Request for Proposals (RFP)

Unified Communications as a Service (UCaaS) and Omnichannel Contact Center Solution

Issuer: ACCESS (Arab Community Center for Economic and Social Services)
RFP Number: ACCESS-UC-CC-2025-08
Issue Date: August 25, 2025
Proposal Due: 10:00 AM ET, September 30, 2025
Contact for this RFP: procurement@accesscommunity.org

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1. Introduction & Background

ACCESS is the largest Arab American community nonprofit in the United States, founded in 1971 and operating from multiple sites across metro Detroit. ACCESS offers 120+ programs spanning health, workforce development, social services, education, arts & culture, and more. We seek a modern, cloud-first Unified Communications (UCaaS) and Omnichannel Contact Center (CCaaS) solution to consolidate communications, improve client experience, and enable a robust intake/referral/information management center. Please note, this RFP is open to direct service providers only. Responses from resellers or third-party agents will not be considered.

1.1 Objectives

- Consolidate disparate numbers and site-based answering into one organization-wide main number and a unified platform.
- Implement a scalable contact center (initially ~10 agents, designed to grow) for intakes, referrals, and information with strong analytics and QA.
- Improve client experience with multilingual IVR (English/Arabic), intelligent routing, and self-service options.
- Integrate with Microsoft 365/Entra ID SSO and relevant business systems (e.g., case management/EHR and CRM), while maintaining regulatory compliance (HIPAA, 42 CFR Part 2 as applicable).
- Reduce total cost of ownership, improve reliability (geo-redundancy), and ensure E911/MLTS compliance.

1.2 Current Environment Summary

- **Telephone Numbers:** ~**1,017 DIDs** (to be ported from AT&T).
- **Users:** ~**450** UC users.
- **Physical Phones:**

- o **Mitel IP 485G:** 45
- o **Mitel IP 480G:** 319
- **Auto Attendants:** 22.
- **Groups:** 22 hunt/call/pickup groups.
- **Sites:** 10
- **Analog Device (all using ATA adapters):**
  - o **Number of Group Faxes/physical fax Machines:** 21 (all connected to Konica copiers)
  - o **Elevators:** 4
  - o **TTY Devices:** 5 (Ultratec Uniphone 1140 but we can also switch to an IP based TTY solution)
- **Today's Call Flow:** Each site answers its own main line; some departments have separate lines.
  - o **Goal:** single org-wide main number with intelligent routing to departments/sites.

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2. Scope of Work

The selected Vendor will design, configure, migrate, and support a production-ready UCaaS + CCaaS platform for all ACCESS sites.

2.1 UCaaS Requirements

- Cloud PBX with softphone (Windows/iOS/Android), web phone, and optional desk phones.
- Voicemail with transcription, shared mailboxes, call park/pickup groups, paging, intercom, music on hold.
- Auto attendants/IVR supporting nested menus, multilingual prompts (English/Arabic), time-of-day/holiday logic. Vendors must describe how nested menus are implemented (single IVR vs. chained AAs) and any cost/latency impacts.
- Multilingual prompts may be delivered via recorded voice (ACCESS-provided) or TTS/ASR. Provide pricing/limitations for both approaches.
- Branded caller ID (CNAM/Branded Calling): price as optional and indicate if third-party services are required/supported.
- Local, toll-free, and international calling plans; CNAM; caller ID branding; STIR/SHAKEN compliance.
- E911/MLTS: direct 911 dialing, on-site notifications, and dispatchable location per law; dynamic location for nomadic/remote users.
- Meetings & Collaboration: audio/video conferencing, screen share, team messaging (optional if integrated with Microsoft Teams).
- SMS/MMS/A2P 10DLC registration and compliance; opt-in/opt-out management.

- Directory sync & SSO with Microsoft Entra ID (Azure AD); SCIM provisioning preferred.
- Reporting/Analytics: call detail records, quality metrics (MOS, jitter, packet loss, latency), contact center KPIs (ASA, Abandon Rate, SLAs, service level, handle time), and adoption dashboards (active users, softphone vs. desk usage, voicemail usage). Optionally, exportable via API.

2.2 CCaaS Requirements (Initial ~10 Agents; scalable)

- **Omnichannel**: voice, SMS, email, web chat; roadmap for social and WhatsApp desirable.
- **Routing**: skills and priority-based, queue callback/virtual hold, overflow/failover, after-hours handling.
- **IVR**: data dips/API-triggered routing; multilingual TTS/ASR; self-service options for common tasks.
- **Quality & Compliance**: selective, policy-based recording (pause/resume), encryption at rest/in transit, retention controls; quality management (QM), screen recording, coaching, scoring forms.
- **Workforce**: forecasting/scheduling (WFM), adherence views; real-time and historical wallboards. Price WFM/WEM as optional (quote with and without).
- **Knowledge**: agent knowledge base, canned responses, and intent-based suggestions. If knowledge is provider-hosted, price as optional; otherwise describe integration to external KBs.
- **Integrations**: Microsoft 365, Outlook/Teams, and open APIs/webhooks for EHR/CRM (e.g., PCE or similar) for screen-pop and dispositions. Vendors must detail supported features by system of record and license type (e.g., Salesforce Community restrictions) and any API rate/field limitations.
- **Supervisor Tools**: live monitoring, whisper/barge, queue configuration, and change control with audit.

