



**The Commonwealth of
Massachusetts**

**Department of
Correction**

**Request for Responses
for an**

**Secure Inmate Calling System
& Related Services**

DOC File No. 1000-Phone2006

July 11, 2005

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Section 1

Description of Procurement

The Massachusetts Department of Correction (DOC) requests qualified Bidders to submit proposals for furnishing, installing and maintaining a Secure Inmate Calling System (ICS) for use in its correctional institutions. The DOC has special security requirements and has a prime objective of controlling inmate telephone usage and limiting the use of the telephone system for fraudulent activity.

The Massachusetts Department of Correction (DOC) is responsible for managing the operation of 18 correctional institutions located within the Commonwealth. These institutions vary in level of security and house approximately 10,500 inmates.

Inmates are defined as all persons, male and female, adult and minor, residing in facilities or admitted or committed to the care and custody of the Department of Correction. This term encompasses all sentenced prisoners including, but not limited to, civil commitments, federal detainees and any other individual under the jurisdiction of the Massachusetts DOC.

This RFR addresses the needs of the DOC in regards to the Secure Inmate Calling System and Related Services. It is the intention of the DOC to have the Secure Inmate Calling System and Related Services provide the following:

- Inmate Telephone Instruments (All Facilities)
- Coin Operated Pay Telephones for Public Areas within Facilities
- All Station Cabling for Inmate Telephone Instruments & Pay Telephones
- Site/Location Processor (Each Facility)
- Centralized Bidder Maintained Data Base
- Digital Call Recording Functionality or System
- Bidder Provided Site Administrators (Each Facility)
- Local Exchange Service (Collect and Debit)
- Intra and Inter-LATA Toll Service (Collect and Debit)
- System Training (DOC Site Administrators)
- System Training (DOC Investigators)
- Remote Password Protected Access to System (Milford HQ)

The DOC intends to have DOC personnel, located at each DOC facility, monitor and control all inmate calling. These DOC personnel must have the ability to access the ICS' data base at any time locally within the facility via a secure, password protected method. The ICS proposed for

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each location of the DOC will be used for ICS system administration, inmate call recording and for reporting capabilities of the inmate call records.

The ICS installed in each DOC facility must allow for [REDACTED]

[REDACTED] Remote access must allow DOC investigative personnel to perform all functions available to the on-site DOC user.

The Bidder is required to provide a centralized data base for the storage of inmate call records and inmate call recordings from all DOC facilities. This centralized data base must allow authorized DOC personnel to access call data, pertaining to an inmate, regardless of which DOC facility is presently housing the inmate.

The Bidder must also provide off-site storage of each ICS's programming to ensure business continuity and system replacement while retaining the unique programming of each DOC facility including all inmate PIN and call restriction information.

DOC personnel at each DOC facility must have the ability to change or modify any privileges or restrictions pertaining to inmates at their institution. DOC personnel must have the ability to enter, modify or view the ICS data base for inmates located at their facility.

Currently the DOC is under contract with Verizon for its present Secure Inmate Calling System. Verizon, serving as the Prime Contractor, provides all local exchange service, intra and inter-LATA collect call services, all inmate telephone hardware, site/location processors, a centralized database of all locations, as well as all call recording devices.

All inmate calls are currently placed as collect call only and identified to the recipient as a call from an inmate at a Massachusetts Correctional Institute (MCI). Inmates are presently required to use PINs to place these collect calls. All calls are recorded by the DOC with the exception of telephone calls to attorneys, designated and pre-approved ordained clergyman, and pre-approved and licensed psychotherapists, physicians, social workers and/or mental health and human service professionals.

It is the DOC's intention via this RFR, to have a Bidder also provide coin-operated, public telephones in DOC institutions, as required. These telephones will be located in areas such as public lobbies, visiting areas and pre-release facilities.

The DOC requires that the Bidder agree to provide the following compensation to DOC:

- a commission based on a percent factor of all revenue received from calls placed via the Secure Inmate Calling System operating in collect only mode;

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- a commission based on a percent factor of all revenue received from calls placed via the Secure Inmate Calling System operating in pre-paid debit based mode;

All commission percentages must be stated in the Cost Tables (Attachment D). Payments to the DOC and the Commonwealth of Massachusetts must be paid monthly.

There shall be no cost to the DOC for the installation or maintenance of the ICS at each DOC facility. The Bidder is responsible for replacement of the ICS in its entirety or its individual components regardless of cause including, but not limited to, normal wear/use, inmate abuse, natural disaster, or inmate unrest. This system or component replacement will be performed at no cost to the DOC and will occur immediately upon notification to the Contractor of the system problem by the DOC facility.

The current contract with Verizon will expire in March, 2006. The selected Contractor will be responsible for implementing the proposed ICS in all DOC facilities to coincide with this contract expiration date. The Bidder must address all aspects of Section 5.7 regarding the transition to and the installation of the proposed ICS.

SECURITY SENSITIVE INFORMATION

This solicitation (and RFR document) contains security-sensitive information which, pursuant to MGL c.4, § 7, cls. 26(n), is generally exempt from public disclosure under the Commonwealth's public records laws and must, for public safety purposes, be safeguarded from widespread public disclosure.

This security-sensitive information is in the form of blueprints, plans, policies, procedures, schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or vulnerability assessments, and/or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation, information technology or other infrastructure located within the Commonwealth.

Qualified prospective Bidders that are interested in accessing this information for the purposes of preparing a bid response must, before being allowed to access the information, sign a confidentiality agreement, thereby agreeing to:

1. a restriction on the use of these sensitive records for any other purpose than as authorized and for the purpose of putting together a bid proposal; and
2. safeguard the information while it is in their possession.

RFR GENERAL INFORMATION

The following information is provided for the Bidder's information only. All contact with the Massachusetts DOC regarding this RFR document must be conducted according to the requirements outlined in Section 2.0 of this RFR.

Comm-PASS Site Address:	www.comm-pass.com
Purchasing Department:	Department of Correction
Address:	50 Maple Street, Suite 3 Milford, MA 01757
Contact Person:	Peter Macchi
Telephone #:	508-422-3333
Fax #:	508-422-3383
E-Mail or Internet Address:	peter.macchi@state.ma.us
Procurement Category:	Equipment, Software and Services – Telecommunications Systems – Standard, Single-Purpose
RFR File Name/Title:	Secure Inmate Calling System & Related Services
RFR File Number:	1000-Phone2006

Section 2

RFR General Information

- 2.1 The terms of 801 CMR 21.00: Procurement of Commodities and Services are incorporated by reference into this RFR. Words used in this RFR shall have the meanings defined in 801 CMR 21.00. Additional definitions may also be identified in this RFR. Unless otherwise specified in this RFR, all communications, responses, and documentation must be in English, all measurements must be provided in feet, inches, and pounds and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this RFR. No electronic only responses may be submitted in response to this RFR. (See Section 2.24)
- 2.2 **Affirmative Market Program AMP.** Massachusetts Executive Order 390 established a policy to promote the award of state contracts in a manner that develops and strengthens Minority and Women Business Enterprises (M/WBEs) and resulted in the Affirmative Market Program in Public Contracting. As a result, M/WBEs are strongly encouraged to submit responses to this RFR, either as Prime Bidders, subcontractors, joint venture partners or other type of business partnerships.

Non-certified Bidders are strongly encouraged to develop creative initiatives to help foster new business relationships with M/WBEs within the primary industries affected by this RFR. In order to satisfy the compliance of this section and encourage Bidder's participation of AMP objectives, the Affirmative Market Program Plan for large procurements greater than \$50,000 must be evaluated at 10% or more of the total evaluation. Once an AMP Plan is submitted, negotiated and approved, the DOC will then monitor the contractor's performance, and use actual expenditures with SOMWBA certified contractors to fulfill their own AMP expenditure benchmarks. M/WBE participation must be incorporated into and monitored for all types of procurements regardless of size, however, submission of an AMP Plan is mandated only for large procurements over \$50,000.

The DOC requires some or all of the following components as part of the Affirmative Market Program Plan submitted by Bidders: Sub-contracting with certified M/WBE firms, Growth and Development activities to increase M/WBE capacity, Ancillary use of certified M/WBE firms, Past Performance or information of past expenditures with certified M/WBEs. The DOC encourages Bidders to commit to at least one certified MBE and WBE in the submission of AMP plans.

A Minority Business Enterprise (MBE), Woman Business Enterprise (WBE), M/Non-Profit, or W/Non-Profit, is defined as such by SOMWBA. All certified businesses are required to submit an up to date copy of their State Office of Minority and Women Business Assistance (SOMWBA) certification letter. The purpose for this certification is to participate in the Commonwealth's Affirmative Market Program for public contracting. Minority- and Women-Owned firms that are not currently certified but would like to be considered as an M/WBE for the purpose of this RFR should submit their application at least two weeks prior to the RFR closing date. For further information on SOMWBA certification, contact their office at 1-617-727-8692 or via the Internet at mass.gov/somwba.

Affirmative Market Program Subcontracting Policies: Prior approval of the DOC is required for any subcontracted service of the contract resulting from this procurement. The DOC defines required deliverables as including, but not limited to, documentation necessary to verify subcontractor commitments and expenditures with Minority- or Women-Owned Business Enterprises (M/WBEs) for the purpose of monitoring and enforcing compliance of subcontracting commitments made in a Bidder's Affirmative Market Program (AMP) Plan. Contractors are responsible for the satisfactory performance and adequate oversight of its subcontractors. Subcontractors are required to meet the same state and federal financial and program reporting requirements and are held to the same reimbursable cost standards as contractors.

- 2.3 Best Value Selection and Negotiation.** The DOC may select the response(s) which demonstrates the best value overall, including proposed alternatives, that will achieve the procurement goals of the DOC. The PMT and a selected Bidder, or a contractor, may negotiate a change in any element of contract performance or cost identified in the original RFR or the selected Bidder's or contractor's response which results in lower costs or a more cost effective or better value than was presented in the selected Bidder's or contractor's original response.
- 2.4 Bidder Communication.** Bidders are prohibited from communicating directly with any employee of Massachusetts DOC except as specified in this RFR, and no other individual Commonwealth employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFR. Bidders may contact the contact person for this RFR in the event this RFR is incomplete or the Bidder is having trouble obtaining any required attachments electronically through the Comm-PASS website at www.comm-pass.com.
- 2.5 Comm-PASS.** Due to the security sensitive nature of this procurement, this RFR document is not being distributed electronically using the Comm-PASS system. However, the Comm-PASS system is used for the distribution of all RFR required forms that are

referenced in Attachment A of this RFR document, other standard attachments, the response to Bidder written inquiries as well as to communicate timely information regarding this procurement including any possible changes in the procurement calendar.

Bidders are solely responsible for obtaining and completing the required forms that are identified in this RFR and for checking Comm-PASS for any addenda or modifications that are subsequently made to this RFR or attachments.

The Commonwealth and its subdivisions accept no liability and will provide no accommodation to Bidders who fail to check Comm-PASS for RFR amendments and other pertinent information and submit inadequate or incorrect responses.

Bidders are advised to check the "last change" field on the summary page of RFRs for which they intend to submit a response to ensure that they have the most recent RFR files.

Bidders may not alter (manually or electronically) the RFR language or any RFR component files. Modifications to the body of the RFR, specifications, terms and conditions, or which change the intent of this RFR are prohibited and may disqualify a response.

- 2.6 Access to Security Sensitive Information:** This solicitation contains security-sensitive information which, pursuant to MGL c.4, § 7, cls. 26(n), is generally exempt from public disclosure under the Commonwealth's public records laws and must, for public safety purposes, be safeguarded from widespread public disclosure. This security-sensitive information is in the form of blueprints, plans, policies, procedures, schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or vulnerability assessments, and/or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation, information technology or other infrastructure located within the Commonwealth.

Qualified prospective Bidders that are interested in accessing this information for the purposes of preparing a bid response must, before being allowed to access the information, sign a confidentiality agreement, thereby agreeing to:

1. a restriction on the use of these sensitive records for any other purpose than as authorized and for the purpose of putting together a bid proposal; and
2. safeguard the information while it is in their possession.

- 2.7 Reasonable Accommodation.** Bidders with disabilities or hardships that seek reasonable accommodation, which may include the receipt of RFR information in an alternative

format, must communicate such requests in writing to the contact person. Requests for accommodation will be addressed on a case-by-case basis. A Bidder requesting accommodation must submit a written statement which describes the Bidder's disability and the requested accommodation to the contact person for the RFR. The PMT reserves the right to reject unreasonable requests.

- 2.8 Public Records:** All Responses and information submitted in response to this RFR are subject to the Massachusetts Freedom of Information Law, M.G.L., Chapter 66, Section 10, and to Chapter 4, Section 7, Subsection 26, regarding public access to such documents. Any statements reserving any confidentiality or privacy rights in submitted Bidder Responses or otherwise inconsistent with these statutes shall be void and disregarded.
- 2.9 Guarantee of Purchase:** The Commonwealth makes no guarantee that any commodities or services will be purchased from any Contract resulting from this RFR. Any estimates or past procurement volumes referenced in this RFR are included only for the convenience of Bidders, and are not to be relied upon as any indication of future purchase levels.
- 2.10 Costs.** Costs which are not specifically identified in the Bidder's response, and accepted by the DOC as part of a contract, will not be compensated under any contract awarded pursuant to this RFR.

The DOC will not be responsible for any costs or expenses incurred by Bidders responding to this RFR.

- 2.11 Information Technology.** All IT systems and applications developed by, or for Executive Department agencies or operating within the Massachusetts Access to Government Network (MAGNet), must conform with the Enterprise Information Technology Policies, Standards and Procedures promulgated by the Commonwealth's CIO. Non-conforming IT systems cannot be deployed unless the purchasing agency and their contractor have jointly applied for and received in writing from the Commonwealth's CIO or his designee, notice that a specified deviation will be permitted. The Enterprise Information Technology Policies, Standards and Procedures, with the exception of the Commonwealth's Public Access Architecture, is available at mass.gov/itd. The Commonwealth's Public Access Architecture is available in hard copy from the purchasing agency. Purchasing agencies may also obtain a current copy of the Public Access Architecture, on behalf of their contractor, by contacting the Information Technology Division (ITD) Customer Coordination Group (CCG: 617-626-4600).

Please Note: Given the pace of information technology innovation, purchasing agencies and their contractors are encouraged to contact the Information Technology Division

(ITD) Customer Coordination Group (CCG: 617-626-4600) to signal a system or application design and development initiative. Such advance notice helps to ensure conformance with the relevant Enterprise Technology Policies, Standards and Procedures.

Contractor delivery of IT systems and applications that fail to conform to the Commonwealth's Enterprise Information Technology Policies, Standards and Procedures, absent the Commonwealth CIO's grant of written permission for a deviation, shall constitute breach of any contract entered as a result of this Request for Response and any subsequent Request for Quotes. The Commonwealth may choose to require the contractor, at his own cost, to re-engineer the non-conforming system for the purpose of bringing it into compliance with Commonwealth Enterprise Information Technology Policies, Standards and Procedures.

- 2.12** Pursuant to Section 11. Indemnification of the Commonwealth Terms and Conditions, the term "other damages" shall include, but shall not be limited to, the reasonable costs the Commonwealth incurs to repair, return, replace or seek cover (purchase of comparable substitute commodities and services) under a contract. "Other damages" shall not include damages to the Commonwealth as a result of third party claims, provided, however, that the foregoing in no way limits the Commonwealth's right of recovery for personal injury or property damages or patent and copyright infringement under Section 11 nor the Commonwealth's ability to join the contractor as a third party defendant. Further, the term "other damages" shall not include, and in no event shall the Contractor be liable for, damages for the Commonwealth's use of contractor provided products or services, loss of Commonwealth records, or data (or other intangible property), loss of use of equipment, lost revenue, lost savings or lost profits of the Commonwealth. In no event shall "other damages" exceed the greater of \$100,000, or two times the value of the product or service (as defined in the contract scope of work) that is the subject of the claim. Section 11 sets forth the contractor's entire liability under a contract. Nothing in this section shall limit the Commonwealth's ability to negotiate higher limitations of liability in a particular contract, provided that any such limitation must specifically reference Section 11 of the Commonwealth Terms and Conditions.

- 2.13 Northern Ireland Notice and Certification.** All Bidders must complete the Northern Ireland Notice and Certification form to satisfy M.G.L. c.7 section 22C, which states that no state agency may procure commodities or services from any Bidder employing ten (10) or more employees in an office or other facility located in Northern Ireland unless the Bidder certifies through the notice and certification form that if it employs ten or more employees in Northern Ireland, a) the Bidder does not discriminate in employment, compensation or the terms, conditions and privileges of employment on account of religious or political belief; b) the Bidder promotes religious tolerance within the workplace and the eradication of any manifestations of religious and other illegal

discrimination and, c) the Bidder is not engaged in the manufacture, distribution or sale of firearms, munitions, including rubber or plastic bullets, tear gas, armored vehicles or military aircraft for use or deployment in any activity in Northern Ireland.

- 2.14 Pricing:** Federal Government Services Administration (GSA) or Veteran's Administration Supply. The Commonwealth reserves the right to request from the successful Bidder(s) initial pricing schedules and periodic updates available under their GSA or other federal pricing contracts.

