

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
REQUEST FOR PROPOSALS
FOR
TELEPHONE SYSTEM REPLACEMENT

PROJECT SUMMARY SHEET

Project Name: Telephone System Replacement

Solicitation Issuance Date: Friday, February 1, 2008

Project Number: none

Project Description: Replacement of MTD telephone system with 30 trunk lines and 52 stations with 73 telephones at two local locations; administrator/user training; oversee ISDN PRI implementation; and service and maintain such system for 3-year period.

Project Locations: 550 Olive Street & 1020 Chapala Street, Santa Barbara, CA 93101

Pre-Proposal Meeting Date/Time: Wednesday, February 13, 2008, at 10:00 AM (local time)

Pre-Proposal Meeting Location: 550 Olive Street, Santa Barbara, CA 93101

Proposal Due Date/Time: Thursday, February 21, 2008 at 4:00 PM (local time)

Proposal Submittal Location: 550 Olive Street, Santa Barbara, CA 93101

Include with Proposal: Price Proposal form, Proposer Information form; Credit & Work Reference/Suppliers & Subcontractors form; and Certificate of Liability Insurance (**proposals submitted without these items are non-responsive & will be rejected**).

Proposal Discussion/Demo Period: March 10 – March 28, 2008 (projected)

Board Award Consideration Date: Tuesday, April 8, 2008 (projected)

Project Implementation Period: May & June 2008 (projected)

Project Contact: Brad Davis, Project Manager, (805) 963-9571 ext. 237, bdavis@sbmtd.gov

Type of Contract: Fixed Price

Bonding Required: None

Project Budget Estimate: \$60,000 (excluding 3-year service & maintenance)

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

**REQUEST FOR PROPOSALS
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TELEPHONE SYSTEM REPLACEMENT**

RFP PROCESS & INSTRUCTIONS

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SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

**REQUEST FOR PROPOSALS
FOR
TELEPHONE SYSTEM REPLACEMENT**

RFP PROCESS & INSTRUCTIONS

1. PROJECT DESCRIPTION

The Santa Barbara Metropolitan Transit District (MTD) is soliciting proposals for the replacement of its voice telecommunications systems serving some 30 trunk lines and 60 stations at two local locations; the training of the new system administrators and users; oversight of the implementation of a new ISDN PRI local loop; and the service and maintenance of such system for a 3-year period. Replacement includes all non-carrier equipment and systems including the PBX, telephones, voice-mail system and any other hardware and software necessary to implement the selected new telephony system. **MTD will consider all non-hosted systems meeting the requirements of the *Statement of Work* whether considered a “standard” digital telephone system, a Voice Over IP (VoIP) system, usage of computer-telephony integration (CTI), or any combination or hybrid of such systems and technologies.** The project does not include MTD’s 2-way radio communications system to and between its buses nor non-integrated wireless cellular telephones. Detailed work specifications and requirements are contained in the *Statement of Work*. This *RFP Process & Instructions* provides directions on preparing proposals as well as the procurement schedule. General contractual conditions are included in the *MTD Master Agreement*. All such documents are contained herein this Request for Proposals (RFP) package.

2. PRE-PROPOSAL SUBMITTAL ACTIVITIES

2.1 RFP PACKAGE REVIEW

It is the intention of MTD to award a contract to the proposing firm submitting the proposal that is most advantageous to MTD provided that such party is technically and financially capable of undertaking the project within the desired timeframe and has provided all required forms and information. The RFP package is composed of the following elements:

- RFP Process & Instructions (the document presently being read)
- Statement of Work
- MTD Master Agreement
- Price Proposal Form
- Proposer Information Form
- Credit & Work Reference/Suppliers & Subcontractors Form

2.2 PRE-PROPOSAL MEETING

There is a pre-proposal meeting at MTD’s administrative office for viewing the project site, reviewing the project work and discussing proposal preparation at 10:00 AM (local time) on Wednesday, February 13, 2008. MTD’s administrative office is located at 550 Olive Street in Santa Barbara. While not mandatory, it is strongly recommended that parties considering the submission of a proposal attend the meeting as it will provide an excellent opportunity to see the project location, ask questions, seek clarifications and generally gain a clearer understanding of the project and the MTD RFP process. Parties are encouraged to submit questions and requests in advance of the pre-proposal meeting, the process for which is addressed next.

2.3 QUESTIONS & AMENDMENTS

Questions concerning this RFP and the project should be directed to Brad Davis, the project manager, in writing, preferably by e-mail to bdavis@sbmtd.gov although other written means are acceptable. Based upon questions, requests, and comments received at the pre-proposal meeting or by e-mail or other written means, MTD may modify the RFP if in its best interests to do so. If modified, the RFP will be posted to MTD's website at www.sbmtd.gov/currentprocurements.htm and concurrently e-mailed or mailed via U.S. Postal Service to all parties that were issued or requested the RFP in addition to those attending the pre-proposal meeting.

3. PROPOSAL PREPARATION & SUBMITTAL

3.1 PROPOSAL CONTENTS

Proposals must include the following contents with the information stipulated below in order to be considered responsive and thus subject to evaluation and potential contract award consideration:

- Description of the Firm
- Description of Partners, Subcontractors or Suppliers
- Key Project Personnel Résumés
- Prior Experience with Similar Projects
- Work Proposal
- Proposed Maintenance Agreement
- Signed and dated Price Proposal Form
- Completed Proposer Information Form
- Completed Credit & Work References/Suppliers & Subcontractors Form
- Certificate of Liability Insurance

Description of the Firm—Proposals shall include a brief description of the proposing firm including its line(s) of business, size, location(s), years in business, and any other information deemed appropriate for providing a general overall picture of the firm. If a large entity, information on the division of the firm that would be responsible for the project should be emphasized. Please limit such information to a maximum of two pages.

Description of Partners, Subcontractors or Suppliers—Proposals shall include a description of all significant partners and equipment or service providers. Provide the same information as that described above for the proposing firm. This must include the telephone system manufacturer, installing firm and maintenance provider if different from the proposing firm. Please limit information to a maximum of one page for each entity.

Key Project Personnel Résumés—Proposals shall include résumés for those persons responsible for managing or supervising project work; and unsupervised technical personnel carrying out important implementation or installation work. Résumés should emphasize the education and/or experience relevant to the project, cover personnel for major relevant partners or subcontractors as well, and be limited to one page per person.

Prior Experience with Similar Projects—Proposals shall include a description of recent, similar projects carried out by the proposer. Of particular importance is inclusion of an implementation with a similar if not identical telephone system to that being proposed. While experience in general may also be cited, **describe the three specific projects for those clients listed on the Work References Form.** Please limit to two pages in total.

Work Proposal—Proposals shall include a description of how the *Statement of Work* would be implemented by the proposing firm. This must include a narrative section written specifically for this RFP addressing each of the 12 bulleted task items in the **SUMMARY WORK DESCRIPTION** section of the *Statement of Work*. Such

narrative, coupled with included manufacturer's product specification documentation, should be of sufficient length and detail to allow MTD to determine that the proposal meets the requirements of the *Statement of Work*.

Proposed Maintenance Agreement—Proposals shall include the proposed agreement, including all terms and conditions, for providing service and maintenance for a three-year period as stipulated in the **NEW TELEPHONE SYSTEM** section of the *Statement of Work*.

Price Proposal Form—Proposals shall include the Price Proposal form included in this RFP package. This form breaks down costs by task for all services, labor and equipment in a manner that assists MTD in comparing proposals. As such, it must be used in place of any proposer-provided price or cost forms and must list the total compensation proposed by the Proposer to undertake the Project.

Proposer Information Form—Proposals shall include the **fully completed** Proposer Information form included in this RFP package.

References/Suppliers/Subcontractors Form—Proposals shall include the **fully completed** Credit & Work References/Suppliers & Subcontractors form included in this RFP package. Please be certain to list appropriate and current contact names and phone numbers for all references. A reminder that the three work references listed should be those included above in the *Prior Experience with Similar Projects* element of your proposal.

Certificate of Liability Insurance—Proposals shall include a Certificate of Liability Insurance form or its equivalent prepared by the proposer's insurance agent or broker showing it's evidence of insurance coverage. **Such form must indicate that the proposer meets the minimum coverage stipulated in paragraph 15 of the MTD Master Agreement.** (If awarded the contract for the project, the proposer shall be required at that time to name MTD as an additionally insured for appropriate policies.)

3.2 PROPOSAL SUBMISSION

One (1) original and two (2) complete copies of the proposal shall be submitted in a non-transparent, sealed envelope or appropriate packaging plainly marked on the exterior with the name of the proposer and the following: "Telephone System Proposal." If using a delivery service, proposals must still be enclosed in the specified packaging within the delivery service packaging. Proposals shall be delivered to:

Santa Barbara Metropolitan Transit District
Attn: Brad Davis, Project Manager
550 Olive Street
Santa Barbara, CA 93101

Proposals will be accepted until 4:00 PM, local time, on Thursday, February 21, 2008. Proposals received after that time shall not be accepted and will be returned unopened to the sender.

3.3 LIMITATIONS

The following limitations apply to this Request for Proposals:

- All proposals submitted as a result of this RFP become the property of MTD
- MTD will not pay any cost incurred by a proposer resulting from preparation of its proposal
- MTD reserves the sole right to evaluate, accept or reject proposals received as a result of this RFP
- MTD reserves the right to cancel this RFP in whole or in part if in its best interests to do so

4. EVALUATION & AWARD

4.1 RESPONSIVENESS

MTD shall examine all proposals for the purpose of ascertaining their completeness and responsiveness to the provisions of this RFP. **Proposals that do not contain all required materials, information or forms; or where such materials, information or forms are substantially incomplete will be considered non-responsive and shall be rejected by MTD.** In such case, MTD shall notify the proposer in writing of its rejection and the basis thereof.

4.2 RESPONSIBILITY

For all proposals found to be responsive, MTD shall make an assessment of the proposer's "responsibility." For purposes of this RFP, responsibility is defined as evidence of adequate financial and technical capacity to undertake the project; and satisfactory performance in previous contracts. MTD shall primarily use the references and insurance information included in the proposal for this determination. However, MTD may at its own discretion seek and utilize other information within and outside of the proposal to assist in the determination. **The proposal of any proposer not found to be responsible shall be rejected.** In such case, MTD shall notify the proposer in writing of its rejection and the basis thereof.

