

TABLE OF CONTENTS

SECTION 1, INTRODUCTION AND OVERVIEW	1
1.1. PURPOSE OF THIS REQUEST FOR PROPOSAL	1
1.2. SCOPE OF THE RFP AND ADMONISHMENTS.....	2
1.3. VENDORS' CONFERENCE.....	6
1.4. AVAILABILITY	6
1.5. PROCUREMENT OFFICIAL.....	7
1.6. PUBLIC INPUT	8
1.6.1. DDTP Public Contact	11
1.6.2. Public Key Action Dates.....	12
1.7. VENDOR KEY ACTION DATES	12
1.8. INTENTION TO BID.....	15

SECTION 1 INTRODUCTION AND OVERVIEW

1.1. PURPOSE OF THIS REQUEST FOR PROPOSAL

The Deaf and Disabled Telecommunications Program (DDTP) has issued this Request for Proposal (RFP) for the acquisition of outsourced Telecommunications Relay Service (TRS) serving Californians, known as the California Relay Service (CRS). It is the intent of the DDTP that this RFP be awarded in three (3) separate parts:

1. A single Network Services (NS) vendor who will provide inbound 800 number service, outbound long distance service, and consumer billing service.
2. Up to four vendors who will each provide relay Call Center Services (CCS) and at the vendor's option, may also provide outbound long distance service with consumer billing.
3. A single vendor who will provide Network Management Services (NMS).

Although vendors may elect to bid on any or all of the three service components, a vendor awarded a contract for Network Management Services will not be awarded a contract for Network Services or Call Center Services. A vendor may be awarded both Network Services and Call Center Services, although under separate contracts. See RFP Section 9.4.6. for information on how awards will be decided if a bidder is qualified to receive awards for the NMS component and the NS and/or CCS component(s).

The DDTP has determined that it is best to issue a single RFP containing the three service components of the CRS rather than three RFPs, one each for NS, CCS and NMS. It is hoped that by doing so, each prospective vendor will more readily see how the components of the DDTP's required services are intended to work together. It is also hoped that by incorporating the components into a single RFP, prospective vendors capable of providing all components may better assess their opportunities when determining how best to respond. The DDTP may elect to make awards as a result of this RFP for any or none of the three service components. The DDTP shall be free to obtain required services in any manner necessary. Failure to award from this RFP in any component will not, in and of itself, cancel proposals and awards in any other component.

1.2. SCOPE OF THE RFP AND ADMONISHMENTS

IF YOU OBTAINED A COPY OF THIS RFP WITHOUT REGISTERING WITH THE DDTP, AND IF YOU WISH TO RECEIVE UPDATES (ADDENDUMS) TO THE RFP AND RELATED CORRESPONDENCE AS THEY ARE ISSUED, YOU MUST REGISTER WITH THE DDTP AS FOLLOWS:

Consumers and non-bidding consumer organizations should register with the DDTP Contact Person listed in RFP Section 1.6.1.

Vendors and potential bidders should register with the DDTP CRS Procurement Official listed in RFP Section 1.5.

The letter should identify the name of the person to receive information, the name of the consumer organization or bidding firm if applicable, the mailing address to receive official RFP correspondence, a voice phone number and/or TTY number, a fax number if available, and email address if available. There is to be only one (1) contact person per consumer organization or prospective vendor per bidding component (NS, CCS, or NMS).

In addition, when vendors have decided that they wish to continue to receive RFP information as potential bidders, they must re-register their intent to bid as described in RFP Section 1.8.

This RFP is addressed to potential bidders. It contains the instructions to vendors governing the requirements for responding to each of the three service components, the format in which bid information is to be submitted and the material to be included therein, the requirements that must be met to be eligible for consideration, and the proposer's responsibilities before and after implementation.

This procurement will follow a phased approach designed to increase the likelihood that Final Proposals will be received without disqualifying defects. The additional steps are designed to: 1) ensure that proposers clearly understand the DDTP's requirements before attempting to develop their final solutions; 2) ensure that the DDTP clearly understands what each proposer intends to propose before those proposals are finalized; and 3) give the DDTP and each proposer the opportunity to discuss weaknesses or potentially unacceptable elements of a bidder's proposal and give each bidder the opportunity to modify their proposal to correct such problems. It is very important that bidders understand the importance of the details of each step. Specific information regarding such steps is found in Section 2 Rules Governing Competition, in Section 8 Proposal Format, and Section 9 Evaluation.

