



Date: September 16, 2024
To: All Vendors
Subject: Addendum #2

REFERENCE: P066-24 Phone System for Brownsville PUB

This Addendum forms part of the contract and clarifies, corrects or modifies original proposal document.

Question 1: The document states that the "Selected Firm will need to follow BPUB stated security requirements and confidentiality agreements pertinent to handling customer and security information". Please provide this for our review.

Answer 1: The Non-Disclosure Agreement is included in the RFP document, Page 15.

Question 2: One of the requirements is to complete the Data Security Questionnaire; however, this has not been provided. Can you please provide the relevant document or confirm that this is not a requirement for this RFP submission?

Answer 2: Attached is the Data Security Questionnaire. USA Data Centers must be used and they will be subject to be monitored by BPUB's Cyber Security Scorecard application.

Question 3: The Conflict of Interest Questionnaire within the document is an inserted image. Can you please provide an editable version so that it can be completed appropriately and included in the submission?

Answer 3: Attached is the Conflict of Interest Questionnaire in pdf format.

Question 4: Within the Scope of Work section, we have noted the "Additional options" section; please confirm whether these are phase one requirements or future state second phase 'nice to have options'.

Answer 4: The additional options are Phase 1 requirements. The ability to provide additional options will be taken into consideration when selecting a vendor for this RFP.

Question 5: What is the minimum number of active callers the system should handle?

Answer 5: The minimum number of active callers is 115 and the maximum is 184.

Question 6: Could you please assist in clarifying whether the following points are all dealbreakers? 6g – Screen Record; 6h – Email integration; 9 – System should integrate with Harris/Cayenta; 13 – Buy back for CISCO phones.

Answer 6: Response is as follows:

6g – screen record – Must have the ability to screen record. This is and will be a critical quality assurance function.

6h – Email Integration – Integration with Microsoft Exchange servers

9 – System should integrate with Harris/Cayenta – The IVR must integrate with InvoiceCloud/Milsoft. Otherwise, it will need to integrate with Cayenta, so the virtual agent can access customer information and balances, etc.

13 – Buy back for CISCO phones – BPUB is willing to sell the phones that cannot be reused.

Question 7: Can you provide more explanation on what these points mean?

6i – support virtual lines; 18 – scripts, does this mean actual scripts or call flows; 11 – mass messaging.

Answer 7: The answers are as follows:

6i - Call Center relies on soft phones with wireless/wired headset

18 – scripts – replicate existing scripts and call flows

11 – mass messaging - System should be able to send out mass text communications to customers. This functionality may then replace existing software such as Everbridge.

Question 8: Clarify these points in “Additional Options”.

1 – virtual agent AI; 2b – InvoiceCloud

Answer 8: The answers are as follows:

1 – virtual agent AI - This is a phase 1 requirement. Either a web crawler or virtual agent is required to assist customers via chat 24/7 from our webpage. Assist with functions such as answering basic BPUB questions, balance inquiries, procedures, etc.

2b – InvoiceCloud - InvoiceCloud is BPUB’s payment processor for all online and IVR payments.

Question 9: Is the Virtual Agent and Web Crawler required natively or is it acceptable if the solution can integrate with a 3rd party for this functionality?

Answer 9: Vendor must submit ability to provide either one of the above-mentioned solutions.

Question 10: Are native WFM and forecasting abilities required or is it acceptable for the solution to integrate with a 3rd party for this functionality through API's?

Answer 10: Vendor must submit ability to provide either one of the above-mentioned solutions.

Question 11: “System should be able to integrate with current Customer Information system (Harris/Cayenta).” Can you clarify what level of integration you are looking for? Example: screen pop record to agent, read/write capabilities back to the system, etc.?

Answer 11: BPUB is interested in read/write capabilities.

Question 12: Software should be able to forecast call volume based on historical data – Is Workforce Administration SW a requirement for the scheduling, forecasting, & adherence of the Agent?

Answer 12: Yes, it is a requirement.

Question 13: Is the requirement of a minimum of 50 agents based on a concurrency model or named? Concurrency is defined as number of agents on the phone at the same time. Named is defined as number of Agents enrolled in the system and capable of calls.

Answer 13: The 50 agents are named.

Question 14: System should be able to integrate with current Customer Information system (Harris/Cayenta) – Define options on integration with Cayenta? Open API, Webservices, etc.?

Answer 14: BPUB prefers an API connection; however, not an open API.

Question 15: Teleconferencing capabilities should be available – Please provide use case or workflows detailing the Teleconference requirement.

Answer 15: Teleconferencing capabilities should be similar to a WebEx type of platform.

