimize damage to the surrounding work environment. All areas affected by the project are to be restored to a pristine condition. This includes replacement of any damaged property or equipment, painting, woodwork, wood staining, trim, cabinetry, carpentry, masonry and all other areas as needed.
- 6.1.11 IUSD has a **Zero Tolerance Policy** that will be enforced towards Negative or Questionable Conduct or behavior.
- 6.1.12 While on the District's property and/or project area there will be **No Fraternalizing** by the Vendor's workforce with anyone outside the project's construction forces.
- 6.1.13 Professional and Neat Appearance of workforce shall be maintained at all times. No offensive, suggestive, or inappropriate attire will be permitted.

- 6.1.14 Use of foul, slanderous, offensive, discourteous or disrespectful language WILL NOT be tolerated.
- 6.1.15 **“Cruising” or “Loitering” on IUSD property or job site is not permitted** at any time. Employees or associates of the Vendor when not engaged in official activities as directed by their employer shall leave IUSD’s property until the next Work Call.
- 6.1.16 Vendor or their employees or associates are not allowed to be in any area of the IUSD’s property that has not been specifically authorized by IUSD or its designee without an official and designated escort.
- 6.1.17 Vendor will remove and replace all furniture and equipment as required. The Vendor will make liaison with the appropriate designated representative on relocation of any equipment. Note: the greatest care is to be taken in all cases where dealing with IUSD equipment. Any damage is at the Vendor’s expense. Vendor must notify IUSD two (2) days in advance when personal items must be removed or may be affected by the Vendor.
- 6.1.18 Vendor shall maintain the project area in the highest state of safety and cleanliness. During the work shift the areas will be kept orderly and not allowed to become cluttered or in a state where safety is compromised. At the end of each shift the Vendor shall ensure that all project equipment, material and debris is properly stowed and secured, or picked up and disposed of as appropriate.
- 6.1.19 Vendor shall indemnify and hold harmless the District, its Board of Trustees, officers, agents, and employees from all actions, claims or demands arising from its work under the Agreement and any all resulting loss, damages, costs or attorney’s fees.
- 6.1.20 Vendor, when required by law, and at the request of the District, shall pay prevailing wages. Vendor shall have the sole responsibility and duty to ensure that the correct prevailing rate of hourly wages is paid by Vendor and all subcontractor to each worker. Any increase in prevailing wages shall not result in an increase in the contract fees and costs.
- 6.1.21 Based on the installation plan supplied to the District for a particular site or sites, the District may require the Vendor to obtain a payment bond, a performance bond, or both.

## 6.2 Termination

- 6.2.1 Termination for Cause: District may terminate the contract resulting from this agreement for a material breach that is not remedied within thirty (30) days of written notice to the Vendor by the District.
- 6.2.2 The District reserves the right to cancel this RFP at any time or limit quantities due to insufficient or non-appropriation of funds. No termination liability penalties will apply if funding is denied, reduced, or discontinued, or if it is not in the best interest of the District.
- 6.2.3 Non-Appropriation: Notwithstanding any other provision to the contrary, if for any fiscal year of this Agreement the Governing Board for any reason fails to appropriate or allocate funds for future payments under this Agreement, the District will not be obligated to pay the balance of funds remaining unpaid beyond the fiscal period for

which funds have been appropriated and allocated.

## **Appendix A: District Standard Agreement**

## INDEPENDENT CONTRACTOR AGREEMENT

This AGREEMENT is hereby entered into this XX day of XXXX, 20XX between the Irvine Unified School District, hereinafter referred to as “DISTRICT,” and Contractor’s Name, address, and phone number, hereinafter referred to as “CONTRACTOR.”

WHEREAS, DISTRICT is authorized by Section 53060 of the California Government Code to contract with and employ any persons for the furnishing of special Services and advice in financial, economic, accounting, engineering, legal or administrative matters, if such persons are specially trained and experienced and competent to perform the special Services required;

WHEREAS, DISTRICT is in need of such special services and advice; and

WHEREAS, CONTRACTOR is specially trained and experienced and competent to perform the special Services required by the DISTRICT, and such services are needed on a limited basis;

NOW, THEREFORE, the parties agree as follows:

1. Services to be provided by Contractor. CONTRACTOR shall provide describe services here hereinafter referred to as “Services”.

2. Term. CONTRACTOR shall commence providing Services under this AGREEMENT on month day, 20XX, and will diligently perform as required and complete performance by month day, 20XX.

3. Compensation. DISTRICT agrees to pay the CONTRACTOR for Services satisfactorily rendered pursuant to this AGREEMENT a total fee not to exceed amount in words Dollars (\$XXXX.00). DISTRICT shall pay CONTRACTOR within thirty (30) days of receipt of CONSULTANT’s invoice detailing the services rendered.

4. Expenses. DISTRICT shall not be liable to CONTRACTOR for any costs or expenses paid or incurred by CONTRACTOR in performing Services for DISTRICT.