IF A VENDOR EXPECTS TO BE AFFORDED THE BENEFITS OF THE STEPS INCLUDED IN THIS RFP, THE VENDOR MUST TAKE THE RESPONSIBILITY TO:

- Carefully read the entire RFP;
- If clarification is necessary, ask appropriate questions in a timely manner;
- Submit all required responses, complete to the best of their ability, by the required dates and times;
- Make sure that all procedures and requirements of the RFP are accurately followed and appropriately addressed; and,
- Carefully reread the entire RFP before submitting proposal(s).

This RFP is divided into eleven sections. A brief synopsis of these sections follows. This synopsis is for the convenience of the reader and is not intended to be all-inclusive. Bidders are still cautioned to read the entire RFP.

Section 1, Introduction and Overview

This section provides a general overview of what the RFP is about, dates that bidders must respond to, and who to contact at the DDTP for information and to submit proposal information.

Section 2, Rules Governing Competition

This section established the rules under which the bids will be conducted. Information is presented about: RFP and bidding requirements; bidding steps including the three principal proposal steps of Conceptual Proposals, Draft Proposals and Final Proposals; confidentiality; submission, evaluation, rejection and award of proposals; protests; and other information.

Section 3, Existing Services

This section describes the existing California Relay Services that are provided under contract by MCI and Sprint, including call volumes, types of calls, reimbursement, mandates, and so forth. This section also includes references to numerous web sites with information directly related to relay services that are very important for bidders to understand.

Section 4, Proposed Services

This section provides a general narrative overview of the new relay services that are envisioned as a result of this bid, and of the three components of CRS and how they will work together. The three components that may be separately bid are: 1) network services, 2) call center services, and 3) network management services. This section also describes the overall scope of CRS and possible future impacts that may affect this opportunity.

Section 5, Administrative Requirements

This section lists specific administrative requirements that all bidders must meet. These include: requirements for customer references; financial and other resources; bonding requirements; subcontractors and employment considerations; confidentiality of data; and other requirements.

Section 6, Technical Requirements

This section contains an extensive list of detailed specifications that must be responded to by bidders of each of the three components of the envisioned California Relay Services. These detailed specifications are in support of, and not in lieu of, the narrative description of services presented in RFP Section 4.

Section 7, Costs

This section describes how bidders of each of the three service components need to bid their costs for providing their service. This section also provides a limit on the amount bid by the call center bidders.

Section 8, Proposal Format

This section describes how bidders' proposals must be organized, the number of copies required, and so forth, for each of the three principal proposal submissions: Conceptual Proposals, Draft Proposals and Final Proposals.

Section 9, Evaluation

This section describes how proposals will be evaluated and scored.

Section 10, Validation and Traffic Allocation

This section provides information on 1) how a bidder's claims may be verified through a demonstration; 2) how the awardees' proposed services will be tested by the DDTP prior to being allowed to go into service; 3) how awardees may be periodically monitored for performance; and 4) how portions of CRS traffic may be allocated among awarded call center vendors as a result of final proposal evaluation, demonstration, acceptance testing and periodic monitoring, as well as traffic allocation during the transition period at the start and end of the contract period.

Section 11, Model Contracts

This section contains the contract language that the DDTP expects to use in awarding each of the three CRS service components: 1) Network Services model contract, 2) Call Center Services model contract, and 3) Network Management Services model contract. This section also describes the process by which bidders may submit requests for minor changes to the model contract language, and how they shall submit the final contracts.

1.3. VENDORS' CONFERENCE

A vendors' conference will be held at the time and place shown below. **All potential bidders are strongly encouraged to attend.** The DDTP will present an overview of the California Relay Service bid opportunities, bidding requirements and service requirements, and will

respond to questions. Questions may be submitted in advance to the Procurement Official listed in RFP Section 1.5. by the appropriate date listed in the vendor key action dates in RFP Section 1.7. Questions from the floor will also be responded to as time allows. ASL interpreters and real-time captioning services will be provided by the DDTP.

Date & Time: October 30, 2001, 10:00 AM

Location: The Auditorium of the Elihu Harris State Office Building
1515 Clay Street, Room 113
Oakland, CA 94612

The Auditorium will be open one hour before the conference begins to allow potential vendors and subcontractors to meet. No services will be provided by the DDTP in this regard.

