



lumenus
Community Services

Request for Proposals (RFP)
for an
Integrated Phone System

Issued: Wednesday, July 27, 2022

Application Deadline: Sunday, August 28, 2022

Please submit electronic proposals to: Laurence Liu
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1. Background

Lumenus Community Services (hereafter called Lumenus) is issuing a Request for Proposals (RFP) to interested vendors and publicly, inviting them to submit proposals to provide an Integrated Phone System with installation, configuration, training, and support services.

The RFP has been initiated as a standard procurement procedure to meet the requirements of the Government of Ontario's Broader Public Sector Accountability Act and its associated directives and in accordance with Lumenus' Procurement Policy.

2. About Lumenus Community Services

In April 2020, Lumenus was created from the amalgamation of four well-respected and long-serving, multi-service delivery agencies, Adventure Place, The Etobicoke Children's Centre, Griffin Centre and Skylark Children, Youth and Families. Lumenus has an associated foundation which is currently named the Skylark Foundation.

Our vision is to provide excellent, accessible, and integrated mental health, developmental and community services. Where there are gaps, we will create seamless connections – where there are obstacles or barriers, we will improve access. Where there is worry, there will be hope. We will do this in collaboration with our clients and partners. That is the bright future of Lumenus – where every client has the opportunity ***to be seen, be heard and to be well.***

We support infants, children, transitional-aged youth, adults, and their families, with a focus on improving their development and mental well-being. We have a dynamic vision to be a modern, integrated organization committed to excellence and meeting the needs of our existing and future clients.

Lumenus has over 600 employees that capitalize on our collective strengths, core values and areas of expertise to provide a quality, integrated, continuous system of much needed accessible services. Our integrated continuum of services includes early intervention, counselling, day school treatment, residential services, fee-for-service and specialized services for clients with complex needs and autism. Specifically, we will be leaders in the development of a unique and broad continuum of service models for:

- Infants and young children (0-6 years) and their parents
- Children and youth with developmental disabilities and autism (0-18 years)
- Children and youth with mental health concerns (0-25 years) and
- Adults with developmental disabilities (16+ years)



We operate from 38 locations in Toronto, East York, Etobicoke, North York, Richmond Hill, and Scarborough. These include residential, commercial, community and school sites. We also work with school boards and individual schools to support individuals in sectioned classrooms. The number of locations will fluctuate (by 3 to 5) year over year.

3. Scope of Services

Lumenus is seeking proposals from qualified vendors to supply a fully integrated Phone System with all installation, configuration, user training (and User Guide documentation) and annual support services.

Lumenus has identified three (3) possible solution streams. Vendors can submit a quote, for any or all 3 streams, or any combination of, and including any new streams, but each Vendor must have a single recommended solution stream.

Stream # 1: A cloud-based PaaS system

Stream # 2: A hosted PBX Solution

Stream # 3: Utilize current IP Office systems, where possible

The scope of services will include but not be limited to:

All Lumenus locations and its remote work force are to be fully, and transparently integrated with a single voice dial plan. This includes configuring incoming voice call destinations (with an AutoAttendant), internal call routings and voicemail services, with each Lumenus employee having the ability to have a dedicated, unique 4-digit extension with voicemail. Each employee must have internal (to Lumenus) and external (outside Lumenus) dial capabilities.

All costs must be identified as capital, one-time **or** annual recurring, operational expenses. A summary of the most important requirements is:

- A well-devised and documented implementation plan, with major milestones identified.
- By December 31, 2022, Lumenus requires a fully integrated and secure voice system, with all Endpoints manageable, and all software, firmware, Operating System maintained under a support contract. This includes all vulnerability remediation, as defined by a Service Level Agreement.
- Ability to use existing extensions numbers, same or better Call Routings, existing Hunt Groups, and voicemail services as is currently in production
- Ability to route or transfer any incoming call to any of the 4-digit extensions
- Ability to set time profiles for call routing and extension availability
- Includes all per user licensing fees, broken out by each application
- Self Service capabilities to forward phones, record greetings and/or change greetings
- Seamless implementation, with limited (ideally none) interruption to daily business



