



REQUEST FOR PROPOSALS

INTERACTIVE VOICE RESPONSE SYSTEM IMPLEMENTATION

ISSUE DATE: March 16, 2018

PROPOSALS DUE: April 25, 2018



TABLE OF CONTENTS

SCHEDULE AND SOLICITATION DOCUMENT 1

 SOLICITATION, OFFER AND AWARD..... 1

 ACKNOWLEDGMENT OF AMENDMENTS 2

 INTRODUCTION 3

 INSTRUCTIONS TO PROPOSERS 5

 SCOPE OF WORK 14

 PRICE SCHEDULE..... 25

SPECIAL PROVISIONS..... 29

 1. TYPE OF CONTRACT..... 29

 2. PERIOD OF PERFORMANCE 29

 3. OPTIONS 29

 4. PAYMENT..... 29

 5. DISADVANTAGE BUSINESS ENTERPRISE (DBE) REQUIREMENT 29

 6. DOCUMENTATION 29

 7. SAFETY SENSITIVE INFORMATION (SSI) DOCUMENTATION 30

END OF SECTION

ACKNOWLEDGMENT OF AMENDMENTS

Solicitation No.: P20180305 Title: Interactive Voice Response System

The undersigned as part of submission of an offer for the above solicitation hereby acknowledges receipt of the following amendments and certifies that the offer has been prepared in accordance with their provisions:

AMENDMENT NO.	DATE	TITLE/SUBJECT

ACKNOWLEDGED BY: _____
(SIGNATURE)

SIGNER'S NAME: _____ **TITLE:** _____

FIRM NAME: _____ **DATE:** _____

END OF SECTION

INTRODUCTION

1. Purpose

JAUNT is requesting proposals from qualified firms to implement an Interactive Voice Response (IVR) system to provide route, schedule, real-time and general information to demand response and commuter route passengers.

2. Solicitation Process

This Request for Proposals is intended to solicit and obtain the qualifications of professional Contractors, their capabilities, and their approach to this project, all in the context of the scope of services defined herein. The award decision will be based on the evaluation criteria identified herein. JAUNT anticipates that it will make an award on the basis of initial proposals, without discussions (except to clarify information in a proposal) or negotiations. However, JAUNT reserves the right to hold discussions and negotiations as it considers necessary. If discussions are held, they will be with all firms considered to have a reasonable chance of obtaining the award, after which JAUNT may request the firms remaining in competitive range submit a Best and Final Offer (BAFO).

JAUNT reserves its right to reject any and all proposals, to award to other than the lowest-priced proposal, and to cancel this solicitation at any time before or after receipt of proposals.

3. Solicitation Distribution

Solicitation packages, including any amendments, clarifications, and other information pertinent to this solicitation will be posted to the “JAUNT RFP” section of the JAUNT website: <http://www.ridejaunt.org/projects.asp>. While JAUNT will attempt to communicate such information to known recipients of the RFP, it is the responsibility of proposers to ensure that they obtain such information from an authoritative source. JAUNT will not provide printed copies of the solicitation package; it will provide a CD of the package at a charge of \$55.00 per copy, payable by certified checks or money orders only. Questions or requests for a CD should be addressed to Christopher Rowland, Chief Administrative Officer, at ChrisR@ridejaunt.org.

4. Procurement Schedule

The following schedule is provided for general guidance only, and is subject to change as the solicitation goes forward:

ACTIVITY	DATE
RFP Issued	March 16, 2018

Pre-Proposal Conference	Wednesday, March 28, 2018, 9:00 a.m. at 104 Keystone Place Charlottesville, VA 22902
Last Date for Receipt of Questions	Friday, April 13, 2018
Proposals Due	Wednesday, April 25, 2018, 1:00 p.m.
Anticipated Award Date	June 2018

Important Notice:

Effective immediately upon release of this Request for Proposals (RFP), and until notice of contract award, all official communications from proposers regarding the requirements of this RFP shall be directed to the individual identified below in accordance with the Instructions to Proposers, Section 9, and Communications with JAUNT:

Christopher Rowland
Chief Administrative Officer
104 Keystone Place
Charlottesville, VA 22902
ChrisR@ridejaunt.org

5. Term of Contract

The term of the Contract shall be for a base period of up to twelve (12) months beginning with the date specified in the Notice of Award and concluding on Acceptance to complete installation, configuration and implementation of the IVR System. JAUNT may extend the Contract for four (4) additional option years from the date of Final Acceptance of the IVR System.

END OF SECTION

INSTRUCTIONS TO PROPOSERS

1. Cautions to Offerors

- A. Offerors are expected to examine all elements of this Request for Proposals. Failure to do so will be at the offeror's risk.
- B. Except as otherwise stated herein, “days” shall be considered to be calendar days.

2. Preparation of Proposals

Proposers shall submit one (1) original and five (5) hard copies of each volume, and one (1) electronic copy in PDF format.

Business and Technical Proposals shall be submitted in separate sealed volumes identified on the outside of the package with the name of the proposing firm, the number and title of the solicitation. The proposal should be submitted in a binder permitting JAUNT to readily remove pages for distribution or copying, and should be limited to 8.5 x 11 paper unless otherwise requested or necessary.