4.3 INITIAL EVALUATION

Responsive proposals from responsible proposers shall be subject to an initial evaluation by a committee made up of MTD staff members to determine whether they fall within the "competitive range." This is the first step to establish the firm that will provide MTD with the best "value." Value, in this instance, is determined by the following factors in descending order of importance:

- ❑ System Quality & Reliability
- ❑ Capital & Ongoing Maintenance Costs
- ❑ System Features & Ease of Use
- ❑ Vendor Past Performance & Experience

4.4 DISCUSSIONS, DEMONSTRATIONS & REVISIONS

MTD will set up individual interviews with those firms within the competitive range, which will serve several purposes. One, to provide the evaluation committee with an opportunity to ask questions and request clarifications about the firm's proposal; two, to provide the proposing firm an occasion to promote and demonstrate their proposed telephone system or other aspects of their proposal; and three, to determine, discuss and hopefully resolve any differences between what is desired by MTD and what is being proposed.

4.5 FINAL EVALUATION

Dependent upon what is considered in its best interest, MTD may either attempt to negotiate further with one or more of the competitive range firms or award a contract without further discussion. If it determined by MTD that negotiations will take place, the selected proposer(s) shall be afforded one last opportunity to modify their proposal and submit their "best and final offer," which shall be due three business days following the termination of such negotiations. Shortly thereafter, the evaluation committee will make its recommendation to the MTD General Manager as to that proposal that it believes provides MTD with the best value.

4.6 AWARD PROCESS

If considered in MTD's best interest, the MTD General Manager will recommend to the MTD Board of Directors that a contract be awarded to the proposer that has submitted the proposal that is most advantageous to MTD. Accordingly, MTD may not necessarily make an award to the proposer with the highest technical ranking

nor award to the proposer with the lowest price proposal if doing so would not be in the overall best interest of MTD. It is anticipated that such recommendation shall be considered by the Board at its regular meeting of April 8, 2008. Proposal prices and terms shall be good for sixty (60) days after the proposal due date in order to provide for the proposal evaluation and contract award process.

4.7 CONTRACT DOCUMENTS

The contract will be executed as soon as practical after contract award. The contract shall be composed of the MTD Master Agreement, the most recent *Statement of Work*, and the Contractor's proposal as modified by any negotiations and/or "best and final offer."

5. PROTEST PROCEDURES

Protests of MTD procurements will be considered in two general categories: those directed at solicitation documents issued by MTD; and those concerning all other aspects of the procurement process. Instructions for filing a protest with MTD are available upon request.

6. RFP & PROJECT SCHEDULE

The following schedule has been established for this RFP. MTD reserves the right to modify this schedule if it is in its best interests to do so. If modified, MTD shall provide written notice of such to all parties known to have received copies of the RFP.

<u>ACTIVITY</u>	<u>DATE (TIME)</u>
RFP Public Notice/Issuance	Friday, February 1, 2008
Pre-Proposal Meeting (at MTD Administrative Office, 550 Olive Street, Santa Barbara, CA 93101)	Wednesday, February 13, 2008 (10:00 AM local time)
Proposals Due (at MTD Administrative Office, 550 Olive Street, Santa Barbara, CA 93101)	Thursday, February 21, 2008 (4:00 PM local time)
Discussions/Demos/Revisions	March 10 – March 28, 2008
Contract Award Decision (projected)	Tuesday, April 8, 2008
Project Work Begins (projected)	May 2008
Project Work Completed (projected) (refers to system implementation, not service and maintenance)	June 2008

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
TELEPHONE SYSTEM REPLACEMENT

STATEMENT OF WORK

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SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
TELEPHONE SYSTEM REPLACEMENT

STATEMENT OF WORK

I. SUMMARY WORK DESCRIPTION

The Santa Barbara Metropolitan Transit District (MTD) desires to replace its existing voice telecommunications system with a new system incorporating currently available productivity enhancing features as specified herein. Acceptable systems include non-hosted systems meeting the requirements of this *Statement of Work* whether considered a “standard” digital telephone system, a Voice Over IP (VoIP) system, usage of Computer-Telephony Integration (CTI), or any combination or hybrid of such systems and technologies. The overall project is composed of the following tasks, which are described in greater detail in Section III, **NEW TELEPHONE SYSTEM**.

- Provide PBX, main switchboard console, telephones, and all associated system hardware
- Provide voicemail, auto attendant, call center with ACD, and other specified systems and features
- Provide options for unified messaging, PC station control, interactive voice response and other features
- Provide backup power supply for full phone system functionality for 30 minutes upon power outage
- Provide redundancy or other means for continued communications capability beyond 30 minutes
- Ensure that MTD receives Enhanced 9-1-1 emergency service from all stations
- Oversee replacement of existing POTS local loop with ISDN PRI over T1 dedicated circuit
- Provide options for telephone system connection between Olive Terminal and remote Transit Center
- Install and set up all equipment in locations and manner specified by MTD
- Train system administrators and users, and provide system documentation
- Provide service and support for a three-year period
- Remove and take possession of legacy telephone system and all associated obsolete items

II. LEGACY SYSTEM & CONDITIONS

- A. Locations—MTD presently occupies two locations, both within the city of Santa Barbara. MTD’s combined administrative, bus dispatch and repair facility, referred to as “Olive Terminal,” is located at 550 Olive Street. It is composed of several buildings and structures. Those relevant to the project include: the two-story Administration Building; the Maintenance Building, which is divided into staff offices, a parts room and the shop floor; the Electric Vehicle (EV) Bus Shelter; the Bus Staging Canopy; and the Fuel Island. The facility comprises the majority of the block surrounded by Olive, Cota, Salsipuedes and Haley Streets (see Appendix A for a site map). The second site is the MTD Transit Center, which is MTD’s main passenger hub located at 1020 Chapala Street. The Transit Center is approximately one mile from the Olive Terminal by streets and 7 to 8 tenths of mile “as the crow flies.” It is situated between Carrillo and Figueroa Streets, adjacent to City Parking Lot #3 and the Greyhound station.
- B. PBX & Related Systems—The Olive Terminal utilizes a *Toshiba Digital Business Telephone System Strata DK280* housed in two adjacent cabinets: one model DKSUE424A and one DKSUB280A. The PBX was purchased in 1995 from Telco in Ventura, CA as their model UST1280DK and is located in the Administration Building in the upstairs server room. The original Contact voicemail system was replaced with a *Toshiba Strategy IVP8* after 2001. The Transit Center uses a key system, the *Panasonic Key Service Unit Model VB-42020 for 616 System* purchased in 1994. A *Viking TMS-6X* call sequencer is used in conjunction with the Transit Center system to provide limited auto attendant and announcement features.
- C. Carrier Services & Lines—Following a recent audit of carrier services and existing phone lines, MTD is modifying its telecommunication services in preparation for the replacement associated with this project.

The changes include bringing all carrier services (local, intra-LATA, and inter-LATA) under Verizon. Additionally, phone or data lines deemed no longer necessary are being discontinued. Once all modifications are implemented, MTD is expected to have the following telephone lines at its two facilities:

Location	Use	Lines	PBX	Centranet
Olive Terminal	Switchboard (hunt group)	6	Yes	Yes
Olive Terminal	Auto Attendant (hunt group)	5	Yes	Yes
Olive Terminal	Fax & Non-Emergency Analog	8	No	No
Olive Terminal	Fire Alarm & Elevator	3	No	No
Transit Center	Passenger Info (hunt group)	3	Yes	No
Transit Center	Supervisors (hunt group)	2	Yes	No
Transit Center	Fax Analog	1	No	No
Transit Center	Line 22 Ringdown	1	No	No
Transit Center	Radio Repeater	1	No	No
Total Number of Lines:		30		

Presently, all local carrier services are through standard analog POTS lines. Verizon—or to be precise, GTE, it's local predecessor—brought in a standard 100-pair Telco cable from Olive Street to the electrical room of the Administration Building of the Olive Terminal when it was built in 1999. Verizon punch-blocked appropriate wire pairs for actual used phone lines out of their distribution box to four “split 50” 66-blocks, which is the Verizon demarcation point. These four 66-blocks are connected to a pair of 66-blocks upstairs in the server room adjacent to the Toshiba PBX via another 100-pair Telco cable (MTD intends to replace this POTS connection to Verizon with an ISDN PRI over T1 connection as discussed below). While MTD has two separate Centranet service contracts with Verizon for 11 of its telephone lines, no Centranet features are utilized, as such services are provided by the Toshiba PBX/voicemail system. The Centranet contracts are simply to take advantage of lower monthly service charges.

- D. Structured Cabling System—All appropriate offices, cubicles, meeting rooms and areas within the Administration Building are wired with two non-plenum CAT5e cables, one blue cable for data and one white for voice. Each of the 96 wall plates throughout the building where the cables terminate thus have two receptacles: an RJ45 for an Ethernet connection to the MTD local area network; and an RJ11 for phone connection to the MTD telephone system. All such cables homerun directly to the server room. The white CAT5e cables terminate on eight 66-blocks, 12 per block and the blue cables terminate in a patch panel connected to the network. As necessary to accommodate internal extensions and outside analog lines, wire pairs run from these eight blocks to either another set of 66-blocks connected to the PBX or directly to the two 66-blocks that accept the incoming 100-pair Telco cable connection to Verizon from downstairs.

Connectivity between the Administration Building and the Maintenance Building is via cables running in underground conduit from the Admin Building electrical room to the maintenance building shop (see map in Appendix A), where the wiring continues along the underside of the shop roof to the Maintenance Building electrical room. Voice services are carried via a 25-pair Telco cable that terminates on 66-blocks on either end; and data services are through 12-strand 62.5/125 UM fiber optic cable. Similar to the Administration Building, each required data and voice location in the Maintenance Building is home-run from RJ11 and RJ45 receptacles back to the Maintenance Building electrical room to either 66-blocks or an Ethernet switch. Presently, there is no voice or data connectivity from the Administration Building to either the EV Bus Shelter or the Bus Staging Canopy, although underground conduits exist for the provision thereof.