5. Independent Contractor. CONTRACTOR, in the performance of the Services pursuant to this AGREEMENT, shall be and act as an independent contractor. CONTRACTOR understands and agrees that it and all of its employees shall not be considered officers, employees or agents of the DISTRICT, and are not entitled to benefits of any kind or nature normally provided employees of the DISTRICT and/or to which DISTRICT’s employees are normally entitled, including, but not limited to, State Unemployment Compensation or Workers’ Compensation. CONTRACTOR assumes the full responsibility for the acts and/or omissions of its employees or agents as they relate to the Services to be provided under this AGREEMENT. CONTRACTOR shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to CONTRACTOR’s employees.

6. Materials. CONTRACTOR shall furnish, at its own expense, all labor, materials,

equipment, supplies and other items necessary to complete the Services to be provided pursuant to this AGREEMENT, except as follows: add exceptions here, if any. CONTRACTOR's Services will be performed in accordance with generally and currently accepted principles and practices of its profession.

7. Originality of Services/Intellectual Property. CONTRACTOR agrees that all ideas, technologies, formulae, procedures, processes and methods prepared for and submitted by CONTRACTOR to the DISTRICT in connection with the Services set forth in this AGREEMENT, shall be wholly original to CONTRACTOR and shall not be copied in whole or in part from any other source, except that submitted to CONTRACTOR by DISTRICT as a basis for such Services. CONTRACTOR further agrees that all writings, materials, compositions, recordings, teleplays, and/or video productions prepared for, written for, or otherwise (hereinafter referred to as "Content") submitted by CONTRACTOR to the DISTRICT and/or used in connection with the Services set forth in this AGREEMENT, reflect the intellectual property of, and copyright interests held by DISTRICT and shall not be copied or used in whole or in part by CONTRACTOR without DISTRICT's express written permission. CONTRACTOR understands and agrees that all Content produced under this AGREEMENT is the property of DISTRICT and cannot be used without DISTRICT's express written permission. CONTRACTOR acknowledges and agrees that DISTRICT shall have all right, title and interest in said Content, including the right to secure and maintain the copyright, trademark and/or patent of said Content in the name of the DISTRICT.

8. Termination. DISTRICT may, at any time, with or without reason, terminate this AGREEMENT and compensate CONTRACTOR only for Services satisfactorily rendered to the date of termination. Written notice by DISTRICT shall be sufficient to stop further performance of Services by CONTRACTOR. Notice shall be deemed given when received by the CONTRACTOR or no later than three (3) days after the day of mailing, whichever is sooner.

DISTRICT may terminate this AGREEMENT upon giving of written notice of intention to terminate for cause. Cause shall include: (a) material violation of this AGREEMENT by the CONTRACTOR; or (b) any act by CONTRACTOR exposing the DISTRICT to liability to others for personal injury or property damage; or (c) CONTRACTOR is adjudged a bankrupt, CONTRACTOR makes a general assignment for the benefit of creditors or a receiver is appointed on account of CONTRACTOR's insolvency. Written notice by DISTRICT shall contain the reasons for such intention to terminate and unless within ten (10) days after service of such notice the condition or violation shall cease, or satisfactory arrangements for the correction thereof be made, this AGREEMENT shall upon the expiration of the ten (10) days cease and terminate. In the event of such termination, the DISTRICT may secure the required Services from another contractor. If the cost to the DISTRICT to secure the required Services from another contractor exceeds the cost of providing the Services pursuant to this AGREEMENT, the excess cost shall be charged to and collected from the CONTRACTOR. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to DISTRICT. Written notice by DISTRICT shall be deemed given when received by the CONTRACTOR, or no later than three (3) days after the day of mailing, whichever is sooner.

9. Hold Harmless. CONTRACTOR agrees to and does hereby indemnify, hold harmless and defend the DISTRICT and its governing board, officers, employees and agents from every claim or demand made and every liability, loss, damage or expense, of any nature

whatsoever, which may be incurred by reason of:

(a) Liability for damages for: (1) death or bodily injury to person; (2) injury to, loss or theft of property; or (3) any other loss, damage or expense arising out of (1) or (2) above, sustained by the CONTRACTOR or any person, firm or corporation employed by the CONTRACTOR, either directly or by independent contract, upon or in connection with the Services called for in this AGREEMENT, however caused, except for liability for damages referred to above which result from the sole negligence or willful misconduct of the DISTRICT or its officers, employees or agents.

(b) Any injury to or death of any person(s), including the DISTRICT's officers, employees and agents, or damage to or loss of any property caused by any act, neglect, default, or omission of the CONTRACTOR, or any person, firm or corporation employed by the CONTRACTOR, either directly or by independent contract, arising out of, or in any way connected with, the Services covered by this AGREEMENT, whether said injury or damage occurs either on or off DISTRICT's property, except for liability for damages which result from the sole negligence or willful misconduct of the DISTRICT or its officers, employees or agents.

(c) Any liability for damages which may arise from the furnishing or use of any copyrighted or uncopyrighted matter or patented or unpatented invention under this AGREEMENT.