In the absence of proprietary information being part of such contracts, compliance for submission of requested pricing information is expected within 30 days of any request. If the contractor receives a GSA or Veteran's Administration Supply contract at any time during this contract period, it must notify the Commonwealth contract manager.

- 2.15 Brand Name or Equal:** Unless otherwise clearly stated in this RFR, any reference to a particular trademark, trade name, patent, design, type, specification, producer, or supplier is not intended to restrict this RFR to any manufacturer or proprietor or to constitute an endorsement of any good or service, and the Procurement Management Team may consider clearly identified offers of substantially equivalent goods and services submitted in response to such reference.

- 2.16 Emergency Standby Commodities and/of Services:** Due to a declaration of a state of emergency where the safety and well-being of the Commonwealth citizens are at risk, the Commonwealth of Massachusetts may request specific commodities and/or services from its Contractors. Contractors may be called upon to supply and/or deliver to the Commonwealth on a priority basis such commodities and/or services currently under contract.

Such accommodations may be requested from a Contractor during an actual emergency. To accommodate such requests, Contractors may be requested and must make every effort to service these requests from regular sources of supply at the rates set forth in any standard contract resulting from this RFR.

- 2.17 Subcontracting Policies/Prime Bidder.** The DOC requires a single point of contact for any contract resulting from this RFR. Subcontractors may be used but the Prime Contractor must accept full responsibility for any subcontractor's performance.

The Bidder, as Prime Contractor, will serve as the single-point-of-contact for the DOC during the course of this contract and shall be responsible for meeting all of the terms of any contract resulting from this RFR.

The Bidder must provide a list of all subcontractors, as description of each subcontractor's responsibilities and signed letters of agreement between the Bidder, as Prime Contractor, and its subcontractors identifying their responsibilities and their relationship to the Prime Contractor.

- 2.18 Single Procurement/Multiple Department Use of Contract:** The DOC reserves the right to include an option for other correctional departments to purchase services or commodities under the same terms of the contract. Should correctional departments exercise this option, Bidders will be required to specify their ability to extend services to other correctional departments and the rates to be used. Other correctional departments may execute separate contracts with awarded Bidders.

- 2.19 Anticipated Expenditures, Funding or Compensation:** This initial contract will result in a commission fee being paid to the Commonwealth of Massachusetts. At no time shall this contract result in a fee being paid by the DOC or the Commonwealth of Massachusetts to the awarded Bidder.

No Federal Funds will be used to fund any part of this contract.

This Request for Response (RFR) is being procured in compliance with the World Trade Organization (WTO) for procurements in which the value over the entire duration of the procurement may exceed \$477,000.

2.20 Expected Duration of Contract

Initial Duration:	Four (4) Years
Renewal Options:	Three (3) Options up to One (1) Year Each
Anticipated Start Date:	March 3, 2006

2.21 Procurement Calendar

Date	Activity
Mon., July 11, 2005 9:30 am EDT	RFR Document Available
Mon., Aug. 8, 2005 9:30 am EDT	Bidder's Conference at DOC HQ, Milford, MA
Fri., Aug. 19, 2005 3:00 pm EDT	Deadline for Bidder Written Inquiries
Fri., Aug. 26, 2005	Answers to Written Inquiries Posted to Comm-PASS
Thur., Sept. 14, 2005 2:00 pm EDT	Bidder Responses to RFR Due to DOC
Sept. – Oct., 2005	DOC Evaluation of Responses
October, 2005	Bidder Finalist Presentations
November, 2005	Award Contract Pending Negotiations
November, 2005	Contract Negotiations
December, 2005	Contract Signed

- 2.22 Bidder's Conference:** A pre-response Bidder's conference will be conducted by the DOC and the Procurement Management Team (PMT). During the Bidders' conference, Bidders may ask questions regarding any part or attachment of this RFR. Questions received will be responded to orally to the extent possible at the conference by members of the PMT. The PMT, however, may request that questions or inquiries be made in writing to the PMT to ensure a proper and thorough reply.

The Bidder should be advised that oral responses provided during the Bidders' conference are not binding on the Commonwealth or the DOC. As only written responses from the PMT will be binding on the Commonwealth or the DOC, the PMT encourages the Bidder

to submit written inquiries (by the required due date) in cases where a clear and binding response may be required.

Bidders are responsible for any and all costs associated with attending the Bidders Conference.

The Bidders' Conference will take place on the date and time listed in the Procurement Calendar and on Comm-PASS at the following location:

Massachusetts Department of Correction
50 Maple Street
Milford, Massachusetts 01757

Bidders must be aware that the Mass DOC is located within the headquarters of the Massachusetts National Guard. Bidders will be required to produce a photo identification to National Guard personnel at the security gate of the facility prior to entering the parking lot. Bidder personnel will also be required to surrender a photo identification to the main desk for a visitors pass to the building. Upon leaving the building, Bidder personnel must surrender the visitors pass and reacquire their photo identification. Failure to comply with or any attempt to circumvent these security measures will result in non-admittance to the National Guard property and prosecution according to all applicable laws.

Any change to this Bidders' Conference date and/or time will be published electronically on the Comm-PASS system. (www.comm-pass.com)

Although attendance at the Bidders' Conference is not mandatory, Bidders are strongly encouraged to attend in order to gain a full understanding of the RFR document and the ICS requirements of the DOC.

2.23 Written Inquiries

Bidders may submit Written Inquiries concerning any part or attachment of this RFR to the Procurement Team Leader (PTL). Written Inquiries regarding issues *outside of the scope* of this RFR will not be considered by the PMT. The deadline for the Submission of Written Inquiries is listed in the Procurement Calendar as well as on Comm-PASS. Any change to this deadline will be posted on the Comm-PASS site.

All inquiries must be submitted, by the required date and time, to:

Mr. Peter V. Macchi

Director, Administration Services
peter.macchi@state.ma.us

All written inquiries must be submitted via electronic mail (e-mail) only. No other manner of submission will be accepted. Questions must be entered in the body of the e-mail rather than in an attachment. The subject of the e-mail should include the words "1000-Phone2006 Question." The Bidder is responsible for confirming receipt of its written inquiries with the Procurement Team Leader (PTL).

The PMT will provide written responses to all written inquiries received by the required due date. Responses will be available via the Comm-PASS system. Responses will not identify the inquiry by Bidder. Only those responses to the Bidder's inquiries posted on Comm-PASS will be binding on the DOC.

It is the responsibility of the Bidder to keep the e-mail address of its RFR contact person/prospective contract manager current for monitoring its e-mail inbox for communications from the DOC PMT, including requests for clarification. The DOC PMT and the Commonwealth assume no responsibility if a Bidder's e-mail address is not current or if technical problems, including those with the Bidder's computer, network or internet service provider (ISP), causes e-mail communications sent to/from the Bidder and the DOC PMT to be lost or spammed.

2.24 Instructions For Submission of RFR Responses

Each RFR Response must be sealed, labeled, and submitted to the DOC at the following address:

Department of Correction
50 Maple Street, Suite 3
Milford, MA 01757
Attention: RFR # 1000-Phone2006

2.24.1 Paper Submission: The Bidder must submit one (1) original Response to the RFR marked "ORIGINAL" and nine (9) copies marked "COPY" on 8 ½" x 11" paper. The PMT requests that the original RFR and copies be printed double-sided.

2.24.2 Electronic Submission: The Bidder must submit one (1) copy of the RFR Response on CD ROM. The Bidder must submit the RFR Response in Microsoft Word® or Adobe Acrobat (pdf) format. All copies of the electronic submission must be identical to information provided by the Bidder on the corresponding paper submission. In the event of a discrepancy between the original paper

submission copy and the electronic submission, the original paper submission will prevail. The Bidder is requested to label the CD with the following information:
Bidder Name; RFR# 1000-Phone2006; Date

The Bidder's response to the RFR document must not include extraneous information not directly pertaining to the requirements outlined in the RFR. The Bidder must not simply include various company brochures, whitepapers, customer testimonials, case studies that are not required under the RFR specifications nor having any effect on the evaluation of the Bidder's response by the DOC.

2.25 Deadline for Submission of Responses

Bidders must follow the requirements of Section 2.23 above in regards to submission of a response to this RFR. All Responses to this RFR are due at the address listed in Section 2.23 above no later than the date and time listed in the Procurement Calendar and on Comm-PASS

No responses to this RFR will be accepted after this published due date and time regardless of the reason for the deliver delay.

Any changes to this due date will be published electronically on the Comm-PASS system. (www.comm-pass.com)

Bidders must be aware that the Mass DOC is located within the headquarters of the Massachusetts National Guard. Bidders will be required to produce a photo identification to National Guard personnel at the security gate of the facility prior to entering the parking lot. Bidder personnel will also be required to surrender a photo identification to the main desk for a visitors pass to the building. Upon leaving the building, Bidder personnel must surrender the visitors pass and reacquire their photo identification. Failure to comply with or any attempt to circumvent these security measures will result in non-admittance to the National Guard property and prosecution according to all applicable laws.

Please keep these security requirements in mind when considering the "hand delivery" of your response to DOC HQ.

2.26 Response to RFR Specifications

2.26.1 The Bidder is required to follow the same sectional format of this RFR and provide an individual response to each RFR specification in its Response. All Responses must be presented using the same numbering sequence and order used

in this RFR document or as otherwise specified by the PMT. A response to each specification is required regardless if the specification is providing information only or requiring information from the Bidder. The Bidder must not provide a "blanket statement" stating compliance to an entire RFR section.

- 2.26.2 To each mandatory RFR specification, the Bidder must clearly state in the affirmative that the Bidder will "comply" with, "agree" to or "understand" the RFR mandatory requirement. The Commonwealth has defined a response of "comply" or "agrees" or "understands" as one in which the Bidder accepts the terms and conditions of the mandatory RFR specification.
- 2.26.3 To each desirable (optional) specification, the Bidder must clearly state in the affirmative that the Bidder will "comply" with, "agree" to or "understand" the RFR desirable requirement. The Commonwealth has defined a response of "comply" or "agrees" or "understands" as one in which the Bidder accepts the terms and conditions of the desirable RFR specification. The Bidder is also required to provide all necessary information requested in the particular desirable specification demonstrating how it will meet this optional specification. Failure to provide this necessary information may result in the award of no evaluation points or a lesser amount of evaluation points to the Bidder's response.
- 2.26.4 To each mandatory or desirable RFR specification that requires that the Bidder "list", "describe", "state", "provide" a subject matter, the Bidder must provide the list, description, statement, etc. clearly in that section of its RFR response. The Bidder must not simply reply with "Comply" or other similar response. References, by the Bidder, to review attachments containing brochures, white papers or other standard "boilerplate" material as a response to a particular RFR specification will not be accepted. The Bidder is, however, allowed to provide such attachments in support of its response to the particular specification.
- 2.26.5 If a Bidder is unable to meet any of the specifications required in this RFR, the Bidder's Response must include an alternative method for meeting such specification by identifying the specification, the proposed alternative, and thoroughly describing how the alternative achieves substantially equivalent or better performance than the performance required in the RFR specification.

The PMT will determine if a proposed alternative method of performance achieves substantially equivalent or better performance. The determination of the PMT on the Bidder's proposed alternative method will be final.

- 2.26.6** The goal of this RFR is to provide the best value of commodities and services for the Commonwealth. Bidder's proposing alternatives which provide substantially better or more cost effective performance than achievable under a stated RFR specification or Bidders that propose discounts, uncharged commodities and services or other benefits in addition to the RFR specifications may receive a preference under this RFR as specified.

2.27 Required Forms

Bidders must complete, execute and return the following forms, which are found under the "Forms & Terms" tab of this solicitation on the Comm-PASS system:

2.27.1 Standard Contract Form

Failure to return a completed and executed Standard Contract Form may disqualify the Bidder's Response. The appropriate version of this form is found under the "Forms & Terms" tab of this solicitation.

By executing this document, the Bidder certifies, under the pains and penalties of perjury, that it has submitted a Response to this RFR that is the Bidder's Offer as evidenced by the execution of its authorized signatory, and that the Bidder's Response may be subject to negotiation by the DOC. Also, the terms of the RFR, the Bidder's Response and any negotiated terms shall be deemed accepted by the DOC and included as part of the Contract upon execution of this document by the DOC Purchasing Agent or his designee.

Signature and date MUST be handwritten in blue ink, and the signature must be that of one of the people authorized to execute contracts on behalf of the Contractor on the Contractor Authorized Signatory Listing.

2.27.2 Commonwealth Terms and Conditions

Bidders must complete, execute and return a copy of the Commonwealth Terms and Conditions form. If the Bidder has already executed and filed the Commonwealth Terms and Conditions form pursuant to another RFR or Contract, please include a copy of the completed Commonwealth Terms and Conditions Form in the Response. If the Bidder's name, address or Tax ID Number have changed since the Commonwealth Terms and Conditions form was executed, a new Commonwealth Terms and Conditions form is required. The Commonwealth Terms and Conditions are hereby incorporated into any Contract executed pursuant to this RFR.

This form must be unconditionally signed by one of the authorized signatories (see Contractor Authorized Signatory Listing, below), and submitted without alteration. If the provisions in this document are not accepted in their entirety without modification, the entire Proposal offered in response to this solicitation may be deemed non-responsive.

The company's correct legal name and legal address must appear on this form, and must be identical to the legal name and legal address on the Verification of Taxation Reporting Information (W9).

Note that the Commonwealth Terms and Conditions have been "clarified" relative to liability; clarification language is included within this RFR, see "Required Specifications for Statewide Information Technology Contracts," under the "Forms & Terms" tab of this solicitation.

2.27.3 Request for Taxpayer Identification and Verification (Mass. Substitute W9 Form)

If a Bidder has already submitted a Request for Taxpayer Identification and Verification (Mass. Substitute W9 Form) and has received a valid Massachusetts Bidder Code, an original W-9 form is not required. A copy of the form as filed may be included in place of an original. The information on this form will be used to record the Bidder's legal address and where payments under a State contract will be sent.

The company's correct legal name and legal address must appear on this form, and must be identical to the legal name and legal address on the Commonwealth Terms and Conditions.

Do not use the U.S Treasury's version of the W9 Form. Use the W9 form found under the "Forms & Terms" tab of this RFR.

2.27.4 Contractor Authorized Signatory Listing

Bidders are advised to pay particular attention to the instructions below. Errors on this form could result in significant delays in proposal review.

Download the form and in the table entitled "Authorized Signatory Name" and "Title," type the names and titles of those individuals authorized to execute contracts and other legally binding documents on behalf of the Bidder. Bidders

are advised to keep this list as small as possible, as Contractors will be required to notify the DOC of any changes. If the person signing in the signature block below will also serve as an "Authorized Signatory," that person's name should be included in the typed table.

With regard to the next paragraph, which begins "I certify that I am the President, Chief Executive Officer, Chief Fiscal Officer, Corporate Clerk or Legal Counsel for the Contractor..." if your organization does not have these titles, cross them out and handwrite the appropriate title above the paragraph.

The signature and date should be handwritten in blue ink. Title, telephone, fax and eMail should be typed or handwritten legibly.

The second page of the form states that the page is optional. However, for the purpose of this procurement this page is **REQUIRED**, not optional. The person signing this page must be the same person signing the Standard Contract Form, the Commonwealth Terms and Conditions, and the RFR Checklist.

Please note that in two places where the form says "in the presence of a notary," this should be interpreted to mean "in the presence of a notary or corporate clerk/secretary." Either a notary or corporate clerk/secretary can authenticate the form; only one is required.

Organizations whose corporate clerks/secretaries authenticate this form are not required to obtain a Corporate Seal to complete this document.

2.27.5 Affirmative Action Plan

The Commonwealth requires that Bidders responding to this RFR include **EITHER** an Affirmative Action Plan for non-discrimination in hiring and employment with their Response **OR** a completed Affirmative Action Plan Form.

In completing this form, note that the "Bidder" is the name of the company submitting a Response to this RFR, the "RFR Name/Title" is "Secure Inmate Calling System RFR" and the "RFR Number" is 1000-Phone2006

2.27.6 Affirmative Market Program Plan

This is **NOT** the same as the Affirmative Action Plan Form, or SOMBWA certification of the Bidder's company. Please see the RFR Required Specifications for a description of the Affirmative Market Program. Bidders do

not need to be SOMBWA-certified to participate. Note that copies of the SOMBWA certifications for any company listed on the Affirmative Market Program Plan must be included with your Proposal.

It is highly desirable that Bidders commit to subcontracting a specific dollar amount, or a minimum percentage of dollars earned through 1000-Phone2006, with a SOMBWA-certified company or company that has applied for SOMBWA certification. Although this is only one of several options to meet the requirements for participation in the Affirmative Market Program, it is the option which is weighted most heavily in the evaluation criteria. Affirmative Market Program participation accounts for 10% of the total points in the evaluation.

Please note that SOMBWA-certified Bidders will be evaluated on their Affirmative Market Programs just as non-SOMBWA-certified Bidders are evaluated. A SOMBWA-certified Bidder may not list itself as being an Affirmative Market Program Partner to its own company.