2.3 Migration & Implementation

- **Number Porting** for ~1,017 DIDs from AT&T; project-manage LOAs, FOC dates, and phased cutovers.
- **Auto Attendant Consolidation** from 22 current AAs to the proposed model under one main number; preserve key departmental paths.
- **Hunt/Call Group Mapping** for current 22 groups; propose optimized routing.
- **Endpoint Strategy**: reuse standards-based SIP phones where practical; otherwise propose new endpoints or softphone-first. Include analog/POTS replacement for elevators, alarms, fax (ATA or POTS-over-LTE) as needed.
- **Network Readiness**: perform assessments, QoS design, SBC/SIP trunking configuration, survivability options (e.g., local gateway).

- **Training & Change Management**: role-based training (agents, supervisors, receptionists, IT admins) and multilingual end-user materials.
- **Acceptance Testing**: detailed test plan; E911 test calls per site; failover scenarios; sign-offs per milestone.

2.4 Support & Managed Services

- **24x7x365** support for Severity 1 incidents; defined SLAs (see Section 7).
- Named Technical Account Manager (TAM) preferred; escalation path; customer success reviews.
- **Administration model**: ACCESS-administered with vendor escalation, or co-managed; include role-based access and audit logs.

3. Compliance & Regulatory Requirements

Vendors must confirm and document compliance and offer contractual commitments where applicable.

- **E911/MLTS**: Direct 9-1-1 dialing; automated internal notification upon 9-1-1 call; dispatchable location for on-prem and remote users.
- **HIPAA**: Willingness to sign a Business Associate Agreement (BAA); describe encryption, access controls, logging, incident response, and breach notification.
- **42 CFR Part 2**: For programs handling SUD information (e.g., Recovery Center), support for strict consent and disclosure controls, segregation of recordings/notes, fine-grained access, and redaction tools.
- **Michigan Data Breach**: Michigan Identity Theft Protection Act compliance for breach notification processes.
- **A2P 10DLC/TCPA**: Support brand/campaign registration and opt-in/opt-out for SMS outreach.
- **STIR/SHAKEN & Robocall Mitigation**: Provider certification and active participation in the FCC Robocall Mitigation Database.
- **Accessibility**: Section 508/WCAG 2.2 AA for portals and client apps; TTY/TDD and relay service support.
- **Security Standards**: SOC 2 Type II reports (preferred), ISO 27001, vulnerability management, MFA-enforced admin access, and customer-managed retention/keys where available.

4. Functional Requirements Matrix (Vendor Response)

Provide responses in the table below (Y/N/Partial) and add notes. You may attach an expanded matrix.

Category	Requirement	Response (Y/N/Partial)	Included in base (Y/N)	Add-on cost (one-time / monthly)	Notes
UCaaS	Softphone (Win/Mac/iOS/Android) & web dialer				
UCaaS	Auto attendants (≥22), nested IVR, holidays				
UCaaS	Multilingual prompts (English/Arabic)				
UCaaS	Voicemail transcription; shared mailboxes				
UCaaS	Paging/intercom/call park/pickup				
UCaaS	E911/MLTS compliance, dispatchable location				
UCaaS	Directory sync + SSO (Entra ID)				
UCaaS	Reporting & CDR export/API				
CCaaS	Voice/SMS/email/chat channels				
CCaaS	Skills & priority routing; callbacks				
CCaaS	QM (recording, screen cap, scorecards)				
CCaaS	WFM (forecast, schedule, adherence)				
CCaaS	Knowledge base & guidance				
CCaaS	Supervisor whisper/barge; live monitor				
CCaaS	Analytics & wallboards (real-time/historical)				
Integration	Teams/Outlook; open APIs/webhooks				
Integration	EHR/CRM screen-pop & dispositions				

Category	Requirement	Response (Y/N/Partial)	Included in base (Y/N)	Add-on cost (one-time / monthly)	Notes
Security	HIPAA BAA; 42 CFR Part 2 features				
SMS	A2P 10DLC registration support				
Compliance	STIR/SHAKEN & robocall mitigation				

5. Technical Requirements

- **Architecture**: Multi-tenant cloud with geo-redundant regions; published uptime SLA; data residency and failover details.
- **Endpoints**: Support for standards-based SIP endpoints and certified headsets; propose handset/ATA models with lifecycle and warranty.
- **Calling**: Codec support (Opus, G.711, G.722), jitter/congestion handling; QoS (DSCP) guidance; SBC options; survivability for internet outages.
- **Networking**: Vendor-led readiness assessment with packet captures, MOS baselines, and remediation guidance.
- **Security**: TLS 1.2+/SRTP; role-based access control; immutable logging; admin MFA; SCIM provisioning.
- **Data**: Recording retention tiers and pricing; export APIs; encryption key management options.