- E. Internal Stations—Including the switchboard, there are 42 stations, or extensions, assigned and in use from the Toshiba PBX (the number is being increased). This includes 35 in the Administration Building and 6 in the Maintenance Building at Olive Terminal; and one at the Transit Center. Most stations utilize the Toshiba DKT2010 10-button LCD display digital telephone (or Teleco's equivalent UST-1010DSD model). A Telco

20-button UST-1020DSD serves as the switchboard. A few stations make use of non-display version of the DKT2010 and the 3 shop floor phones that answer to one extension are featureless analog wall-mounted phones. Additionally, two stations (the switchboard and the shop floor) have cordless phones that work in conjunction with the wired station (the number is being increased).

- F. MTD LAN—The MTD local area network (LAN), housed in the Administration Building server room, uses the TCP/IP protocol running over Ethernet with a *Hewlett-Packard ProCurve 4000M* switch that contains eight 8-port 10/100Base-T modules (53 ports in use for workstations and printers); one 4-port 100Base-FX module (one port in use for the fiber optic connection to the Maintenance Building); and one 1-port 10/1000Base-T module (connected to a D-Link 24-port GBit switch used for MTD’s servers). On the Maintenance Building end of the fiber optic cable is a *Cisco Catalyst 2900* 24-port 100 Mbit/sec switch. Two of the ports accommodate a fiber optic connection with the remaining 22 for 10Base-T/100Base-TX Ethernet connections. Connectivity to the Transit Center is discussed below.
- G. TC Voice & Data Links—Presently, there are independent phone systems and trunk lines at the Olive Terminal and the Transit Center as discussed above. However, MTD does have an off premise extension (OPX) from the Olive Terminal Toshiba system to the Transit Center provided by Verizon. This one extension is shared by all five phones at the Transit Center.

For data purposes, MTD has set up a virtual private network (VPN) over the internet for connectivity of the Transit Center to the MTD internal network at Olive Terminal. Presently there are two workstations at the Transit Center on the network. MTD uses Cox Communications as its internet service provider (ISP) at both locations. Present bandwidth capacities are as follows:

Cox Communications Internet Connection		
Location	Download Speed	Upload Speed
Olive Terminal	4.0 Mbps	768 Kbps
Transit Center	1.5 Mbps	384 Kbps

III. NEW TELEPHONE SYSTEM

This section describes only the minimum requirements for the new telephone system to be supplied under the project. As this *Statement of Work* is associated with a Request for Proposals and not an Invitation for Bids, **proposed systems should not be limited to these minimums. MTD expects to consider proposals for systems that are more robust and featureful than the minimum described here.** It is up to MTD as part of its evaluation process to balance the cost of features against capital funding availability and determine what provides MTD with the highest value.

- A. PBX, Phones & Hardware—The Contractor shall provide all necessary hardware to implement the project including, but not limited to, the Post Branch Exchange (PBX); equipment necessary to connect with an ISDN PRI local loop; all telephones, including a main console; and telephone headsets, both wired and wireless (the requirements for the backup power supply are covered in a separate section below).
1. PBX—Contractor shall provide one PBX for on-site installation—a hosted system is not being considered. The term “PBX” is used in the general sense meaning that equipment necessary to perform the required switching and other core functions of the provided internal telephone system regardless of the methods and protocols used. Such PBX shall have the following minimum features (those items noted below as “ideally” are not mandatory but are considered highly desirable):
 - Minimum 120-port capacity allocable among trunks, stations and auto-attendant/voicemail
 - User-definable port allocation mix of up to 40 trunk lines, 75 stations or 8 voicemail accesses

- 10 of the 40 trunk lines shall accommodate analog telephones or devices
- Compatible with analog or T1 loop or wink start, T1, and ISDN PRI incoming trunks
- Ideally, will contain integrated channel service unit (CSU) with loopback testing capability
- Ideally, will contain integrated multiplexer (MUX) appropriate for ISDN PRI connection
- Ideally, compatible as-is for usage with a SIP trunk

2. Telephones—Contractor shall provide the number and type of telephones shown in the below table, which is followed by a description of the various phone types (a breakdown of types and other information by individual stations is included in Appendix C):

Phone Type	Needed	Spare	Total
Switchboard	1	0	1
Full Feature	46	3	49
Basic	5	0	5
Cordless	5	1	6
Conference	2	0	2
Analog	10	0	10
Total	69	4	73

- Switchboard—The main switchboard, or console, may be one device or composed of a phone with attached DSS console(s). It should provide a constant visual status of up to 75 assignable trunk lines or stations, which is expandable up to 120 (i.e., the PBX port requirement). It shall have a large easy-to-read LCD display in addition to standard switchboard features such as paging and barge-in. The console shall also be headset compatible and work with an accompanying cordless phone. Primary functions (e.g., transferring calls to voicemail) must be intuitive and simple.
 - Full Feature—The full-feature telephone shall be a desktop model that takes advantage of and has access to all user features. It should have a large easy-to-read LCD display in addition to speaker phone and headset capability. Access to features should be intuitive and simple.
 - Basic—The basic phone type is a desktop model for low-use, non-personal stations such as break rooms, where only limited features are required. However, such phones should have a small LCD display to indicate basic information and speaker phone capability including receipt of paging.
 - Cordless—All cordless phones will be used in conjunction with an existing wired station telephone rather than being a separate extension. In addition to normal telephone functions, cordless phones shall have the following capabilities:
 - ✓ Have an LCD display indicating standard information such as caller/station ID
 - ✓ Operate on either the 2.4 GHz or 5.8 GHz frequency band
 - ✓ Be digital and secure from eavesdropping (e.g., use DSS)
 - ✓ Switchboard cordless: ability to transfer calls to voicemail and handle at least 4 trunk lines
 - Conference—The conference telephone type is distinguished from other phones in that it is designed primarily for speakerphone usage with digital, full duplex enhanced-quality audio. As such, the microphone(s) and speaker(s) are omni-directional for improved room-wide performance.
 - Analog—The analog phones, which will be wall-mounted on the shop floor or in the Olive yard, require minimal features beyond making, accepting and transferring calls. They should be durable and appropriate for an outside environment, yet relatively inexpensive to replace.
3. Headsets—Contractor shall provide 7 wired and 5 wireless monaural headsets for usage with full feature telephone stations; and 1 wireless monaural headset for use with the switchboard. Included with the headsets shall be any required cords, amplifiers, chargers, adaptors, batteries or any other devices required for usage. Contractor shall make initial recommendation of the specific headset type and specifications in their proposal, including overcoming overlapping wireless range issues.
4. Other Hardware—Contractor shall provide all other hardware, equipment, and supplies necessary to implement the telephone system. This may include, but is not limited to, the CSU or MUX, if not

integral to the PBX (although integration is preferred); voicemail/auto attendant device or server, if not integral to the PBX; device(s) necessary to provide Power over Ethernet for VoIP systems (a single, centralized solution is preferred); 66-blocks, and telephone cords.

B. Required Features—Contractor shall provide the following telephone system features or capabilities:

1. Voicemail—One centralized voicemail system that shall serve both the Olive Terminal and the Transit Center and have the following minimum standards or features:
 - Fully integrated with telephone system (i.e., designed by PBX manufacturer for usage with system)
 - Provide for a minimum of 100 voice mailboxes, including one for each of the 75 internal stations
 - Handle a minimum of 8 concurrent accesses to the voicemail system regardless of access type
 - Provide a minimum of 100 hours of overall system recording time (or its equivalent in data storage)
 - Secure access to messages and setup from actual stations, remote station, or from outside line
 - Provide a means of backing up and restoring voicemail system recordings and messages
2. Automated Attendant—An automated attendant system with the following features or standards:
 - Fully integrated with telephone system (i.e., designed by PBX manufacturer for usage with system)
 - Secure access to setup and changes from switchboard, remote station, or from outside line
 - Simple and intuitive to setup, administer and change modes
 - Flexibility and automation for setting greetings by day of week, time of day, holidays, etc.
3. ACD Call Center—A “call center” system with an automated call distributor (ACD):
 - Fully integrated with telephone system and automated attendant
 - Menu navigation using interactive voice response system via caller keypad entry (i.e., using DTMF)
 - Flexibility in setting up “agent” groups and call routing parameters
 - Ability for at least one station of MTD’s choice to remotely listen in live on or record agent calls
 - Simple and intuitive to setup, administer and change modes
4. GUI Switchboard—Ability to manage switchboard functions via graphical user interface (GUI) application software running on an existing Windows XP or Vista PC.
5. Other Features—The telephone system will also have the following features:
 - Ability to forward station calls to multiple, sequential locations including outside phone numbers
 - Allow for usage of direct inward dialing (DID) utilizing DID ANIs provided with ISDN PRI
 - Means of assuring that shop personnel detect when shop floor station (extension 235) is called. Conditions to be overcome include heavy noise generation and lack of direct sight to telephones. Solution will likely require combination of lights and bells independent of phones.
6. System Administration—The telephone system shall have the following administrative capabilities:
 - Administrative-level functions and settings—including those for voicemail, auto attendant and ACD systems—accessible via a graphical user interface (GUI) application from existing Windows XP or Vista PCs attached to the PBX, the switchboard, or to two stations of MTD’s choice.
 - Ideally, administrative PC interface accessible over MTD LAN and remotely (over VPN WAN, etc.)
 - Ability to perform station adds, moves, modifications and deletions
 - Ability to create, modify and delete trunk groups and trunk routing tables
 - Provide diagnostic tools for troubleshooting and resolving basic problems
 - Include comprehensive reporting system on usage and other measures by trunk and station

C. Optional Features—Contractor shall provide the following telephone system features or capabilities as options. If integral and standard to the telephone system, Contractor shall so indicate in their proposal

narrative and on the Price Proposal form. MTD will determine during the proposal evaluation process whether or not to accept non-standard optional features.