2.27.7 Northern Ireland Notice and Certification

All Bidders must complete the Northern Ireland Notice And Certification Form to satisfy M.G.L. c. 7 section 22C, which states that no State agency may procure commodities or services from any Bidder employing ten (10) or more employees in an office or other facility located in Northern Ireland unless the Bidder certifies through the notice and certification form that if it employs ten or more employees in Northern Ireland, a) the Bidder does not discriminate in employment, compensation or the terms, conditions and privileges of employment on account of religious or political belief, b) the Bidder promotes religious tolerance within the workplace and the eradication of any manifestations of religious and other illegal discrimination and, c) the Bidder is not engaged in the manufacture, distribution or sale of firearms, munitions, including rubber or plastic bullets, tear gas, armored vehicles or military aircraft for use or deployment in any activity in Northern Ireland.

Note that Bidders must check one of the two spaces at the beginning of the form to indicate whether they do, or do not, employ ten or more employees in Northern Ireland.

2.27.8 Certification of Tax Compliance

All Bidders must certify compliance with all Federal and Commonwealth tax laws, including M.G.L. Chapter 62C Paragraphs 49A. A Bidder may "self certify" on the appropriate Response Form. Bidders based in Massachusetts or deriving an income in Massachusetts are encouraged to apply for a Certificate of Good Standing from the Massachusetts Department of Revenue.

DOR's Certificate Unit of the Taxpayer Service Division, which issues these certificates, is located at:

Massachusetts Department of Revenue, Certificate Unit
P.O. Box 7066, Boston, MA 02204

Bidders can apply for a Certificate of Good Standing from DOR in one of 2 ways: 1) apply online – visit DOR's "Certificate of Good Standing Website" or see www.mass.gov/dor for instructions if the previous link is no longer valid 2) complete a paper application (fax to DOR at 617- 887-6262). DOR will notify the requestor if there are any remaining liabilities or tax requirements. Certificates will be issued only if the organization is in full compliance. Since all applications require extensive research, the Bidder should allow sufficient time to process. For more information on the certificate contact the Certificate Unit at (617) 887-6550.

- 2.28 Cooperation in Litigation:** The Commonwealth, including the DOC or any other division, agency or office, shall not be responsible for representing or defending, or for any costs incurred by the Contractor or Contractor's personnel, agents or subcontractors, in connection with any lawsuit or claim, including, but not limited to any claim brought pursuant to the Massachusetts Tort Claims Act, G.L. c. 258.

The Contractor agrees to make all reasonable efforts to cooperate with the DOC in the defense of any litigation brought by any person not party to this Agreement, including suits that concern Services, the Program or this Contract.

- 2.29 Penalty Waivers:** Upon timely written request by the Contractor, and upon good cause shown by supporting documentation, the DOC, in its discretion, may waive the imposition of a penalty outlined in this RFR document for substandard or non-performance. The determination of the DOC with respect to any waiver request shall be final and not subject to appeal.

- 2.30 Performance Bond Requirement:** Simultaneously with the execution of the contract, the Contractor shall provide to the DOC a performance bond with a surety company qualified to do business in Massachusetts and in a form satisfactory to the DOC to guarantee the faithful performance of the contract. The penal sum of such bond shall be in the amount of \$500,000.00. The bond shall remain in effect for the duration of this contract plus two years from the date of contract completion.
- 2.31 Victim Information and Notification Everyday (VINE):** The Contractor must pay the annual cost (approximately \$50,000) each year of the contract resulting from this procurement. The first payment must be made in March, 2006. Actual payment terms will be negotiated with the awarded Contractor at the time of contract negotiations. Information with regard to VINE may be found at www.appriss.com/vine.html.
- 2.32 Response Preparation Cost:** Neither the Commonwealth nor the DOC will be responsible for any costs or expenses incurred by Bidders responding to this RFR.
- 2.33 Cancellation of this Procurement:** The DOC may cancel this RFR procurement project at any time.
- 2.34 Oral Presentation/Demonstrations:** If requested, Bidders will be required to provide the DOC with a functional demonstration of the proposed ICS exhibiting the required and desired features. Such requests will be made prior to the award of the contract. All expenses related to this demonstration including any required travel expenses for the DOC PMT members will be borne by the Bidder according to Commonwealth policies and regulations.
- 2.35 Evaluation of Responses:** Bidders must submit responses that meet all the submission requirements of the RFR as defined in the section herein. Only responsive proposals that meet the submission requirements will be evaluated, scored and ranked by the PMT according to the evaluation criteria. Additional information may be requested from the Bidder by the PMT for evaluation purposes.

Any submission which fails to meet the submission requirements of the RFR will be found non-responsive without further evaluation unless the DOC PMT, at its discretion, determines that the non-compliance is insubstantial and can be corrected. In these cases, the evaluation team may allow the Bidder to make minor corrections to the submission.

Below are the criteria and maximum points available:

- | | |
|--------------------------------|-------------------|
| 1. Mandatory Requirements Met | No Points Awarded |
| 2. All Required Forms Provided | No Points Awarded |

3. Desirable Requirements Met	Up to 300 Points Awarded
4. Bidders' References Satisfactory	Up to 100 Points Awarded
5. Bidders' Demonstration/Presentation	Up to 350 Points Awarded
6. Bidders' Proposed Commission Schedule	Up to 150 Points Awarded
7. Affirmative Market Program (AMP)	Up to 100 Points Awarded

2.36 Best and Final Offer: After the deadline for response submission, the DOC reserves the right to extend a Best and Final Offer opportunity to all or a select number of Bidders. Bidders may be asked to submit additional information specific to program specifications and cost.

2.37 Best Value Selection and Negotiation: The PMT may select the Response which demonstrates the "Best Value" overall, including proposed alternatives, that will achieve the procurement goals of the DOC. The PMT and a Selected Bidder, or a Contractor, may negotiate a change in any element of Contract performance or cost identified in the original RFR or the Selected Bidder's or Contractor's response which results in lower costs or in a more cost effective or better value than was presented in the Selected Bidder's or Contractor's original response.

2.38 Definitions: For the purposes of this RFR, the following definitions shall be used. These definitions are based on industry standard terminology as well as internal DOC terms. These definitions are not meant to indicate a preference to any manufacturer or provider but to provide clarification and continuity with regard to terms used in this RFR.

Bidder: An individual, corporation or other entity engaged in the business of supplying Secure Inmate Calling Systems and Related Services who is submitting a Response to this RFR solicitation.

Contractor: An individual, corporation or other entity that is awarded a contract as a result of this procurement.

Contract: The word "contract" refers to any contract resulting from this RFR.

CMR: Code of Massachusetts Regulations

Department: The Massachusetts Department of Correction.

DOC: The Massachusetts Department of Correction

DOC Facility/Facilities: The institutions of the Department of Correction including all prisons, correctional centers, pre-release centers, the Bridgewater State Hospital, MASAC and the Treatment Center for Sexually Dangerous Persons.

DOC Personnel/Staff: Employees of the Massachusetts Department of Correction.

Fiscal Year: The year beginning with July 1st and ending with the following June 30th as defined in M.G.L. Chapter 4, Section 7. This may also be referred to as the "State Fiscal Year."

Inmates: All persons, male and female, adult and minor, residing in facilities or admitted or committed to the care and custody of the Massachusetts Department of Correction.

M.G.L.: Massachusetts General Laws

MMARS: The Massachusetts Management Accounting and Reporting System established by the Office of the Comptroller pursuant to M.G.L. Chapter 7A, Section 7. All payments to Contractors are processed and recorded in MMARS. Contractors are listed in a Bidder file in MMARS by their tax identification number.

PMT: Procurement Management Team. Personnel assigned to this specific procurement including development of the RFR document and evaluation of Bidder responses to the RFR.

Program: The goods and services provided by the Contractor under this contract.

Section 3

Background and DOC Information

The Massachusetts Department of Correction (DOC) is responsible for managing the operation of 18 correctional institutions located within the Commonwealth of Massachusetts. These institutions vary in level of security and house approximately 10,500 inmates.

Inmates are defined as all persons, male and female, adult and minor, residing in Facilities or admitted or committed to the care and custody of the Department of Correction. This term encompasses all sentenced prisoners including, but not limited to, civil commitments, federal detainees and any other individual under the jurisdiction of the Massachusetts DOC.

3.1 MASS DOC BACKGROUND INFORMATION

Current Secure Inmate Calling System

Currently the DOC is under contract with Verizon for its Secure Inmate Calling System. Verizon, serving as the Prime Contractor, provides all local exchange service, intra and inter-LATA collect call services, all inmate telephone hardware, site/location processors, a centralized database of all locations, as well as all call recording devices.

All inmate calls are currently placed as collect call only (with the exception of international calls) and identified to the recipient as a call from an inmate at a Massachusetts Correctional Institute (MCI). Inmates are presently required to use PINs to place these collect calls.

All calls are recorded by the DOC with the exception of telephone calls to attorneys, designated and pre-approved ordained clergyman, and pre-approved and licensed psychotherapists, physicians, social workers and/or mental health and human service professionals.

It is the DOC's intention via this RFR, to have a Bidder also provide coin-operated, public telephones in DOC institutions, as required. These telephones will be located in areas such as public lobbies, visiting areas and pre-release facilities.

List of Current Institutions

The following is a listing of all DOC Massachusetts Correction Institutions (MCI) including current inmate population (as of June 14, 2005). Please refer to Attachment B for a breakdown of collect and coin-operated telephones. Presently, the DOC has 18

Secure Inmate Calling Systems in operation.

Facility	Location	Population
Bay State Correctional Center	Norfolk	294
Boston Pre-Release Center	Roslindale	97
Bridgewater State Hospital	Bridgewater	335
Lemuel Shattuck Hospital Correctional Center ¹	Jamaica Plain	23
Mass Alcohol & Substance Abuse Center (MASAC)	Bridgewater	201
Massachusetts Treatment Center	Bridgewater	635
MCI - Cedar Junction	Walpole	632
MCI - Concord	Concord	1,166
MCI - Framingham	Framingham	686
MCI - Norfolk	Norfolk	1,420
MCI - Plymouth	Plymouth	150
MCI - Shirley	Shirley	1,133
North Central Correctional Institution at Gardner	Gardner	988
Northeastern Correctional Center	Concord	265
Old Colony Correctional Center	Bridgewater	707
Pondville Correctional Center	Norfolk	189
South Middlesex Correctional Center	Framingham	130
Souza Baronowski Correctional Center (Shirley)	Shirley	990
TOTAL		10,041

¹ Presently not on Secure Inmate Calling System

Further information regarding the Massachusetts Department of Correction can be found on the Department's website at www.mass.gov/doc.

Description of the DOC Inmate Management System

The Department's current Inmate Management System is used to track various types of inmate data. [REDACTED]

The system is used to track all inmate movement during their incarceration within the state system. In instances where a state inmate is transferred to a non-Massachusetts' state

[illegible]

[REDACTED]

**Department of Correction
Milford, Massachusetts 02202**

Section 4

General Bidder Requirements

This Section lists all mandatory and desirable specifications of this solicitation for a Secure Inmate Calling System & Related Services. Please refer to Section 2 for instructions and definitions of mandatory and desirable specifications.

4.1 REQUIRED ACCOUNT TEAM

The Bidder must establish an internal "Account Team" to interface with the DOC for the Secure Inmate Calling System (ICS) and Related Services. This Account Team will serve as the single-point-of-contact (SPOC) for the DOC and must provide system and network design services, system programming services, system transition and implementation services, post installation programming, updates and maintenance services and commission and rate schedule services.

The Bidder must list, in its response, the names of the Account Team members, their titles and their role/function during this contract.

4.2 DOC ACCESS TO ACCOUNT TEAM

4.2.1 The Bidder must provide access to the Account Team in the following manners:

- Voice Telephone (Toll Free Number)
- Facsimile (Toll Free Number)
- Electronic Mail (E-Mail)

4.2.2 To ensure access to key Bidder personnel during emergency situations, the Bidder must provide access to the Account Team or specific members of the Account Team 24-hours-a-day, 7-days-a-week by providing home, cellular and other appropriate contact numbers for the specific Account Team members.

4.3 ACCOUNT TEAM SECURITY REQUIREMENTS

4.3.1 The DOC reserves the right of rejection for personnel assigned to the Account Team including personnel from the Prime Bidder and personnel from any subcontractors utilized by the Prime Bidder during the life of the contract.

- 4.3.2 The DOC reserves the right to request the re-assignment of any Bidder personnel they believe are not performing in a proper or professional manner within the DOC's facilities causing disruption, security issues or embarrassment to DOC personnel or visitors. Should such reassignment of personnel be requested by the DOC, the Bidder must provide replacement personnel immediately in order to meet assigned installation dates or facilitate necessary repairs or service.
- 4.3.3 Upon contract award, the Contractor shall furnish a list of all installation and service employees who will have access to the secure areas of the DOC institution to the DOC. Such list shall include:
- a) first name, middle initial, and last name;
 - b) date and place of birth;
 - c) current residential address;
 - d) driver's license state and number; and,
 - e) social security number.

All Contractor personnel must receive security and background clearance by the DOC prior to provision of services. This includes a probation check and FBI background check. The DOC will not unreasonably withhold or delay such clearance.

- 4.3.4 Security clearance by the DOC will be mandatory before any employee of the Bidder will be allowed to enter the DOC institution. Admittance to the DOC institution will be denied to any Bidder employee who, in the opinion of the DOC Official, compromises the security of the DOC institution.
- 4.3.5 A current list of the Bidder's employees with security clearance will be maintained at the DOC Institution. The Bidder shall notify the DOC whenever an employee on this list is no longer employed by the Bidder, and the employee's name shall be removed from this list.
- 4.3.6 All decisions of the DOC relating to a security consideration of any kind are final and are not subject to arbitration.
- 4.3.7 Should any employee of the Bidder be terminated from his/her position for any reason which may affect the security of the DOC institution (i.e. stealing drugs, improperly distributing drugs to inmates or staff, improper fraternization with inmates, etc.) the DOC must be notified in writing immediately. If necessary, the Bidder must cooperate with the DOC in investigating the potential effect on DOC security.

- 4.3.8 The actual security of supplies, tools, systems and equipment in the DOC's designated telecommunications areas are the responsibility of the Bidder, and the Bidder shall adhere to all DOC appropriate written tool security policies and procedures.
- 4.3.9 The Bidder must ensure that all installation personnel assigned to the ICS installed at the DOC appear at the DOC site fully equipped to perform the installation duties required. "Fully Equipped" is described as possessing all tools, cable, connectors, ladders, test equipment, termination equipment, etc. needed to complete the required installation or repair without requiring the DOC to supply such items.
- 4.3.10 The Bidder must ensure that all installation and repair personnel assigned to the ICS at the DOC appear at the DOC site dressed in a professional manner and possessing some type of company photo identification.
- 4.3.11 The Bidder must agree, in its response, that it's personnel will comply with the DOC policy that **no jeans of any color** may be worn by an personnel within a DOC facility.
- 4.3.12 All Bidder personnel must comply with all security requirements of the DOC facility (including any necessary background checks, tool inventory, etc.) at which they are performing system installation or repair services under this contract.
- 4.3.13 All DOC facilities are considered "tobacco free". The Bidder must agree to inform its installation and repair personnel of such non-tobacco regulations and enforce such at the DOC's premises.

4.4 QUALIFIED PERSONNEL & CERTIFICATION REQUIREMENT

- 4.4.1 The Bidder must be an authorized distributor of the ICS proposed for the DOC. The Bidder must be certified to provide installation and maintenance services on all aspects of the ICS including hardware and software.

The Bidder must provide confirmation of this manufacturer authorization by providing, as an attachment to its response, a letter from the system's manufacturer stating such.

- 4.4.2 The Bidder must agree to provide only personnel that have been trained by the manufacturer on the installation and use of the Secure Inmate Calling System

proposed for the DOC. The Bidder shall provide to the DOC upon request written verification from the manufacturer of such training completed by the Bidder's personnel.

- 4.4.3 The Bidder must provide, in its proposal, qualifications statements for all personnel assigned to service the ICS proposed for the DOC. These qualifications statements may include descriptions of formal technical training, certificates received, formal education or degrees consistent with the inmate calling system or engineering field, membership in technical associations, field experience, etc.

4.5 REGULATORY COMPLIANCE

- 4.5.1 The Bidder must agree to adhere to any current municipal, state or federal requirements for installation and operation of the Secure Inmate Calling System. Failure to comply with present municipal, state or federal requirements will result in termination of any contract with the Bidder and the Bidder rendering payment of any applicable fines, etc. incurred by the DOC for violation of such requirements.
- 4.5.2 The Bidder shall be responsible for compliance with all regulatory requirements imposed by local, state and federal regulatory agencies for all systems and services provided throughout the duration of this contract.
- 4.5.3 The Bidder shall be responsible for complying with and updating the Secure Inmate Calling System for any regulatory changes and requirements during the life of the contract. These regulatory changes include federal, state or local municipal modifications. These changes must be made in a timely manner and at no cost to the DOC. The Bidder is responsible for paying all applicable fines levied should compliance with future regulatory requirements not be performed by required deadlines.
- 4.5.4 The Bidder must ensure that all of its installation work and materials comply with all local, state and federal laws, ordinances and regulations as well as the direction of any inspectors appointed by proper authorities having jurisdiction over this type of network and equipment installation.

The Bidder is responsible for obtaining all necessary permits. Should violation of codes occur relating to this ICS installation project because necessary permits were not identified and obtained by the Bidder, the Bidder will cease all work at that specific location and correct the situation, immediately, at no cost to the DOC prior to continuation of system installation.