10. Insurance. CONTRACTOR shall insure CONTRACTOR's activities in connection with the Services under this AGREEMENT and agrees to carry insurance to ensure CONTRACTOR's ability to adhere to the indemnification requirements under this AGREEMENT.

10.1 CONTRACTOR shall, at CONTRACTOR's sole cost and expense, maintain in full force and effect the following insurance coverages from a California licensed insurer with an A, VIII, or better rating from A.M. Best or an approved self-insurance program, sufficient to cover any claims, damages, liabilities, costs and expenses (including attorney fees) arising out of or in connection with CONTRACTOR's fulfillment of the obligations under this AGREEMENT:

a. Comprehensive or Commercial General Liability Insurance, including bodily injury, property damage and contractual liability with minimum limits set by the DISTRICT.

(1) General Aggregate	\$2,000,000
(2) Each Occurrence	\$1,000,000
(3) Products/Completed Operations	\$1,000,000
(4) Personal and Advertising Injury	\$1,000,000
(5) Damage to Rented Premises	\$50,000
(6) Medical Expense (any one person)	\$5,000

The policy may not contain an exclusion for coverage of claims arising from claims for sexual molestation or abuse. This policy shall include or be endorsed to include abuse and molestation coverage of at least \$1,000,000 for each occurrence.

b. Umbrella (excess) liability insurance coverage with a limit of \$3,000,000, unless waived by the DISTRICT. The policy may not contain an exclusion for sexual molestation or abuse coverage.

c. Business Automobile Liability Insurance for owned, scheduled, non-owned, or hired automobiles with a combined single limit not less than \$1,000,000 per occurrence. (Required only if the CONTRACTOR drives on behalf of the DISTRICT in the course of performing Services.)

d. Professional Liability Insurance with a limit of \$1,000,000 per occurrence, unless waived by the DISTRICT.

e. Workers' Compensation and Employers Liability Insurance in a form and amount covering CONTRACTOR's full liability under the California Workers' Compensation Insurance and Safety Act and in accordance with applicable state and federal laws. The policy shall be endorsed with the insurer's waiver of rights of subrogation against the DISTRICT.

It should be expressly understood, however, that the coverage and limits referred to under a., b., c., and d. above shall not in any way limit the liability of the CONTRACTOR.

10.2 No later than ten (10) days from execution of this AGREEMENT by the DISTRICT and CONTRACTOR, and prior to commencing the Services under this AGREEMENT, CONTRACTOR shall provide DISTRICT with certificates of insurance evidencing all coverages and endorsements required hereunder.

CONTRACTOR shall provide prior written notice to the DISTRICT thirty (30) days in advance of any non-renewal, cancellation, or modification of the required insurance. The certificates of insurance providing the coverages referred to in clauses (a) and (b) above shall name DISTRICT, its Governing Board, officers, and employees, as additional insureds with appropriate endorsements. In addition, the certificates of insurance shall include a provision stating "Such insurance as is afforded by this policy shall be primary, and any insurance carried by DISTRICT shall be excess and noncontributory." Failure to maintain the above mentioned insurance coverages shall be cause for termination of this AGREEMENT.

11. Assignment. The obligations of the CONTRACTOR pursuant to this AGREEMENT shall not be assigned by the CONTRACTOR.

12. Compliance With Applicable Laws. The Services completed herein must meet the approval of the DISTRICT and shall be subject to the DISTRICT's general right of inspection to secure the satisfactory completion thereof. CONTRACTOR agrees to comply with all federal, state and local laws, rules, regulations and ordinances that are now or may in the future become applicable to CONTRACTOR, CONTRACTOR's business, the Services, equipment and personnel engaged in Services covered by this AGREEMENT or accruing out of the performance of such Services.

12.1 Fingerprinting. Education Code section 45125.1 requires that employees of a Contractor providing certain services to school districts must be fingerprinted by the California Department of Justice for a criminal records



check, unless the District determines that the Contractor and/or Contractor's employees will have limited or no contact with District's students. In making this determination, the District will consider the totality of the circumstances. If the District has determined that fingerprinting is required, whether or not the Services are one of those listed in Section 45125.1, the Contractor expressly agrees that Contractor and all of Contractor's current and subsequent employees will submit or have submitted fingerprints in a manner required by the California Department of Justice, as set forth in Education Code section 45125.1. Contractor and/or Contractor's current and subsequent employees shall not come in contact with students until the Department of Justice has ascertained that the Contractor and/or Contractor's employees have not been convicted of a serious or violent felony. Contractor shall certify in writing to the District that none of its employees who may come in contact with students have been convicted of a serious or violent felony; and shall provide to the District a list of names of its employees who may come in contact with students. Contractor shall fulfill these requirements at its own expense. The District may require the Contractor and its current and subsequent employees to submit to additional criminal records checks at the District's sole and absolute discretion.

The Services and scope of work defined in this Agreement

will

will not

require the CONTRACTOR to submit to fingerprinting.

CONTRACTOR's Initials: \_\_\_\_\_

13. Permits/Licenses. CONTRACTOR and all CONTRACTOR's employees or agents shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of Services pursuant to this AGREEMENT.