The contents of the proposal reflect the offeror’s approach to the project. A sufficient amount of detail needs to be included to permit a full and fair evaluation of the proposal. However, overly elaborate proposals; proposals which provide generic information or information not relevant to the subject matter of the solicitation, and proposals which do not show the capability to follow the instructions given herein will usually receive lower scores than those that reflect these instructions. JAUNT reserves the right to reject all or any proposals, to award to a proposal other than the lowest priced, and to award a Contract without discussions, except for clarifications which do not modify the proposal or negotiations. Each offeror should therefore ensure that its initial submittal represents the best possible combination of technical merit and low price.

3. Volume I, Business Information

This volume shall address all non-technical aspects of the solicitation, including but not limited to the following:

	Cover letter, identifying the principal point of contact for the proposer by name, title, mailing address, telephone, facsimile, and email address.
Tab A	Signed Solicitation, Offer and Award form
Tab B	Acknowledgment of any amendments
Tab C	Completed and Signed Price Schedule
Tab D	Completed and Signed Appendix B, Responsibility Questionnaire

Tab E	Completed and Signed Appendix C, Past Performance References
Tab F	Certificate of Insurance, with JAUNT named as additional insured (Due upon notification of intent to award)
Tab G	Any exceptions to the contractual terms and conditions, if applicable.

4. Volume II, Technical Proposal

This volume shall address technical requirements, experience, qualifications, past performance, and references. Proposers should address all relevant aspects of the solicitation instructions, basis for award, evaluation factors, and Scope of Services. The proposal should address each element of the Scope of Services and each evaluation factor as listed. The content should include:

	Cover letter Table of Contents
Tab A	Executive Summary of the Offeror's Capabilities and Skills
Tab B	<p>Description of the Offeror's Capabilities and Skills to include:</p> <ul style="list-style-type: none"> • General history and background of the firm, and its partners or associates, including its ownership, size, and lines of business and specialties. Also include the number of years the firm has been providing these services and the volume of business currently conducted. • A description of the firm's approach to the types of services described herein, identifying points of contact and responsibility within the firm, and whether specific portions of the services will be provided by outside firms. • Provide at least three (3) references for similar services performed within the past five years that include specific written project descriptions and contracts detailing the firm's professional experience and accomplishments similar to the scope requirements defined herein. Also include the points of contact by name, title, address, phone number and email address.
Tab C	<p>Description of the Offeror's Qualifications to include:</p> <ul style="list-style-type: none"> • Offeror's Key Personnel, including identification of proposed assignments for this contract, and describe the office which will be responsible for the management and administration of this contract. • Provide an organization chart describing the project staff structure and how it relates to the overall organization. • Provide resumes and experience for key personnel proposed to participate in and supervise these services on a regular basis.

	<ul style="list-style-type: none"> • Provide detailed experience regarding the firm’s expertise in receiving large volume inbound data collection inquiries and outbound calls.
Tab D	<p>Functional Requirements and Performance</p> <p>Provide a detailed summary and diagram of the design. Include any customizations or deviations required in order to accommodate the stated requirements in this RFP.</p>
Tab E	<p>Technical Requirements</p> <p>Provide a detailed outline, summary and diagram of the Technical Requirements.</p>
Tab F	<p>Project Management</p> <p>Provide a detailed outline and summary of all Project Management requirements.</p>
Tab G	<p>Training</p> <p>Provide a detailed outline and summary of the Training Requirements.</p>
Tab H	<p>Integration</p> <p>Provide a detailed outline and summary of the Integration plan and procedures.</p>
Tab I	<p>Testing</p> <p>Provide an outline of all testing requirements, timeframes, required resources and support during the testing phase.</p>
Tab J	<p>Reporting</p> <p>Provide a detailed outline and summary of the Reporting Requirements.</p>
Tab K	<p>Project Schedule</p> <p>Provide a detailed project schedule that outlines all of the activities for this project.</p>
Tab L	<p>Support and Maintenance</p> <ul style="list-style-type: none"> • Describe and document how the firm will provide ongoing support. • Provide a comprehensive maintenance plan and schedule defining how often maintenance is done, the required hours and how the firm can accommodate this plan without service interruptions.
Tab M	<p>Options</p> <p>Provide a detailed outline, summary and individualized pricing for the Optional Features defined in the Scope of Work. Pricing for these options shall be provided as an attachment to the Price Schedule in Volume I, Tab C.</p>
Tab N	<p>Narrative summary of deviations from the Scope of Services outlined in the RFP.</p>

5. Pricing

Pricing will be on the basis of a not-to-exceed price. The prices proposed shall include all direct costs, indirect costs, overhead and profit, and represent the total amount payable by JAUNT for these services.

6. Evaluation Criteria (in order of relative importance)

A. Technical Merit (70 Points)

Technical Approach (40 points)

The technical proposal should enable evaluators to make a thorough evaluation as to whether the proposal will meet JAUNT's requirements. Each technical proposal shall be detailed and complete as to clearly demonstrate the offeror's proposed approach and that the offeror has a thorough knowledge and understanding of providing and implementing an Interactive Voice Response system as described in the Scope of Work.

Firm Experience and Qualifications (20 points)

The proposal should clearly indicate the firm's history/experience in performing similar work, preferably for organizations similar to JAUNT and/or projects similar to the Project described herein. Specific topics include:

- Offeror's performance history and experience
- Offeror's understanding of requirements and approach to providing the services
- Discussion of factors which separates this approach from others

Past Performance (10 Points)

Relevant references including the customer's name, contact person's name, telephone number, and email address. Each reference should identify the project involved, the starting and ending dates, and the Scope of Work performed, identifying any features of particular significance for this Project.