4.6 INDUSTRY DIALING PLAN CHANGES

The Bidder shall be responsible for making all system modifications, at no cost to the DOC, necessary to allow inmates to place calls as industry dialing requirements change (e.g., new area code implementation, new NNXs, etc.) Such modifications must be made in a timely manner to ensure proper use of the system by inmates and DOC personnel.

4.7 DOC AUTHORIZED PERSONNEL

The Bidder's Account Team must accept system programming and maintenance orders from authorized personnel within the DOC only. The Account Team must determine authorized personnel during the initial contracting process and provide "Authorization Forms" for DOC personnel signatures. The Bidder will be responsible for all charges associated with "unauthorized" service repairs, additions, or changes performed by the Bidder.

4.8 PREVAILING WAGE COMPLIANCE

The Bidder is required to adhere to all prevailing wage rate specifications and schedules as determined by the Commissioner of the Commonwealth of Massachusetts Department of Labor and Workforce Development, Division of Occupational Safety and the United States Department of Labor when required.

Section 5

General System Requirements

The Secure Inmate Calling System and Related Services proposed for the DOC must meet or exceed the technical requirements outlined in this Section of the RFR document. The Secure Inmate Calling System (ICS) proposed to meet these technical requirements must be provided for all DOC facilities at no cost to the DOC including system installation, training, operation and maintenance of the system and its components.

The Bidder is responsible for replacement of the Secure Inmate Calling System in its entirety or its individual components regardless of cause including, but not limited to, normal wear/use, inmate abuse, natural disaster, or inmate unrest. This system or component replacement will be performed at no cost to the DOC and will occur immediately upon notification to the Bidder of the system problem by the DOC facility.

5.1 The Secure Inmate Calling System (ICS) proposed for the DOC must include the following components:

5.1.1 An on-site ICS located at each facility (See Section 3.1) of the DOC. Each system must contain one (1) PC and laser printer (22 ppm minimum);

5.1.2

[REDACTED]

[REDACTED]

[REDACTED]

5.1.3

[REDACTED]

5.1.4

- 5.1.5 A Centralized System Database located outside of the DOC facilities and maintained by the Bidder. The Bidder must state, in its response, the physical location (City/State) where the centralized system database is location.

The proposed ICS must allow for all DOC locations to be networked together thus allowing the sharing of inmate information, inmate PINs and call records between system. This network between DOC locations must allow for remote access of the ICS at one DOC facility by an authorized user at another DOC facility.

The proposed ICS must allow for administrator password levels that restrict DOC personnel to the ICS within their particular DOC facility as well as allow certain DOC personnel to access multiple systems, if required.

- 5.1.2 The Bidder must propose one type of Secure Inmate Calling System for all DOC locations. All system hardware, software, software level and support systems must be the same in each DOC facility.
- 5.1.3 The ICS at each DOC facility must provide for all telecommunications capabilities for inmate services as well as administrative capabilities for DOC personnel.
- 5.1.4 The Bidder must provide a Centralized System Database that is located at a Bidder provided site and provide full database redundancy for the ICS at each DOC facility.
- 5.1.5 The Bidder must propose an ICS at no cost to the DOC and include:
- full design, programming and installation;
 - programming of all inmate PINs and call lists;
 - post installation maintenance;
 - all network services (local, IntraLATA, InterLATA);
 - all network services for administration of the ICS.

-
- 5.1.6 The Bidder must propose an ICS for the DOC that has the capability of processing inmate calls in a pre-paid debit mode; collect call mode or a combination of the two depending on the DOC facility and unique needs of the DOC.
- 5.1.7 The Bidder must propose an ICS that allows for all inmate telephones to be in use simultaneously. The Bidder must describe, in its response, how this will be accomplished with the proposed ICS.
- 5.1.8 The Bidder must propose an ICS that can be shut down quickly and selectively. The DOC must be able to shutdown the system globally and restrict all PIN access within an entire facility and/or within a particular housing unit.
- 5.1.9 The Bidder must propose an ICS solution that allows the DOC to completely restrict inmate access to outside network services/facilities should the ICS control unit of the ICS fail for any purpose. The Bidder must describe, in its response, how this restriction is accomplished with the proposed ICS (e.g., toggle "kill" switches, etc.).
- 5.1.10 The proposed ICS must be restricted to outgoing calls only. The system must not process incoming calls at any time. The Bidder must agree, in its response, that no inmate telephone shall be capable of receiving an incoming call.
- 5.1.11 The Bidder must agree, in its response, that it will keep all call processing and call rating information current. This information includes, but is not limited to, local exchanges, area codes, country codes, vertical & horizontal coordinates and any other information necessary to accurately process and rate calls. The Bidder must provide the DOC with any and all rate information for all calls upon request by the DOC at any time during the term of this contract.
- 5.1.12 The ICS must block all calls made to any of the following services whether the system is used in direct dial, debit-based or collect call mode. The Bidder shall be responsible for ensuring that the system is programmed for such blocking.
- 900, 972, 976, 550, telephone numbers incurring excess charges;
 - long distance carrier access codes (e.g., 101-XXXX);
 - local toll free numbers (e.g., 950-XXXX);
 - directory assistance numbers (e.g., 411, 555-1212, etc.);
 - toll free numbers (e.g., 800, 888, 877, 866, 855, etc.)
- 5.1.13 The proposed ICS must not provide a second dial tone to an inmate telephone without the inmate hanging up the telephone receiver after the first call is completed and the PIN re-entered to place the second call.

- 5.1.14 The proposed ICS must allow for a maximum "ring time" prior to disconnecting the inmate call. This "ring time" parameter must be programmable by the DOC but must be consistent among DOC facilities.
- 5.1.15 The proposed ICS must provide notification to an inmate of the call status (e.g., ringing, busy, etc.). This notification may either be in the form of ringing, busy tones, SIT tones, or appropriate recorded messages. This requirement must be implemented for both direct dial (debit) or collect call mode of operation.
- 5.1.16 The proposed ICS shall not allow the inmate to speak to the called party until the call has been positively accepted. This requirement must be implemented for both direct dial (debit) or collect call mode of operation.
- 5.1.17 The proposed ICS must not allow the inmate to hear the called party prior to the actual positive acceptance (via touch tone entry) of the call.
- 5.1.18 The proposed ICS must allow for the DOC to program times when the system will be available or unavailable to inmate calling.
- 5.1.19 The proposed ICS must allow DOC personnel to temporarily restrict or disconnect service to an individual inmate telephone or station.
- 5.1.20 As one of the major problems associated with inmate calling, the initiation of 3-Way or Conference Calling is a constant issue with the DOC. [REDACTED]
[REDACTED] The proposed ICS must provide technology that deters an inmate's attempt to initiate a 3-Way or Conference Call with a Third Party and provide the ability to immediately terminate the call. The Bidder must describe, in its response, how this technology operates with regard to the proposed ICS and the options available to the DOC.
- 5.1.21 It is a desirable that the proposed ICS provide a function that prevents 3-Way or Conference Calling [REDACTED] The Bidder must explain, in its response, how this will be accomplished with the proposed ICS.
- 5.1.22 As one of the major problems associated with inmate calling, the use of call forwarding at the destination telephone number is a constant issue with the DOC. The proposed ICS must provide technology that deters the use of call forwarding by the party being called by the inmate and provide the ability to immediately terminate the call. The Bidder must describe, in its response, how this technology operates with regard to the proposed ICS and the options available to the DOC.

- 5.1.23 It is a desirable that the proposed ICS provide a function that prevents call forwarding [REDACTED] The Bidder must explain, in its response, how this will be accomplished with the proposed ICS.
- 5.1.24 [REDACTED]
- 5.1.25 The Bidder must describe, in its response, how the proposed ICS operates when the inmate call [REDACTED]. This description must include how collect calls are [REDACTED], how billing of the collect call is processed and how the DOC is notified when an inmate call is placed [REDACTED]
- 5.1.26 The proposed ICS must have the ability to allow for a called party to activate a code (via the touch tone pad of their telephone) that automatically notifies the DOC that the number should be deleted from the calling inmate's "Authorized Telephone Number List".
- 5.1.27 Each call placed (direct dialed or collect) through the ICS must be electronically identified by the system as being a call originating from a DOC facility in 100% of the cases with or without the accompanying inmate PIN.
- 5.1.28 If a call is not accepted by the called party, or if no one answers the call, the ICS must inform the inmate of the situation rather than simply disconnecting the call.
- 5.1.29 The ICS must have the capability to accept the called party's response via DTMF (Touch Tone Pad) input from the telephone. Calls shall not be billed until positive acceptance by the called party is indicated by the input of a specific Touch Tone digit.
- 5.1.30 The ICS must have the capability of "passive acceptance" for rotary telephone users and particular called numbers such as an automate attendant at an attorney's office, etc. Passive acceptance is defined as the system interpreting the non entry of digits after the playing of the initial collect call message twice as acceptance of the call by the called party.
- 5.1.31 The ICS, whether in pre-paid debit or collect call mode, shall be capable of announcing to the called party the name of the calling inmate. Bidders must provide a mechanism to record an inmate's name a single time to be used each time this announcement is required. The activation or deactivation of this feature must be controlled by institution by the DOC.

- 5.1.32 The ICS shall be capable of announcing to the called party how to accept calls.
- 5.1.33 The proposed ICS must be capable of announcing to the called party the collect call rate, prior to acceptance, when a collect call is placed. The Bidder must describe how this is accomplished by the called party.
- 5.1.34 The system must provide a manner for all calls (debit based or collect) to be "branded" with the standard DOC message as well as the statement that "All Calls are Recorded".
- 5.1.35 The Bidder must propose and implement an ICS that provides telephone reception quality meeting all industry standards for service quality as defined by Massachusetts Department of Telecommunications & Energy and by the Federal Communications Commission (FCC). The Bidder must accept the DOC's decision regarding such determination.
- 5.1.36 The Bidder must provide and install adequate surge protection for the proposed ICS and its components. The use of traditional "power strips" for surge protection is not acceptable for this requirement.
- 5.1.37 The Bidder must provide and install adequate lightning protection equipment on all network services supplied for the proposed ICS.
- 5.1.38 The Bidder must provide a sufficient number of uninterruptible power supply (UPS) systems that also have surge protection at each DOC facility capable of supporting all ICS components including recording devices for a minimum of one (1) hour.
- 5.1.39 The Bidder must provide, install and **maintain** (according to manufacturer's specifications) all ICS UPS equipment at each of the DOC facilities. The Bidder must replace all UPS equipment upon expiration of the manufacturer's life cycle of the installed product.
- 5.1.40 In the unlikely case of the loss of commercial power and the failure of the UPS, the ICS must automatically restrict or "shut off" all inmate telephones so that no inmate calls can be made until commercial power is restored and access is once again provided by the DOC.
- 5.1.41 The Bidder must describe, in its response, what component redundancy is provided to limit or virtually eliminate system downtime due to hardware component failure.

- 5.1.42 It is desirable that the Bidder provide an ICS in which the Central Processor Unit (CPU) and other critical components are redundant. The Bidder must describe, in its response, those critical components that are redundant with the proposed ICS.
- 5.1.43 The Bidder must provide standard hardware and software enhancements/upgrades to the proposed ICS at no cost to the DOC during the term of this contract. The installed ICS at each DOC facility must always be at the latest general release of the system's available hardware and software including operating systems for the system administration and system reporting function. Beta and field tested hardware and software must not be provided unless specifically approved by the DOC. Prior to any hardware and/or software upgrades or enhancements, the Bidder shall discuss the software benefits with the DOC and proceed only after DOC approval.
- 5.1.44 Telephone network services provided by the Bidder shall not be capable of being detected by the called party for calling number identification (Caller ID).
- 5.1.45 The Bidder shall provide local exchange service for pre-paid debit-based calling and collect calling use at each DOC institution. The local calling area shall be equal to or greater than the local calling area defined in the Verizon Massachusetts Department of Telecommunications and Energy (DTE) Tariff (MA DPU #10) for each of the DOC's facilities.
- 5.1.46 The proposed ICS must allow for [REDACTED] by DOC personnel. This monitoring must be allowed by **specific inmate telephone, specific inmate PIN or by called telephone number**. Any and all equipment and software required to perform this function must be provided with the proposed system.
- [REDACTED]
- [REDACTED] The Bidder must describe, in its response, how this will be accomplished with the proposed system.
- 5.1.47 The collect call automated announcement function of the Secure Inmate Calling System must be capable of processing calls on a selective bi-lingual basis: English and Spanish. The inmate must be able to select the preferred language using no more than a two digit code.
- 5.1.48 It is desirable that the ICS be capable of processing calls in additional languages than those required in 5.1.47. The Bidder must list, in its response, the languages available with the proposed ICS.

- 5.1.49 The proposed Secure Inmate Calling System must allow for the DOC to program times when the system will be available or unavailable to inmate calling. The Bidder must describe, in its response, how this is accomplished.

Personal Identification Numbers (PINs)

It is the intention of the DOC to implement the proposed ICS in a collect call mode with the use of inmate Personal Identification Numbers (PINs). The proposed ICS must operate in pre-paid debit mode for international calling outside of the North American Dialing Plan. Whether in collect call mode or pre-paid debit mode, the proposed ICS must adhere to the following requirements for PIN operation.

- 5.1.50 The ICS must restrict use through authorized Personal Identification Numbers (PINs) assigned to each inmate. The length of these PINs must be determined by the DOC and remain consistent throughout DOC facilities.
- 5.1.51 The proposed ICS must allow for the cross-referencing of inmate PINs to the DOC inmate commitment number allowing for DOC personnel to search by commitment number for call records and call recordings. The Bidder must describe, in its response, how this will be accomplished with the proposed system.
- 5.1.52 The Bidder must provide appropriate three-part forms (See Attachment E) to allow for PIN and allowed telephone number list assignments.
- 5.1.53 The Bidder shall be responsible for the administration of all inmate PIN through its Site Administrators (See Section 5.12).
- 5.1.54 Although the ICS installed at the DOC will initially operate solely in collect call mode, the ICS must be capable of utilize the PIN feature for pre-paid debit as well.
- 5.1.55 The ICS must allow each PIN to have a "class of service" assigned. For example, each PIN shall have a list of allowable telephone numbers, the maximum duration of each call, etc. The proposed system must provide call restrictions by PIN that provide the following restrictions at a minimum:
- **Placing of Calls:** Inmates can be either approved or not approved to make phone calls by PIN;
 - **Use of Specific Telephones:** Inmates, via the PIN, can be restricted to a specific telephone or group of telephones, at the DOC's option;

- **Duration of Call:** Maximum call duration can be set globally (all PIN's), by site, by facility area, by individual inmate's PIN, by type of call (Local, IntraLATA, InterLATA) at the DOC's option;
- **Time of Day Calling:** An allowed calling schedule can be provided for each specific PIN, by facility area, by site and globally (all PIN restrictions) at the DOC's option.
- **Specific PIN:** Restrict an inmate under disciplinary action from placing all calls assign to his particular PIN with the exception of privileged numbers (e.g., attorney, approved clergy and social work professionals).
- **Restriction:** Set call duration, set number of calls per day, set only certain numbers per PIN, etc.

5.1.56 The ICS's PIN feature must ensure that the automated operator function uses the inmate's pre-recorded name (recorded in either the inmate's voice and language, or in the voice of an administrator) to announce to the called party from whom the call is originating. Identification of the specific inmate and thus the announcement of the inmate's name must be performed by the PIN assignment. This feature will be implemented at the discretion of the DOC.

5.1.57 The ICS must use an announcement format similar to the following:

"You have a call from 'inmate name', an inmate at 'facility name'. Call forwarding or 3-way calling are not allowed. The cost of this call is \$X.XX for the first minute, and \$.XX for each additional minute. To consent to these charges and accept this call, please press 0."

5.1.58 The ICS's PIN feature must allow the recording of inmate calls to be discontinued when certain pre-determined telephone numbers (privileged telephone numbers) are called.

5.1.59 The proposed ICS must provide for telephone lists to be assigned to each particular inmate's account information. These telephone lists must be restricted and controlled by the inmate's PIN.

5.1.60 The proposed ICS must allow for a minimum of 30 telephone numbers to be assigned to each particular inmate's account information. These telephone numbers shall be placed in the particular inmate's "Approved Number List" assigned to the inmate's PIN.

5.1.61 The Bidder must state the maximum number of telephone numbers assignable to each inmate's account.

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- 5.1.62 The proposed ICS must allow the DOC to restrict an inmate under disciplinary action from placing all calls assigned to his particular PIN with the exception of privileged numbers.
- 5.1.63 It is desirable that the proposed ICS provide for an automatic suspension and reactivation (after a set period of time) of the inmate PIN.
- 5.1.58 The proposed ICS shall provide DOC personnel with the capability to enter, modify, and delete numbers from an inmate's "Approved Number Lists".
- 5.1.64 The proposed ICS shall provide the capability to flag an individual telephone number in the inmate's "Approved Number List" as "do not record". The default setting for each telephone number will be to record until flagged by DOC personnel to the contrary.
- 5.1.65 The proposed ICS must be capable of assigning an inmate's account to an individual telephone or group of telephones so that the inmate's account may only place calls from those designated telephones. These telephones must still be capable of being used by inmate accounts not specifically assigned to them.
- 5.1.66 The proposed ICS must allow for the deletion or disabling of the PIN of a released inmate while retaining all call records and call recordings associated with that PIN. The Bidder must describe, in its response, how this will be accomplished with the proposed system.
- 5.1.67 The proposed ICS must allow for the inmate PIN to be associated or linked to the inmate's DOC commitment number. The Bidder must describe, in its response, how this will be accomplished with the proposed system for both "active" inmates and "inactive" (released) inmates.