6. Implementation & Migration Plan

- **Project Governance**: kickoff, RACI, stakeholder map, change management plan.
- **Discovery**: inventory validation (1,017 numbers; 22 AAs; 22 groups; 450 users), analog/life-safety lines, and site survivability needs. Include site surveys if needed (priced option) when end-user validation is insufficient.
- **Design**: future-state call flow for one main number; IVR trees; language support; contact center queues; disposition taxonomy; QA forms.
- **Build**: tenant configuration, integrations, SSO, routing, recording policies; knowledge base and wallboards.
- **Testing**: unit, site pilot, E911 validation per site, failover, and user acceptance.
- **Training**: admins, supervisors, agents, receptionists, end users; quick guides.
- **Cutover**: phased porting with rollback plans; hypercare support.

7. Service Levels & Support

- **Availability**: ≥ **99.99%** monthly uptime target (voice/CC core).
- **Incident Response Targets**: Sev1: 15-min acknowledgment, 1-hour workaround/4-hour resolution target; Sev2: 1-hour ack, next-business-day resolution target.
- **Credits**: Clearly defined SLA credits and exclusions.
- **Support Channels**: 24×7 phone, chat, and portal; P1 paging; status page with historical uptime.
- **Change Control**: maintenance windows, notifications, and customer approval thresholds.

8. Vendor Qualifications

- Experience delivering UCaaS+CCaaS for health and human services nonprofits and Michigan-based organizations.
- At least three relevant references (prefer nonprofits in Michigan or the Midwest).
- Security attestations (SOC 2 Type II, ISO 27001), HIPAA BAA willingness, and RMD/STIR-SHAKEN certifications.
- Local resources/partners for onsite work in metro Detroit; project management credentials (PMP/PMI-ACP preferred).

9. Pricing & Commercials

Provide a transparent, itemized Bill of Materials and pricing.

- **Licensing**: seat pricing for 450 UC users and 10 CC agents (show tiers/scalability); nonprofit discounts.
- **Usage**: minute pools (local/LD, toll-free), international rates, SMS/A2P fees, 10DLC registration and carrier surcharges. State assumptions (e.g., unlimited local/LD for UCaaS; TF/international rated). Provide estimated taxes/surcharges where possible.
- **Numbers**: DID/TFN costs, porting fees, new number costs. Include Branded Caller ID as an optional, per-number item.
- **Hardware/ATAs**: phone/ATA models, warranties, RMA.
- **Professional Services**: discovery, design, implementation, training, and project management.
- **Support**: ongoing support plans; success services; WFM/QM/Analytics modules.
- **Taxes/Fees**: all regulatory and recovery fees enumerated; no hidden charges.

- **Price Protections**: multi-year price caps, renewal terms, downturn clause (10–20%), and early termination.
- **Funding Out**: include a funding contingency clause enabling termination if expected grant funding is not appropriated or is materially reduced.

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10. Proposal Instructions

- **Intent to Bid**: email procurement@accesscommunity.org by 10:00 AM ET, September 30, 2025.
- **Questions Deadline**: 10:00 AM ET, September 20, 2025 (answers posted to all bidders).
- **Submission**: electronic PDF to procurement@accesscommunity.org; include subject **ACCESS-UC-CC-2025-08**.
- **Format**: Executive Summary; Solution Overview; Architecture; Security & Compliance; Functional Matrix; Implementation Plan; Training; SLAs; Pricing (Appendix B); Exceptions/Assumptions; References; Required Forms (Appendix C).

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11. Evaluation Criteria

Category	Weight
Functionality fit (UCaaS & CCaaS)	25%
Security, privacy & compliance	20%
Implementation approach & timeline	15%
Total cost of ownership	15%
Integration & extensibility	10%
Vendor experience & references	10%
Local presence/customer success	5%

ACCESS may request presentations, demos, or proofs-of-concept and reserves the right to negotiate or reject any/all proposals.

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12. Terms & Conditions

- **Uniform Guidance (if federally funded)**: Vendor agrees to comply with 2 CFR 200 procurement standards, including competition (200.319), methods (200.320), small/minority/women-owned participation (200.321), domestic preferences (200.322), conflicts of interest (200.318), and prohibition on covered telecom equipment/services (2 CFR 200.216).

- **HIPAA & 42 CFR Part 2**: Execution of BAA; safeguards for PHI and SUD records; breach notification timelines aligned to law and ACCESS policy.
- **Michigan Identity Theft Protection Act**: Breach notification to Michigan residents consistent with statute and ACCESS policy.
- **Non-Discrimination**: Compliance with federal and Michigan civil rights laws (including ELCRA and PWDCRA), EEO/AA.
- **Accessibility**: Compliance with ADA and Section 508/WCAG for end-user portals.
- **Data Ownership & Exit**: ACCESS owns all numbers, recordings, metadata, and configurations. Upon termination, Vendor will provide export (portable format) within 30 days.
- **Insurance**: Commercial general liability, cyber liability, workers' compensation (Michigan), and professional liability; provide COI upon award.
- **Confidentiality**: Mutual NDA; restrict subcontractor access; background checks for personnel with privileged access.
- **Governing Law**: State of Michigan.