Question 16: Mass messaging and communications for both internal and external customers – What is the preferred channel of communications for this mass messaging? What is the scope of volume for this requirement? Define the use cases for this feature (outage, disaster, etc.).

Answer 16: The preferred channel of communications for mass messaging could be for general, outage and/or disaster communication via text.

Question 17: Are there any current AI initiatives or use cases BPUB is interested in?

Answer 17: BPUB is interested in a web based virtual agent that customers can utilize to answer questions, such as, payment and account inquiries, etc.

Question 18: Are end customer-based surveys a requirement?

Answer 18: Yes, they are vital to BPUB's QA/QC process.

Question 19: Concerning the request for Chatting – what platforms and quantity? Is this internal chatting between agents or texting to customers?

Answer 19: Currently internal chatting between agents is done via Cisco jabber or Cisco Webex. A platform is needed so customer service representatives can chat with customers.

Question 20: On the Mass notification request, item 11 on the RFP, please clarify what you mean by Mass Notification.

Answer 20: Correspondence to all customers or targeted to specific customers.

Question 21: Are you still using the Voice Gateways for analog devices? If so, how many and what Cisco model number are these current Voice Gateways? Are these centrally located or dispersed?

Answer 21: BPUB uses 10 gateways (VG224 & VG320 Models). Gateways are dispersed.

Question 22: Section E.2 – “Must complete attached Data Security Questionnaire.” Is there a separate document for the Data Security Questionnaire that was not included in the RFP document?

Answer 22: See answer #2 above.

Question 23: Required Forms Checklist – Are we required to complete and return any (or all) of the items listed in the “Special Instructions” row?

Answer 23: The Proposal Cost Sheet listed in the Special Instructions section is the only form that must be completed, signed and returned with the RFP response, as well as the remaining forms that are attached in the RFP (Pages 21-28).

Question 24: Format and Section of RFP – Item B – Please clarify further what is meant by Disclosure Requirements.

Answer 24: Disclosure requirements is the release of information related to the products offered or any conflict of interest that will assist the team in the evaluation of the RFP response. In addition, a non-disclosure agreement will need to be completed.

Question 25: Instructions to Participating Firms – Item 7 – Please clarify what is meant by a “personal representative with binding authority for the company”. Can this be the Project Manager or does it need to be an actual executive of the company? Please clarify what kind of transactions this person will be assisting with and coordinating.

Answer 25: The Project Manager can be the representative for the company. This person will assist BPUB with any concerns with the products should the need arise.

Question 26: Is Office365 / Microsoft Teams currently BPUB’s Unified Communication & Collaboration solution for Chat, Web Conferencing, and Collaboration? If not, please describe your collaboration tools for chat (instant messaging and web / meeting room conference)?

Answer 26: Currently BPUB does not have an EA for Office 365/Teams. BPUB uses Cisco WebEx as their tool for web conferencing and collaboration.

Question 27: Will there be licensing requirements to create a full solution for BPUB? Could details of current Cisco, Microsoft or Zoom licenses be provided?

Answer 27: Yes, additional licensing requirements may be needed to create a full solution for BPUB. BPUB only has a 50-user license for WebEx.

Question 28: Does a persona spreadsheet exist to help determine the different phone types and counts?

Answer 28: This information has already been provided with the original RFP, phone count and phones per location.

Question 29: To select the right solution, more detail on the four-digit dialing is needed. Complexities include extensions that do not correlate with DIDs or a large number of non-contiguous DIDs. Could you provide a spreadsheet with the complete list of DIDs or at least details on the current blocks of numbers?

Answer 29: Main block of DID's is 956 983-6100 to 6799; another block of DID's is 956 214-4000-4099.

Question 30: What is the estimated number of call center scripts, and hunt groups?

Answer 30: The system is using approximately 20 different scripts to carry out different functions.

Question 31: Call Center, number 6c. Software should be able to forecast call volume based on historical data. Can BPUB provide more details around the types of reports that you are looking for? Is it basic reports such as # of calls, # successful calls, # failed calls or is BPUB looking for something more complex such as AI-base or workforce management analytics?

Answer 31: BPUB is looking for the basic information and workforce management analytics.

Question 32: Call Center, number 6g. Call / Screen recording and skills-based call routing. Please describe the call / screen recording requirements in more detail?

Answer 32: Vendor should be able to record all calls including screens utilized by agents.

Question 33: Call Center, number 6i. Support virtual lines or headsets as they have now. Please define Virtual lines in more detail?

Answer 33: Customer service agents will be using soft phones with either wired or wireless mic/headsets. Physical phones will not be needed.

Question 34: Additional Options, number 1d. Virtual agent must be able to retrieve information from the Utilities website and applications? Does all of the BPUB website and applications support or publish APIs for integration? Can you provide a list of applications? Will any 3rd parties be assisting with the Integration of the website or applications?