Mode of Operation

The DOC operates the current Secure Inmate Calling System in collect call mode. It is the intention of the DOC to implement the proposed ICS in collect call mode to all locations within the North American Dialing Plan while utilizing pre-paid debit mode for calls to international locations outside of the North American Dialing Plan. The proposed ICS must allow the DOC to operate in this combined mode.

- 5.1.68 The Bidder shall provide the collect call services required in the RFR through the use of an Automated Operator. At no time shall an inmate be connected to a "live" operator.

- 5.1.69 The collect call automated announcement function of the ICS must be capable of processing calls on a multi-lingual basis: English, Spanish. The inmate must be able to select the preferred language using no more than a two digit code.
- 5.1.70 Call acceptance by the called party must be accomplished through caller confirmation (positive acceptance). Collect calls shall not be connected nor shall billing commence until the called party indicates acceptance of the call.
- 5.1.71 The Bidder must provide, in its response, a list of all countries (outside of the United States) that can be reached via the ICS operating in a collect call only mode.
- 5.1.72 The proposed ICS must provide notification to an inmate of the call status or progress (e.g., ringing, busy, etc.). This notification may either be in the form of ringing, busy tones, SIT tones, or appropriate recorded messages. The proposed ICS must not allow the inmate to hear the called party prior to the actual positive acceptance (via touch tone entry) of the call.
- 5.1.73 During the call setup process, the ICS must provide a pre-recorded announcement identifying that the collect call is coming from a specific inmate at a Massachusetts Correctional Institute and must be heard by the answering party. The announcement must also include: "All telephone calls will be recorded except attorney calls and other privileged party calls".
- 5.1.74 The proposed ICS shall process direct dial calls only when the system is operating in a pre-paid debit-based controlled mode. Direct dial calls must be made through network services provided by the Bidder at no cost to the DOC.
- 5.1.75 The proposed ICS must provide a pre-paid debit based database capability that tracks an inmate's "telephone usage balance". Such balances shall be maintained by the ICS in conjunction with the DOC Inmate Canteen Accounts.
- 5.1.76 The ICS shall confirm that funds are available in the inmate's "telephone usage account" after the telephone number is dialed by the inmate but prior to placing the call. The Bidder must explain, in its response, the options available to the inmate should his "telephone usage account" be insufficient for the desired call.
- 5.1.77 The proposed ICS must provide for true "answer supervision" for the billing of Direct Dial charges. Billing shall begin when the call is answered by the called party and shall terminate when either the inmate or the called party hang up.

- 5.1.78 The Bidder must provide a list of international locations (outside the North American Dialing Plan) that can be reached via collect calling in the forms in Attachment D.
- 5.1.79 The Bidder must provide a list of international locations (outside the North American Dialing Plan) that can be reached via the ICS' pre-paid debit mode in the forms in Attachment D.

General System Management Requirements

- 5.1.80 The Bidder must propose an ICS that can be administered on-site by the Bidder's Site Administrators or DOC personnel.
- 5.1.81 The Bidder must propose an ICS that allows for changes to be administered in "real time" while the system is in use. The proposed system must not require the system to be taken off line to make additions, changes or retrieve reports.
- 5.1.82 The Bidder must propose an ICS that provides a Graphical User Interface (e.g., Microsoft Windows™) for both system administration and system reporting functions.
- 5.1.83 The ICS proposed for the DOC must allow [REDACTED]

[REDACTED] The Bidder must describe, in its response, how this will be accomplished with the proposed ICS. This description must include what is required with regard to hardware, software and network services as well as the security procedures involved with this remote access.

Restrictions, Fraud Control Options and System Security

- 5.1.84 In order to limit possible telephone fraud, it is mandatory that a fraud prevention feature be available which will be able to randomly interject pre-recorded announcements throughout the duration of the conversation to the called party indicating the source of the call. The Bidder must describe in its proposal in detail how this is accomplished.
- 5.1.85 The Bidder must describe, in its response, all detection and prevention capabilities related to fraudulent, illicit or unauthorized activity available on the proposed ICS.
- 5.1.86 The Bidder must identify, in its response, specific activities the proposed system capabilities shall detect and/or prevent. The Bidder must also identify, in its response, possible methods inmates may use to circumvent these capabilities.

- 5.1.87 The Bidder must propose an ICS that is capable of detecting extra dialed digits from either the called party or the inmate's telephone. The Bidder must describe, in its response, the options available to the DOC upon detection of the extra dialed digits. (i.e., call termination, system alarm, logging of call to the database, etc.)
- 5.1.88 The Bidder must propose an ICS that is capable of detecting unusual or suspicious number sequences dialed or dialing patterns which the system identifies as possible attempts to commit fraud. The Bidder must describe, in its response, the options available to the DOC upon detection of the unusual or suspicious number sequences.
- 5.1.89 The proposed ICS must allow the DOC to immediately and remotely turn telephones on and off. This shall be capable of being accomplished by individual telephones, groups of telephones, or an entire DOC facility by DOC personnel with the appropriate authorization level.
- 5.1.90 The Bidder must describe, in its response, all standard and optional security services employed to protect the proposed ICS in terms of unauthorized access through the installed network of services, unauthorized access through the ICS Local Area Network (LAN), unauthorized access to the ICS programming, unauthorized access through the ICS Wide Area Network (WAN).
- 5.1.91 The Bidder must agree, in its response, that it has reviewed the security policies of the Commonwealth of Massachusetts Information Technology Division (ITD) available on the ITD website at www.mass.gov/itd.
- 5.1.92 The Bidder must describe, in its response, how the DOC will be able to monitor the installed ICS and the ICS WAN network of services for possible security breaches.

General Operational Requirements

- 5.1.93 The Bidder must describe, in its response, the network of services required to support the proposed ICS. (i.e., ISDN, 56Kbps Circuit, T1, etc.).
- 5.1.94 The Bidder must describe, in its response, how it will address instances of inadequate outside network plant facilities at a DOC facility to ensure that the proposed ICS is implemented according to the installation schedule agreed to by the DOC.
- 5.1.95 The Bidder must describe, in its response, how remote access to the ICS for maintenance and programming by the Contractor provided. The Bidder must describe, in its response, all security measures, policies and procedures in place for this remote access.

- 5.1.96 The Bidder must provide, in its response, all electrical and environmental requirements of the ICS for each DOC facility. Such information must be provided for all components of the ICS including the central processor/equipment, call recording equipment, PCs, printers, etc.
- 5.1.97 The ICS proposed by the Bidder must be capable of automatically recovering from a power outage(auto-reboot) to full working order capable of processing inmate telephone calls with all programmed restrictions in place. This "auto reboot" must include all system hardware components, all software including DOC specific programming and restrictions and all network services (analog lines, T1 circuits, etc.). The Bidder must describe, in its response, any interaction required by DOC personnel for this system "auto reboot" to occur.
- 5.1.98 The Bidder must provide, in its response, a written description of the space requirements associated with all components of the proposed ICS. The Bidder must clearly define how much physical space is required by each hardware component and provide a recommended equipment layout configuration.
- 5.1.99 [REDACTED]
- 5.1.100 The Bidder must provide, in its response, the capacities/limits for the proposed ICS. At a minimum, the Bidder must provide the capacity for the following:


- Individual Inmate Accounts
 - Call Records
 - Simultaneous Administrative Users
 - Workstations/PCs
- [REDACTED]

- Inmate Telephones
- Simultaneous Telephone Calls

5.2 SYSTEM CALL RECORDING AND LIVE MONITORING

The DOC currently records inmate calls and monitors [REDACTED] select calls when necessary. This recording and monitoring is conducted on all calls with the exception of privileged calls (e.g., attorneys, etc.). The Bidder must address the following specifications regarding the recording of inmate calls.

- 5.2.1 The ICS proposed by the Bidder must be capable of recording all inmate calls simultaneously and at any time that a call is placed. The Bidder must describe, in its response, the call recording system being proposed in conjunction with the ICS.
- 5.2.2 The call recording system proposed by the Bidder must be capable of allowing call recording to be deactivated for specific telephone numbers assigned to an inmate's PIN. This capability would be utilized for inmate calls to attorneys, etc.
- 5.2.3 The call recording system proposed with the ICS must be a fully digital system allowing for digital storage of call recordings and the use of Compact Disk for the transfer of recordings.
- 5.2.4 The call recording system proposed by the Bidder must be capable of storing a minimum [REDACTED] of inmate call recordings on site at each DOC facility.
- 5.2.5 The Contractor must provide backup storage of all recordings of inmate calls from each DOC facility off site at the Contractor's data storage facility for the life of this contract. The Bidder must describe, in its response, how this will be accomplished with the proposed system.
- 5.2.6 The Contractor must allow access to off site inmate call recordings by DOC personnel providing the ability for DOC personnel to download and transfer such recordings to CD when necessary. The Bidder must describe, in its response, how this is accomplished with the proposed solution for the DOC and what security measures are in place to ensure that DOC personnel access only those call recordings for which they are authorized.
- 5.2.7 The call recording system proposed by the Bidder must allow access to inmate call recordings from any PC on the ICS network within each facility. The Bidder must describe, in its response, how this is accomplished with the proposed system.
- 5.2.8 The call recording system proposed by the Bidder must allow access to inmate call recordings at each DOC facility by investigative personnel [REDACTED]

 The Bidder must describe, in its response, how this is accomplished with the proposed system.

- 5.2.9 At many times, the recorded telephone conversations of inmates are used as evidence in criminal or DOC violation investigations. The system proposed to the DOC must include the capability of transferring recorded calls and call segments to Compact Disk (CD-R/CD-RW) to be played on any industry standard CD device. The interface for accessing such recordings must have a Graphical User Interface (GUI) such as Microsoft Windows® and allow for “click and drag” capability for the transferring of recorded calls or call segments to CD.
- 5.2.10 The call recording system proposed by the Bidder must allow for the transfer of call recordings to CD in industry standard formats (e.g., wav, mp3, etc.) allowing for playback on standard PC CD drives or industry standard CD players. The Bidder must state, in its response, the recording file formats provided by the proposed recording system.
- 5.2.11 The call recording system proposed by the Bidder must allow DOC personnel to transfer call recordings to CD in a simplified and efficient manner. The system must allow DOC to transfer a call without having to fully download the file to the PC at which the staff member is working. The Bidder must describe how the transfer of call recordings is performed with the proposed ICS and call recording system.
- 5.2.12 The call recording system proposed by the Bidder must allow DOC personnel to locate call recordings in the following manners:
- search by inmate PIN;
 - search by certain time period (date/time)
 - search by certain telephone instruments
- The system must allow for the search criteria either individually or in combinations.
- 5.2.13 The Bidder must retain ownership of the proposed recording equipment for the duration of this contract. All responsibility for maintenance and upgrades must be provided by the Bidder at no cost to the DOC.
- 5.2.14 The Contractor must ensure that the call recording system proposed with the ICS is maintained at the latest hardware and software level to ensure that DOC personnel are utilizing the latest tools available for call recording and call monitoring of inmate calls.

- 5.2.15 It is desirable that the call recording system provide a search capability that allows DOC personnel to search recordings [REDACTED]. The Bidder must provide, in its response, a description of this capability.
- 5.2.16 It is desirable that the call recording system provide a manner in which call recordings are encrypted to ensure that no digital modification of the recording has been made or to note if such modifications have been made. The Bidder must describe, in its response, how this encryption function operates and the features provided by such.
- [REDACTED]
- 5.2.17 The proposed ICS must allow DOC personnel to monitoring inmate calls [REDACTED]. This [REDACTED] must be allowed by specific inmate telephone within a DOC facility. The Bidder must provide all necessary equipment and software required to perform [REDACTED] with the proposed system.
- 5.2.18 The [REDACTED] function of the proposed ICS must allow for [REDACTED] monitoring of inmate calls [REDACTED] within each DOC facility [REDACTED] in the monitoring. The Bidder must describe, in its response, how this will be accomplished with the proposed system.
- 5.2.19 The proposed ICS must allow for DOC personnel to monitor inmate calls [REDACTED] by entering the specific inmate PIN. The Bidder must describe, in its response, how this is accomplished with the proposed system.
- 5.2.20 The proposed ICS must allow for DOC personnel to monitor inmate calls [REDACTED] by entering a specific telephone number. The Bidder must describe, in its response, how this is accomplished with the proposed system.
- 5.2.21 The proposed ICS must allow for [REDACTED]. The Bidder must describe, in its response, how this function will operate with the proposed system.
- 5.2.22 It is desirable that the ICS provide the [REDACTED]. The Bidder must list, in its response, the devices to which the ICS can send alerts.
- 5.2.23 It is desirable that the ICS provide the [REDACTED] listed in Section 5.2.22 above in a [REDACTED]. For example, [REDACTED]. If unanswered, the call would then [REDACTED].

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- 5.2.24 It is desirable that the ICS call monitoring capability provide a form of [REDACTED] that would [REDACTED]. The Bidder must provide, in its response, a description of this capability.
- 5.2.25 The proposed ICS must allow for DOC personnel to monitor [REDACTED] from the DOC facility from which the call is placed. The Bidder must state, in its response, how this will be accomplished with the proposed system.
- 5.2.26 It is desirable that the ICS call monitoring capability allow for [REDACTED]. The Bidder must state, in its response, what is required to provide this [REDACTED] within the particular DOC facility.

5.3 GENERAL TELEPHONE EQUIPMENT REQUIREMENTS

The Inmate Telephone Station Equipment required for the DOC shall consist of five (5) types of telephones as listed in this section of the RFR

Type 1: Wall Mounted Telephones (Indoor)

The first type, which will be the majority of inmate telephones installed, shall be permanently mounted wall telephones meeting the following specifications:

- 5.3.1 All Inmate Telephone Equipment must be of new manufacture and be provided (and installed) with the proposed ICS at no cost to the DOC.
- 5.3.2 The Bidder must provide all required materials, hardware, software and telephone cabling (where re-use is unavailable or new locations are required) to install the proposed inmate telephones.
- 5.3.3 The Bidder is responsible for reimbursing the DOC for any "construction" costs incurred to facilitate the installation of the inmate telephones.
- 5.3.4 All inmate telephones must be powered by the ICS system and require no additional power source at the instrument.
- 5.3.5 The inmate telephone instrument must be compact in design. The Bidder must include photographs of the proposed inmate telephones in its response.
- 5.3.6 The inmate telephone instruments must not include coin entry slots or coin return slots regardless of whether these functions are disabled.
- 5.3.7 The inmate telephone instruments shall not contain card reader capabilities or slots used to identify inmate telephone accounts for purpose of debiting inmate telephone accounts.
- 5.3.8 The Bidder shall provide a unique number, physically imprinted on each Inmate Telephone so that the number can be seen by DOC personnel for the purposes of reporting troubles and troubleshooting problems. As new inmate telephones are added or telephones are replaced they shall be identified in the same manner and all appropriate paper work shall be updated to reflect the addition.
- 5.3.9 The inmate telephones must be capable of reducing or eliminating background noise to the inmate using the telephone. The Bidder must describe, in its response, how this will

be accomplished with the proposed inmate telephone instruments (e.g., confidencers, phone enclosures, etc.).

- 5.3.10 All inmate telephones shall provide volume controls which allow inmates to amplify the called party's voice.
- 5.3.11 The Bidder shall provide dialing instructions as well as a "warning" that states "This Call is Being Recorded" to the inmate in English and Spanish on each inmate telephone in a manner which reduces the possibility of being destroyed. Simple labels or other accessible surface instructions will not be acceptable to meet this requirement.
- 5.3.12 The Bidder shall maintain the above required telephone dialing instructions and warning statements for legibility and accuracy during the course of this contract.
- 5.3.13 The inmate telephone instrument shall not be capable of being used to program any feature of the proposed ICS.
- 5.3.14 All of the proposed inmate telephones must be compliant with all applicable requirements of the American with Disabilities Act (ADA).

Type 2: Special Management Unit Telephones

- 5.3.15 The second type of inmate telephone instrument shall be portable or "movable" inmate telephones that are used mainly in special management units and must be manufactured to withstand abuse (physical, liquid, etc.) as well as be compact enough to fit through standard food slots. Industry standard 2500 telephone sets will not be acceptable at meeting this requirement. The Bidder must state how it will allow the DOC to secure the touch tone pad after the special management unit's inmate's initial call now been placed.
- 5.3.16 The Bidder must describe, in its response, how these movable or portable telephones will be moved from one cell to another by DOC personnel to allow for inmate calling.
- 5.3.17 The Bidder must provide a special management unit telephone that includes all call restrictions of the ICS with regard to inmate PINs, call duration, etc.
- 5.3.18 The Bidder must provide a special management unit telephone that allows DOC personnel to provide the handset only to the inmate thus denying access to the dial pad by the inmate. The Bidder must describe, in its response, how this is accomplished with the proposed telephone instrument.

- 5.3.19 The Bidder must provide special management unit telephones according to the telephone quantities listed in Attachment B.