1.4. AVAILABILITY

The awarded period of CRS service from the in-service/cutover date listed in RFP Section 1.7 shall be three years with two additional one-year periods each awarded at the sole discretion of the DDTP, plus if necessary a single extension of up to one-hundred-eighty days added to the end of any one of the other periods which shall also be awarded at the sole discretion of the DDTP. Therefore Final Proposals made in response to this RFP shall be binding offers to provide service for up to the total possible five years and six months, with the exception that CCS bidders may decline awards if their projected call volume, as determined or verified by the DDTP, will initially be ten percent or less of the total CRS call volume (see RFP section 2.5.9.(5.)). If at any time during the contract period the DDTP has less than four CCS providers, the DDTP reserves the right to award additional CCS contracts up to a total maximum of four CCS providers serving CRS, without requiring the existing CCS providers to re-bid. The offer of award to such additional CCS provider(s) may be to the next most qualified compliant CCS bidder(s) as a result of this RFP as determined by the evaluation of final proposals and as may be modified prior to the offer(s) by demonstration(s) to verify capabilities as described in RFP Section 10.1., and/or may be awarded as a result of a new solicitation for services. New CCS entrants would compete with established providers for CRS traffic including non-customer designated CRS traffic via participation in the ongoing

allocation of such traffic as described in RFP Section 10.5. New CCS entrant provider contracts may, at the option of the DDTP, be coterminous with existing CRS CCS contracts.

1.5. PROCUREMENT OFFICIAL

The DDTP Procurement Official and the mailing address for vendors to request a copy of the RFP, or to send proposals, questions, or copies of protests are:

Mr. Bill Stobbe of Hesse, Stobbe & O'Sullivan, LLC Voice: (916) 446-5624
c/o The Deaf and Disabled Telecommunications Program TTY: (916) 446-3577
505 14th Street, Suite 400 Fax: (916) 446-5809
Oakland, California 94612 Email: bstobbe@hesse-stobbe.com
stobbe.com

With the exception that Final CCS Proposals shall be sent to:

Mr. Bill Stobbe, CRS RFP Procurement Official
Hesse, Stobbe & O'Sullivan, LLC
428 J Street, Suite 340, Sacramento, CA 95814.

Note that all proposals must be delivered in paper format, per instructions in RFP Sections 2 and 8.

1.6. PUBLIC INPUT

The DDTP encourages public consumer input about this CRS procurement and has established a special process to ensure that consumer input will be heard and considered. The public is invited to participate in the following activities as indicated below. Dates associated with these activities are shown below in RFP section 1.6.2.

Release of the RFP

Upon its official release, the RFP is made public. The RFP and its updates can be downloaded from the DDTP's web site (www.ddtp.org), and paper copies are available to pick up at the DDTP's Oakland office or can be mailed upon request. Requests from the public, i.e., not vendors, should be made to the public contact person listed in RFP section 1.6.1.

Written public input

The DDTP will accept public input during a two-month period, from 8/17/01 to 10/16/01. All questions and comments should be sent (via mail, email or fax) to the public contact person listed in RFP section 1.6.1. The DDTP will try to address questions and comments received by 9/11/01 at two public consumer meetings.

Public consumer meetings

The DDTP will hold two meetings for consumer input approximately one month after the RFP is released. One meeting will be held in Northern California and one will be held in Southern California. At these meetings the DDTP will present an overview of the new CRS procurement plan, and will solicit consumer input on the RFP, on CRS service quality measurements, and on the CRS customer profile process.

The public consumer meeting in Northern California will be held:

On: Tuesday, September 18th, at 6:00 PM

At: Newark-Fremont Hilton

39900 Balentine Drive

Newark, California, 94560

TTY: (510) 490-8390 via CRS

Phone: (510) 490-8390

The public consumer meeting in Southern California will be held:

On: Wednesday, September 19th, at 6:00 PM

At: The Greater Los Angeles Council on Deafness (GLAD)
Auditorium

2222 LaVerna Avenue

Los Angeles, Calif. 90041

TTY/Phone: (323) 478-8000

CRS service quality measurements

CRS service quality is of the highest importance to the DDTP. Therefore, the DDTP is especially desirous to receive consumer input during the public comment period from 8/17/01 to 10/16/01. This comment will be reviewed and considered by the DDTP RFP Subcommittee to determine if any changes are needed to the RFP.