Answer 34: Yes, BPUB's website and social media accounts support API. We use WordPress, which supports API integrations. No third parties will be assisting with integrations at this time.

Question 35: Additional Options, IVR 1b. Must be able to interface with other IVR services, such as InvoiceCloud and Milsoft/OMS (Outage Management System)? Please provide more details on the level of integration. Is BPUB looking to pass calls between the Proposed Vendor's IVR to these Cloud based 3rd party solutions or are you looking for application or API integration.

Answer 35: Currently, BPUB does not have an Outage Management System. Interfaces should be able to communicate to InvoiceCloud via API integrations. When customer calls and is given the

option to make payment over the phone, it sends customer directly to Payment processor, InvoiceCloud.

Question 36: We are counting a total of 600 internal lines. Is 600 the total license count? How many lines are for end users? How many lines are for common area devices (breakrooms, conference rooms, etc.)?

Answer 36: All 600 are distributed as needed.

Question 37: Is 1000 the total DIDs are in current inventory? How will you need to port over?

Answer 37: The total number of DIDs is 700; the port-over manner will be a management decision.

Question 38: Can you provide how many phones will be needed by user type? Common Area device (breakroom), Knowledge Worker, Receptionist, Conference Phone, Executive Phone, and WIFI enabled phones by type.

Answer 38: The list of phones and types were included in the initial RFP document.

Question 39: If new phones must be purchased, do you have a preference between Yealink and Poly?

Answer 39: Cisco has been the brand BPUB uses; other brands must be management-approved.

Question 40: Do you have multiple internet service providers in your data center? Do you have last mile resiliency?

Answer 40: Yes, BPUB has multiple internet service providers at two distinct remote locations or data centers.

Question 41: What manufacturer and model of your paging system does the proposed solution need to integrate with? How many total paging systems are required?

Answer 41: Vendor must provide a new paging solution to integrate with the phone system.

Question 42: How many total ATA ports are required? Can you give a breakdown of ATA ports by location so we can properly scope the ATA models and quantities?

Answer 42: Cisco ATA 186 (9); Cisco ATA 187 (5); Cisco ATA 190 (9); Cisco ATA 191 (1)

Question 43: How many total Fax numbers will need to be ported to an eFax service? Do your Fax services require HIPPA compliance? What is your total monthly outbound fax volume?

Answer 43: There are a total of 65 eFax numbers. A preferred optional feature is for the fax services to be HIPPA compliant. Volume varies per organizational unit.

Question 44: Do you require survivability at your data center(s)? Or do you require local survivability at each location? If at each location provide the total location count.

Answer 44: Yes, BPUB requires survivability at the data centers and at each remote location. There are 8 locations in total.

Question 45: How many users will need Call Queue live reporting for time in queue, abandoned calls, overflowed to VM. The proposed solution supports historical reporting without additional licensing.

Answer 45: Live reporting will be needed for approximately 10 to 15 agents. Number of agents that take customer calls varies.

Question 46: Do you want headsets quoted? If so, how many wireless and how many wired?

Answer 46: Quote on 15 wireless headsets, compatible with proposed phone system.

Question 47: Do you require onsite services (Boots on the Ground) for hardware setup, ATA, desk phones? If so, do you have potential number of phones and hardware to be deployed with onsite technicians to help ensure accurate pricing?

Answer 47: Yes, BPUB requires onsite services to install the phones and hardware. There are 522 phones and other hardware, as determined by vendor, to be installed onsite.

Question 48: What is the potential timeframe to start the implementation and when would you potentially like to see be finished?

Answer 48: The timeframe depends on the selection committee review and BPUB Board approval.

Question 49: How many total Contact Center Agents, Supervisors and Admins are required?

Answer 49: For day-to-day activities, there are 40 agents. Call Center Operations during an emergency are extended to approximately 50 additional agents.

Question 50: What are the Omnichannel requirements for your contact center? (i.e. Voice, Video, Chat, SMS, Email)

Answer 50: Voice, chat, SMS and email are required.

Question 51: How many total lines of business (LOB) or departments are required?

Answer 51: Total number of DID's is (700), BPUB is not aware of any virtual numbers. Toll-free number 1-800-869-2922.

Question 52: How many different systems does your contact center integrate with? What are the names of the CRMs or business systems?

Answer 52: Cayenta (Customer Service Billing), InvoiceCloud (Payment Processor).

Question 53: Regarding the identified systems (Harris\Cayenta, Milsoft/OMS, InvoiceCloud) can the Board provide the details of these integrations?