Type 3: Outdoor Telephones

- 5.3.20 The third type of Inmate Telephone Station Equipment shall be "all weather" inmate telephone sets to be used in some outdoor conditions as various DOC facilities.
- 5.3.21 The outdoor inmate telephone instruments must meet all requirements of the Type 1: Wall Mounted Telephones (Indoors) described in this section. The Bidder must state this compliance in its response.
- 5.3.22 The outdoor inmate telephone instrument must be weather-proof to ensure durability in outdoor conditions including winter weather.

Type 4: Coin Operated Telephones

The fourth type of inmate telephone instrument shall be coin operated pay telephones primarily used in pre-release areas, lobby and/or visiting areas only. Coin operated telephones are not to be proposed to meet the inmate telephone requirement. Coin operated telephones must offer all standard payphone options including coin, collect and calling card access.

- 5.3.23 The Bidder must provide coin-operated, public telephones to DOC facilities, as listed in Attachment B. These telephones must meet all FCC and Massachusetts Dept. of Telecom & Energy regulations regarding local calling, toll free number surcharges and alternate carrier access.
- 5.3.24 Throughout the term of the contract the Bidder must install additional coin operated telephones as required by DOC. This includes expansion to existing institutions and newly constructed facilities. This must be done at no cost to DOC.
- 5.3.25 Coin operated telephones must provide outgoing service only. Incoming calls must not be accepted at any coin operated telephones at the DOC facilities.

Type 5: TDD/TTY Devices

- 5.3.26 The DOC currently have inmates who are deaf or hearing impaired and must place outgoing telephone calls via a TDD/TTY. The Bidder must describe, in its response, how such calls will be conducted in conjunction with the proposed ICS.

- 5.3.27 The Bidder must describe, in its response, how outgoing inmate calls via the TDD/TTY are conducted in the following circumstances while maintaining all call controls:
- a standard telephone number on the inmate's call list;
 - toll free number for the deaf relay service;
 - 711 deaf relay service call;
- 5.3.28 The Bidder must describe, in its response, how outgoing call control for TDD/TTY users is maintained with the proposed ICS.
- 5.3.29 The Bidder must provide adequate TDD/TTY or suitable devices to each DOC facility, maintain such devices as well as provide additional devices, at no cost, when requested by a specific DOC facility.
- 5.3.30 The Bidder must provide TDD/TTY or suitable devices which contain a digital display (e.g., LCD, LED, etc.) and a printing device.
- 5.3.31 The Bidder must provide TDD/TTY or suitable devices that allow the inmate conversation [REDACTED] allowing the DOC to have [REDACTED] [REDACTED] with the exception of privileged calls to attorneys, etc.
- 5.3.32 The Bidder must describe, in its response, how inmate call will be invoiced (and to whom) when the inmate uses the TDD/TTY device to place a call via the Massachusetts Deaf Relay Service.

5.4 DATA BACK-UP

- 5.4.1 The Bidder must perform all system and database back-ups and archiving. All archival hardware, supplies, network and recovery procedures which ensure that no data shall be lost must be provided by the Bidder at no cost to the DOC.
- 5.4.2 The Bidder must be capable of recovering all system data for all locations, to the point of full system operation, using a system backup.
- 5.4.3 The Bidder must describe, in its response, the back-up schedule for:
- The local system programming databases for each DOC facility;
 - The central Contractor maintained programming database for all DOC facilities;
 - All inmate call records for each DOC facility;
 - All inmate call records for all DOC facilities maintained at the Contractor's site;
 - All inmate call recordings for each DOC facility;
 - All inmate call recordings for all DOC facilities maintained at the Contractor's site.
- 5.4.4 The Bidder must state, in its response, if these system back-ups are performed in real-time (e.g., as the transaction/call completes) or as a pre-scheduled time during the day.
- 5.4.5 The Bidder must describe, in its response, how the local ICS databases at all DOC facilities will be kept current with the ICS backups at the Contractor site in case of required re-programming or system recovery at a DOC facility.
- 5.4.6 The Bidder must agree, in its response, that the DOC retains ownership of all archived information, call detail, inmate records, etc. The Bidder must agree, in its response, that the DOC has the right to obtain all archived information, call detail, inmate records, etc. associated with the ICS regardless of the location of such information within the Contractor's organization or site.
- 5.4.7 The Bidder must describe, in its response, how it will provide system security for all data stored locally and at its central storage location. Such security description must include system security as well as how access to such sensitive information will be performed within the Bidder's organization.

5.5 ICS MANAGEMENT/ADMINISTRATION REQUIREMENTS

- 5.5.1 The Bidder must propose an ICS that can be administered on-site by the Bidder's personnel and DOC personnel.
- 5.5.2 The Bidder must propose an ICS that allows for changes to be administered in "real time" while the system is in use. The proposed system must not require the system to be taken off line to make additions, changes or retrieve reports.
- 5.5.3 The Bidder must propose an ICS that provides a Graphical User Interface (e.g., Microsoft Windows™) for both system administration and system reporting functions. The Bidder must provide samples of its User Interface screens with its response.
- 5.5.4 The Bidder must describe, in its response, what system administration functions are available with the proposed ICS (i.e., new account entry, account/record modification, account deletion, etc.).

PIN Transfer Between DOC Sites

The DOC makes transfers of inmates between facilities on a daily basis (Monday through Friday). In addition, unscheduled inmate transfers can occur at any time or on any day. Although the DOC understands that there will sometimes be unusual circumstances to prevent such, it is important that the PIN assigned to the transferred inmate be active at the new facility within [REDACTED] after the physical transfer. The DOC will provide the Contractor with a list of inmates to be transferred on a daily basis to assist in facilitate this PIN transfer.

- 5.5.5 The Bidder must agree, in its response, to this [REDACTED] PIN transfer requirement.
- 5.5.6 The Bidder must describe, in its response, how it will perform daily scheduled transfers.
- 5.5.7 The Bidder must describe, in its response, how it will perform unscheduled PIN transfers to ensure that the transferred inmate has access to their attorney through the ICS.

Semi-Annual Review

- 5.5.8 The Contractor must conduct a semi-annual review of the inmate PIN database to ensure that all DOC staff, volunteers, consultants, etc. telephone numbers are not part of the system allowable number lists. The DOC will provide a list of appropriate telephone numbers.

5.6 SYSTEM REPORTING FUNCTION

5.6.1 The proposed ICS must provide a system reporting package accessible by DOC personnel. This reporting package must allow for the querying of inmate call records and include a graphical user interface (GUI) for ease of use.

5.6.2 The proposed ICS must allow for the generation of reports by DOC facility, a combination of DOC facilities or all DOC facilities.

5.6.3 The proposed ICS must allow for the generation of reports by DOC personnel based on their user access level.

5.6.4 The proposed ICS must provide for custom reports to be developed by the DOC and provide for the following standard, at a minimum:

- Chronological List of Calls
- Daily Call Volume Summary
- Weekly Call Volume Summary
- Inmate Account Summary
- Inmate Account Detail
- Suspended Inmate Account
- Telephone Numbers Assigned to More Than One Inmate Account
- Quantity of Calls per Inmate Account
- Quantity of Minutes per Inmate Account
- Blocked Telephone Number List
- Local Exchange Volume (by Exchange)
- Area Code Volume (by Area Code)

5.6.5 The proposed ICS must allow for selected reports to be generated automatically based on DOC criteria (e.g., time of day, volume of calls, particular inmate, etc.).

5.6.6 The proposed ICS must allow for automatic generation of reports by individual DOC facility or on a system wide basis.

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- 5.6.7 The proposed ICS reporting function must allow for the exporting reporting data to Microsoft Excel® and Microsoft Word® at a minimum.
- 5.6.8 The proposed ICS must allow for all reports to be viewed in hard copy format or viewed "on-line" by a user with the proper access level.
- 5.6.9 The proposed ICS must allow for access by members of the [REDACTED] to the ICS at each of the DOC facilities for inmate call reports, inmate call monitoring and inmate call recording. The Bidder must describe, in its response, how this is accomplished and what security measures are in place during this access.
- 5.6.10 It is desirable that the ICS provide DOC personnel that ability to [REDACTED] The Bidder must describe, in its response, how this function is provided and how it operates with the proposed system.

5.7 SYSTEM IMPLEMENTATION AND TRANSITION

The DOC is presently utilizing an ICS provided by Verizon. It is therefore of the utmost importance that the Bidder address the issue of transition from the existing system to the new ICS at all DOC locations. The DOC realizes that some "down time" will occur during this transition but the Bidder must propose an implementation plan that reduces this "down time" and allows for a smooth progression to the new system.

5.7.1 The Bidder is required to provide the DOC a full implementation plan upon award of contract for the ICS. The Bidder's implementation plan must include a detailed explanation of the following items:

- pre-installation procedures for each DOC facility;
- pre-installation procedures for the complete system;
- network circuits/service coordination requirements;
- software programming and preparation;
- equipment delivery schedules;
- equipment security procedures;
- equipment/system installation procedures;
- inmate telephone installation procedures;
- system testing at each DOC facility;
- system testing of overall system connectivity;
- training of DOC personnel;
- actual system cutover to service
- list of DOC responsibilities.

5.7.2 The Bidder must work with the DOC to determine the exact times when Inmate Telephone Equipment can be replaced to reduce "down time".

5.7.3 The Bidder is required to conduct a site visit to each DOC facility prior to installation of the ICS there in order to become familiar with the physical location of the ICS and the inmate telephones as well as to be completely familiar with the installation requirements of each particular facility.

5.7.4 The Contractor shall coordinate the removal of the existing inmate **telephones** in all DOC facilities. The Contractor is required to meet with the DOC so that the existing telephones may be used during the transition to the new inmate telephones provided under this contract.

- 5.7.5 The Bidder is allowed to re-use existing station cabling installed at each DOC facility for the inmate telephones once it has "tone and tested" each cable run to ensure that the station cable is capable of supporting the new inmate telephones.

In cases where the existing cable is re-used, the Bidder will re-terminate and label the station cabling at the cross connect (main/intermediate distribution frames) to ensure that all cabling is identified correctly and terminated in such a way to simplify future maintenance.

In cases where existing station cabling cannot be used, the Bidder will install new station cabling (Category 5e minimum) at no cost to the DOC. Any new cabling must include required wall plate, cross connection, patch cords, etc. as required by the Bidder and the DOC to ensure proper operation of the inmate telephones.

- 5.7.6 Although the DOC does not anticipate that such work will be required, the Bidder must agree in its response to obtain DOC permission in writing before proceeding with any work that requires cutting into or through girders, beams, concrete or tile floors, partitions or ceilings, or any work that may impair fireproofing or moisture proofing, or potentially cause any structural damage.
- 5.7.7 The Bidder will be responsible for all programming of the ICS including the generation and creation of the system database(s) required to provide a fully operational ICS.
- 5.7.8 The Bidder must transfer the current ICS database information including inmate profiles (PINs) and call records to the new system. The Bidder must state, in its response, how this will be accomplished and what is required of the DOC to facilitate this transfer of information.
- 5.7.9 The Bidder must clean up and remove any and all debris and packaging material resulting from its work at the DOC facility on a daily basis.
- 5.7.10 Upon completion of installation, the Bidder must leave the DOC facility clean, orderly and ready for immediate use.
- 5.7.11 The Bidder shall be completely responsible for replacing, restoring or bringing to former condition any damage caused by the Bidder's installation personnel to floors, ceilings, walls, furniture, grounds, pavement, etc. Any damage or disfigurements shall be restored to its former condition by the Bidder at no cost to the DOC.
- 5.7.12 The Bidder must ensure that all of its work and materials comply with all local, state and federal laws, ordinances and regulations as well as the direction of any inspectors

appointed by proper authorities having jurisdiction over this type of network and equipment installation.

The Bidder is responsible for obtaining all necessary permits. Should violation of codes occur relating to this network installation project because necessary permits were not identified and obtained by the Bidder, the Bidder will cease all work at that specific location and correct the situation, immediately, at no cost to the DOC prior to continuation of system installation.

- 5.7.13** The Bidder is required to adhere to all prevailing wage rate specifications and schedules as determined by the Commissioner of the Commonwealth of Massachusetts Department of Labor and Workforce Development, Division of Occupational Safety and the United States Department of Labor when required.

Implementation Team

- 5.7.14** The Bidder must provide a Project Manager for the implementation of the proposed ICS for the DOC. The Project Manager must serve as the Single Point of Contact (SPOC) for the DOC during the initial ICS implementation period regardless of the length of this implementation period. The Project Manager must be available to the DOC via telephone, cellular telephone, and e-mail at a minimum during the course of this project.

The Project Manager for the implementation of the ICS must have experience with the implementation of an ICS on a scale equal to the DOC. The Project Manager for the implementation of the network services must not be the Account Manager required in Section 4.1.

The Bidder must provide, in its response, the name of the Implementation Project Manager to serve the DOC during the implementation of the ICS. A professional résumé detailing this Project Manager's qualifications and experience on projects of similar size and complexity as the DOC project must be provided as an attachment to the Bidder's response.

- 5.7.15** The Bidder must provide, in its response, the names of the implementation project team members, their location, and qualifications statements for each member assigned to the implementation of the ICS at the DOC.

- 5.7.16 The Bidder must warrant in its response that all installation personnel who will implement the proposed ICS have been fully trained and certified by the manufacturer as qualified to install and service the proposed ICS. The Bidder must provide proof of manufacturer certification for its implementation team members as an attachment to its response.
- 5.7.17 All personnel assigned to the Bidder's implementation team who will work on-site at the DOC facility at any time must comply with all DOC requirements for facility access including tool control, background checks and dress code. (See Section 4.3 and Section 4.4).
- 5.7.18 When individual personnel changes within the implementation team are necessary, the Bidder must provide personnel replacements whose experience and expertise is equal or superior to the personnel member being replaced.
- 5.7.19 All personnel replacements to the implementation team must be completely familiar with the Bidder's ICS offering to the DOC as well as the requirements of this RFR as they pertain to the implementation of the ICS as the DOC.
- 5.7.20 The Bidder must describe, in its response, how it will transition implementation team members when necessary. This transition must include a transfer of specific DOC information and knowledge as well as Bidder specific information/services offered to the DOC.
- 5.7.21 The Bidder must state the implementation requirements and responsibilities of DOC personnel at each DOC facility. These requirements and responsibilities must be kept to a minimum. The Bidder is responsible for performing all installation tasks to provide a fully functional ICS at each DOC facility.

System Testing

- 5.7.22 The Bidder must describe, in its response, how it performs standard system testing to ensure that the proposed ICS and its network services are fully implemented and ready to accept inmate traffic and DOC use. This description must include the Bidder and industry standard methodologies, procedures and protocols consistent with the ICS proposed for the DOC. The Bidder must describe what is required of DOC personnel during this system testing. All hardware, software, software licensing, etc. required to perform this testing must be provided to the DOC at no cost.

- 5.7.23 The Bidder is required to provide system testing which simulates normal operating conditions of the installed ICS to ensure proper performance after hardware and software configuration is complete. This simulation must include full traffic load representing high traffic situations for inmate calling traffic.
- 5.7.24 The Bidder must agree, in its response, to the DOC's right to require the replacement of any network service or system component whose failure to meet required performance levels during testing has risen to chronic problem level.

System Acceptance

- 5.7.25 The DOC defines system acceptance as the "problem free" operation of the ICS and its network of services for a period of 30 consecutive days commencing with the actual completion of ICS installation and testing.

Should the proposed ICS operate "problem free" during the initial 30 day acceptance period, the Bidder may consider the ICS installation as complete at that DOC facility and commence with post installation maintenance and support.

Should the ICS fail to operate "problem free" during the 30 day acceptance period, the Bidder shall correct the problem at no cost to the DOC and the 30 day acceptance period will begin again. The Bidder is required to provide all materials and labor to ensure that the installed ICS is performing according to manufacturer specifications and the requirements of this RFR. Failure of the Bidder to have the installed ICS installation "accepted" by the DOC within 60 days of the installation date will result in the replacement of the ICS in its entirety at that specific DOC facility.

- 5.7.26 The Bidder must agree, in its response, to negotiate the definition of "problem free" operation with the DOC **prior to system contract**. However, for the purposes of this RFR, "problem free" operation during the initial 30 day period is defined as the following:

- Failure of no more than two percent (2%) of the telephone instruments;
- Failure of no more than ten percent (10%) of analog network services;
- Failure of no more than one (1) digital trunk (T1, ISDN PRI);
- Operation of the system security features including PINs, etc.
- Operation of the system software without major conflicts or feature failure;
- Non- failure of any Central Processing Unit (CPU).

System Documentation

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- 5.7.27** At the completion of the project, the Bidder must provide a complete set of system reference manuals which must include information specific to the installation at each DOC facility.
 - 5.7.28** The Bidder shall supply all necessary documentation to DOC personnel with regard to maintenance contact numbers, maintenance reporting procedures, maintenance escalation procedures, etc.
 - 5.7.29** The Bidder must provide programming manuals that are specific to each DOC facility.
 - 5.7.30** The Bidder must provide DOC facility specific "checklists" allowing trained DOC personnel to become acquainted with the specific programming of the ICS installed at that particular DOC facility.
 - 5.7.31** The Bidder must provide written procedures at each DOC facility that instruct DOC personnel on how to report system troubles, escalate system troubles within the Bidder's organization, contract Bidder personnel during weekend shifts, etc. The Bidder must update such written procedures on a quarterly basis during the term of this contract.