1. Unified Messaging—Voicemail and fax access via existing PC workstations using Microsoft Outlook in a MS Windows 2003 Server & Exchange environment.
 2. GUI Telephone—Ability to manage user telephone station functions via graphical user interface (GUI) application software running on existing Windows XP or Vista PCs.
 3. GUI Call Center—Ability for call center personnel to manage calls via graphical user interface (GUI) application software running on existing Windows XP or Vista PCs. Shall include ability to record marketing and other data about each incoming call.
 4. Interactive Voice Response—Ability to allow outside caller to use voice responses to navigate auto attendant or ACD menus and messaging systems (note that DTMF IVR is a required feature). If not integral to the this IVR system, include an additional option for Spanish language IVR functionality.
 5. Call Accounting—Ability to track and report on telephone usage parameters including station, call time, call length, phone number, and other similar information.
 6. Cordless Range Extension—Ability for the cordless phones to work beyond the standard reception range of 2.4/5.8 GHz frequency range models. The switchboard cordless telephone shall have a range that extends throughout the Administration Building. The remaining Olive Terminal cordless phones (stations 231, 235 and 243) shall have a range that covers the vast majority of the Olive Terminal exterior yard. The Transit Center Supervisor cordless phone (station 212) shall have a range that covers the entire Transit Center property (which the standard cordless model may already do).
 7. Other—Any other features or systems Contractor may deem appropriate for or beneficial to MTD.
- D. Backup Power Supply—Contractor shall provide uninterruptible power supplies (UPS) or other means of maintaining full telephone system operation for a minimum of 30 minutes without local utility electrical power at both the Olive Terminal and the Transit Center.
- E. Critical System Redundancy—MTD, as a public service agency with the responsibility for providing lifeline transit services in times of emergency, must maintain access to voice communications under all reasonable circumstances. Contractor shall provide and implement a system or methods for ensuring at least limited landline telephone communications during long-term electrical power outages. While maintaining analog POTS lines outside the telephone system is one aspect of the solution, MTD would prefer and will consider more advanced, automated solutions. Contractor shall provide solutions that allow continued usage of the telephone system with most if not all available features at both the Olive Terminal and the Transit Center.
- F. Enhanced 9-1-1 Service—Contractor shall ensure that dialing 911 from any station in the telephone system will connect with the Public Safety Answering Point using enhanced 911 service. Thus, the call will identify the physical building address, whether the Olive Terminal or the Transit Center, to the E911 operator.
- G. ISDN PRI Implementation—The present 100-pair POTS local loop to Verizon—the Incumbent Local Exchange Carrier and MTD’s current LEC—will be replaced with a ISDN PRI over T1 dedicated circuit concurrent with implementation of the telephone system associated with this project. After consultation with the Contractor, MTD will make the decision on and enter into a separate agreement with a LEC for the provision of the dedicated circuit. Thereafter, the Contractor will work as MTD’s agent in overseeing and implementing this changeover. Such services are expected to include, at a minimum, coordinating with appropriate parties on the timing of the change; presence and participation as necessary during LEC installation and testing of the circuit; and connection of the circuit to MTD’s phone system.

- H. Olive-TC Connection—The present voice and data connections between the Olive Terminal and the Transit Center were described in Section II, **LEGACY SYSTEM AND CONDITIONS**. Given the telephone system specified herein, it is likely that these connections will no longer be sufficient. Important factors include that MTD will not accept a separate PBX at the Transit Center; all call center activities will occur at the Transit Center (although, the system must retain the flexibility to move it to the Olive Terminal); and there should not be any noticeable degradation to either the voice or data signals passing between the two locations. If deemed necessary by the Contractor, Contractor shall propose an improved or altogether replaced connection between the Olive Terminal and the Transit Center such that this *Statement of Work* is met. MTD will consider all reasonable options such as additional T1 connections, and wireless or IP setups. Whether the cost, implementation or maintenance of any proposed connection is part of this project and the associated agreement or handled separately with a different party and/or agreement will be determined during proposal evaluation phase of the RFP process.
- I. Installation & Setup—The Contractor shall install, test and implement the new telephone system equipment in accordance with applicable laws, regulations, system documentation and industry standards. The Contractor and MTD shall mutually discuss and determine the transition from the existing to new local loop and equipment such that telephone service interruptions are minimized and preferably kept between the hours of 7 PM and 4 AM. Contractor shall also install the system and cabling in the manner and locations as specified herein:
1. Primary System Equipment—Contractor shall install all primary telephone system equipment in the upstairs server room in the Olive Administration Building. Such equipment includes any private branch exchange (PBX), channel service unit (CSU), multiplexor/channel bank (MUX), uninterruptible power supply (UPS), servers, or other switching, controlling or testing components. Wall-mounted equipment shall be located on the existing plywood backboard on the left wall of the room where the current telephone system is mounted. If rack-mounted or free-standing, Contractor shall consult with MTD IT personnel to determine the appropriate location within the room.
 2. Telco Hookup—The Contractor shall connect the new telephone system to the new ISDN PRI local loop. It should be noted that the current Verizon point of demarcation is in the downstairs electrical room of the Administration Building. Thus, it should be assumed that the network interface unit (NIU) (or whatever device serves as the demarc for the new T1) will also be downstairs. There are six T1-compatible cables wired between the electrical room and the server room terminating at each end in a junction box with T1 receptacles. Contractor shall verify that these cables may be used to bring the T1 into the server room. If not, Contractor shall run appropriate cable from LEC demarc to new PBX.
 3. Telephone Line Configuration—Contractor shall configure the PBX for incoming lines as designated on Trunk Line Listing table in Appendix B. Note that this table includes trunk groups that will connect through the PBX as well as a number of lines for telephones, fax machines, elevator ring down, and alarm circuits that will bypass the PBX altogether. Contractor shall ensure that all such lines in the server room, including those bypassing the PBX and whether or not carried over the T1, are securely, correctly and neatly connected.
 4. New Station Cabling—Contractor shall provide new structured cabling from the upstairs Server Room in the Administration Building to six new stations as indicated on the Olive Site Map in Appendix A: three at the Electric Vehicle Shelter and three at the Bus Staging Canopy (which includes the station in the Service Pit). The map indicates the existing underground conduit path which shall be used to pull the cabling, which shall be CAT5e suitable for an underground or exterior environment. Cables shall terminate at the telephone location with a standard RJ-11 jack appropriate for a wall-mounted telephone.
 5. Stations—Contractor shall install and set up telephones, including the programming in of station names, using the schedule on the Station Listing table in Appendix C. Maps specifying phones by specific

location and jack in each building will be provided by MTD prior to installation. Additionally, a schedule of how Direct Inward Dial (DID) numbers provided with the ISDN PRI will be allocated amongst stations will also be provided for Contractor setup. For non-VoIP systems, desktop phones shall be connected to the specified telephone wall jack via a 12' to 15' Contractor-provided new telephone cord. For VoIP systems, telephones shall be connected to the workstation (or wall jack) utilizing the appropriate Contractor-provided cable that is of sufficient length to allow reasonable movement of the telephone in the work area. Shop and exterior analog telephones shall be wall- or pole-mounted in the general location shown on the map in Appendix A, which shall be exactly specified by MTD during actual installation.

6. Transit Center—In installing the telephone system equipment at the Transit Center, Contractor shall replace all existing telephone system wiring and cabling on the MTD side of the LEC point of demarcation. This shall include cables and wiring for any remaining analog lines bypassing the PBX.
7. Labeling—Contractor shall label equipment, cabling, phone lines and other aspects of the telephone system sufficiently to assist in future maintenance, troubleshooting and repair. Labels shall be machine-printed in an easily read font type and size and of a durable nature sufficient to last several years.
- J. Training & Documentation—Contractor shall provide on-site user and administrator training sessions by a qualified Contractor representative. Such training shall take place shortly before the “go live” date using the actual new telephone system after installation and set up have been largely completed. The exact dates, times and locations will be mutually determined between the Contractor and MTD. Appropriate telephone system documentation, as specified below, shall be provided at the time of training.
 1. Administrator Training—Contractor shall provide one group training session for three MTD employees of MTD’s choosing on administering the telephone system. Depending upon the complexity of the system, it is assumed that such training will last from 3 to 6 hours. At a minimum, training shall cover:
 - Physical review of telephone system by component including its setup, function, and connectivity. Includes all equipment in Server Room, the main console, and any other key system components. If appropriate, will include visits to the Olive Maintenance Building and yard, and the Transit Center.
 - Physical and GUI process for creating, setting up, adding, moving, changing, restricting and deleting stations, trunk groups, ACD groups, and mailboxes.
 - Setting up and modifying voicemail, automated attendant, ACD call center, and any other such optional systems acquired with the telephone system.
 - Basic diagnostic and troubleshooting methods for all hardware and software systems. While the Contractor will provide service under a maintenance contract, to minimize downtime administrators should be provided with a rudimentary knowledge base to detect and repair basic system problems.
 - Appropriate process for and conditions under which the telephone system and its individual components shall be powered down, restarted, rebooted, reset or similar mode changes implemented.
 2. User Training—The Contractor shall provide four group training sessions of up to 12 employees each for telephone system user training of approximately 45 MTD employees. Sessions must include user interaction with working telephones, should not exceed one hour in duration, and shall include:
 - Basic instruction on making, receiving, holding and transferring internal station and outside line telephone calls; and basic set up and retrieval of voice mail. Clear and thorough instruction on these core functions using actual equipment is essential and should not be under-emphasized.
 - Instruction on all other features available to the user. Greater emphasis should be placed on those features more likely to be used, such as call forwarding and temporary voice mail announcements.
 3. Documentation—The Contractor shall provide all documentation necessary to administer and operate the telephone system for all equipment, components and systems provided by the Contractor. Such documentation shall be provided in both paper and electronic format and MTD shall have the right to

make unlimited paper and electronic copies of such documentation as necessary for internal use to administer, operate, troubleshoot, maintain, and repair the system. Such documentation shall include:

- Telephone and voice mail user manual of basic functions (a user “quick guide”)
- Telephone and voice mail user manual for all functions (detailed instructions)
- Telephone system administrator manuals for all systems and equipment

K. Service & Support—The Contractor shall provide support and repair services sufficient to assure a smooth system implementation and ongoing support under a maintenance agreement as specified below:

1. “Go Live” Support—The Contractor shall provide “go live” support in the form of on-site personnel on the day that the new telephone system is implemented. Such personnel shall be sufficiently competent to troubleshoot, repair, adjust, program or otherwise overcome plausible issues occurring during system implementation. Such personnel shall also be competent in the telephone system end-user features and be available to assist MTD employees in switchboard and station usage. Such support shall be extended to the off-site Transit Center as well, which opens at 6 AM on weekdays. The Contractor and MTD shall mutually determine the exact logistics of such support prior to going live.