B. Price. (30 Points)

The price for each offeror will be compared against the values assigned the various elements of the technical proposal. The evaluators will determine whether additional technical merit in a proposal justifies a higher price. The objective of this process is to obtain the best available combination of technical capability and price.

7. Evaluation Process

Proposals will be evaluated by a panel of JAUNT personnel possessing appropriate expertise in the subject matter of the solicitation, generally in accordance with the following process. The

Evaluation Panel will be led by the Chief Administrative Officer. The Evaluation Panel may utilize other resources inside or outside JAUNT for assistance in the evaluation process. The proceedings of the evaluators shall be considered confidential and not subject to public disclosure to the fullest extent permitted by the Virginia Freedom of Information Act.

An initial evaluation will be made of all proposals received. Based on this evaluation, the Chief Administrative Officer may (1) determine that one proposal is clearly superior to all others; determine that the price of that proposal is fair and reasonable; and recommend that JAUNT accept that proposal without discussions; (2) determine that no proposals are capable of meeting JAUNT's needs and recommend cancellation of the solicitation; or (3) determine which firms, based upon the initial proposals received, are capable of meeting JAUNT's requirements at prices capable of being determined fair and reasonable after negotiations (the competitive range).

Following the initial evaluation, offerors may be requested to submit additional information in writing, by telephone or by a meeting with the evaluators. The Evaluation Panel may then (1) recommend a proposal for award; (2) narrow the number of firms considered for award; (3) request additional information; (4) recommend one or more firms for negotiations; or (5) determine that no offeror is capable of meeting JAUNT's requirements and recommend cancellation of the solicitation. This may include investigation of an offeror's responsibility, including contact with previous customers of the offeror. Discussions may be conducted with the offerors who remain within the competitive range, through oral presentations, written presentations, or electronic communications, as the Chief Administrative Officer deems appropriate.

Price and Technical negotiations will be conducted only with offerors within the competitive range, as determined by the Chief Administrative Officer. Offerors may be requested to provide additional pricing information and clarifications, or certified cost or pricing data, if deemed appropriate by the Chief Administrative Officer. Proposals whose combination of technical and pricing offers are considered incapable of receiving an award may be rejected.

At the end of the evaluation/negotiation process, the Chief Administrative Officer may request all offerors under consideration for award to submit a Final Proposal Revision (also called a Best and Final Offer), incorporating the offeror's best technical and financial offer based upon the discussions and negotiations conducted. Receipt of such offers shall denote the close of the evaluation/negotiation process, and, unless the Chief Administrative Officer determines that no Final Proposal Revision is capable of award, no further proposal modifications will be permitted.

Upon completion of the evaluation and negotiation process, the Evaluation Panel shall determine the proposal which represents the best overall value to JAUNT, and the Chief Administrative Officer will prepare a recommendation that JAUNT accept the proposal and award a Contract. Upon JAUNT approval, the Contract will be executed on behalf of JAUNT and issued to the successful offeror.

JAUNT reserves the right at any time during the evaluation process to reject some or all

proposals; award a Contract without further discussions or negotiations; or to award a Contract to other than the lowest-priced proposal.

The Chief Administrative Officer may conduct a pre-award survey to determine if an offeror is responsible both financially and technically and has the capability to perform the work.

8. Basis for Award

This is a negotiated procurement based on best value as described herein.

9. Communications with JAUNT

All communication in regard to any aspect of this solicitation shall be with the Chief Administrative Officer, not with any other of its employees or Contractors, in regard to any aspect of this solicitation. Violation of this requirement may lead to the rejection of the offender's proposal or cancellation of the solicitation. If the offense is egregious and causes cancellation of the procurement, the offending party will not be permitted to participate in any re-solicitation as either an offeror or a Subcontractor.

Any explanation desired by an offeror regarding the meaning or interpretation of any portion of the solicitation shall be requested in writing. Oral explanations or instructions given before the award of the Contract shall not be binding. Material information which alters a substantive portion of the solicitation will be furnished promptly to all prospective offerors as a written amendment. Matters clarifying but not altering the solicitation may be provided in writing to all prospective offerors, but shall not amend the solicitation.

10. Solicitation Amendments

Revisions and amendments shall be announced by written amendment to this solicitation. Copies of such amendments shall be furnished to all prospective offerors known to the Chief Administrative Officer, and may be posted on an internet site if one is established for this solicitation. If the revisions and amendments require substantial changes to the contents of proposals, the time for receipt of proposals may be extended at the discretion of the Chief Administrative Officer. Offerors are responsible for ensuring that they have received all amendments and incorporated any changes in their proposals.

Offerors are requested to acknowledge receipt of all amendments as part of the Solicitation, Offer and Award form. Failure to acknowledge an amendment will not automatically disqualify an offeror, but failure to address any changes in the proposal may lead to it receiving a lower score than would otherwise be the case.

11. Submission of Proposals

Offers and modifications thereof shall be enclosed in sealed envelopes and addressed to the office specified in the Schedule. Electronic proposals or modifications will not be considered unless specifically authorized in this solicitation or by the Chief Administrative Officer. Offers or modifications thereto may be withdrawn by written or electronic notice, provided such notice is received prior to the hour and date specified for receipt of proposals or modifications.