- Defined Support procedures with SLAs.
- Annual support and maintenance contract for all software and hardware, excluding phones (a small subset of each model of phone may be included in the maintenance contract for ongoing compatibility support).
- A defined single point of contact for ALL issues, extending throughout the project and for 30 days past the final implementation date.
- Softphone or dialer capabilities on laptops or desktop PCs is required. However, extending this capability to cell phones is an optional add-on and should be included with costs for this component broken out.

Please see the attached Excel spreadsheet for more clarifications on the User Requirements.

Lumenus can provide current configuration details of the 4 key Location's phone systems.

As an optional breakout addendum, we ask for budgetary costs for a (1) standard boardroom. This room would be able to hold 12-20 people with a size of 540 sq feet (18 x 30). Our Year Two goal is to complete the rollout of the integrated 4-digit dial plan to all Locations, and provide Unified Communications resources, with the Microsoft Office 365 suite of programs with common resource sharing to all Lumenus locations. This budgetary quote would include hardware, software costs and type / model determination only.

Note: Lumenus can determine Microsoft licensing costs as long as the quantity and exact Microsoft license type is detailed. Lumenus will procure the Microsoft licenses as needed.

We also ask the proposal to include recommendations for a **cost-effective, forward thinking**, fully integrated and redundant external voice/data network between for the 4 key locations. e.g., migrate from PRI to SIP, or configure secondary routes for failover. Although not in this scope of this RFP, a future phase will be to have all Lumenus locations fully integrated with voice, video and data communications with common file sharing, and access to all resources with an availability of greater than 98%.

4. Current Infrastructure and Details

Lumenus has identified four (4) "key" permanent locations. They originate from the four legacy divisions main offices at 65 Hartsdale Dr, (Lumenus West formerly Etobicoke Children's Centre), 40 Orchard View Blvd (Lumenus South formerly Skylark Children, Youth and Families), 1124 Finch Ave West (Lumenus North formerly Griffin Centre) and 155 McNicoll Ave (Lumenus East formerly Adventure Place). Lumenus has further identified the 1124 Finch Ave West location as the primary location. Each key location has a locked "server room" with server resources, full networking, and rack space available. Dedicated Windows server(s) can be provided at no cost for this project.



Each of the four (4) key locations currently has an installed phone system with working incoming lines, call routings, voicemail, and extensions. Additionally, two (2) of the secondary locations (RK House and Wellesley House) have an Avaya IP Office ver 11 system installed and working. All Lumenus offices have internet access capabilities already installed. Three (3) of the key locations, that are using Avaya IP Office currently, have an established VPN between them with direct dial transfers and direct dial capability already working. Lumenus will provide a VPN tunnel to each secondary location.

The average call volume is 10 calls per hour per 8-hour business day. The 4 key locations require the ability to support 10 simultaneous calls. Each secondary Lumenus location must be able to support 3 or more calls to an extension.

The key locations currently utilize.

- 65 Hartsdale Dr, (Lumenus West formerly Etobicoke Children's Centre)
 - Mitel
 - 150 users and extensions
 - 40 hard phones

- 40 Orchard View Blvd (Lumenus South formerly Skylark Children, Youth and Families)
 - Avaya ver 11.0.
 - 200 users and extensions
 - 50 hard phones (currently Avaya 1408)
 - IP Office ver 11.0.4

- 1126 and 1124 Finch Ave West, (Lumenus North formerly Griffin Centre)
 - Avaya ver 11.0.
 - 200 users w extensions
 - 50 hard phones (currently Avaya 9650)
 - IP Office ver 11.0.4

- 155 McNicoll Ave (Lumenus East formerly Adventure Place)
 - Avaya ver 11.0.
 - 150 users w extensions
 - 40 hard phones (currently Nortel M7310 and T316e)
 - IP Office ver 11.0.4

As part of the scope of this project, please include the following.