14. Employment With Public Agency. CONTRACTOR, if an employee of another public agency, agrees that CONTRACTOR will not receive salary or remuneration, other than vacation pay, as an employee of another public agency for the actual time in which Services are actually being performed pursuant to this AGREEMENT.

15. Entire Agreement/Amendment. This AGREEMENT and any exhibits attached hereto constitute the entire AGREEMENT among the parties to it and supersedes any prior or contemporaneous understanding or AGREEMENT with respect to the Services contemplated, and may be amended only by a written amendment executed by both parties to the AGREEMENT. This AGREEMENT incorporates by this reference, any exhibits, which are attached hereto and incorporated herein.

16. Nondiscrimination. CONTRACTOR agrees that it will not engage in unlawful discrimination in employment of persons because of race, ethnicity, religion, nationality, disability, gender, sex, marital status, age, or other characteristics protected by federal or state laws of such persons.

17. Non Waiver. The failure of DISTRICT or CONTRACTOR to seek redress for violation of, or to insist upon, the strict performance of any term or condition of this AGREEMENT, shall not be deemed a waiver by that party of such term or condition, or prevent a subsequent similar act from again constituting a violation of such term or condition.

18. Notice. All notices or demands to be given under this AGREEMENT by either party to the other shall be in writing and given either by: (a) personal service or (b) by U.S. Mail, mailed either by registered or certified mail, return receipt requested, with postage prepaid. Service shall be considered given when received if personally served or if mailed on the third day after deposit in any U.S. Post Office. The address to which notices or demands may be given by either party may be changed by written notice given in accordance with the notice provisions of this section. At the date of this AGREEMENT, the addresses of the parties are as follows:

District:	Contractor:
Irvine Unified School District	Company Name
5050 Barranca Parkway	Street Address
Irvine, CA 92604	City, State, Zip
Attn: Asst. Superintendent, Business Services	Attn:

19. Severability. If any term, condition or provision of this AGREEMENT is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.

20. Attorney Fees/Costs. Should litigation be necessary to enforce any terms or provisions of this AGREEMENT, then each party shall bear its own litigation and collection expenses, witness fees, court costs, and attorneys' fees.

21. Headings. The headings contained in this AGREEMENT are provided exclusively for reference and the convenience of the Parties. No legal significance of any type shall be attached to the headings.

22. Counterparts. This AGREEMENT may be signed and delivered in two (2) counterparts, each of which, when so signed and delivered, shall be an original, but such counterparts together shall constitute the one instrument that is the AGREEMENT, and the AGREEMENT shall not be binding on any party until all Parties have signed it.

23. Authorized Signatures. The individual signing this AGREEMENT warrants that he/she is authorized to do so. The Parties understand and agree that a breach of this warranty shall constitute a breach of the AGREEMENT and shall entitle the non-breaching party to all appropriate legal and equitable remedies against the breaching party.

24. Governing Law. The terms and conditions of this AGREEMENT shall be governed by the laws of the State of California with venue in Orange County, California. This AGREEMENT is made in and shall be performed in Orange County, California.

25. Exhibits. This AGREEMENT incorporates by this reference, any exhibits, which are attached hereto and incorporated herein, if applicable.

This AGREEMENT is entered into this XX day of XXXX, 20XX.

IRVINE UNIFIED SCHOOL DISTRICT

CONTRACTOR

By: \_\_\_\_\_

Name: John Fogarty

Title: Asst. Superintendent, Business Services  
*(a Board Authorized IUSD rep. will sign for IUSD)*

IUSD Board Approved:

By: \_\_\_\_\_

Name:

Title:

\_\_\_\_\_  
Taxpayer Identification Number

## Appendix B: Required Forms

## PROPOSAL SUBMISSION CHECKLIST

- Cover Page: Company Name, Contact Information
- Part 1: Vendor Experience and Ability to Perform
- Part 2: Technology Requirements
- Part 3: Price
- Part 4: Exceptions
- Part 5: District Standard Agreement
- Part 6: Required Forms (Appendix B)
  - Proposal Submission Checklist
  - Purchase Agreement
  - Acknowledgment of Amendments to RFP
  - Vendor Representation and Certification
  - Noncollusion Declaration
  - Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
  - Certification on Restrictions on Lobbying
  - Piggyback Clause
- Part 7: Pricing and Proposed System Forms (Appendix C)
  - Component Pricing Form (provide both a **PDF and Excel** copy with electronic proposal)
  - E-911 Station Locator Capability Form
  - Optional Equipment Form
  - Additional Telephone Station Pricing Form
  - Summary of One Time Costs Form
  - Annual Recurring Costs Form
- Part 8: Required Supplementary Materials (Appendix D)
  - Draft Project Plan
  - Sample Contract
  - Service Level Agreement
  - Maintenance Agreement
  - Station User's Manual
  - Voicemail User's Manual
  - Sample Reports and Training Materials
  - Additional Resources that Support the Proposal
- Part 9: Optional Forms (Appendix E) - *Required of Selected Vendor within ten (10) days of Notice of Intent to Award*

- Workers' Compensation Certificate
- Drug Free Workplace Certification
- Tobacco Use Policy
- Notice to Vendors Regarding Criminal Records Check
- Criminal Records Check Certification by Vendor
- W-9
- Certificate of Liability Insurance, including an Additional Insured Endorsement

**PURCHASE AGREEMENT**

Upon notification of selection and Board Approval, the undersigned hereby promises and agrees to furnish all articles or services within the dates specified, in the manner and form and at the prices herein stated in strict accordance with the advertisement, specifications, proposals and general conditions all which are made a part of the purchase agreement.