In addition to the measurement of potential quality services as reflected in the bidders' proposals (see RFP section 9.4), this RFP sets up a process to measure the quality of relay service on an ongoing basis after the new contracted relay services begin. This RFP requires the DDTP's California Relay Service Advisory Committee (the CRSAC) to develop CRS quality measurement and testing guidelines and to approve all test call plans and measurement criteria before testing actually begins (see RFP section 10.4.) The CRSAC is a consumer-dominated committee that meets publicly once a month. (For dates and times see the DDTP's web site or contact the DDTP office.) CRS consumers are welcome to provide public input to the CRSAC at any time.

Public input to CRS customer profile process

The DDTP is desirous that the customer profile process (described in general in RFP sections 4.2 and 4.8.4, and in detail in RFP section 6.4.6.) meets consumer needs. CRS consumers will not be required to fill out a customer profile form in order to place or receive CRS calls. The opportunity to establish a profile is provided only as a convenience to allow consumers to pre-register their individual call handling choices, including relay vendor of

choice, long distance company of choice, and specific call handling features (for example, VCO, typing background noises, etc.) Callers will also be able to tell relay providers their preferences during live call set up. Nevertheless, for those consumers that may wish to establish profiles, the DDTP is interested in consumers' viewpoints regarding how profile forms may be made available, and the procedures to initiate or change their profiles. Therefore, the DDTP encourages the public to provide comments to the DDTP public contact person listed below in section 1.6.1. and at the public meetings listed above.

Public access to the DDTPAC's award discussion, vendor proposals and the evaluation report

The DDTP is required to follow the procurement process established by the government of the State of California. This process protects the confidentiality of vendors' proposals by prohibiting public access to vendors' proposals, to proposal evaluation meetings and minutes, and to evaluation documents and reports, while the evaluation is in process. Therefore, with the exception of the vendors' conference, the procurement process is closed to the public. Only the RFP and changes to it (issued as addenda) are public. After the DDTPAC's evaluation team (the CRS RFP Subcommittee) issues its evaluation report to the DDTPAC, the DDTPAC will hold a meeting to discuss the evaluation report's findings and to vote on the report's award recommendations. This DDTPAC meeting will be open to the public. Upon the DDTPAC's resolution to award (expected at that meeting) the vendors' proposals, proposed contracts, the evaluation report, and supporting material will become public record and available for viewing at the DDTP.

CPUC review (includes public input)

The proposed contracts between the vendors and the DDTP will need to be approved by the CPUC prior to them becoming effective. After the DDTPAC's resolution, a copy of the proposed contracts and supporting material will be forwarded to the CPUC for review and approval. The CPUC's review and approval process includes a period of public comment.

1.6.1. DDTP Public Contact

All questions and comment from the public (i.e., not from bidding vendors) should be sent to the DDTP public contact person listed below. Public questions and comment will not be directly responded to. Instead it will be presented to the CRS RFP Subcommittee for consideration. The CRS RFP Subcommittee is the DDTPAC's working committee that 1) has developed the CRS RFP, 2) may continue to modify the RFP in response to public, vendor and DDTP input, and 3) will evaluate the vendors' proposals.

The contact person to receive all public questions and comment is:

Mr. David Weiss, CRS Contract Manager
The Deaf and Disabled Telecommunications Program
505 14th Street, Suite 400
Oakland, California 94612
TTY: (510) 302-1114

Voice: (510) 302-1100 (use CRS: 800-735-2922 for MCI or 888-877-5379 for Sprint)
Fax: (510) 302-1130
Email: dweiss@ddtp.org

1.6.2. Public Key Action Dates

The following key action dates are for the public only, i.e., not for bidding vendors:

1. Release of RFP (the RFP is made public)8/17/01
2. Last day for the public to submit questions or comments prior to the public consumer meetings9/11/01
3. Public consumer meeting, Northern California9/18/01
4. Public consumer meeting, Southern California9/19/01
5. Public input to CRS service quality measurements 8/17/01 –10/16/01
6. Public input to CRS customer profile process8/17/01 –10/16/01
7. Last day for the public to submit input for consideration prior to the vendors’ conference10/16/01
8. DDTPAC meeting (open to the public) and subsequent public access to proposals, proposed contracts, evaluation report and supporting material 7/9/02
9. Notice of Intent to Recommend Awards and public access to all proposals7/9/02
10. CPUC review (includes a period for public input) 7/19/02 – 10/17/02

Note that the dates for items 8 through 10, above, may change. If any of the above dates change, the change will be posted on the DDTP’s web site.

