

# **I. Introduction and Overview**

## **1.1 OBJECTIVE**

The objective of this request for proposal (RFP) is to select a vendor capable of providing a billing system to help manage the voice services for both the administrative side of the college for employee phones and for resident students. The only option Salem State College is exploring is a turnkey solution: all marketing, programming, maintenance, PIN code administration, billing and collection activities are the sole responsibility of the vendor.

## **1.2 PROJECT SCHEDULE**

Key dates for this project are described below:

March.....	Release of RFP
April.....	Vendor Proposals Due
May.....	System Demonstrations (Finalists)
June.....	Selection of Vendor
July .....	System Operational (Target Date)

## **1.3 BIDDERS INQUIRIES**

All contractual questions concerning this proposal should be referred to Evelyn Wilson, C.P.M., Director of Purchasing at (978) 542-7321.

All data transfer, operational and technical questions concerning this should be referred to Chuck Walla, Information Technology Department at (978) 542-6961. All questions regarding the telephone switch should be referred to Larry Hansen, Director of Telecommunications at (978) 542-6662.

## **1.4 PROPOSAL EVALUATION**

This process will consist of functional, technical, and cost evaluations of the proposed systems. Vendor performance in similar installations and financial stability will also be considered. Those vendors whose proposal are judged by Salem State College to best meet the requirements may be invited to present a product demonstration. During the evaluation process, the Telecommunications Department will require the availability of a vendor representative to answer specific questions.

## **1.5 Voice Services**

Salem State College currently supports our voice services with our own staff; we are responsible for end user installation, support and maintenance, this includes PBX station translations, wire plant and connectivity.

Resident student services, along with administrative and academic departments, are currently billed via a contractual arrangement with an outside vendor.

The college is currently utilizing one Lucent Technology PBX to support the voice needs of our faculty, staff and resident students. We have a Definity G3R6 and Audix.

## **1.6 Systems Integration**

PeopleSoft – Salem State College is embarking on a massive implementation of the PeopleSoft Enterprise Management System. We currently have two modules working: Student Administration and Financial Modules. Implementation of these systems will have a direct impact on whatever billing system we choose.

## **2.0 Call Accounting Requirements & Specifications**

### **2.1 GENERAL**

Vendors must describe call accounting software in complete detail. All mandatory software features must be available today. Planned future enhancements/developments should be addressed as a separate section attached to the RFP response.

The successful bidder must provide all hardware, software, conversion, installation and training services needed to provide the requirements below.

### **2.2 MANDATORY REQUIREMENTS**

- 1.) The call accounting system must interface with the College's server-based accounting system. The College's accounting system is PeopleSoft.
- 2.) The call accounting system must process, at a minimum, the following call detail information:
  - (a) originating I.D.
  - (b) digits dialed
  - (c) date and time of call origination
  - (d) duration
  - (e) authorization number (for student billing)
- 3.) The call accounting system should hold at a minimum the current month-to-date call records and the entire previous two month's call records on hard disk for on-demand reporting. An additional year of call record history must be available for easy retrieval from hard disk or secure off-line storage.
- 4.) The call accounting system must be capable of processing the College's 13-digit alphanumeric account code for debits and credits.
- 5.) The system must bill calls keyed to the local and long-distance authorization numbers/pin, and associated 4-digit extension number. Describe in detail how the proposed system handles this process.

### **2.3 DESIRABLE FEATURES:**

- 1.) The system should provide a fraud detection capability. Describe in detail fraud detection capabilities/processes and notification procedures.
- 2.) The system should provide call detail reports. Describe and provide examples of all available "canned" reports. Describe other types of reports that can be customized for or created by the College.

## **3.0 Billing Services**

### **3.1 GENERAL**

The system must be able to assign different calling rates to different entities defined within the college and bill by authorization code and/or telephone number. On-line account inquiry must be provided. The system must give the user (telcom department) the ability to create separate entities or tenants within the billing system.

#### **3.1A STUDENT BILLING**

The telephone billing process must be simple and timely. Resident students will be invoiced on a monthly basis. Invoices are to include complete call detail reporting and are to be easily read and understood.

