

**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 ~~53-52~~ stations with ~~75-73~~ 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:** ~~\$50,000~~ \$60,000 (excluding 3-year service & maintenance)

**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 ~~call~~ ~~accounting~~ ~~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 100 Mbit/sec 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. Approximately half of the 100 ports in the switch are used for the half dozen servers and 40+ workstations and printers making up the LAN. This switch does contain a GBit expansion card that is connected to a 24-port GBit switch used for the servers and a few limited workstations. As previously stated, all nodes are wired with CAT5e and fiber optic cable connects the Maintenance Building to the LAN.~~ 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
<b>Total</b>	<b>69</b>	<b>4</b>	<b>73</b>

- **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 a clear, useable range throughout the Olive Terminal (including the yard)~~
  - ✓ 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
    - Basic 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 supervisory oversight and evaluation of agents via real time or delayed monitoring
    - 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 ~~actual~~ 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).
  - 6.7. Other—Any other features or systems Contractor may deem appropriate for or beneficial to MTD.
- D. Backup Power Supply—Contractor shall provide ~~an~~ uninterruptible power ~~supply~~ 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 ~~does not want~~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 ~~provide~~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.

**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**

**TELEPHONE SYSTEM REPLACEMENT RFP**

**PRICE PROPOSAL (page 1 of 3)**

**Mandatory Equipment & Systems Costs**

<b>Equipment/System Description</b>	<b>Make</b>	<b>Model</b>	<b>Qty</b>	<b>Unit Price</b>	<b>Ext Cost</b>
Primary PBX for Voice Switching			1		\$
Other Switching Device (if necessary)					
Other Switching Device (if necessary)					
Multiplexor (MUX) <sup>1</sup>			1		
Control Service Unit (CSU) <sup>1</sup>			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 <sup>1</sup>			1		
Automated Attendant System <sup>1</sup>			1		
ACD Call Center System <sup>1,2</sup>			1		
GUI Switchboard System <sup>1</sup>			1		
Extension 235 Ring Equipment <sup>2</sup>			1		
System Administration System <sup>1</sup>			1		
Backup Power Supplies					
System Redundancy System <sup>2</sup>			1		
E911 System (if necessary) <sup>1,2</sup>			1		
Olive-TC Connection System <sup>2</sup>			1		
New (Yard) Station Cabling <sup>2</sup>			1		
Miscellaneous Wiring, Blocks, etc. <sup>2</sup>			1		
Documentation <sup>1,2</sup>			1		
Other:					
<b>I. Mandatory Equipment &amp; Systems Subtotal:</b>					<b>\$</b>

**Optional Equipment & Systems Costs**

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

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

<sup>2</sup> 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**

<b>Labor/Service Description</b>	<b>Hrs</b>	<b>Hrly Rate</b>	<b>Ext Cost</b>
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:			
<b>Mandatory Labor &amp; Services Subtotal:</b>			<b>\$</b>

**Optional Labor & Services Costs**

<b>Labor/Service Description</b>	<b>Hrs</b>	<b>Hrly Rate</b>	<b>Ext Cost</b>
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			
<u>Install &amp; Set Up Cordless Range Extension Equipment (if necessary)</u>			
Other:			
Other:			
<b>Optional Labor &amp; Services Subtotal:</b>			<b>\$</b>

**Mandatory System Cost Summary**

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

**Optional System Cost Summary**

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

**SANTA BARBARA METROPOLITAN TRANSIT DISTRICT**

**TELEPHONE SYSTEM REPLACEMENT RFP**

***PRICE PROPOSAL (page 3 of 3)***

**Maintenance Agreement**

<b>Description</b>	<b>Total</b>
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)