1.7. VENDOR KEY ACTION DATES

The following key action dates are for bidding vendors only, i.e., not for the public:

1. Release of RFP8/17/01
2. Vendors’ last day to submit questions for clarification of RFP before the vendors’ conference10/16/01
3. Vendors’ conference10/30/01
4. Vendors’ last day to submit letter of intent to bid and

- confidentiality statement (Exhibit 5A).....11/29/01
- 5. Vendors' last day to submit Conceptual Proposal.....11/29/01
- 6. Vendors' last day to submit proposed contract and financial responsibility information.....11/29/01
- 7. Confidential Discussions with individual vendors.... 1/7/02– 1/22/02 #

- 8. All vendors' last day to finalize proposed contract language .7/12/02
- 9. Last day for NS and NMS vendors to submit final questions for clarification of the RFP prior to submittal of the NS and NMS Draft Proposals.....7/12/02
- 10. Last day for NS and NMS vendors to request a change in the RFP7/19/02 *
- 11. Last day for CCS vendors to submit final questions for clarification of the RFP prior to submittal of the CCS Draft Proposals7/25/02
- 12. Last day for NS and NMS vendors to protest the RFP (see Section 2.9.1. on Protests)7/26/02
- 13. Last day for CCS vendors to request a change in the RFP 8/1/02 *
- 14. Last day for CCS vendors to protest the RFP (see Section 2.9.1. on Protests)8/8/02
- 15. Vendors' last day to submit NS and NMS Draft Proposals.5:00 PM, 8/12/02
- 16. Vendors' last day to submit CCS Draft Proposals ..5:00 PM, 8/22/02
- 17. Vendors' last day to submit all Final NS and NMS Proposals...5:00 PM, 10/09/02
- 17. Vendors' last day to submit revised NS and NMS Pricing..... 3:00 PM, 12/31/02
- 17. Vendors' last day to submit all Final CCS Proposals ..1:00 PM, 10/28/02
- 18. Vendors' demonstration of requirements 11/20/02 – 11/29/02 #
- 19. DDTPAC approval of evaluation recommendations1/7/03
- 20. Notification of Intent to Recommend Awards.....1/7/03
- 21. Vendors' last day to protest selections1/15/03
- 22. DDTP submittal of Recommendation to Award to the CPUC..1/7/03

- 23. CPUC Award Decision 4/18/03 **
- 24. Contract Awards and Execution..... 4/21/03 **
- 25. Last day for vendor to submit Notice of Readiness and Plan for
Acceptance Testing:
 - NS vendor.....9/8/03
 - NMS vendor (phase 1)9/22/03
 - CCS vendors.....10/6/03
- 26. Acceptance Testing:
 - NS vendor.....9/15/03 – 11/14/03
 - NMS vendor (phase 1)9/30/03 – 11/14/03
 - CCS vendors.....10/15/03 – 11/14/03

27. In-Service/Cutover dates for live CRS calls:

NS vendor.....	10/29/03
NMS vendor (phase 1)	10/29/03
CCS vendors.....	10/29/03

Exact dates will be provided to each bidder.

* Or five (5) days following the last addendum that materially changes the requirements of the RFP. See Section 2.2.4., Questions Regarding the RFP.

** Dates for items 23 and 24 are estimates.

1.8. INTENTION TO BID

Vendors wishing to participate in the RFP must submit written notification of their intention to propose on this procurement in accordance with Section 2.2.6., Vendor's Intention to Bid, in order to receive additional information. Only those vendors acknowledging interest in the RFP will receive further correspondence regarding this procurement after the Vendor Key Action Date item # 4 listed in Section 1.7. Vendors should submit their letter of Intent to Bid as soon as possible. The letter should identify the name of the bidding firm, the address to receive official correspondence, a contact person for the correspondence, a telephone number, TTY number if available, fax number, email address and which RFP component being bid on (i.e., network services (NS), call center services (CCS), or network management services (NMS).) There is to be only one (1) contact person per prospective vendor per bidding component (NS, CCS, or NMS) during the procurement process. Information related to a vendor will only be given to the designated contact person. The letter should also contain a signed Confidentiality Statement as illustrated in Exhibit 5A of Section 5, Administrative Requirements.