2. Maintenance Agreement—The Contractor shall provide on-going maintenance, support, repairs, software/firmware upgrades or any other services as may be deemed necessary to keep the telephone system operating as specified in this *Statement of Work*, the Contractor’s proposal, and the telephone system specifications and documentation. Such services shall **not** extend to the basic and typical functions of the in-house administrator such as station, trunk group, and call permission setup and modification. Such non-basic services shall be provided under a **separate** three-year maintenance agreement, the terms and conditions of which will be determined as part of the Request for Proposals negotiation process. **Contractor shall provide their proposed agreement, including all terms and conditions, and how it interrelates with the telephone system warranty as part of their proposal.**

L. Legacy System Removal—The Contractor shall remove from MTD premises, including the Transit Center, all PBXs, telephones, cables, cords, wiring, 66-blocks or other items associated with the legacy telephone systems that are rendered obsolete as a result of implementation of the telephone system under this project. Contractor shall take possession and ownership of such equipment and may dispose of, resell or use as desired. Such removal by Contractor shall be in a professional manner without damaging MTD property.

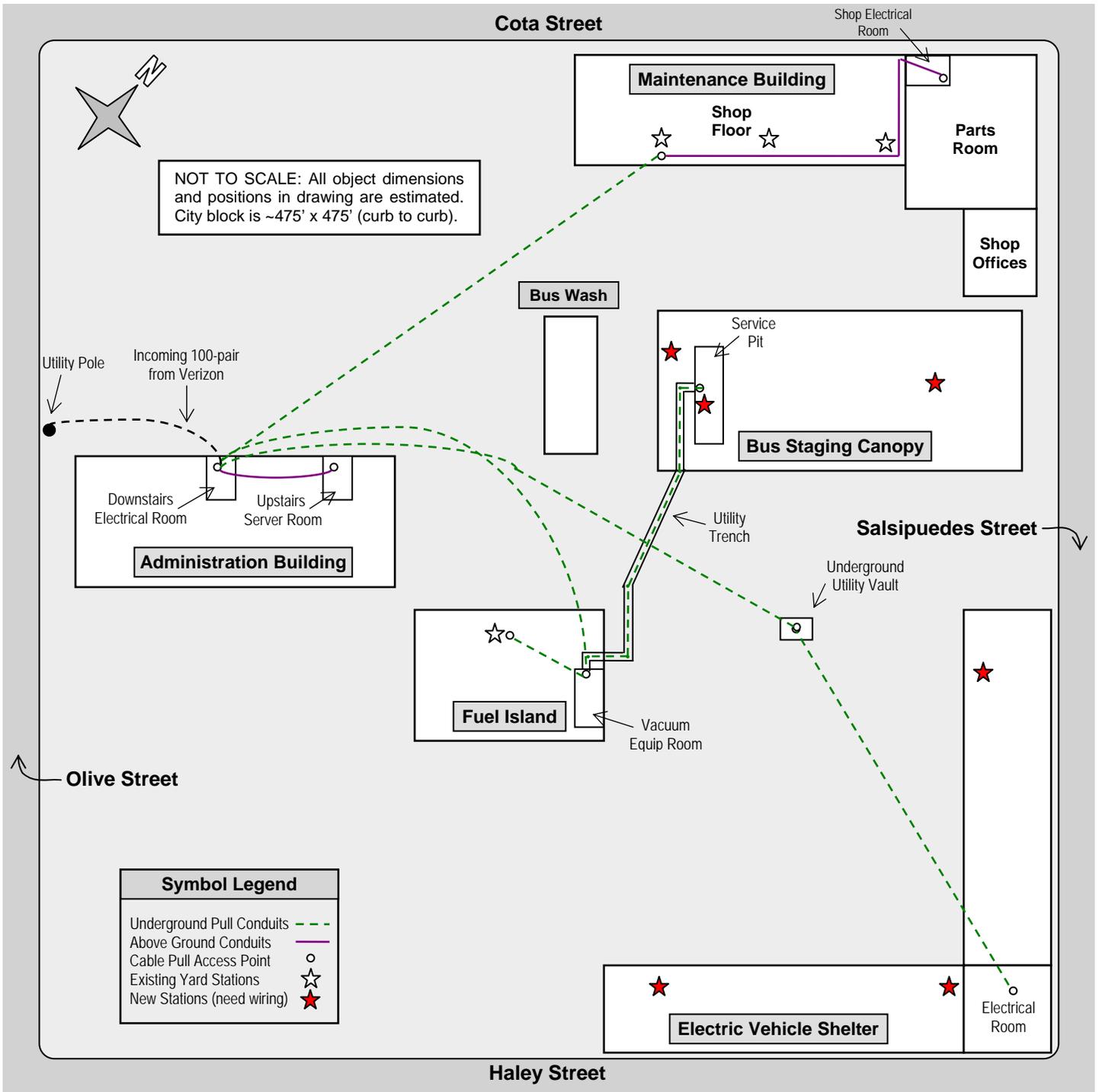
IV. GENERAL REQUIREMENTS

A. Complete System—This *Statement of Work* does not necessarily include a full and complete description of all required equipment, materials, services, or processes required to carry out the project. Specifications and descriptions are provided only for those items, materials, procedures, locations, and values that are considered key to achieving the overall goals and objectives of the project. Contractor shall provide to MTD all equipment, systems, software, hardware, cabling, programming, training, supervision, labor, and other resources necessary to properly and successfully install and implement the new telephone system and features as specified and described in this *Statement of Work*. Contractor is expected to be experienced in and adhere to the customs of the industry or trade. Any substantive deviations from such customs must be identified to and approved by MTD prior to implementation.

B. Quality of Audio—The quality of the audio signal resulting from the telephone system acquired under this project shall be sufficiently high so as to not impede voice communications on either the calling or receiving end whether within or outside of the MTD telephone system network. For example, if VoIP technology is used, adequate network capacities and quality of service methodologies shall be implemented so as to minimize latency and jitter such that “clipping” of voice conversations is essentially eliminated.

- C. Compliance with Manufacturer Documentation—The Contractor shall be familiar with and follow all appropriate and relevant documentation for equipment or systems installed, used or implemented as a part of or associated with the project. Such documentation includes but is not limited to: installation, setup, operating, and programming manuals and guides; and any related technical bulletins, announcements, and updates issued by equipment manufacturers or systems providers.
- D. Project Schedule & Access—Following full execution of the agreement associated with this *Statement of Work*, Contractor shall promptly begin the project and diligently carry through to project completion with minimal delays. Unless worked out in advance and agreed to by MTD, Contractor access to the sites for carrying out work shall be limited to non-holiday weekdays between 8:00 AM and 5:00 PM.
- E. Clean-Up—All debris, containers and any project-generated waste materials shall be removed from the MTD site and disposed of by the Contractor. At completion, all project work areas shall be neat and tidy.
- F. Warranty—All project work is warranted and guaranteed by the Contractor to be free from defects due to design or workmanship for one (1) year beginning on the date of acceptance. Unless an extension is granted by MTD, within three (3) working days of the reporting of the warranty defects by MTD to Contractor, MTD and Contractor shall discuss and determine the repair(s) to be made and its scheduling. If there is no such determination due to the fault of the Contractor, MTD reserves the right to commence required warranty repairs. If the Contractor is responsible for repairs under these warranty provisions, Contractor shall endure all repair costs and shall perform such repairs in a diligent and expedient manner. If Contractor fails to carry out warranty repairs under these provisions, MTD reserves the right to contract with a qualified third party to perform the work with reimbursement by the Contractor for all reasonable expenses.

Appendix A: Olive Site Map



Appendix B: Trunk Line Listing

Parent Nbr	Location	Purpose	Phone Nbr	Cnt	Hnt	Blk	Comments
805 963-3364	550 Olive Street	reception line (hunt group)	805 963-3364	1	1	1	On 3-year CentraNet contract until 11/14/09
			805 963-3365	2	2	2	
			805 963-3366	3	3	3	
			805 963-3367	4	4	4	
		805 963-9573	5	5	5	On 3-year CentraNet contract until 5/14/10	
		805 963-9574	6	6	6		
		auto-attendant (hunt grp)	805 963-9571	7	1		7
		805 963-9572	8	2	8		
		805 963-3515	9	3	9		
		805 564-3014	10	4	10		
		805 962-3240	11	5	11		
	fuel island	fuel island emergencies	805 564-4622	12	n/a	30	
	GM's extra office	postage meter	805 568-0985	13		12	
	copy room	fax line	805 962-4794	14		13	
	shop (parts counter)	fax line	805 962-6015	15		?	
	front door alarm panel	ring down for fire alarm	805 963-4517	16		n/a	Informs Simplex of alarm status
	Bill Morris' office	fax line	805 963-4844	17		26	Presently no fax machine connected up
elevator	elevator emergencies	805 963-5480	18		31	Ring down line to 805 683-1639 (Republic Elevator)	
dispatch office	fax line	805 963-8136	19		22		
D&A office	fax line	805 963-8913	20		14		
front door alarm panel	b/u ring down for fire alarm	805 963-9518	21		n/a	Informs Simplex of alarm status (back up line)	
driver's room	driver use	805 966-9411	22		15		
805 563-3357	Mission Canyon Road	Line 22 pick-up request	805 563-3357	23		n/a	Ring down line to 805 683-3702 for Botanical Gardens pick up
805 181-0391	1020 Chapala Street	repeater knockdown	n/a	24		n/a	TC to repeater & unknown 3rd pt for Code 4; not reliable.
805 683-3702	1020 Chapala Street	bus info line (hunt group)	805 683-3702	25	1	n/a	
			805 683-3703	26	2		
			805 683-3704	27	3		
		TC supe line (hunt group)	805 965-8531	28	1		
		805 965-8532	29	2			
fax line	805 962-1627	30	n/a				

Notes:

- All non-cell phone carrier services are with Verizon effective 1/3/2008; includes local; local toll (intra-LATA); and long distance (inter-LATA).
- There is a separate paper bill for each **Account Number**; thus, MTD receives two paper bills from Verizon; at this point, not possible to combine into one bill.
- All phones under Parent Nbr 963-3364 set up w/FlexDistance plan w/mo-to-mo contract w/toll calls at 5.3¢/min requiring minimum spending level of \$150/mo.
- Colored sections represent "hunt groups" (or "rollovers") which are set up by Verizon to hunt for available phone line in the order specified in the **Hnt** column.
- The **Blk** column refers to the position on the upstairs Server Room punch block (on the far R of the L wall) where incoming line is connected; info is helpful for troubleshooting; 2 fire alarm lines bypass block altogether; have not been able to locate shop fax line (805 962-6015) in Electrical Room or Server Room.
- Not certain why entered into the CentraNet contracts; don't use CentraNet services as these are provided by Toshiba PBX; must be for lower rate.