Proposals shall be mailed or hand-delivered to the following address:

Christopher Rowland
Chief Administrative Officer
104 Keystone Place
Charlottesville, VA 22902

12. Late Submissions, Modifications, and Withdrawals of Offers

Any proposal, modification, or revision, that is received at JAUNT's office after the exact time specified for receipt of proposals is "late" and will not be considered.

13. Electronic Communications

To the extent permitted herein, communications to or from JAUNT may be by electronic means. Any electronic communication sent to JAUNT must be confirmed by hard copy received by JAUNT not more than forty-eight (48) hours after the initial electronic communication is sent.

14. Minimum Proposal Acceptance Period

JAUNT requires a minimum acceptance period of ninety (90) calendar days after receipt of the proposal or any modification thereof, including a Final Proposal Revision.

15. Contract Award and Notice to Proceed

- A. A written award or acceptance of offer mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer shall result in a binding Contract without further action by either party.
- B. A Notice to Proceed (NTP) shall be issued by JAUNT before any work begins on this Contract. A conference may be held to issue the Notice and to establish a working understanding of the Contract and work required. The NTP establishes the beginning of the performance period.

16. Notice of Protest Policy

JAUNT policy and procedure for the administrative resolution of protests is set forth in Section 10 of the [Procurement Policy](#). The Procurement Policy contains strict rules for filing a timely protest, for responding to a notice that a protest has been filed, and other procedural matters. JAUNT has, in this Section, defined matters which may be protested, the form of protest, and the time limits for submitting protests during different stages of the procurement process. Chapter

VI, §1 of Federal Transit Administration (FTA) Circular 4220.1F addresses protests of solicitations utilizing Federal funds. FTA will only review protests regarding the alleged failure of the grantee to have a written protest procedure or failure to follow such procedure, or protests alleging a violation of Federal law or regulation. FTA will not consider a protest until the protestor has exhausted its local administrative remedies.

17. Oral Presentations

Oral presentations may be required. If so, oral presentations will be conducted with all firms in the competitive range. The oral presentation should utilize a visual methodology such as PowerPoint™ or overhead slides and include printed copies for the evaluators. No cost/price information shall be included in the presentation. The purpose of the presentation is to provide clarifications and to respond to any questions or concerns regarding the proposal raised by the evaluators. The presentation itself is not an evaluation factor; however, any clarifications, discussions, or changes to a proposal requested as a result of the presentation shall be made in writing and will thereafter be considered in the evaluation.

18. Restriction on Disclosure and Use of Data

JAUNT is subject to the Virginia Freedom of Information Act (Code of Virginia, § 2.2-3700 et seq.). To the extent permitted by that Act, JAUNT shall provide all reasonable precautions to ensure that information properly identified by an offeror as proprietary is held confidential within the review process. Offerors shall attach to each page containing any proprietary data of any proposal or modification thereof the following legend:

This page contains data which is proprietary to the offeror or confidential business information not subject to disclosure under the Virginia Public Records Act, JAUNT policies, or the terms of this solicitation. It is therefore not to be disclosed inside or outside JAUNT, be duplicated, or used in whole or in part, for any purpose other than to evaluate this offer; provided that, if a Contract is entered into on the basis of this offer, JAUNT shall have the right to duplicate, use, and disclose this data as part of the Contract document or as required for performance of the Contract.

Identification of such proprietary information must be specific. Any general identification of the document as a whole, or of pages which patently do not contain proprietary information, shall render the entire document non-confidential.

19. Disadvantaged Business Enterprise (DBE) Participation:

No DBE goal is assigned for this solicitation.

Although no DBE goal will be imposed on the Contract, JAUNT encourages the Contractor to utilize the DBE Directory as certified DBE's do exist for contracting opportunity, although in negligible numbers. Any DBE participation on the Contract will be counted as race-neutral DBE participation.

20. Organizational Conflicts of Interest:

Unless specifically exempted from the conditions of this provision by the Chief Administrative Officer, any JAUNT Contractor, Subcontractor, subsidiary, or other entity which is legally related to an entity or party which develops or drafts specifications, requirements, statements of work, Invitations for Bids, or otherwise is in a position to influence the nature, scope or conditions of a subsequent Commission solicitation or Contract, shall be excluded from competing under such solicitation or receiving such Contract. If a proposer is uncertain whether or not a conflict exists, it should promptly contact the Chief Administrative Officer for a determination.

21. Ineligible Proposers

No excluded proposer listed on the U.S. Government's System for Award Management (SAM) or otherwise barred from public contracting by the U.S. government or the Commonwealth of Virginia shall be awarded a Contract hereunder. SAM may be found at <https://www.sam.gov/portal/public/SAM/>. The Virginia Department of General Services Debarred List and Suspended List may be found at <http://www.eva.virginia.gov/>.

END OF SECTION

SCOPE OF WORK

INTERACTIVE VOICE RESPONSE SYSTEM IMPLEMENTATION

1. Introduction

JAUNT is seeking a qualified Contractor to implement an Interactive Voice Response (IVR) system to provide route, schedule, real-time, and general customer service information. The Goal is to reduce the number of calls from passengers that require a live agent.

2. Background Information

JAUNT provides paratransit, demand response, and commuter route services to the Central Virginia region of Virginia. JAUNT's services provide over 300,000 trips each year, but do not currently have an IVR system.