A sample invoice for each of the venues addressed in this RFP is to be included in the response. Each student subscriber shall be solely responsible for his/her bill. Bills are to be rendered by student account number and personal identification number (PIN) for all outgoing calls.

The vendor will provide a toll-free number by which subscribers (students) can initiate billing inquiries, service and/or billing complaints. Escalation procedures shall be defined by the vendor and approved by Salem State College. A statement of policies and procedures relating to customer service, billing adjustments, etc., is to be included in the response. All invoices will be delivered to subscribers (students) by the vendor via U.S. Mail at the vendor's expense.

The vendor will provide call collection devices connected to the PBX and poll these devices on a daily basis to enable daily credit measurement and monthly reports.

The vendor will generate a monthly invoice (bill) for each student, summarizing local calls (if applicable) and detailing all long-distance calls placed for the prior month, payments received and balance due. Invoices will be mailed in bulk to Salem State for distribution ten (10) days after the end of each monthly billing cycle.

The vendor will be responsible to activate and de-activate PINs with an on/off utility effective within an agreed-upon number of hours, based upon credit limits, past due balances and payments made. Salem State will provide the successful vendor dial-in access to PBX and assign a password to administer authorization codes.

The vendor shall be responsible for all collections, past due notices, contacting students and de-activating PINs and follow-up collection procedures.

The vendor will provide monthly administrative chargeback reports indicating by "chartfield," department and extension, the details of calls placed and the charges associated with those calls. These reports are to be provided electronically and in a disk format. Your system must be able to download into PeopleSoft.

### **3.1B ADMINISTRATIVE BILLING / REPORTING**

Each vendor is asked to provide pricing for supplying administrative department billing detail.

- The administrative chargeback report should provide three levels of detail:
  - a) College Summary – provides a synopsis of all telecommunication charges by chartfield/department.
  - b) Departmental Summary – reports all charges associated with individual users within a given department.
  - c) Account Detail – provides an itemization of all charges by either station number or authorization code (PIN).

### **3.2 ACCOUNT FILE**

Accounts within the billing system must be accessible by Chartfield number, authorization code (PIN) or telephone number. On-campus, and home addresses (a total of two) must be stored for each student account and must be able to be invoked as the “mail to” address by authorization code (PIN) number.

The account balance including month to date, current, 30-day, 60-day and 90-day balances must be stored and readily available for reporting purposes. The system must store the last date on which an account was billed.

The system must store the last date a payment was received for an account. The system must provide a method to change the student ID and/or chartfield number during the billing cycle and yet process the bill for the entire billing cycle.

### **3.3 DELINQUENCY PROCESSING**

The College requires that the vendor be capable of tracking and reporting on delinquent accounts. The following features are required:

In order to insure against fraud, the vendor’s system must require that students provide a valid credit card.

A report of all accounts exceeding a balance defined by the College must be provided at agreed upon intervals.

The vendor’s system must have the ability to change the “class of service” of an account authorization (PIN) code for those accounts that have exceeded their credit limit or that have reached the delinquency level. When an account has returned to normal status, the system must be able to reverse the “class of service” change. A reliable response time for re-activating student accounts must be assured.

The vendor’s system should have the ability to generate a monthly file containing selected account information for all accounts that have been delinquent for 90 days. What is your response time to re-activate a student account?

### **3.5 BILLING ARRANGEMENTS**

The vendor shall show proof of billing arrangements with MasterCard, Visa, American Express and any other agreements held.

## **4.0 Marketing & Promotion**

Marketing and promotion is the responsibility of the vendor but will not proceed without the approval and optional participation of Salem State College. The vendor will include example(s) of prior effective marketing, promotion and subscriber recruiting plans.

The vendor will advertise and solicit for enrollment to this service. The vendor shall be represented at all resident hall orientation sessions for new students. Our Residence Life Office will provide a list of students by dorm and room location. The vendor is expected to submit a marketing plan to Salem State College at least sixty days prior to the beginning of each fall semester.