5.8 TRAINING REQUIREMENTS

It is instrumental to the success of the installation of the ICS that DOC personnel be trained in various aspects of the system operation. Therefore, the Bidder must provide an complete training schedule based on the following requirements.

- 5.8.1 The Bidder must provide all end-user training to the DOC at no cost.
- 5.8.2 The Bidder must provide all end-user training on site at the various DOC facilities.
- 5.8.3 The Bidder must provide training for various levels of DOC personnel including full-time system administrators, part-time system administrators, special investigators, and data entry specialists, etc.
- 5.8.4 The Bidder must provide full training for all assigned system users on how to create, delete and modify inmate programming and profiles.
- 5.8.5 The Bidder must provide full training for all assigned system users on how to generate appropriate system reports.
- 5.8.6 The Bidder must provide full training for all assigned system users on how to maintain inmate [REDACTED] and respond accordingly when these [REDACTED] are exceeded.
- 5.8.7 The Bidder must provide full training on all components of the Secure Inmate Calling System.
- 5.8.8 The Bidder must provide full training on the provided call recording function including the [REDACTED] of inmate calls, playback of archived calls and the transfer of calls to other media for playback [REDACTED]
- 5.8.9 The Bidder shall provide full training for all assigned DOC system users on how to change inmate restriction levels (by telephone, suspend PIN, etc.).
- 5.8.10 The Bidder must provide full training for all assigned system users on how to initiate system restrictions including the shutting down of individual inmate telephones, groups of inmate telephones or the entire facilities systems.
- 5.8.11 The Bidder must provide ongoing system training for existing DOC personnel when required by the DOC at no cost.

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- 5.8.12 The Bidder must provide additional training for new DOC personnel when required by the DOC at no cost.
- 5.8.13 The Bidder must describe, in its response, any advanced system training that may be available to DOC personnel whether provided on-site at the DOC facility or off-site at the Bidder's training facilities.
- 5.8.14 The Bidder must in its proposal include the name, title and qualifications of the Bidder staff member who will have the overall responsibility for training.
- 5.8.15 The proposed ICS must provide for integrated help function for system operation, administration, reporting and management functions.
- 5.8.16 The Bidder must provide a "live" Help Desk support function to DOC at no cost to the DOC during the term of this contract. This Help Desk function must be capable of providing support via telephone to the DOC ICS personnel for the functions of the ICS. This Help Desk function must be available Monday through Friday, 8:00 am to 6:00 pm Eastern Time.
- 5.8.17 The "live" Help Desk support function provided by the Contractor must be located within the continental United States.

5.9 EQUIPMENT/SYSTEM MAINTENANCE

- 5.9.1** The Bidder must provide an ICS at all required DOC facilities that is fully functional in regards to all labor, materials, programming, system hardware and software.
- 5.9.2** The Bidder must warrant that the ICS installed for the DOC facilities shall be free of defects, irregularities, unprofessional installation, code violations and shall operate as designed and proposed. Should the system not operate as designed and proposed or violate any local, state or federal code, the Bidder shall immediately correct the defect or irregularity or bring the system within code and performance specifications at no cost to the DOC.
- 5.9.3** The Bidder must provide all post installation system programming and maintenance services at no cost to the DOC.
- 5.9.4** The Bidder must agree in its response that maintenance service is available on its ICS seven days per week, twenty-four (24) hours a day
- 5.9.5** The Bidder must propose an ICS that provides for remote diagnostics and maintenance.
- 5.9.6** The Contractor is responsible for replacement of the ICS in its entirety or its individual components regardless of cause including, but not limited to, normal wear/use, inmate abuse, natural disaster, or inmate unrest. This system or component replacement will be performed at no cost to the DOC and will occur immediately upon notification to the Bidder of the system problem by the DOC facility.
- 5.9.7** The Contractor is responsible for replacing of inmate telephones in their entirety regardless of cause including, but not limited to, normal wear/use, inmate abuse, natural disaster, or inmate unrest. The Contractor must replace inmate telephones requiring repair and not repair components of the inmate telephone on site at the DOC.

Response To Maintenance Calls

Should any critical component of the ICS provided by the Bidder fail, the Bidder must respond to ICS maintenance/repair calls from the DOC in the manner outlined in this section.

5.9.8 Definition of a "Major Emergency"

For the purpose of this RFR, a "Major Emergency" shall be defined as an occurrence of any one of the following conditions. The Bidder is required to further negotiate with the

DOC prior to system installation to determine additional **specific criteria** for a "Major Emergency".

- A failure of the ICS processor, its common equipment or power supplies which render the system incapable of performing its normal functions;
- A failure of the recording function or any of its components that affects the full recording operation;
- A failure of 50% or more of the inmate telephones **at any one area** within a DOC facility;
- A failure of any of the ICS functions that result in the ability of inmates to place calls without the use of assigned PINs;
- A failure of any of the ICS functions that results in the ability of inmates to make direct dialed calls when the system is operating in collect call mode;
- A failure of any of the system functions that results in the ability of inmates to reach a "live" operator;
- A failure of the system "kill switches" or similar ICS disabling function proposed by the Bidder.

5.9.9 Response Times for a "Major Emergency"

For a "Major Emergency" the Bidder must respond to the service problem within 30 minutes of initial trouble report by the DOC facility through the use of remote testing or access. Should the ICS not be accessible for remote access, the Bidder must have a qualified technician, suitably equipped for the installed ICS, on site at the DOC location within two (2) hours from the time of initial trouble report.

Should the problem not be resolved via remote access, the Bidder must have a qualified technician, suitably equipped for the installed system, on site at the DOC institution within two (2) hours from the time of initial trouble report.

Response to "Major Emergency" conditions must be performed on a 24 Hours-a-Day/Seven Days-a-Week/365 Days-a-Year basis through out the term of this contract.

5.9.10 Definition Of "Routine Service"

For the purpose of this RFR, Routine Service shall be defined as an ICS failure or problem other than a "Major Emergency" item as listed above or defined by the DOC.

5.9.11 Response Times For "Routine Service"

For a "Routine Service" the Bidder must respond to the service problem within four (4) hours of the initial trouble report by the DOC facility through the use of remote testing or access. Should the ICS not be accessible for remote access, the Bidder must have a qualified technician, suitably equipped for the installed system, on site at the DOC facility within twelve (12) business hours from the time of initial trouble report. Business hours are defined as 8:00 a.m. to 6:00 p.m., Monday through Friday.

Should the problem not be resolved via remote access, the Bidder must have a qualified technician, suitably equipped for the installed system, on site at the DOC institution within six (6) hours from the time of initial trouble report.

Answering of Maintenance Calls

5.9.12 The Bidder must ensure and state, in its response, that all maintenance calls from the DOC shall be answered by a "live" operator/service representative at all times.

5.9.13 It is desirable that that all maintenance calls from the DOC be answered by a "live" operator/service representative who is local (within Massachusetts) at all times.

Critical Component Availability

5.9.14 The Bidder must guarantee to the DOC that all parts and materials necessary to repair the proposed ICS are readily available to on-site service personnel 24 hours per day, seven days per week, 365 days per year. The DOC will not accept the delay of any ICS repair based on the fact that service personnel cannot access a system parts warehouse, office or similar Bidder facility because the facility not being opened "after hours", or on weekends or holidays.

5.9.15 It is desirable that the Contractor provide "spare" inmate telephone equipment at each DOC facility to allow for timely replacement of telephones that are not operating for any reason. The Bidder must provide on site a minimum number of spare sets equal to five percent (5%) of the total number of inmate telephones installed at each DOC facility.

Escalation Procedures During Service Maintenance

- 5.9.16 The Bidder must provide, in its response, escalation procedures to address inadequate maintenance service of the ICS. These escalation procedures must include multiple levels of management personnel. Access to additional management personnel must be made available to the DOC upon request.

The Bidder must provide, in its response, a **complete list** of its maintenance service escalation procedures including:

- a list of personnel at each level of escalation;
- contact telephone, fax, pager, cellular numbers;
- methods by which escalation is initiated; and
- criteria for escalation at each level.

The Bidder must agree, in its response, that the DOC has the right to initiate these escalation procedures at its discretion based on diminished service or non-performance of the Bidder.

Maintenance Records

- 5.9.17 The Bidder must provide to the DOC, upon request during the term of this contract, maintenance records that include a listing all repair notices including the date and time of the service trouble report, the nature of the problem reported, and date/time of problem resolution.
- 5.9.18 The Bidder must provide historical maintenance records for 24 months from the current date.
- 5.9.19 It is desirable that the Bidder provide historical maintenance records from the initial contract date of this contract with the DOC.

5.10 CONTRACTOR PERFORMANCE

As the single Commonwealth Agency responsible for promoting public safety by incarcerating offenders while providing opportunities for participation in effective programming, the DOC requires that the ICS and the Contractor perform at the highest levels of operation and service.

5.10.1 The Bidder must describe, in its response, how it will maintain maximum network "up time" for the ICS installed at each DOC location. The Bidder must provide current network "up time" figures for similar ICS installations.

5.10.2 The Bidder must describe, in its response, how it will maintain maximum network "up time" for the network services installed for the ICS at each DOC location. The Bidder must provide current network "up time" figures for similar ICS installations.

Catastrophic Network Failure Conditions

5.10.3 The Bidder must describe, in its response, the business continuity plans it has in place within its own organization and its network of services to ensure that the network services installed to serve the ICS installed at the DOC.

Penalty for Non-Performance and Network Downtime

5.10.4 The operation of the Contractor's ICS at each DOC facility must be of the highest priority for the Bidder. Therefore the Bidder must provide a credit of \$100 to \$500 (depending on the occurrence) per hour for each hour the Contractor exceeds the response times listed in Section 5.9.9 and Section 5.9.11. (Refer to Section 2.29 with regard to the application of penalties.)

5.11 POST INSTALLATION & EXPANSION REQUIREMENTS

- 5.11.1 The DOC may require the addition of equipment at its facilities after the original installation of the proposed ICS. The Bidder must install additional equipment within 30 days upon notification from the DOC authorized personnel. The installation of this equipment shall be at no cost to the DOC.
- 5.11.2 When a new DOC facility is opened by the DOC, the Bidder shall determine (in conjunction with the DOC) a schedule for installation of an ICS at that facility to ensure inmate calling service at the new site as soon as practical. The ICS shall be installed at the new facility at no cost to the DOC.
- 5.11.3 The Bidder shall be responsible for making all system modifications necessary to allow inmates to place calls as industry dialing requirements change including the introduction of new area codes and new exchanges. These system modifications shall be provided at no additional cost to the DOC. The update of the ICS with new area codes and exchanges will be performed within 30 days of the area code and/or exchanges introduction to the general public.
- 5.11.4 The Bidder shall be responsible for complying with and updating the Secure Inmate Calling System for any regulatory changes and requirements during the life of the contract. These regulatory changes include federal, state, county and municipal modifications. These changes shall be made at no additional cost to the DOC.
- 5.11.5 All call processing and call rating information shall be kept current by the Bidder to ensure inmates can place calls to all approved numbers. This information includes but is not limited to local exchanges, area codes, country codes, vertical & horizontal coordinates, and any other information necessary to accurately process and rate calls. The Bidder shall provide the DOC with rating information within 24 hours when requested by the DOC.
- 5.11.6 The Bidder must describe, in its response, the transition plan for all call records and call recordings to be transferred to the DOC at the completion of the contract resulting from this procurement.
- 5.11.7 The Bidder shall provide, in its response, a full explanation of how it will handle a phase-out situation at the end of the contract period should the Bidder not be selected for the next contract to provide an ICS to the DOC.

This plan shall indicate any commission adjustment that will take effect should the next provider not be able to phase-in its service for ninety (90) days.

The Bidder shall identify any equipment which will be owned by the DOC and any equipment not owned by the DOC at the end of this contract.

5.12 SITE ADMINISTRATORS

The Contractor is required to provide on-site Site Administrators for the DOC facilities during the term of this contract.

The Site Administrators must be fully trained on the proposed ICS with regards to system programming, entering of inmate information, manipulation of call recordings and the treatment of call records for required reports.

Supervisor Personnel

5.12.1 The Contractor must provide a full time (40 hours per week minimum) supervisor dedicated to the DOC for the term of this contract. The Bidder must provide, in its response, the qualifications of the supervisor by means of a professional résumé.

5.12.2 The Contractor provided supervisor must be located locally within Massachusetts.

5.12.3 The Contractor provided supervisor must have full responsibility for the performance of the all site administrators provided by the Contractor to the DOC.

5.12.4 The Contractor provided supervisor must be familiar with the DOC and visit each DOC facility a minimum of once per month to meet with the site administrator at that particular DOC facility.

5.12.5 The supervisor provided by the Contractor to the DOC must be a full time employee of the Contractor.

5.12.6 The Contractor provided supervisor must not be one of the site administrators provided by the Contractor to meet the requirements of this RFR.

5.12.7 The Contractor provided supervisor must be capable of fulfilling the duties of a site administrator due to unexpected absence of the site administrator at any DOC facility.

Site Administrators

5.12.8 The Contractor must provide a full time site administrator at the DOC facilities in Concord and Framingham. These locations are the committing facilities for the DOC. The Contractor must provide full time site administrators dedicated to the DOC only and be on-site in Concord and Framingham Monday through Friday, eight (8) hours per day.

-
- 5.12.9 The Contractor must provide dedicated site administrators for each of the DOC's remaining facilities for four (4) hours per day, Monday through Friday. Actual assignment of site administrator personnel will be finalized prior to contract signing with the Contractor. Any change in site administrator assignments or coverage will be made only upon approval by the DOC.
- 5.12.10 The Bidder must state if the site administrators proposed for the DOC will be employees or independent contractors of the Contractor.
- 5.12.11 The Bidder must describe, in its response, how it will keep the turnover of site administrators at a minimum during the term of this contract (e.g., competitive salary, paid holidays, reasonable health benefits, vacation packages, etc.).
- 5.12.12 It is desirable that the Contractor provide site administrators with a minimum hourly wage of \$15.00 and competitive health benefits. The Bidder must describe in its response how it meets this desirable specification.
- 5.12.13 It is desirable that the Contractor make all reasonable efforts to hire bi-lingual site administrators.
- 5.12.14 The site administrators provided by the Contractor must adhere to all background and security checks required by the DOC as well as attend the DOC's new employee orientation (40 hours total).
- 5.12.15 The Contractor must provide site administrators that are fully trained in the operation of the ICS proposed for the DOC. The Bidder must describe, in its response, the training that each site administrator will undergo prior to deployment at the DOC facilities.
- 5.12.16 It is important to the success of this contract that the site administrator positions are filled at all times by the Contractor. The Contractor must fill any site administrator position vacancy within 45 days. Failure to achieve such may result in a \$200 per day penalty (See Section 2.29) commencing on day 46 until the position is filled and the new site administrator attends the DOC's new employee orientation.
- 5.12.17 The Contractor must provide site administrators that will perform the following functions, at a minimum, for the DOC with regard to the ICS installed at each facility:
- Test the ICS to ensure functionality each day;
 - PIN data base initial entry (at committing sites);
 - PIN changes, moves, transfers, discipline sanctions, etc.;
 - Production of standard administrative and investigative reports;

- Production of customized reports as required;
- Conducting of quarterly inmate PIN list updates;
- Conducting of semi-annual scans of inmate PIN lists for DOC personnel telephone numbers, etc.
- Initiate or facilitate maintenance and repair of the proposed ICS, as required;
- Primary Bidder point of contact for the DOC facility;
- Resolve all complaints and inquiries regarding the ICS in a timely manner;
- Transfer call recordings to portable media as directed by the DOC;
- Transfer of inmate PINs between DOC facilities when required;
- Other related duties as determined by the DOC.

5.13 RATE AND BILLING REQUIREMENTS

- 5.13.1 The Bidder shall provide all local exchange, intra-LATA (Eastern Massachusetts) and inter-LATA network services at all DOC facilities where the ICS is installed. The Bidder shall be responsible for installing and maintaining all telephone circuits necessary to provide the required ICS operation at no cost to the DOC.

Usage and Surcharge Rate Limitations

- 5.13.2 The Bidder's per call surcharge rates charged to the called party for collect calls within Massachusetts (local, intra-LATA and intra-state, inter-LATA) shall be the current DOC charge of \$.86 for inmate collect calls.
- 5.13.3 The Bidder's per call surcharge rate to the called party for inter-state, inter-LATA collect (outside of Massachusetts) shall be the current DOC charge of \$3.00 for inmate collect calls.
- 5.13.4 **Local Calling:** The Bidder's usage rates for local calling, in accordance with regulations of the Massachusetts Department of Telecommunications and Energy (MDTE) must adhere to the current effective Verizon tariff: DTA MA No. 10, Part M, Section 1.9.1, Schedule 2 (Page 29) for structure, billing and rates (\$.10 per minute). The DOC will not accept rates that differ from this required tariff.
- 5.13.5 **Intra-LATA Calling:** The Bidder's usage rates for Intra-LATA (eastern Massachusetts), in accordance with regulations of the Massachusetts Department of Telecommunications and Energy (MDTE) must adhere to the current effective Verizon tariff: DTA MA No. 10, Part M, Section 1.9.1, Schedule 2 (Page 29) for structure, billing and rates (\$.10 per minute). The DOC will not accept rates that differ from this required tariff.
- 5.13.6 **Intra-State, Inter-LATA Calling:** The Bidder's usage rates for intra-state, inter-LATA calling, in accordance with regulations of the Massachusetts Department of Telecommunications and Energy (MDTE) must adhere to the current effective Verizon tariff: DTA MA No. 10, Part M, Section 1.9.1, Schedule 2 (Page 29) for structure, billing and rates (\$.10 per minute). The DOC will not accept rates that differ from this required tariff.
- 5.13.7 **Inter-State, Inter-LATA Calling:** The Bidder must quote a per minute rate for all interstate, inter-LATA calls. All proposed rates must be based on a per minute basis only and not be distance sensitive. This per minute rate must be set at the current DOC required rate cap of \$.69 per minute for day, evening and night/weekend rates.