JAUNT's Current Customer Service Center Statistics:

The numbers are based on monthly reports from the current phone system, ShoreTel.

Average calls per month: 15,000

Average calls per year: 180,000

Current hours of operation:

- 5:00 a.m. to 10:30 p.m. Monday through Friday
- 6:00 a.m. to 10:30 p.m. on Saturdays
- 7:00 a.m. to 6:30 p.m. on Sundays

Current Environment

JAUNT does not currently have an IVR system.

JAUNT utilizes Trapeze PASS Workstation for paratransit, demand response, and commuter scheduling.

JAUNT utilizes ShoreTel phone systems.

3. Scope of Services

The Contractor shall design, configure, test, implement, maintain, monitor and support an automated IVR system that provides bus schedule information via telephone.

The IVR system shall be hosted by the Contractor utilizing the Contractor's hardware and infrastructure. The Contractor shall offer a solution based on a Software-as-a-Service (SaaS) model.

The Contractor shall furnish the following items and services, as well as any additional items and services that may be required to support a functional IVR system.

General Requirements

1. The Contractor shall assist JAUNT with completing a final design of the proposed system.
2. The Contractor shall send a design team to meet and work with key departmental staff at JAUNT, as deemed necessary, to finalize the system design.
3. After completion of the final design by the Contractor, a review of the final design shall be jointly conducted by JAUNT and the Contractor to approve the design.
4. As call volumes grow, the Contractor shall expand the call handling capacity of the IVR system without a significant re-engineering or redesign effort.
5. The Contractor shall describe the call flow for a typical completed call, with the call originating from a customer's phone dialing the published JAUNT number, the call being answered by the proposed IVR system, and the call possibly being sent over to JAUNT's Reservations Department, Dispatch Department, or Receptionist by the IVR system. This description shall include information regarding the proposed infrastructure provider(s) to be used for each segment of a typical call flow.
6. The Contractor shall submit proposal to address each of the following options:
 - a. No recurring telephony costs for JAUNT; or,
 - b. Tiered billing structure for JAUNT based on call volumes.
7. The Contractor shall clearly outline all telephony related requirements and assumptions.

Functional Requirements

The proposed IVR system shall meet or exceed the following:

1. Answer the calls to JAUNT's published phone number on a twenty-four (24) hour a day basis, 365 days a year.
2. Be voice as well as touch tone driven.
3. Be capable of offering information in English as well as Spanish languages with an option for additional languages in the future.
4. Optionally, if used for commuter route service, accept stop, route, and direction information from the caller by name as well as numbers.
5. Be capable of handling multiple concurrent calls and be scalable to meet the call volume.
6. Deliver prompt and efficient customer information.
7. Provide a simple user interface.

8. Seamlessly transfer a call to the JAUNT Reservations Department, Dispatch Department, or Receptionist if the system fails to understand the callers input.
9. Present callers the option to get schedule information for time(s) different than the next three (3) times.
10. Present callers the option to get schedule information for a different day.
11. Be capable of interfacing with the CAD/AVL System at JAUNT if those systems are purchased.
12. Recognize repeat callers.
13. Recognize repeat callers and customize user experience based on prior stop/route/direction requested. This feature would require less input from callers and is expected to shorten the call duration for repeat callers.
14. Be capable of handling different service day types (Weekday, Saturday, Sunday, etc.) and any exceptions.
15. Support, at a minimum, two (2) schedule versions; one (1) current and at least one (1) future version.
16. Provide a test environment for user testing.
17. Accept up to ten (10) aliases (common/alternate names) for each stop; JAUNT will provide a list of aliases for stops.
18. Allow callers to speak with the Receptionist utilizing a simple voice command or a single key press.
19. Allow a caller to start the session over at any time during the call using a simple voice command or a single key press.
20. Allow a caller to get automated help about using the system at any time during the call.
21. Provide configurable customer menu options to deliver pre-recorded information. The options would be used to access general information about JAUNT, fare information, Reservations and Dispatch hours of operation, etc.
22. Provide secure role based access to a web-based administrative interface.

23. Provide a simple and secure web interface to allow administrators to record using telephone as well as upload pre-recorded audio files for ad-hoc general, system wide, route, and stop specific floodgate messages. The system shall allow administrators to select start and end times for the messages. Those messages shall be easily programmable to be played immediately or on a future day for a specified range of days.
24. Provide a simple and secure interface via telephone with limited administration capabilities for use by authorized JAUNT users in situations when the system cannot be reached via web interface.
25. Record all customer interactions with the IVR system and preserve the recordings along with call details such as caller's number, status of call, duration, and relevant information for a minimum of sixty (60) days.
26. Allow authorized users at JAUNT to access, search and download call recordings and call related information for troubleshooting and complaint investigations.
27. Log all call activity details and provide an easy to use, configurable reporting tool.
28. Keep all logs online for a minimum period of two (2) years or longer with the capability to export the logs for offline use using non-proprietary tools.
29. At a minimum, provide the following canned reports:
 - a. Number of incoming calls with call duration details. b. Average call duration.
 - b. Number of calls by time of day.
 - c. Number of calls by Service day type based on service defined in schedules (i.e., Weekday, Saturday, Sunday, Holiday, etc.).
 - d. Incoming line(s) capacity usage.
 - e. Number of incoming calls where the caller initiates transfer to JAUNT Customer Service Center agent.
 - f. Number of incoming calls where the system is unable to recognize caller input and transfers the call to JAUNT Customer Service Center agent.
 - g. Number of incoming calls where the caller does not provide input and the system initiates transfer to JAUNT Customer Service Center agent.
 - h. Number of abandoned calls.