### **4.1 LOGOS**

The use of the Salem State College logo for bills, letterhead, uniforms, vehicles and other such items must be approved by Salem State College Publications Office.

## **5.0 Service Specifications**

The vendor must have on-campus representative(s) available during the school year to market the services and address billing issues with the student subscribers. Please provide your company's commitment to on-campus availability.

## **6.0 Security Requirements**

System security is of paramount importance to the College. The vendor is asked to provide necessary network/PBX security interface requirements, also include definition as to how authorized and unauthorized calls are being identified (toll fraud security) and the method used for providing authorization code control.

In addition, the current Verizon network restrictions are in place. These would include:

- Collect Call Restrictions
- Bill to Third Party Restrictions
- Billed Number Screening Requirement

In addition, "976" and "900" calls are blocked by our switch.

## **7.0 Additional Services**

This RFP is purposely written in such a way as to encourage proposers to identify, explicate and recommend additional services. Salem State College will entertain material relating to other services that may positively impact our resident students. Such materials should be included in the response as a separate attachment.

## **7.1 BILLING ARRANGEMENTS**

Operational Service to our resident students at Salem State will be required on July 1, 2002.

## **7.2 CUSTOMER SERVICE**

Please describe in detail how you propose to address the following customer service issues:

- Policies, practices and time frame for handling billing disputes
- Methods of handling service disconnects for exceeding credit limits, non-payment of bills, fraud or move-outs
- Time frames for reconnecting service
- Policies, practices and time frame for issuing tardy notices
- A customer service center must be available for student inquiries. Please provide the hours of operation your center is open per day/per week (Eastern Time).
- Does your company provide a web site as an alternative to access a student's account?

## **8.0 Financial Reporting**

### **8.1 DOCUMENTATION**

It is important that complete documentation and financial integrity be maintained for the revenue and expense aspects of the plan. Please provide complete detail as to how this information will be maintained and provided to the College.

### **8.2 CONTRACT PRICING AND BILLING SERVICES**

Please provide any special contract pricing programs that are available and this also includes the provision of your billing services.

### **8.3 CONTRACT PRICING AND BILLING SERVICES**

How are student payments transferred to Salem State College?

## **9.0 Bidding Requirement**

The only option Salem State College is exploring is a turnkey solution all marketing, programming, maintenance, PIN code administration, billing and collection activities are the sole responsibility of the vendor.

## **10.0 Required Paperwork / Salem State College**

Forms: Commonwealth of Massachusetts Terms & Conditions  
Commonwealth of Massachusetts Standard Contract Form  
Workers' Specifications  
Affidavit of Compliance  
W-9 Certificate of Insurance

## **11.0 Vendor Response / Company Profile**

### **11.1 VENDOR INFORMATION**

Please provide the following information about your company:

A brief history of your company, including when and where it was founded, where it is headquartered, location of regional offices, other businesses engaged in, length of time in the higher education telecommunication business.

A statement of escalation procedures, including executive contact names, addresses, telephone numbers and e-mail addresses accessible to Salem State College management personnel.

Please provide no fewer than three customer references of similar size and environment where the proposed system is in use. Include contact name and telephone number. Is your product installed at any other (state) college or university?

### **11.2 SERVICE BEING PROPOSED**

Provide a brief outline of the services you are offering to provide in response to this RFP response. Vendors are required to provide all services outlined in this RFP. We are open to a creative response to this RFP and are looking for a solution that best fits Salem State College's needs. Be sure to include sufficient detail in all areas to enable the college to perform the necessary comparative analysis.

## **12.0 Terms & Conditions**

In order to assess a vendor's proposal, the following terms and conditions must also be provided:

Term of the agreement will be for four (4) years commencing July 1, 2002 through June 30, 2005, with two (2) renewable one-year options.

## **13.0 Operational Cost**

The systems and infrastructure as well as the administration of services to be provided in this RFP will have operational and underlying costs. The vendor must detail all costs associated to provide the services requested within this RFP.