Appendix C: Station Listing

Site	Building	Room/Desc	Room	Position/Purpose	Station Name	Jack	Current Use	Cur Ext	New Ext	Phone Type	Cordless	Headset	
Olive	Admin	Auditorium	102	Public Meetings	Auditorium	T057	not in use	n/a	264	basic			
Olive	Admin	Auditorium	102	Public Meetings		T059	station	264		conference			
Olive	Admin	Office	105	Operations Assistant	Hattie Husbands	T062	station	221	221	full		wired	
Olive	Admin	Office	108	HR & Risk Manager	Gabe Garcia	T068	station	242	242	full			
Olive	Admin	Office	113	Dispatch Supervisor	Dispatch Supervisor	T081	station	243	243	full	yes	wireless	
Olive	Admin	Office	114	Super of Operations	Dave Morse	T080	station	260	260	full			
Olive	Admin	Office	117	Farebox Technician	Juan Perez	T078	station	251	251	full			
Olive	Admin	Office	122	HR & Risk Admin.	Jill Grisham	T075	station	208	208	full		wireless	
Olive	Admin	Office	123	Mgr of Operations	Bill Morris	T073	station	273	273	full			
Olive	Admin	Office	124	D & A Testing Rm	D&A Testing Room	T071	station	216	216	basic			
Olive	Admin	Office	202	Admin Asst to the GM	Tiara Lakey	T002	station	234	234	full		wireless	
Olive	Admin	Office	203	General Manager	Sherrie Fisher	T004	station	248	248	full		wireless	
Olive	Admin	Office	204	Controller & Asst GM	Jerry Estrada	T010	station	232	232	full			
Olive	Admin	Office	205	Central Files	Central Files	T008	station	211	211	full			
Olive	Admin	Office	208	Mgr of Accounting	Liz Hasch	T015	station	226	226	full			
Olive	Admin	Office	210	Mgr of Strategic Planning	Steve Maas	T020	station	227	227	full			
Olive	Admin	Library	213	Meetings	Library	T040	station	261	261	full			
Olive	Admin	Server	215	IT & Telecom Equipment	Server Room	T055	station	275	275	full			
Olive	Admin	Office	216	Mgr of Information Sys	Tom Sheldon	T054	station	205	205	full			
Olive	Admin	Lounge	217	Breakroom	Staff Breakroom	T052	not in use	n/a	270	basic			
Olive	Admin	Office	219	Asst Mgr of Marketing	Sarah Herbold	T051	station	255	255	full			
Olive	Admin	Copy	224	n/a	Copy Room	T036	station	265	265	basic			
Olive	Admin	Office	227	Asst Mgr of Planning	Cynthia Boche	T027	station	218	218	full			
Olive	Admin	Office	228	Mgr of TD & Comm Rel	David Damiano	T028	station	220	220	full			
Olive	Admin	Conference	229	Meetings	Conference Room	T039	station	267	267	conference			
Olive	Admin	Training	104A	Training & Meetings	Training Room	T061	not in use	n/a	266	full			
Olive	Admin	Training	104B	Training & Meetings		T066	station	266		full			
Olive	Admin	Office	116A	Driver Trainer	Sal Alvarez	T076	station	222	222	full			
Olive	Admin	Office	116B	Road Supervisor	Road Supervisor	T077	station	272	272	basic			
Olive	Admin	Reception	201A	Administrative Asst	Imelda Martin	T006	switchboard	200	200	switchboard	yes	wireless	
Olive	Admin	Cubicle	206A	Accounting Clerk	Patricia Sarabia	T013	station	245	245	full			
Olive	Admin	Cubicle	206B	Asst Accounting Mgr	Thais Sayat	T014	station	219	219	full			
Olive	Admin	Cubicle	206C	Accounting Asst	Diana Bautista	T017	station	209	209	full			
Olive	Admin	Cubicle	206D	n/a	Acctng Cubicle D	T018	not in use	n/a	202	full			
Olive	Admin	Cubicle	212A	n/a	Next to Sally	T022	not in use	n/a	203	full			
Olive	Admin	Cubicle	212B	Office Specialist	Sally Bowman	T023	station	233	233	full		wired	
Olive	Admin	Cubicle	212C	Quality Assurance Mgr	Jim Haggerty	T025	station	210	210	full			
Olive	Admin	Cubicle	221A	Graphic Designer	Viviana Leija-Sysak	T049	station	249	249	full			
Olive	Admin	Cubicle	221B	Lead Cust Service Rep	Martha Torres	T046	station	274	274	full			
Olive	Admin	Cubicle	221C	IT Work Area	Tom Sheldon	T042	not in use	n/a	239	full			
Olive	Admin	Cubicle	225A	n/a	Planning Cubicle A	T031	not in use	n/a	241	full			
Olive	Admin	Cubicle	225B	Asst Controller	Brad Davis	T033	station	237	237	full			
Olive	Admin	Cubicle	225C	Senior Scheduler	Paul Tumbleson	T035	station	252	252	full		wired	
Olive	Shop	Office	105	Super of Maintenance	Mike Cardona	tbd	station	231	231	full	yes		
Olive	Shop	Parts	106A	Material Control Clerk	John Herrera	tbd	station	250	250	full			
Olive	Shop	Parts	106B	Facilities Specialist	Frank Reynoso	tbd	no jack	n/a	230	full			
Olive	Shop	Office	108	Mgr of Material Control	Steve Hahn	tbd	station	229	229	full			
Olive	Shop	Office	109	Mgr of Maintenance	Dale Zielinski	tbd	station	223	223	full			
Olive	Shop	Office	110	Maintenance Analyst	Pablo Zuniga	tbd	station	263	263	full			
Olive	Floor	1st Bay	n/a	Mechanics	Shop	n/a	station	235	235	analog	yes		
Olive	Floor	3rd Bay	n/a	Mechanics		n/a	station			analog			
Olive	Floor	5th Bay	n/a	Mechanics		n/a	station			analog			
Olive	Canopy	East	n/a	Maintenance Personnel		n/a	n/a			n/a	analog		
Olive	Canopy	West	n/a	Maintenance Personnel		n/a	n/a			n/a	analog		
Olive	Shelter	East	n/a	Maintenance Personnel		n/a	n/a			n/a	analog		
Olive	Shelter	Center	n/a	Maintenance Personnel		n/a	n/a			n/a	analog		
Olive	Shelter	South	n/a	Maintenance Personnel		n/a	n/a			n/a	analog		
Olive	Fuel	Cntr Island	n/a	Service Workers		n/a	outside line			n/a	analog		
Olive	Pit	n/a	n/a	Mechanics		Pit	n/a			n/a	n/a	236	analog
TC	n/a	Back	n/a	Dispatcher	Bob Burnham	n/a	station	212	213	full			
TC	n/a	Platform	n/a	TC Supervisor	TC Supervisor	n/a	station	212	212	full	yes		
TC	n/a	Counter 1	n/a	Customer Service Rep	Customer Service	n/a	station	212	214	full		wired	
TC	n/a	Counter 2	n/a	Customer Service Rep		n/a	station	212		full		wired	
TC	n/a	Counter 3	n/a	Customer Service Rep		n/a	station	212		full		wired	

Number of Distinct Extensions:

	Phone Type	Needed	Spare	Total
	Switchboard	1	0	1
	Basic Features	5	0	5
	Full Features	46	3	49
	Conference	2	0	2
	Analog Phone	10	0	10
	Cordless	5	1	6
	Number of Phonesets	69	4	73
	Wired Headsets	6	1	7
	Wireless Headsets	5	1	6
	Total Headsets	11	2	13

**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
TELEPHONE SYSTEM REPLACEMENT PROJECT**

MASTER AGREEMENT with [Contractor Name]

THIS AGREEMENT is entered into by and between Santa Barbara Metropolitan Transit District, an incorporated transit district under Sections 95000, et seq. of the California Public Utilities Code ("MTD"), and [contractor name], a [state name] [business type] ("Contractor"), at Santa Barbara, California, as of the later date set forth below the signatures executing this Agreement.

WHEREAS:

- A. MTD desires to replace it's wired voice telephone systems located at 550 Olive Street and 1020 Chapala Street in the City of Santa Barbara (the "Project");
- B. Contractor represents that it has the knowledge and experience to carry out the Project, and desires to carry out the Project pursuant to the terms and conditions hereof; and;
- C. Based upon the representations made by Contractor, MTD desires to retain the services of Contractor to carry out the aforesaid Project, upon the within terms and conditions.