Name under which business is conducted \_\_\_\_\_

Business Street Address \_\_\_\_\_ Tel: \_\_\_\_\_

\_\_\_\_\_  
City State Zip Code

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above.

\_\_\_\_\_

IF PARTNERSHIP, sign here:

The undersigned certify that we are partners in the business named above and that we sign this purchase agreement with full authority so to do. (One (1) or more partners sign)

\_\_\_\_\_

IF CORPORATION, execute here:

The undersigned certify that they sign this purchase agreement with full and proper authorization so to do.

Corporate Name

\_\_\_\_\_

Signed \_\_\_\_\_ Title \_\_\_\_\_

Signed \_\_\_\_\_ Title \_\_\_\_\_

Incorporated under the laws of the State of \_\_\_\_\_

**ACKNOWLEDGEMENT OF AMENDMENTS TO RFP**

VENDOR HEREBY ACKNOWLEDGES RECEIPT OF ANY AND ALL AMENDMENTS TO THE RFP.

If Vendor has no knowledge of any amendments to the RFP having been issued to, or received by, Vendor, please check following box:

Amendments

Amendment No.	Date Published	Date Received

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature of Authorized Agent

\_\_\_\_\_  
Name and Title of Authorized Agent

\_\_\_\_\_  
Name of Vendor



**VENDOR REPRESENTATION AND CERTIFICATION**

The undersigned hereby acknowledges and affirms that:

- He/she is a duly authorized agent of the Vendor with the authority to submit a Proposal on behalf of the Vendor (corporate or other authorization confirmation may be requested prior to final contract execution).
- He/she has read the complete RFP documents and all amendments issued pursuant thereto.
- The Proposal complies with State conflict of interest laws. The Vendor certifies that no employee of its firm has discussed, or compared the Proposal with any other Vendor or District employee, and has not colluded with any other Vendor or District employee.
- If the Vendor's Proposal is accepted by the District, the Vendor will enter into a contract with the District to provide the Services, Systems and Equipment described by the Proposal on the terms mutually acceptable to the District and the Vendor.
- The District reserves the right to reject any or all proposals.

I hereby certify that I am submitting the attached Proposal on behalf of [Specific Entity Submitting Proposal].

I understand that, by virtue of executing and returning this required response form with the Proposal, I further certify, that the Vendor understands and does not dispute any of the contents of the proposal requirements (except as may be noted in the response).

Vendor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

FAX: \_\_\_\_\_

E-Mail: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Authorized Agent

\_\_\_\_\_  
Name and Title of Authorized Agent

NOTE: If Joint Venture, each member of the joint venture must provide a completed certificate form.

**NONCOLLUSION DECLARATION**

TO BE EXECUTED BY VENDOR AND SUBMITTED WITH PROPOSAL  
(Public Contract Code section 7106) The undersigned declares:

I am the \_\_\_\_\_ (title) of \_\_\_\_\_ (Vendor), the party making the foregoing proposal.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The Vendor has not directly or indirectly induced or solicited any other Vendor to put in a false or sham proposal. The Vendor has not directly or indirectly colluded, conspired, connived, or agreed with any Vendor or anyone else to put in a sham proposal, or to refrain from submitting a proposal. The Vendor has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Vendor or any other Vendor, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Vendor. All statements contained in the proposal are true. The Vendor has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Vendor that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Vendor.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on \_\_\_\_\_ [date], at \_\_\_\_\_ [city], \_\_\_\_\_ [state].

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The \_\_\_\_\_ (Principal) of \_\_\_\_\_ (Firm Name)

Certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local), with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this proposal had one (1) or more public transactions (federal, state or local) terminated for cause or default.

If unable to certify to any of the statements in this certification, the participant shall attach an expiration to this certification.

I HEREBY CERTIFY AND AFFIRM THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTAND THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Vendor/Firm Name

\_\_\_\_\_  
Name and Title of Primary Participant/Authorized Official

\_\_\_\_\_  
Date

**CERTIFICATION OF RESTRICTIONS ON LOBBYING**

I hereby certify on behalf of \_\_\_\_\_ (name of offeror) that \_\_\_\_\_ (Firm name) meets the following qualifications:

1. No Federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the attached, Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in all subcontracts, and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, 2018

By \_\_\_\_\_ (Signature of authorized official)

\_\_\_\_\_  
(Name and Title of authorized official)

**PIGGYBACK CLAUSE**

Pursuant to Public Contract Code section 20118, other school districts and public agencies in the State of California may purchase identical items under the price, terms and conditions of this RFP for the term specified by the Irvine Unified School District.