- 20 x low cost, simple guest/reception area phones (must have the ability to restrict toll and long-distance calling).
- 50 x simple VoIP phones (4-10 programmable buttons)



- 20 x advanced VoIP phones (10+ programmable buttons)
- 2 x Reception phones with 24 programmable extension buttons

In addition to the above totals, all phones currently in production, that cannot be reused must be replaced on a one-to-one basis.

Lumenus has already devised the unique 4-digit dial plan.

Lumenus will deploy the end user devices once past the testing phase of 10 in each key location, and 5 in mutually agreed upon secondary locations.

Lumenus will provide the LAN cabling infrastructure, server rack space (if required) and environmental controls as needed for all locations and the associated devices to maintain proper industry standards.

At the completion of the Project, the Operational handoff will require:

- All training documentation including new hire training (Onboarding)
- All application administrator (full control) passwords, with licensing details and proof of purchase
- All hardware and software transferred to Lumenus as the owner
- All fully identified vulnerability remediation plan with Service Level Agreements, included in an annual service or maintenance contract
- A backup and restore process, ensuring business continuity for critical ICT Services.

5. Evaluation Criteria

All proposals are required to contain each of the following:

a) Qualifications

- Background of the firm, company or partnership presenting the proposal, with all ownership structure and total revenue for each of the last 4 years.
- Experience in achieving the scope of services, as outlined above, from past projects. Please include 3 contactable references from past projects of a similar nature and scope.
- Details of who will be directly involved in this project and their experience.

b) Technology Recommendations: Complete, detailed description with quantities, of the hardware components and all software, including any 3rd party software required. Includes all licensing fees.

c) Timelines and Milestones

- Clearly defined milestones and identification of all timelines.

d) Costs Breakdown



- All costs must be itemized as capital, one-time expenditures, **or** recurring, operational expenses.
 - Hardware, software, professional (project) services and support costs should each be clearly identified as such
- e) Support and Maintenance Service level Agreements and annual costs.
- Annual Costs broken out by location (each of the 4 identified key locations only)

All proposals will be evaluated based on the following criteria (company refers to the organization, firm, or partnership) presenting the response to the RFP):

Evaluation Domain	Weight
a) Professional qualifications, company background, RFP submission process, team experience as related to scope, socially responsible company, forward looking strategy, and historical performance of vendor with Lumenus	15%
b) Technical Breakdown: Clarity of technological breakdown of platform recommended. Quality of Platform recommended	10%
c) Three references and relatable experience of company	10%
d) Service and Maintenance: Ability of Lumenus to Self-Service simple changes. Support and Maintenance viability moving forward	15%
e) Cost; inclusive of ongoing operational and capital expenditures	20%
f) Quality of proposal in meeting the scope of services and requirements	25%
g) Degree of fit with Lumenus and willingness to contribute to our mission and vision	5%

Please note that:

- Submissions that do not meet the evaluation criteria will be disqualified (vendor will be informed what was lacking)
- In order to be fair to all applications, late submissions and phone calls or emails to discuss application status after submission will not be accepted
- Only short-listed applicants will be contacted for an interview/ presentation.



6. Terms and Conditions

a. Delivery of Response to Request for Proposals

Please send electronic copy via email to Laurence Liu at ylaurence@lumenus.ca by Sunday, August 28, 2022, by 11:00pm

b. Proposal Time Limit

Each bidding organization shall commit that the proposal is valid and accurate for 120 days from the closing date of Sunday, August 28, 2022

c. Selection Process

Lumenus will review all applications but reserves the right to accept or reject any proposals. The award of an organization will be based on a review of proposals against all evaluation criteria and will not necessarily be awarded based on the lowest price offered but rather the overall assessment of value for money.