NOW, THEREFORE, for valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties do hereby agree as follows:

1. Effect of Recitals. The foregoing recitals are hereby made express provisions of this Agreement.
2. Request for Proposals. MTD has heretofore issued on February 1, 2008, the Statement of Work contained in Request for Proposals for Telephone System Replacement, a true copy of which is attached hereto as Exhibit "A" and incorporated herein by this reference.
3. Proposal. Contractor has heretofore submitted on February 21, 2008, a proposal to carry out the Project, a true copy of which is attached hereto as Exhibit "B" and incorporated herein by this reference.
4. Scope of Contractor Undertaking. Contractor shall carry out the Project described in Exhibit "A" to this Agreement for the price quoted in Exhibit "B". All work and services shall be performed according to and controlled by the terms and provisions of this Agreement and the exhibits attached hereto. In the event of any conflict between the contract documents, the following order of control shall prevail: MTD Master Agreement, Exhibit "A", Exhibit "B".
5. Fixed Price. Contractor shall carry out the Project for a fixed price of [price written out and in numeric form] which is in accordance with Exhibit "B".
6. Payment Schedule. Contractor shall submit invoice to MTD upon completion of the Project. Payment shall be made to Contractor no later than thirty (30) days after the receipt of a valid invoice, which shall be sent to: Santa Barbara MTD, Attn: Brad Davis, 550 Olive Street, Santa Barbara, CA 93101. (deal with maintenance contract)
7. Taxes. MTD is exempt from the payment of Federal Excise and Transportation taxes. Unless specified otherwise in the Statement of Work, MTD is subject to applicable California Sales Tax which shall be included in the Contractor's fixed bid price and shall not be paid otherwise by MTD.
8. Delivery & Freight. Unless specified otherwise in the Statement of Work, any material described herein shall be delivered FOB Santa Barbara to 550 Olive Street, Santa Barbara, CA 93101. Any Project freight and delivery charges shall be included in the Contractor's price proposal and shall not be paid otherwise by MTD.
9. Title & Risk of Loss. The Contractor shall have title to and bear the risk of any loss of or damage to any item provided hereunder until it is delivered and installed in conformity with the Agreement. Upon such delivery and installation, title shall pass from the Contractor, and the Contractor's responsibility for loss or damage shall cease, except for loss or damage resulting from the Contractor's negligence. Such passing of title shall not constitute acceptance of the item(s) by MTD. The Contractor shall further warrant that the title to any item provided hereunder is free from all encumbrances and liens.

10. Damages. All losses or damages arising from any unforeseen circumstances, either natural or artificial, which may be encountered by the Contractor during the performance of the work and/or furnishing and installation of equipment, shall be sustained solely by the Contractor. This provision shall also apply to losses or damages resulting from any act or omission not authorized by this Agreement on the part of the Contractor or any agent or person employed by him.

11. Defective, Damaged or Noncompliant Work. Any items or systems purchased under this Agreement found to be defective, damaged or non-compliant with the Statement of Work at the time of delivery or installation shall be replaced by the Contractor without additional cost to MTD. If the Contractor should fail to promptly comply with any order to replace or repair any defective material, equipment or work, MTD shall have the authority to deduct the cost of such replacement or repair from any compensation due or to become due to the Contractor. Nothing in this section shall limit or restrict any warranty provisions set forth in this Agreement or any exhibits hereto.

12. Acceptance. All items or services to be furnished by the Contractor pursuant to this Agreement shall be subject to acceptance by MTD. MTD shall inspect such items or services to determine acceptability no later than five (5) business days after said items are received or services rendered. Acceptance shall occur when it is determined by MTD that all items and services provided under this Agreement are in compliance with the and any other applicable contract documents. Upon acceptance, formal notification thereof shall be made by MTD via written notice to the Contractor.

13. Warranty. Pursuant to warranty provisions contained in the Statement of Work, the Contractor shall warrant to MTD that, for the specified period after MTD's full acceptance of items or services, each item or service shall conform with the requirements hereof and be free of defects. In addition to other remedies which may be available, MTD may at its option return any non-conforming or defective items to the Contractor and/or require correction or replacement of said item when the defect is discovered, all at the Contractor's risk and expense. If MTD does not require such correction or replacement of non-conforming or defective items, the Contractor shall repay such portion of the payment specified herein or such additional amount as is equitable under the circumstances. The rights of MTD hereunder are in addition to, and not limited by, the Contractor's standard warranties. Acceptance of items and services by MTD, or payment therefor, shall not relieve the Contractor of its obligations thereunder.

14. Changes. By written notice or order MTD may make changes in quantities, drawings, designs, specifications, place of delivery or delivery schedules, methods of shipment or packaging, and property and services furnished by MTD. If any such change causes an increase or decrease in price for the items or services procured herein, or results in a change in the time required for Contractor performance, the Contractor shall promptly notify MTD thereof and assert its claim for adjustment within five (5) days after the change is ordered. An equitable adjustment shall be negotiated between MTD and the Contractor. Nothing in this clause shall excuse the Contractor from proceeding immediately with work as changed. If the Contractor finds that it is impractical to comply strictly with the Statement of Work, the Contractor shall submit a change order to the MTD authorizing official or his designee. Such change order shall be in writing and include a description of the requested change and the estimated cost or cost savings resulting from such change. If MTD accepts the requested change order, an equitable adjustment shall be negotiated between MTD and the Contractor. Under no circumstances shall the change order be executed by the Contractor until MTD accepts such order as signified by the MTD authorizing official's signature upon the change order.

15. Insurance. General Requirements. Contractor shall provide, at its sole expense, insurance coverage at limits not less than those specified herein with respect to the items or services provided under this Agreement. All insurance required for this project shall be first dollar coverage and provided by companies licensed to practice in the State of California. Such companies shall have a Best's Rating of A or better, as shown in the current issue of Best's Key Rating Guide, Property-Casualty. In lieu of first dollar coverage, Contractor may post a bond payable to MTD in an amount equal to the uninsured portion of the limits specified herein. The insurance described herein sets forth minimum limits of liability and

coverage required and is not to be construed in any way as a limitation of the Contractor's liability. *Comprehensive General Liability.* Contractor shall provide Comprehensive General Liability Insurance for Bodily Injury and Property Damage with a liability limit of not less than \$1,000,000 with coverage extended for the endorsements to the policy as follows: Operations - Premises Liability; Independent Contractors Liability - Broad Form; Contractual Liability covering the Contractor's obligations herein; Personal Injury Liability extending to claims arising from employees of the Contractor; Completed Operations and Products Liability; Professional Liability Coverage. *Automobile Liability.* Contractor shall provide Automobile Liability Insurance covering all owned, hired, or non-owned vehicles used in connection with this project, with a liability limit of \$1,000,000. *Workers' Compensation.* Contractor shall provide Workers' Compensation Insurance, Employers Liability, Section B providing statutory limits of liability, and Employer's Liability Insurance with a liability limit of \$1,000,000.

16. Termination. *Termination for Convenience.* MTD may terminate this contract in whole or in part at any time after award of the contract, by provision of thirty (30) days written notice to the Contractor, whenever, for any reason, MTD shall determine that such action is in its best interests. Upon the effective date of the written notice of termination the Contractor shall cease performance of services to the extent specified in the notice. MTD shall pay the Contractor allowable costs incurred to date of termination, plus those costs deemed reasonably necessary to effectuate such termination. *Termination for Default.* Subject to the provisions below, MTD may, by written notice of default to the Contractor, terminate this contract in whole or in part if the Contractor fails to perform the services described herein within the time and in the manner specified in this Agreement or any extension thereof, or fails to perform any of the other provisions of this Agreement. MTD's right to terminate this Agreement may be exercised if the Contractor does not cure the condition(s) constituting default within ten (10) calendar days after receipt of written notice from MTD specifying the failure. *Contractor Liability for Excess Costs.* If MTD terminates this contract in whole or in part due to the default of the Contractor as described above, it may acquire, under terms and in the manner MTD considers appropriate, services similar to those terminated, and the Contractor shall be liable to MTD for any excess costs for those services. *Contractor Liability for Excess Costs in the Event of Default due to Circumstances Beyond Its Control.* Except for default of subcontractors at any tier, the Contractor shall not be liable for any excess costs if the failure to perform contract services arises from causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include: acts of God; natural disasters; quarantine restrictions, or; unusually severe weather. In each instance the failure to perform must be beyond the control and without the fault or negligence of the Contractor. *Payment for Conforming Services.* Upon termination of this Agreement due to Contractor default as described herein, MTD shall pay the Contractor for conforming services actually provided to date of termination, less previous payments.

17. Unavoidable Delays. If the Contractor is delayed at any time during the Project by the neglect or failure of MTD or by a cause described below, then the time for completion shall be extended by MTD subject to the following conditions: (1) The cause of delay arises after the notice of award and neither was nor could have been anticipated by the Contractor by reasonable investigation before such award; (2) The Contractor demonstrates that the completion of the Project will be actually and necessarily delayed; (3) The effect of such cause cannot be avoided or mitigated by the exercise of all reasonable precautions, efforts and measures whether before or after the occurrence of the cause of delay; and (4) The Contractor informs MTD within one business day of the discovery of the condition(s) leading to the delay. A delay meeting all the conditions of this section shall be deemed an excusable delay. Any concurrent delay which does not constitute an excusable delay shall not be the sole basis for denying a request hereunder. None of the above shall relieve the Contractor of any liability for the payment of any liquidated damages owing from a failure to complete the Project by the time for completion that the Contractor is required to pay pursuant to Section 19 above for delays occurring prior to, or subsequent to the occurrence of an excusable delay. MTD reserves the right to rescind or shorten any extension previously granted, if subsequently MTD determines that any information provided by Contractor in support of a request for an extension of time was erroneous; provided however, that such information or facts, if known, would have resulted in a denial of the request for an excusable delay. Notwithstanding the above, MTD will not

rescind or shorten any extension previously granted if the Contractor acted in reliance upon the granting of such extension and such extension was based on information which, although later found to have been erroneous, was submitted in good faith by the Contractor.

18. Infringement of Patents. The Contractor agrees that it will, at its own expense, defend all suits and proceedings instituted against MTD and pay any award of damages assessed against MTD in such suits or proceedings, insofar as the same are based upon any claim that the materials or equipment, or any part thereof, or any tool, or process used in the development thereof, constitutes an infringement of any legal United States copyright or patent, provided that MTD gives the Contractor prompt notice in writing of the institution of the suit or proceeding and permits the Contractor through its counsel to defend the same and gives the Contractor all information, assistance and authority necessary for the Contractor to do so.

19. Indemnification. The Contractor shall agree to indemnify, defend, and hold MTD harmless from any and all claims and lawsuits by third parties (including, but not limited to, employees and agents of MTD and the Contractor) arising from the performance of services described herein. This shall include the payment of all damages, expenses, penalties, costs, fines, royalties, charges, and attorney's fees incurred by MTD, whether these claims or lawsuits are based upon breach of warranty, strict liability in tort, any failure by the Contractor to comply with the laws pertaining to the contract governing this project, the use of patent appliances, products, or processes, or any breach by the Contractor of any of its other duties, representations, covenants, or other agreements in the contract. The Contractor shall defend all suits brought upon all such claims and lawsuits and shall pay all costs and expenses incidental thereto, but MTD shall have the right, at its option, to participate at its own expense in the defense of any suit, without relieving the Contractor of any of its obligations thereunder.