OPTION GRANTED:

OPTION NOT GRANTED:

By: \_\_\_\_\_  
Signature of Authorized Agent

Date: \_\_\_\_\_

\_\_\_\_\_  
Name and Title of Authorized Agent

## Appendix C. Pricing and Proposed System Forms

Detail all costs associated with the proposed solution, including, but not limited to, complete delivery, the implementation, installation, configuration, software licensing, maintenance, ongoing support, repairs, parts, recommended professional services, taxes and surcharges, and costs of optional services and products. Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

- Component Pricing Form (provide both a **PDF and Excel** copy with electronic proposal)
- E-911 Station Locator Capability Form
- Optional Equipment Form
- Additional Telephone Station Pricing Form
- Summary of One Time Costs Form
- Annual Recurring Costs Form

**Component Pricing Form:** Expand the following table, in the excel spreadsheet provided, as required to provide itemized, component pricing for the proposed system to meet the requirements. Include all components required to meet the minimum specifications in this RFP. The component name should be clear and understandable, not a code or stock number. The Discounted Price must be the actual cost the District will pay for the component, not a list price with a summary discount at the end. Total Price equals the Quantity times the Discounted Price. **Please provide the options for District’s current PRI solution as well as a SIP solution. Submit both PDF and Excel versions**

Vendor Name:

Component Details	Component 1	Component 2	Component 3	Component 4	Component 5	Component 6	Component 7	Component 8	Component 9	Component 10	Component 11	Component 12	Paging Access	SIP	Analog Trunk/POTS
Component Name															
Part Number															
Unit Cost (List)															
Discount Percent/Amount															
USD Unit Cost															
Installation/Labor Unit Cost															
Sites (Input Recommended Quantities)															
Data Center															
District Office															
Aldenwood ES															
Beacon Park MS															
Bonita Canyon ES															
Brywood ES															
Caliente Park MS															
Canyon View ES															
College Park ES															
Creskide Education Center															
Culverdale ES															
Cypress Village ES															
Deerfield ES															
Early Childhood Learn. Ctr.															
Eastshore ES															
Eastwood ES															
El Camino Real ES															
Greenway ES															
Irma MS															
Jaffray Trail MS															
Lakewood MS															
Laguna Creekside															
Loma Ridge St. (Open 2019)															
Meadow Park ES															
Northwood ES															
Northwood MS															
Oak Creek ES															
Plaza Vista MS															
Romulo MS															
Romulo Spring ES															
Rancho San Joaquin MS															
Santiago Hills ES															
Serra Vista MS															
South Lake MS															
Springdale ES															
Stone Creek ES															
Stonewate ES															
Turtle Rock ES															
University MS															
University Park ES															
Venado MS															
Vista Verde MS															
Westpark ES															
Westwood Training Center															
Woodbridge MS															
Woodbury ES															

**E-911 Station Locator Capability Form:** Expand the following table as required to provide itemized, component pricing for the proposed system to meet the requirements.

<b>E-911 STATION LOCATOR CAPABILITY</b>				
<b>Component - Name</b>	<b>Qty</b>	<b>Total Price</b>	<b>Install</b>	<b>Total</b>
(List all component parts of the system)				
Sub-total – Hardware / Software				
Shipping				
General Install and Training				
Tax Exempt				
Total Purchase Price				



**Optional Equipment Form:** Expand the following table as required to provide itemized, component pricing for the proposed system to meet the requirements.

OPTIONAL EQUIPMENT						
Component/Hardware/Software	Qty	Total Price	Install	Recurring Costs (annual)	Total	
(List all component parts of the system)						
Call Accounting System						
Conference Bridge						
Recording Device/System						
Wireless Headset Tools						
Twinning Licenses	50					

**Additional Telephone Station Pricing Form:** Expand the following table as required to provide itemized, component pricing for the proposed system to meet the requirements.

- Pricing for Additional Stations is consistent with the pricing on Component Pricing Form.
- Pricing for Additional Stations is NOT consistent with the pricing on Component Pricing Form. *\*Complete the Additional Telephone Station Pricing Form below.*

ADDITIONAL TELEPHONE STATION PRICING				
Station Type	Qty	Total Price	Install	Total

**Summary of One-Time Costs Form:** Expand the following table as required to provide itemized, component pricing for the proposed system to meet the requirements.

<b>SUMMARY OF ONE-TIME COSTS</b>		
<b>Item</b>	<b>Examples of Included Items</b>	<b>Estimated Total One Time Cost</b>
<b>Equipment</b>	<i>Including all proposed equipment, and components</i>	
<b>E911 Station Locator Capability</b>		
<b>Implementation</b>	Including, but not limited to, delivery, complete installation, programming and testing of components and software (including QOS testing), PSTN coordination, on-site station reviews, and full system configuration documentation.	
<b>Training</b>		
<b>Other</b>		
<b>Total One-Time Costs</b>		

**Annual Recurring Costs Form:** Expand the following table as required to provide itemized, component pricing for the proposed system to meet the requirements. Include Software Upgrade Costs, Software Update Costs and Maintenance Support and Assurance. Explain any escalation or price change if pricing for each year is not identical. Provide the hourly rate for services not covered by warranty or service contracts.