Each applicant will be provided with fair access to information, as requested by email or in writing (see Key Dates). Additional written materials, to ascertain the qualification or suitability of an applicant may be requested.

d. Inquiries

Applicants should contact **Mark Lawley** (mlawley@lumenus.ca), ICT Manager Lumenus if they have any project related questions or concerns.

e. Liability Insurance

All organizations are requested to warrant that the organization does not currently have any outstanding liability claims that may negatively impact on the future health of the organization's services. Additionally, the organization must maintain sufficient liability insurance relevant for the nature and breadth of the services provided to Lumenus. Evidence of liability insurance will be requested and must be provided.

f. Conflict of Interest

Applicants responding to the RFP must not have any personal or business interests that would present an actual, potential, or apparent conflict of interest with the performance of the contract to be awarded. Should the potential perception of a conflict of interest exist, this must be explicitly declared in writing as soon as knowledge of such a conflict may arise.



g. Distribution of the Invitation for Proposals

This invitation has been released by:

- Publication on Lumenus' website and social media sites
- By invitation to vendors who may be qualified or suitable based on Lumenus' knowledge and experience

h. Expense Claims and Reimbursement Rules

In accordance with the Government of Ontario's Broader Public Sector Accountability Act and its associated directives, Lumenus will not pay or reimburse an applicant for any hospitality, incidental or food expenses, including but not limited to expenses associated with meals, snacks, beverages, gratuities, laundry or dry cleaning, valet services, dependent care, home management and personal telephone calls. Reimbursement for allowable expenses is allowable only when the contract specifically provides for it and Lumenus' associated approval and reimbursement policies are appropriately complied with.

i. External Factors

Lumenus reserves the right to withdraw this RFP or terminate the resulting contract within the terms of the contract without penalty.

j. RFP Dispute Resolution Process and Procedures

Unsuccessful applicants may request a debriefing within 60 calendar days following the date of the contract award notification. The request should be submitted to the ICT Manager. The ICT Manager will respond to the vendor and arrange an applicant debriefing within 10 business days of receiving the request.

When conducting vendor debriefings, Lumenus will:

- Confirm with each applicant the date, time, and location of the debriefing session in writing
- Conduct separate debriefings with each applicant, where requested
- Not disclose information concerning other applicants, other than the names and address of the applicants who participated in the competitive process
- Not answer questions unrelated to the competitive process
- Provide a general overview of the evaluation process set out in the procurement document
- Discuss strengths and weaknesses of the applicant's submission in relation to specific evaluation criteria
- Provide suggestions on how the applicant may improve future submissions
- Address questions and issues raised by the applicant in relation to their submission



Subsequent to the applicant debriefing process, if an applicant wishes to dispute the outcome of the RFP process, the aggrieved party is to file the bid protest in writing to the CEO, by registered mail within 10 business days of the debriefing meeting. A protest in writing shall include:

- The name and address of the complainant
- Identification of the RFP process being protested
- The date of the debriefing and the name of the procurement officer who conducted the debriefing
- Detailed and factual statements of grounds for protest
- The complainant’s arguments and supporting documentation and
- The complainant’s requested remedy

The CEO will respond, in writing, to the complainant within 10 business days of receipt of the protest. The final decision on the issue will come from the CEO, in consultation with appropriate Lumenus senior management and Board of Directors involvement and shall be considered final and conclusive.

k. Information Disclosure

Any confidential information supplied to Lumenus may be disclosed by Lumenus where it is obliged to do so under the Freedom of Information and Protection of Privacy Act (FIPPA), by order of a court or tribunal or otherwise required by law.

7. Key Dates and Contact Information

RFP Issue Date	Wednesday, July 27, 2022
Bidders’ questions deadline	Friday, August 19, 2022
Deadline for electronic proposal submissions	Sunday, August 28, 2022, by 11:00PM EST
Contact	Laurence Liu Manager, Financial Planning and Analysis Lumenus Community Services 1126 Finch Ave West, Unit 16 Toronto ON M3J 3J6 ylaurence@lumenus.ca