- i. Number of repeat callers.
- j. Number of requests by each individual stop.
- k. Number of requests by each individual route and direction.
- m. Most frequently requested menu options.
- l. All reports shall support reporting by hour, day, week, month, year, and range of dates and times.

30. Be capable of generating Custom Reports.

The proposal may suggest additional features available that are not mentioned in this section. Suggestions must be relevant to the Scope of Work.

Performance Requirements

The proposed IVR system shall meet or exceed the following:

1. Answer every call at the first ring.
2. Transfer the call to the JAUNT Reservations Department, Dispatch Department, or Receptionist if the system cannot understand user input in two (2) consecutive attempts, or if the caller does not provide any input after being prompted twice by the system.
3. Recognize the stop, route, and direction names as pronounced in the Central Virginia area.
4. Be designed to process the caller's voice and ignore any background noises.
5. Have an uptime exceeding 99.9% computed every month. Downtime includes complete outage, degraded performance, or any deviation from normal operation of the system. Planned maintenance time approved by JAUNT shall not be counted as downtime.
6. Provide service that meets or exceeds a mutually agreed upon Service Level Agreement (SLA) for Automation Rate, defined as the total number of calls where schedules are correctly delivered divided by the total number of calls where schedules are requested.
7. Handle a minimum of twenty (20) concurrent calls and be scalable to meet the JAUNT customer call volume.

If the system fails to meet the performance requirements for two (2) consecutive months, payments to Contractor shall be subject to the following financial penalty:

- For every one (1) cumulative hour in a calendar month that the system is not available

for use by JAUNT customers, the total monthly invoice will be reduced by two percent (2%).

Technical Requirements

The proposed IVR system shall meet or exceed the following:

1. Detailed technical documents of the system and processes submitted by the Contractor shall include, but not limited to, schematics, flow charts, technical specifications and data dictionary to substantiate all the requirements listed in the Scope of Work.
2. The system shall provide redundancy and automatic failover features.
3. The system shall be continuously monitored. The Contractor shall provide error logs to JAUNT upon request.
4. The capability to instantaneously bypass the system and transfer service to an alternate JAUNT telephone number in case of system outage shall be available to JAUNT's administrator. This feature will be utilized by JAUNT after thirty (30) minutes of system outage.
5. The system shall provide a standard web browser based interface using the most widely used web browsers for administering floodgate messages and other administration activities.
6. The system shall accept pre-recorded floodgate messages in commonly used audio file formats without requiring any specialized audio editing applications to create those pre-recorded floodgate messages.
7. The system's reporting feature shall use a standard web browser based interface.
8. The system shall allow the reports to be exported as PDF, Microsoft Excel, and Comma Separated Value (CSV) text formats.
9. The Contractor shall fine-tune pronunciations for words used in the IVR system in consultation with JAUNT before the system goes "live" and throughout the term of the Contract as needed and requested by JAUNT, at no additional cost.

Project Management

1. The Contractor shall assign a Project Manager (PM) to work closely with JAUNT for this project.
2. The Contractor's PM shall be expected to follow the project through delivery of requested services.
3. The Contractor shall develop a detailed project schedule that outlines all of the activities for this project from Contract award through implementation, testing and training. The project schedule shall be generated and maintained in Microsoft Project software and shall show critical path and float between activities.

4. The proposed project schedule shall be updated in collaboration with JAUNT's staff within one (1) week of kick-off meeting. The updated project schedule submitted shall include an actual start date and any necessary revisions requested by JAUNT.
5. The Contractor shall have a documented business continuity plan to protect against possible service interruption due to an emergency event or system failure.
6. The Contractor shall have documented processes and procedures for restoring service for situations where a reported service interruption cannot be resolved within one (1) hour and for services that cannot be restored within twenty-four (24) hours.
7. Service transfer capabilities and the time to implement must be described for service outage scenarios.
8. Service shall be hosted in a Statement on Standards for Attestation Engagements (SSAE 16) data center and the data center shall maintain this compliance throughout the duration of the contract.

Contractor Responsibilities

The Contractor shall be responsible for the following:

1. Licenses.
2. System Hosting.
3. Deployment, Training, and Testing Services.
4. Recommending any server Hardware & Software upgrades.
5. Telephony switch integration services.
6. Telephony board(s) (if required) to support port capacity required for service.
7. Porting of the published JAUNT telephone number and all associated telephony charges for the duration of the contract. The phone number shall remain a local phone number for the JAUNT service area.
8. Expansion of port capacity as required to handle short term "burst" call volume.
9. Integration of scheduled and real-time service data.
10. Loading, staging, testing, and making the data available for UAT before each schedule change.
11. Ongoing Support and Maintenance.
12. Other responsibilities as agreed upon between the Contractor and JAUNT.
13. Project Management.