<b>Annual Recurring Costs</b>		
<b>Item</b>	<b>Examples of Included Items</b>	<b>Estimated Total Cost (Per Year)</b> <i>If cost differs per year please include the price difference and an explanation.</i>
<b>Equipment</b>	<i>Including all proposed equipment and components</i>	
<b>E911 Station Locator Capability</b>		
<b>Software Licensing</b>		
<b>Software Upgrade and Update Costs</b>		
<b>Maintenance and Support</b>		
<b>Other</b>		
<b>Total Recurring Costs (per year)</b>		

## **Appendix D: Required Supplementary Materials**

**Vendor must submit:**

- Draft Project Plan
- Sample Contract
- Service Level Agreement (SLA)
- Maintenance Agreement (MA)
- Station User's Manual
- Voicemail User's Manual
- Sample Reports and Training Materials
- Additional Resources that Support the Proposal

## **Appendix E: Optional Forms**

Required only of selected Vendor within ten (10) days of notification of Intent to Award.

**WORKERS' COMPENSATION CERTIFICATE**

Labor Code Section 3700.

"Every employer except the state shall secure the payment of compensation in one or more of the following ways:

a. By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this state.

b. By securing from the Director of Industrial Relations a certificate of consent to self-insure either as an individual employer or as one employer in a group of employers, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his or her employees.

c. For any county, city, city and county, municipal corporation, public DISTRICT, public agency or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702."

I am aware of the provisions of Labor Code Section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

\_\_\_\_\_  
Name of the Vendor

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under the contract.)

IRVINE UNIFIED SCHOOL DISTRICT  
Irvine, California

**DRUG FREE WORKPLACE CERTIFICATION**

This Drug-Free Workplace Certification is required pursuant to Government Code §8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the Vendor may be subject to debarment from future contacting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code §8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

- a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;
- b. Establishing a drug-free awareness program to inform employees about all of the following:
  - i. The dangers of drug abuse in the workplace;
  - ii. The person's or organization's policy of maintaining a drug-free workplace;
  - iii. The availability of drug counseling, rehabilitation and employee-assistance programs;
  - iv. The penalties that may be imposed upon employees for drug abuse violations;
- c. Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I the undersigned, agree to fulfill the terms and requirements of Government Code §8355 listed above and will publish a statement notifying employees concerning (a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of statement required by §8355 (a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the DISTRICT determines that I have either (a) made false certification herein, or (b) violated this certification by failing to carry out the requirements of §8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of §8350, et seq.

I acknowledge that I am aware of the provisions of Government Code §8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

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Name of Vendor

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Signature

---

Date

---

Print Name

---

Title



**TOBACCO USE POLICY**

In the interest of public health, the Irvine Unified School District provides a tobacco-free environment. Smoking or the use of any tobacco products are prohibited in buildings and vehicles, and on any property owned, leased or contracted for, by the District. Failure to abide with this requirement could result in the termination of this contract.

I acknowledge that I am aware of Tobacco Use Policy and hereby certify that I and my employees will adhere to the requirements of the policy.

\_\_\_\_\_  
Name of Vendor

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**NOTICE TO VENDORS REGARDING CRIMINAL RECORDS CHECK**

(EDUCATION CODE §45125.1)

Education Code §45125.1 provides that if the employees of any entity that has a contract with a school DISTRICT may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice together with a fee determined by the Department of Justice to be sufficient to reimburse the Department for its costs incurred in processing the application.

The Department of Justice shall ascertain whether the individual whose fingerprints were submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code §1192.7(c) or has been convicted of such a felony, the Department shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first-class mail.

The contract shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The Vendor shall certify in writing to the Board of Trustees of the school DISTRICT that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal Code §667.5(c) lists the following “violent” felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; lewd acts on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited dwelling; arson; penetration of a person’s genital or anal openings by foreign or unknown objects against the victim’s will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking.

Penal Code §1192.7 lists the following : “serious” felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally inflicts great bodily injury on another, or in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non-inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim’s will; grand theft involving a firearm; carjacking; and a conspiracy to commit specified controlled substances offenses.