20. Notice. Notices in connection with this Agreement shall be made in writing and may be delivered either personally, by governmental postal service (regular, certified or registered), by private delivery service, or by electronic facsimile. Receipt shall be deemed to have occurred when actually made to the party or its designated agent. Such notices shall be properly addressed to the intended party as follows:

MTD:

Sherrie Fisher, General Manager
Santa Barbara Metropolitan Transit District
550 Olive Street
Santa Barbara, CA 93101
Fax (805) 962-4794

CONTRACTOR:

[authorized official name & title]
[contractor name]
[contractor street address]
[contractor city, state & zip]
[contract fax number]

21. Attorneys' Fees and Costs. In the event of a judicial dispute between the parties with respect to the enforcement or interpretation of this Agreement, the prevailing party in such dispute shall be entitled to receive, in addition to such other award as the court may deem appropriate, full reimbursement for its court costs and reasonable attorneys' fees incurred therein.

22. Negation of Partnership. This Agreement creates a relationship between two independent contractors and does not, nor may it be interpreted to, create the relationship of joint venturers, partners, employee/employer, or any other business relationship.

23. No Assignment. This Agreement is not assignable by either party, and any attempt by either party to assign its obligations hereunder shall be void ab initio at the election of the other party, which election may be made by written notice within ten (10) days of the non-assigning party's receipt of actual knowledge of such attempted assignment. Notwithstanding the foregoing, however, at the election of the other party, the obligations and burdens of a party shall bind and apply to any permitted successor in interest or assignee of the business and/or operations of a party.

24. Partial Invalidity. In the event that any portion of this Agreement or any provision hereof shall be deemed as invalid as contrary to applicable law, the balance of this Agreement shall be enforced according to its term, and that portion found unenforceable shall be interpreted and enforced to the extent that it may be within said applicable laws.

25. Applicable Law. This Agreement shall be construed and all disputes arising therefrom shall be settled in accordance with the laws of the State of California. Pending final resolution of a dispute thereunder the Contractor shall proceed diligently with the Project.

26. Prohibited Interest. The parties hereto covenant and agree that to their knowledge no board member, officer, or employee of MTD, during his/her tenure or for one year thereafter, has any interest, whether contractual, non contractual, financial or otherwise, in this transaction, or in the business of a contracting party other than MTD. If any such interest comes to the knowledge of either party at any time, a full and complete disclosure of all such information will be made in writing to the other parties, even if such interest would not be considered a conflict of interest under Article 4, Chapter 1, Divisions 4 and 4.5, Title I of the Government Code of the State of California.

27. Compliance with Laws and Regulations. Contractor shall warrant that in the performance of work under contract to MTD that they shall comply with all applicable federal, state and local laws and ordinances, and all lawful orders, rules, and regulations thereunder.

28. Audit and Inspection of Records. The Contractor shall agree that all materials supplied and services performed under the Project, facilities used in connection therewith, and records and documentation thereunto appertaining shall be subject to inspection, test, or audit by duly authorized representatives of MTD and the State of California. The Contractor agrees to maintain all required records relating to the Project for at least three (3) years after MTD makes final payment and all other pending matters are closed.

29. Equal Employment Opportunity. The Contractor shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin. The Contractor shall take affirmative action to ensure that applicants are employed, and that employees are treated during their employment, without regard to their race, religion, color, sex, or national origin. Such actions shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation, and; selection for training, including apprenticeship. The Contractor shall agree to post in conspicuous places available to employees and applicants for employment notices setting forth the provisions of the above paragraph. The Contractor shall insert a similar article to the above in all subcontracts entered into in connection with the contract governing this project, except subcontracts for standard commercial supplies or raw materials.

IN WITNESS WHEREOF, the undersigned have caused this Agreement to be executed.

SANTA BARBARA MTD

[contractor name in caps]

Sherrie Fisher, General Manager

[authorized official name & title]

Date

Date

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

TELEPHONE SYSTEM REPLACEMENT RFP

PRICE PROPOSAL (page 1 of 3)

Mandatory Equipment & Systems Costs

Equipment/System Description	Make	Model	Qty	Unit Price	Ext Cost
Primary PBX for Voice Switching			1		\$
Other Switching Device (if necessary)					
Other Switching Device (if necessary)					
Multiplexor (MUX) ¹			1		
Control Service Unit (CSU) ¹			1		
Switchboard Telephone			1		
Switchboard DSS Console(s)					
Full Feature Telephones			49		
Basic Telephones			5		
Cordless Telephones			5		
Switchboard Cordless			1		
Conference Telephones			2		
Analog Telephones			10		
Wired Headsets			7		
Wireless Headsets			5		
Voicemail System ¹			1		
Automated Attendant System ¹			1		
ACD Call Center System ^{1,2}			1		
GUI Switchboard System ¹			1		
Extension 235 Ring Equipment ²			1		
System Administration System ¹			1		
Backup Power Supplies					
System Redundancy System ²			1		
E911 System (if necessary) ^{1,2}			1		
Olive-TC Connection System ²			1		
New (Yard) Station Cabling ²			1		
Miscellaneous Wiring, Blocks, etc. ²			1		
Documentation ^{1,2}			1		
Other:					
I. Mandatory Equipment & Systems Subtotal:					\$

Optional Equipment & Systems Costs

Equipment/System Description	Make	Model	Qty	Unit Price	Ext Cost
Unified Messaging System ^{1,2}			1		\$
User GUI Telephone System ^{1,2}					
GUI Call Center System ^{1,2}					
Interactive Voice Response ¹			1		
Spanish-Language IVR ¹			1		
Call Accounting System ¹			1		
Cordless Range Extension ²					
Other:					
Other:					
Optional Equipment & Systems Subtotal:					\$

¹ If equipment/system & its cost are integrated within another item, note above (e.g., write "cost included in PBX" in CSU cost fields).

² If appropriate, include separate listing of equipment, systems, & materials by description, make, model, qty, unit price, & ext cost.

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

TELEPHONE SYSTEM REPLACEMENT RFP

PRICE PROPOSAL (page 2 of 3)

Mandatory Labor & Services Costs

Labor/Service Description	Hrs	Hrly Rate	Ext Cost
Install & Configure Mandatory Equipment in Server Room & Connect to T1			\$
Backup Power Supply & Critical System Redundancy			
Enhanced 911 Service (if necessary)			
ISDN PRI Implementation Oversight			
Olive Terminal to Transit Center Voice Connection (if necessary)			
Ensure Integrity/Rewire Existing Analog Lines			
Wire Six New Yard Stations			
Install & Set Up Switchboard & Telephones (including at Transit Center)			
Rewire Transit Center			
Telephone System Labeling			
Administrator Training			
User Training			
"Go Live" Support			
Legacy System Removal (labor only)			
Other:			
Other:			
Other:			
Mandatory Labor & Services Subtotal:			\$

Optional Labor & Services Costs

Labor/Service Description	Hrs	Hrly Rate	Ext Cost
Set Up Unified Messaging System			\$
Set Up GUI Telephones			
Set Up GUI Call Center System			
Set Up Interactive Voice Response System			
Set Up Call Accounting System			
Install & Set Up Cordless Range Extension Equipment (if necessary)			
Other:			
Other:			
Optional Labor & Services Subtotal:			\$

Mandatory System Cost Summary

Description	Total
Mandatory Equipment & Systems Subtotal:	\$
Mandatory Equipment Sales Tax:	
Mandatory Labor & Services Subtotal:	
Delivery & Freight:	
Legacy System Disposal Cost or (Credit):	
Mandatory Systems Total Cost:	\$

Optional System Cost Summary

Description	Total
Optional Equipment & Systems Subtotal:	\$
Optional Equipment Sales Tax:	
Optional Labor & Services Subtotal:	
Delivery & Freight:	
Optional Systems Total Cost:	\$

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

TELEPHONE SYSTEM REPLACEMENT RFP

PRICE PROPOSAL (page 3 of 3)

Maintenance Agreement

Description	Total
Maintenance Agreement Year 1:	\$
Maintenance Agreement Year 2:	
Maintenance Agreement Year 3:	
Maintenance Agreement Total Cost:	\$

The Proposing Firm hereby represents and warrants that:

1. It has sufficiently informed itself in all matters affecting the performance of the work, or the furnishing of the labor, supplies, material, or equipment called for in carrying out the project.
2. Its proposal has been thoroughly checked for errors and omissions and the costs, prices, labor hours, labor rates, and any other constituents of this Price Proposal are a complete and correct statement of its price for performing project work required by the contract documents.
3. Its proposal is genuine, not sham or collusive, nor made in the interest of any person not herein named; that it has not in any illegal manner sought to secure for himself any advantage over any other proposing firm.
4. Its proposal, including this Price Proposal is valid for sixty (60) days following the proposal due date.

Signature

Date

Name

Title

(Signer must match authorized official shown on Proposer Information form)

**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
TELEPHONE SYSTEM REPLACEMENT RFP**

CREDIT REFERENCES

Include your primary bank and two firms that you **currently** purchase materials or services from on credit:

Bank Name: _____ Contact: _____ Phone: _____

Vendor Name: _____ Contact: _____ Phone: _____

Vendor Name: _____ Contact: _____ Phone: _____

WORK REFERENCES

Include three recent clients for which you provided **similar services** to the project work:

Vendor Name: _____ Contact: _____ Phone: _____

Vendor Name: _____ Contact: _____ Phone: _____

Vendor Name: _____ Contact: _____ Phone: _____

SUPPLIERS & SUBCONTRACTORS

Provide the following information for **significant** suppliers or subcontractors to be used in the project:

Firm: _____ Contact: _____ Phone: _____

Description of Work: _____

Firm: _____ Contact: _____ Phone: _____

Description of Work: _____

Firm: _____ Contact: _____ Phone: _____

Description of Work: _____

Firm: _____ Contact: _____ Phone: _____

Description of Work: _____