14. User Training.
15. Documentation.
16. Providing test plans and system testing.

JAUNT Responsibilities

JAUNT will be responsible for the following:

1. Any third-party integration license fees or charges.
2. Providing schedule information in GTFS format.
3. Providing real-time service information when it is implemented at JAUNT.
4. Providing location of all stops.
5. Assignment of points of contact.
6. User Acceptance Testing.
7. JAUNT shall allow porting of its published telephone number to a carrier of Contractor's choice for the duration of the contract. JAUNT will not relinquish the ownership of its published telephone number to the Contractor or any proposed third party.
8. Provide a telephone number that will receive the calls transferred by the hosted IVR system to JAUNT.

Training

To ensure that JAUNT's operating staff is properly trained to administer and use the proposed system, training shall be offered as follows:

- "Hands-On" user training with sample scenarios.
- Explanation of all system commands, their functions and usage.

Training shall be conducted at the completion of all installation, testing and acceptance of the system. Training manuals shall be provided specific to JAUNT's use of the system. Training materials, including a detailed training plan document, shall be submitted ten (10) days prior to the commencement of training in both hard and soft copies. Training must be accomplished on site at JAUNT's facility.

The Contractor shall provide detailed training, including training manuals, to JAUNT staff for the following:

- Administering the floodgate messages.

- Accessing, creating and using all reports.
- Preparing GTFS and GTFS Realtime data and any additional information or data required by the IVR.
- All other administration, user, and maintenance activities.

Integration

Optional software data integration options are as follows (pricing should be separate):

- Flat file integration using Google Transit (GTFS) format
- Integration to TransitMaster (Trapeze)

Data provided will include all scheduled, real-time, landmark, stop and intersection data where stop ID is matched to the corresponding intersection (when available) and landmarks.

Test Plans and Procedures

The Contractor shall provide test plans and procedures for user acceptance testing to ensure that each test is comprehensive and verifies all the features to be tested. Comprehensive test plans and procedures for the system shall place special emphasis on testing each function and feature; checking error conditions; and, documenting and verifying the validity of all. The test procedures shall be modular to allow individual test segments to be repeated as needed.

Test plans shall provide a high-level functional summary of the methods used for verifying each function being tested. Test procedures shall include step-by-step procedures associated with each test. All test plans and procedures shall be submitted to JAUNT for approval prior to testing. JAUNT reserves the right to reject the test plans and procedures.

Acceptance Testing

The system shall be acceptance tested for compliance with performance requirements. The Contractor shall work closely with JAUNT to perform acceptance testing and ensure that all the features in the system are fully functional and operating to JAUNT's satisfaction. The cost for acceptance testing shall be the responsibility of the Contractor. Any deficiencies found shall be the responsibility of the Contractor to rectify before acceptance is finalized by JAUNT.

Reporting

Standard and ad-hoc reports delivered through a web-based reporting portal as described in "Functional Requirements" and including the following:

- Real-time snapshot of system operational status: system utilization, call volume trend, requested information, hardware diagnostics, etc.

- Data that can be analyzed for a defined interval (from date x to date y) detailing call volumes, trends, peak loading, operator transfers, automation rates, etc.

Support and Maintenance

The Contractor shall provide ongoing maintenance and support services for the term of the Contract to include, but not limited to:

1. Responding to all issues within thirty (30) minutes of being notified that a problem exists.
2. Issues shall be logged and tracked by the Contractor in an issue management system that shall be accessible by JAUNT for reporting new issues and viewing the status of issues.
3. Notifying JAUNT two (2) calendar weeks in advance, by email and phone, of any planned system maintenance. Scheduled maintenance of the system shall be performed between 1:00 a.m. and 3:00 a.m. EST and only after obtaining approval from JAUNT.
4. Outline, in detail, its policies regarding maintenance and provide telephone support twenty-four (24) hours per day, 365 days per year.
5. Providing JAUNT with a support hotline phone number to report issues.
6. Periodic analysis of system usage and proposing ways to improve customer experience.
7. Providing a Support and Maintenance Plan document describing ongoing maintenance and support procedures, service levels and service call initiation process before the system is put into production mode.

Deliverables

The Contractor shall be responsible for delivering the following:

1. Fully functional system conforming to or exceeding the requirements of the Scope of Services.
2. Traceability/conformance matrix providing a cross reference for all requirements within the Scope of Services including any exceptions or suggestions.
3. Documentation in electronic format to include, but not limited, to the following:
 - a. System Configuration
 - b. High level architectural document depicting redundancy and automatic failover features
 - c. System Maintenance plan and policy

- d. System Support Contract for the Contract term
- e. Test plans and procedures for user acceptance testing
- f. System Administration manuals
- g. User manuals

All documents submitted in electronic format shall be in searchable PDF format.

Optional Features

Information and pricing provided in regard to the following optional features, to the proposed system, are for information purposes only and will not be considered as a part of the evaluations. Pricing for these options shall be provided as an attachment to the Price Schedule in Volume I, Tab C and shall be valid for one (1) year from system acceptance.

1. Using standard web browsers or mobile app.
2. Capable of responding to text messages where the user texts a stop ID, route ID, or a combination of stop ID and route ID to obtain the next three (3) scheduled times and near-real time arrival information when available.
3. Capable of recognizing QR (Quick Response) code posted on stop signs and provides schedule information, including near real-time arrival information when available and where applicable, for all routes servicing that stop.
4. Provide subscription based service for notifications related to route, stop, trip, etc.