**CRIMINAL RECORDS CHECK CERTIFICATION BY VENDOR**

(AB 1610, 1612 and 2102)

To the Board of Trustees of Irvine Unified School DISTRICT:

I, \_\_\_\_\_ (name)  
certify that: \_\_\_\_\_ (Name of Vendor)

1. I have carefully read and understand the Notice to Vendors Regarding Criminal Record Checks (Education Code §45125.1) required by the passage of AB 1610, 1612 and 2102.
2. Due to the nature of the work I will be performing for the DISTRICT, my employees may have contact with students of the DISTRICT.
3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code §1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at \_\_\_\_\_, California on \_\_\_\_\_.  
(City) (Date)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed or printed name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

**W-9**

Current Version Available at: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>



## Irvine Unified School District Insurance Requirements

All insurers must be duly licensed and admitted by the State of California

### **Mandatory Requirements (unless District reduces or excludes coverage requirements)**

1. Commercial General Liability insurance for bodily injury and property damage, including accidental death in the combined single limit of not less than \$1,000,000 per occurrence (\$2,000,000 aggregate) and \$3,000,000 Excess/Umbrella Liability.
2. Sexual Abuse/Molestation coverage must be included under General Liability or obtained in separate policies in an amount of not less than \$1,000,000 per occurrence (\$2,000,000 aggregate) and \$3,000,000 excess/umbrella coverage.

### **Minimum Limits (if required by District)**

1. Automobile Liability insurance for bodily injury and property damage in an amount of not less than \$1,000,000 per occurrence with no annual aggregate limit.
2. Workers' Compensation and Employer's Liability insurance in the amount of not less than \$1,000,000 per occurrence.
3. Professional Liability insurance in an amount of not less than \$1,000,000 per occurrence (\$2,000,000 aggregate). If Professional Liability policy is made on a claims-made basis, the vendor/consultant must purchase and maintain an extending reporting period (tail coverage) for one year.

### **Additional Insured Endorsement Language**

"Irvine Unified School District, its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory."

Additional Insured Endorsements are required to accompany Certificates of Insurance. Certificate of Insurance shall provide thirty (30) day prior written notice of cancellation.

See sample certificate on the Irvine Unified School District website at [www.iusd.org](http://www.iusd.org).

### **Additional Required Documents**

Certificates of Insurance must be accompanied by a list of all excluded coverages under the general liability and excess/umbrella liability policies. The exclusion policy document section may be emailed or faxed to Risk Management & Insurance. The general liability and excess/umbrella liability documents must list the corresponding policy numbers referenced on the Certificate of Insurance.

Questions may be directed to Risk Management & Insurance at [Insurance@iusd.org](mailto:Insurance@iusd.org).

Email: [Insurance@iusd.org](mailto:Insurance@iusd.org) Fax: (949) 936-5019

# SAMPLE

<b>ACORD</b> <small>TM</small> <b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) INSERT DATE
<b>PRODUCER</b>  NAME & ADDRESS OF INSURANCE COMPANY	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
<b>INSURED</b>  NAME & ADDRESS OF COMPANY/ORGANIZATION	<b>INSURERS AFFORDING COVERAGE</b> INSURER A: Name of Insurance Company INSURER B: Name of Insurance Company INSURER C: Name of Insurance Company INSURER D: Name of Insurance Company INSURER E: Name of Insurance Company	<b>NAIC #</b>

**COVERAGES**  
 THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJ-ECT <input type="checkbox"/> LOC	MANDATORY REQUIREMENTS	Insert Date	Insert Date	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/PROP AGG \$ 1,000,000
	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS	REQUIRED IF APPLICABLE TO SERVICE	Insert Date	Insert Date	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$
	<b>EXCESS/UMBRELLA LIABILITY</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE  <input type="checkbox"/> DEDUCTIBLE <input type="checkbox"/> RETENTION \$	REQUIRED UNLESS REDUCED/EXCLUDED	Insert Date	Insert Date	EACH OCCURRENCE \$ 3,000,000 AGGREGATE \$ \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below	REQUIRED UNLESS REDUCED/EXCLUDED	Insert Date	Insert Date	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
	<b>OTHER</b> Professional Liability and/or Sexual Abuse/Molestation	MAY BE REQUIRED	Insert Date	Insert Date	\$ 1,000,000 per occurrence \$ 2,000,000 aggregate

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS**  
 Irvine Unified School District, its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory. Sexual Abuse/Molestation is not excluded from coverage under the general liability and excess/umbrella liability policies. (Provide brief description of services/dates).

<b>CERTIFICATE HOLDER</b>  Irvine Unified School District 5050 Barranca Parkway Irvine, California 92604 Attention: Risk Management	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL <u>30</u> DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES. AUTHORIZED REPRESENTATIVE _____ SIGNATURE REQUIRED
--	---

ENDORSEMENT

ADDITIONAL COVERED PARTY

COVERED PARTY (INSERT INSURED NAME)	COVERAGE DOCUMENT (INSERT POLICY NUMBER)	ADMINISTRATOR (INSERT NAME OF ADMINISTRATOR)
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Subject to all terms, conditions, exclusions, and endorsements, such additional covered party as is afforded by the coverage document shall also apply to the following entity but only as respects to liability arising from the actions and activities of the covered party described below.

Additional Covered Party:

Irvine Unified School District  
5050 Barranca Parkway  
Irvine, California 92604

Description of Activities:

Irvine Unified School District, its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory.

Authorized Representative Signature  
MUST APPEAR ON THE ENDORSEMENT PAGE

SAMPLE