- a) Is there an existing web service, REST API, URL, or other method that currently allows connectivity to these systems?
- b) If so, what is that method of connection for each of these systems?

Answer 53: Cayenta: Be able to provide Balances to customer, make payment extensions, request fax of your last bill, move out request and update your phone number. The connection to the Cayenta database is thru Oracle client and API's. InvoiceCloud: When calling and you are given options to make payment over phone, it sends directly to Payment processor, InvoiceCloud.

Question 54: Will you prefer Named Agent or Concurrent Licensing model?

Answer 54: BPUB prefers concurrent licensing model.

Question 55: List the total number of DIDs, Virtual Numbers, and Toll-Free numbers pointed towards the Contact Center.

Answer 55: Total number of DIDs is (700), BPUB is not aware of any virtual numbers. Toll-free number 1-800-869-2922.

Question 56: Can you provide documentation of your existing call center scripts or call routing?

- a) How many scripts do you have for contact center?
- b) How many queues to you have for contact center?
- c) How many skills do you have for contact center?

Answer 56: a) The system is using approximately 20 different scripts to carry out different functions b) 7 Queues c) 9 Skills

Question 57: Since you require a Workforce Management (WFM) solution, how many agents/supervisors are required?

Answer 57: Forty (40) agents/supervisors are required during regular operations. For emergency operations an additional fifty (50) agents are required.

Question 58: Since you require a Quality Management (QM/QA) system.

- a) How many agents/supervisors are required?
- b) What is the estimated number of scorecards required?

Answer 58: a) 40 agents/supervisors; b) 5 per agent/month.

Question 59: Since the RFP states that you will need a self-service virtual agent chatbot,

- a) Can you provide estimated number of monthly interactions you anticipate? (i.e. 5,000, 10,000, 15,000).
- b) If this number is unknown, can you provide the average monthly website visits to your website?
 - i. Also can you provide your highest peaks?
 - ii. Do these peaks occur frequently?
- c) Do you have an existing knowledge base that will be utilized?

- d) Estimated number of articles that the virtual agent would require? Articles are the specific information being accessed by the bot. A good way to determine this, is to count the number of links in your sitemap.
- e) You mention integrations with virtual agents, can you provide use cases for the virtual agent?

Answer 59: The BPUB website receives roughly 12,000 monthly visitors; we do not tack peaks. We have various articles on our website, but we do not have a formal knowledge base. Our sitemap has about 500 links.

Question 60: Do you plan on keeping your Cisco 7800, 8800, and the Cisco ATA 191 if they are compatible? Or would you like to look replacing them with new models with warranties?

Answer 60: Yes, BPUB plans to keep the Cisco 7800, 8800 and the ATA 191 if they are compatible, otherwise quote on new models with warranties.

Question 61: With the Cisco 7800 and 8800 phones they are required to have MPP (multi-party platform firmware) Do you have this already purchased or will your requirement to buy them from Cisco?

Answer 61: BPUB has not purchased the platform firmware. Vendor will be required to buy it from Cisco.

Question 62: We see there is a requirement to fill out a security questionnaire, however we do not see an attachment. Will this questionnaire be sent to us separately? Is the security questionnaire also due on by the Proposal Response submission date?

Answer 62: See answer to question 2 above.

The signature of the company agent, for the acknowledgement of this addendum, shall be required. **Complete information below and return via e-mail to: dsolitaire@brownsville-pub.com.**

I hereby acknowledge receipt of this addendum.

Company: _____

Agent Name: _____

Agent Signature: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone Number: _____ **E-mail address:** _____

If you have any further questions about the Proposal, call 956-983-6366.

BY: ***Diane Solitaire***, Purchasing

IT Questions regarding Cybersecurity

- 1) Provide documentation for third party company that is maintaining the data in the cloud.
- 2) Provide audit certificate/report from company that conducts a yearly vulnerability assessment or yearly penetration test on their system.
- 3) Provide a Plan B (backup plan) in the event of a service interruption with the system being used.
 - i) What type of Service Level Agreement is provided? (Service Uptime, Support Resolution)
 - ii) Location of Data Centers
- 4) Provide information on the process of retrieving backed up or historical data.
- 5) What will happen if I ever decide to switch to another provider?
 - a) How long is our data retained/Is it Destroyed?
 - b) Will there be any fees or charges?
 - c) Assist with migration to new services?
- 6) Provide three references from companies using the proposed hosted services.
- 7) How does the security company ensure that the data that is collected is secure and kept confidential?
- 8) How do they monitor or document changes of the data or accounts?
- 9) Is any data shared with any other company? How is data loss handled?
- 10) How will BPUB users access the system? System must use some sort of MFA (Multi-Factor Authentication). Please explain.

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.