END OF SECTION

PRICE SCHEDULE

Proposer's Name: _____

BASE YEAR			
Description	Quantity	Unit Price	Total Price
Vendor-Hosted IVR System (Software, Hardware and Implementation)	1 each	\$	\$
Hardware Enterprise License Fee	1 years	\$	\$
Software Enterprise License Fee	1 years	\$	\$
Warranty	1 years	\$	\$
Maintenance	1 years	\$	\$
TOTAL BASE YEARS PRICE			\$

OPTION YEAR 1			
Description	Quantity	Unit Price	Total Price
Hardware Enterprise License Fee	1 year	\$	\$
Software Enterprise License Fee	1 year	\$	\$
Warranty (Per Year)	1 year	\$	\$
Maintenance (Per Year)	1 year	\$	\$
TOTAL OPTION YEAR 1 PRICE			\$

OPTION YEAR 2			
Description	Quantity	Unit Price	Total Price
Hardware Enterprise License Fee	1 year	\$	\$
Software Enterprise License Fee	1 year	\$	\$
Warranty (Per Year)	1 year	\$	\$
Maintenance (Per Year)	1 year	\$	\$
TOTAL OPTION YEAR 2 PRICE			\$

OPTION YEAR 3			
Description	Quantity	Unit Price	Total Price
Hardware Enterprise License Fee	1 year	\$	\$
Software Enterprise License Fee	1 year	\$	\$
Warranty (Per Year)	1 year	\$	\$
Maintenance (Per Year)	1 year	\$	\$
TOTAL OPTION YEAR 3 PRICE			\$

OPTION YEAR 4			
Description	Quantity	Unit Price	Total Price
Hardware Enterprise License Fee	1 year	\$	\$
Software Enterprise License Fee	1 year	\$	\$
Warranty (Per Year)	1 year	\$	\$
Maintenance (Per Year)	1 year	\$	\$
TOTAL OPTION YEAR 4 PRICE			\$

SUMMARY BASE YEAR + 4 OPTION YEARS	
Base Years	\$
Option Year 1	\$
Option Year 2	\$
Option Year 3	\$
Option Year 4	\$
TOTAL PRICE	\$

Notes:

1. Unit prices proposed for the IVR system shall include all costs associated with delivery, implementation, programming and training (as required). Pricing shall also include all overhead, markups and profit, and represent the total amount payable by JAUNT. No other costs or fees will be entertained.
2. Provide the following information as an attachment to the Price Schedule:
 - a. A detailed breakdown of the IVR unit price.

- b. Number of licenses included in both the hardware and software license fees.
- c. Price per additional license above the enterprise license number.
- d. Optional Features.

The undersigned certifies that he/she is an officer or responsible executive of the above firm and is fully authorized to submit this proposal on said firm's behalf.

Company Name

Signatory Name
(Please Print)

Authorized Signature

Date

END OF SECTION

SPECIAL PROVISIONS

1. TYPE OF CONTRACT

This is a service contract. Compensation to the Contractor shall be based on the prices established in the Price Schedule; and, services in accordance with the Scope of Work.

2. PERIOD OF PERFORMANCE

The initial term of the Contract shall be up to twelve (12) months beginning with the date specified in the Notice of Award and concluding on Acceptance to complete installation, configuration and implementation of the IVR System. The Contract may be extended for four (4) additional one-year terms from the date of Final Acceptance of the IVR System.

3. OPTIONS

At the conclusion of the initial twelve (12) months term JAUNT shall have the option to extend the Contract for up to four (4) additional years on the same Terms and Conditions of the base Contract and at prices set forth in the Price Schedule for the option years. JAUNT may exercise the option by giving written notice to the Contractor within thirty (30) days prior to the date on which this Contract would otherwise expire.

4. PAYMENT

- A. Payment will only be made after receipt of a proper invoice. A proper invoice includes the purchase order/contract number, date of invoice and a description of service delivered.
- B. Mail original and one copy of all invoices to Accounts Payable, 104 Keystone Place Charlottesville, VA 22902.

5. DISADVANTAGE BUSINESS ENTERPRISE (DBE) REQUIREMENT

No DBE Goal is assigned for this solicitation.

Although no DBE goal will be imposed on the Contract, JAUNT encourages the Contractor to utilize the DBE Directory as certified DBE's do exist for contracting opportunity, although in negligible numbers. Any DBE participation on the Contract will be counted as race-neutral DBE participation.

6. DOCUMENTATION

Documentation produced by the Contractor/Consultant as a deliverable under this Contract, including but not limited to databases, reports, drawings, etc., shall be produced and submitted to JAUNT in an editable electronic format, as well as, in print form upon consultation with JAUNT.

7. SAFETY SENSITIVE INFORMATION (SSI) DOCUMENTATION

Specific documents identified as SSI are any information or record whose disclosure may compromise the security of the traveling public, transit employees, or transit infrastructure. SSI may include data, documents, engineering drawings and specifications, and other records whose disclosure could increase the agency's risk of harm. Any of these documents produced for the agency by a Contractor/Consultant must adhere to the following distribution limitation statement specified in the FTA regulation to their document before submission, **“Warning: This record contains Sensitive Security Information that is controlled under 49 CFR Parts 15 and 1520. No part of this record may be disclosed to persons without a ‘need to know,’ as defined in 49 CFR Parts 15 and 1520, except with the written permission of the Administrator of the Transportation Security Administration or the Secretary of Transportation. Unauthorized release may result in civil penalty or other Action.”**

END OF SECTION