- 5.13.8 The Contractor may not make any changes to the per minute rates and per call surcharges during the life of this contract without the written approval of the DOC.
- 5.13.9 The Bidder must describe, in its response, how collect call to international locations outside the North American Dialing Plan are processed.
- 5.13.10 The Bidder must describe, in its response, how the pre-paid debit function of the ICS will operate with regard to international calls. The Bidder must provide a list of international locations to which inmates may place pre-paid debit calls and the per minute rate for such calls in the Cost Tables in Attachment D.

Billing and Payment of Commissions

- 5.13.11 The Bidder shall assume sole responsibility for billing called parties receiving collect calls from the ICS and for the collection of payments for these calls.
- 5.13.12 The Bidder shall provide a toll free number which will be clearly shown on the called party's bill for assistance in billing matters.
- 5.13.13 The Bidder must describe and list, in its response, the billing arrangements it has with local exchange carriers (LECs) to ensure that collect calling from the ICS can be processed to the called party.
- 5.13.14 It is desirable that the Bidder have billing arrangements with at least [REDACTED] of the local exchange carriers doing business in Massachusetts. The Bidder must provide, in its response, verification of this percentage being met.
- 5.13.15 It is desirable that the Bidder have billing arrangements with cellular service providers. The Bidder must provide, in its response, a list of cellular service providers with which it has billing arrangements.
- 5.13.16 The Bidder shall collect all revenue from the called party for collect calls placed by inmates. The Bidder shall provide a percentage of this revenue as a commission fee to the DOC on a monthly basis. The Commission rate proposed by the Bidder must be included in the Bidder's Price Bid. Do not include any specific costs or commission information in the Technical Bid.
- 5.13.17 The Commission Revenue paid to the DOC will be based on Gross Revenue. Gross Revenue is defined as revenue for all accepted calls without exception. The Bidder shall not deduct fraudulent, uncollectible or unbillable calls from the Gross Revenue prior to applying the Commission Percentage Rate for the DOC.

- 5.13.18 The Bidder must agree, in its response, that a check for the commission amount will be sent to the DOC no later than 30 days after the close of the billing month. For example, a commission check for calls made during April will be forwarded to the DOC no later than June 1st.
- 5.13.19 The Bidder must state, in its response, all charges associated with the inmate initiated collect call that will appear on the called party's telephone bill.
- 5.13.20 The Contractor is not allowed to place any charges on the called party's telephone bill that are not directly related to providing the collect call. This includes charges for "property taxes", "construction fees", and other like charges that are not dictated by regulatory bodies. Violation of this requirement during the term of this contract may result in a one time fine of up to \$10,000 assessed by the DOC as well as refunds made to the called parties for all such charges.
- 5.13.21 The Bidder must describe, in its response, all pre-paid collect call options available to inmate families and other authorized called parties.
- 5.13.22 It is desirable that the pre-paid collect call option available to inmate families and other authorized called parties provide the following:
- Free initial call period offered to the inmate's called party;
 - Automatic transfer of the called party to the Bidder's billing customer service department for payment arrangement;
 - Funds tied entirely to a specific called party telephone number (of the depositor);
 - Balance of pre-paid account and the cost of the call be provided to the called party for each call;
 - Payment via credit card;
 - Payment via debit card;
 - Payment via money transfer organization (e.g., Western Union, etc.)
- 5.13.23 It is desirable that the pre-paid collect call option allow for [REDACTED] of the pre-paid account.
- 5.13.24 The Contractor must provide, on a monthly basis, a commission report that breaks down the total commission paid to the DOC by DOC facility. The Bidder must provide, with its response, a sample of this commission report.

Section 6

Bidder History & References

6.1 COMPANY BACKGROUND

6.1.1 The Bidder must be in the business of providing Secure Inmate Calling Systems and Related Services (as specified in this RFR) for a period of at least three (3) years prior to the due date of this RFR. The Bidder must state the number of years it has been providing ICS and provide documentation in its response.

6.1.2 It is desirable that the Bidder be in the business of providing Secure Inmate Calling Systems and Related Services (as specified in this RFR) for a period of ten (10) years prior to the due date of this RFR. The Bidder must state the number of years it has been providing ICS and provide documentation in its response.

6.1.3 The Bidder must include, in its response, a summary which describes, briefly, the following:

- Number of Offices;
- Number of Offices within Massachusetts;
- Organizational Structure;
- Total Staff
- Number of Years in Business;
- Number of Years Providing Secure Inmate Calling Systems and Related Services;

6.2 BIDDER/PRODUCT REFERENCES

The Bidder **must** provide end user references with its response. These references will be contacted either by telephone, mail or facsimile transmission to verify the Bidder's experience and "real world" installation procedures. All reference reviews are done in a professional and timely manner to minimize the demands on Bidder reference contacts.

A minimum of three (3) references must be provided on the Business Reference Form provided in Attachment F and included with your response. At least one (1) of these references must be for a correctional organization with in excess of 10,000 inmates.

Failure to provide references as required on the Business Reference Form may lead to disqualification of the Bidder's response.

It is the Bidder's responsibility to ensure that any reference provided in its response be aware that they may be contacted by the DOC regarding the services provided by the Bidder. All reference reviews are done in a professional and timely manner to minimize the demands on Bidder reference contacts. However, reference contacts which refuse to discuss the Bidder or the services provided by the Bidder will result in a "0" rating for the Bidder for that reference. The DOC is not responsible for "negotiating" a response from a reference provided by a Bidder and will not tolerate such reference responses as "we are not allowed to discuss that", "we do not have time to discuss this", etc.

The Bidder must provide an authorized primary and secondary contact name for each reference submitted. This will allow the DOC to complete any reference reviews in a timely manner.

6.3 BIDDER EXPERIENCE

6.3.1 The Bidder must further demonstrate its experience in the inmate calling system and correctional industries by providing a list of all correctional institution in which the Bidder has installed the proposed ICS. This list must include the institution, its location, and the total number of inmate telephones installed.

If the Bidder has not installed the proposed ICS in any other correctional institutions, the Bidder must state that fact in order to meet the requirement of this specification.

6.3.2 It is desirable that the Bidder have at least one reference of the same size as the DOC with regard to facilities and inmates. The Bidder must provide, in its response, a description of this reference including the number of facilities and number of inmates.

Attachment A

Required Forms Checklist

Attachment A

Required Forms Checklist

Bidders must complete, execute and return the following forms, which are found under the "Forms & Terms" tab of this solicitation on the Comm-PASS system.

- ☐ Standard Contract Form
- ☐ Commonwealth Terms and Conditions
- ☐ Request for Taxpayer Identification and Verification (W9)
- ☐ Contractor Authorized Signatory Listing
- ☐ Affirmative Action Plan Form
- ☐ Affirmative Market Program Plan
- ☐ Northern Ireland Notice and Certification
- ☐ Certification of Tax Compliance

The Bidder must complete this checklist and include it with the completed forms as an attachment to its response to the RFR document.

Attachment B

Required Inmate Telephones

Attachment B

Required Number of Inmate Telephone Instruments

Location	Inside Inmate Telephones	Outside Inmate Telephones	Special Mgmt Unit Telephones	Coin Telephones
Bay State Correctional Center	24	6	0	2
Boston Pre-Release Center	12	0	0	3
Bridgewater State Hospital	18	4	0	1
Lemuel Shattuck Hospital Correctional Center	2	0	0	3
Mass Alcohol & Substance Abuse Center (MASAC)	18	0	0	2
Massachusetts Treatment Center	59	7	2	2
MCI - Cedar Junction	79	4	20	2
MCI - Concord	85	4	5	1
MCI - Framingham	64	0	2	4
MCI - Norfolk	57	11	3	2
MCI - Plymouth	13	2	0	1
MCI - Shirley	123	0	4	7
North Central Correctional Institution at Gardner	106	5	2	2
Northeastern Correctional Center	18	0	0	2
Old Colony Correctional Center	59	11	2	2
Pondville Correctional Center	11	0	0	0
South Middlesex Correctional Center	11	0	0	2
Souza Baronowski Correctional Center (Shirley)	159	7	9	4
TOTAL	918	61	49	42

Attachment C

**Current Inmate Call Volume
and
Commission History**

Attachment C

Current Inmate Call Volume and Commission History

SUMMARY BY MONTH – ALL CALL TYPES

Date	Attempted Record Count	Accepted Record Count	Accepted Total Minutes
May, 2004	669,411	232,738	3,112,166
June, 2004	662,920	229,168	3,084,469
July, 2004	698,724	246,581	3,333,243
August, 2004	714,055	248,792	3,328,119
September, 2004	652,354	226,399	3,020,223
October, 2004	650,301	229,635	3,106,129
November, 2004	583,247	215,365	2,930,300
December, 2004	609,364	232,899	3,154,870
January, 2005	620,379	230,869	3,205,913
February, 2005	570,035	202,887	2,769,717
March, 2005	601,662	213,279	2,893,523
April, 2005	613,635	216,218	2,898,585
Totals:	7,646,087	2,724,830	36,837,257

SUMMARY BY MONTH – LOCAL CALLS

Date	Attempted Record Count	Accepted Record Count	Accepted Total Minutes
May, 2004	613,380	216,677	2,907,056
June, 2004	611,730	213,875	2,886,776
July, 2004	639,164	229,832	3,111,377
August, 2004	656,074	231,874	3,111,321
September, 2004	598,851	210,400	2,815,874
October, 2004	596,281	213,448	2,893,064
November, 2004	534,843	200,158	2,724,022
December, 2004	558,139	216,397	2,933,423
January, 2005	570,581	214,617	2,985,441
February, 2005	521,088	186,275	2,545,174
March, 2005	546,790	194,924	2,643,895
April, 2005	558,694	198,386	2,657,781
Totals:	7,005,615	2,526,863	34,215,204

SUMMARY BY MONTH – INTRALATA/INTRASTATE CALLS

Date	Attempted Record Count	Accepted Record Count	Accepted Total Minutes
May, 2004	30,728	7,354	97,793
June, 2004	28,730	6,997	94,348
July, 2004	32,780	7,681	107,343
August, 2004	31,204	7,700	106,164
September, 2004	29,981	7,364	98,077
October, 2004	30,391	7,566	101,052
November, 2004	27,414	7,258	99,023
December, 2004	29,407	8,062	108,004
January, 2005	26,608	7,072	97,796
February, 2005	26,609	6,974	95,528
March, 2005	29,231	7,167	98,074
April, 2005	31,535	7,630	103,670
Totals:	354,618	88,825	1,206,872

SUMMARY BY MONTH – INTERLATA/INTRASTATE CALLS

Date	Attempted Record Count	Accepted Record Count	Accepted Total Minutes
May, 2004	25,088	8,707	107,317
June, 2004	22,266	8,296	103,345
July, 2004	26,594	9,068	114,523
August, 2004	26,602	9,218	110,634
September, 2004	23,438	8,635	106,272
October, 2004	23,503	8,621	112,013
November, 2004	20,642	7,949	107,255
December, 2004	21,549	8,440	113,443
January, 2005	22,494	9,176	122,676
February, 2005	21,902	9,638	129,015
March, 2005	25,081	11,188	151,554
April, 2005	22,969	10,199	137,134
Totals:	282,128	109,135	1,415,181

SUMMARY BY MONTH – INTERLATA/INTERSTATE CALLS

Date	Attempted Record Count	Accepted Record Count	Accepted Total Minutes
May, 2004	204		
June, 2004	194		
July, 2004	185		
August, 2004	175		
September, 2004	84		
October, 2004	126		
November, 2004	348		
December, 2004	210		
January, 2005	135		
February, 2005	173		
March, 2005	281		
April, 2005	159		
Totals:	2274		

COMMISSION HISTORY
Fiscal Year 2004

Month	Total Revenue	DOC Commission (42%)
July, 2003	\$ 490,945.69	\$ 206,197.19
August, 2003	\$ 445,659.52	\$ 187,177.00
September, 2003	\$ 448,721.36	\$ 188,462.97
October, 2003	\$ 484,124.10	\$ 203,332.12
November, 2003	\$ 438,756.76	\$ 184,277.84
December, 2003	\$ 454,614.00	\$ 190,937.88
January, 2004	\$ 528,622.05	\$ 222,021.26
February, 2004	\$ 542,363.74	\$ 227,792.77
March, 2004	\$ 409,230.93	\$ 171,876.99
April, 2004	\$ 439,949.81	\$ 184,778.92
May, 2004	\$ 625,636.12	\$ 262,767.17
June, 2004	\$ 487,880.60	\$ 204,909.85
Totals:	\$5,796,504.68	\$2,434,531.96

Fiscal Year 2005

Month	Total Revenue	DOC Commission (42%)
July, 2004	\$ 594,881.69	\$ 249,850.31
August, 2004	\$ 527,634.83	\$ 221,606.63
September, 2004	\$ 379,338.57	\$ 159,322.20
October, 2004	\$ 364,367.90	\$ 153,034.52
November, 2004	\$ 406,782.55	\$ 170,848.67
December, 2004	\$ 766,795.57	\$ 322,054.14
January, 2005	\$ 667,263.57	\$ 280,250.70
February, 2005	\$ 524,624.31	\$ 220,342.21
March, 2005	\$ 499,326.90	\$ 209,717.30
April, 2005	\$ 589,396.40	\$ 247,546.49
Totals:	\$5,320,412.29	\$2,234,573.17

Attachment D

Cost Tables

Attachment D

Cost Tables

The Bidder must complete all of the following Cost Tables. The proposed Inmate Calling System and Related Services must be provided to the Massachusetts Department of Correction at no cost to the DOC. Costs proposed in these Cost Tables will be the Commission Percentage paid to the Commonwealth for all inmate calls made through the proposed system while in Collect-only Mode or Debit-Based.

The Bidder must include the Inmate Calling System and Related Services according to the RFR specifications for all goods and services. Any and all costs must be entered in U.S. currency. The Bidder should be careful when it completes these Cost Tables because the Bidder shall be responsible for any and all costs not included in these Cost Tables.

These cost tables must be provided in your response.

The following must be completed by the individual identified in the Contractor Authorized Signatory Listing.

I am authorized by the Bidder to provide these costs and commission fee schedule in response to this RFR.

Bidder Name:

Signature:

Name:

Title:

Date:

COST TABLE 1.0
COLLECT CALL COMMISSION FEE SCHEDULE

The following stated percentage is the figure used to calculate the monthly Commission paid to the Mass DOC for all accepted¹ telephone calls placed through the Inmate Calling System. This percentage will be based on monthly Gross Revenue² attributed to the Inmate Calling System for all call traffic.

The Bidder must provide a commission rate that includes a figure to the 1/100 position (as in the example below) to ensure that no ties will be possible from proposing Bidders.

Example:

1	2	•	3	4
---	---	---	---	---

The Bidder must not leave any space in the following form blank. Insert an appropriate number into each space provide even if the number is a zero (0).

**Proposed Monthly
Commission Percentage:**

		•		
--	--	---	--	--

- 1 - Accepted calls are defined as those inmate collect calls positively accepted (proactively or passively) or approved by the called party via the use of Touch Tone input.

COST TABLE 2.0
INTERNATIONAL CALL PER-MINUTE SCHEDULE

Bidders must complete Cost Table 2.0 on the following page. Feel free to make copies for this table for inclusion with your response.

The Cost Table on the following page **must** be included in the Bidder's Response. This Cost Table provides the proposed per-minute cost for inmate calling to countries/locations outside of the North American Dialing Plan.

This Cost Table 2.0 (International Calling Costs) completed by the Bidder will be made an integral part of the Bidder's Contract with the DOC. The Bidder must list all countries/locations to which it can provide collect only or direct dial (debit based) calls. In the appropriate column, the Bidder must enter the per call surcharge, per minute rate (collect calls) and per minute rate (direct dial).

All rates (with the exception of the per call surcharge) must be quoted on a per minute basis. No per call minimum will be allowed for international calling.

Please do not leave any spaces empty in the Cost Table on the following page. For example, if you provide direct dial service to the United Kingdom but do not provide access to this country in a collect mode, place "Not Available" in the space provide for "Per Call Surcharge" and "Collect Call Rate".

All costs for the proposed hardware, software, maintenance, service, etc. for the proposed Inmate Calling System shall be the responsibility of the Bidder. No costs for such items shall be included in Cost Table 2.0.

COST TABLE 2.0
INTERNATIONAL CALL PER-MINUTE SCHEDULE

Bidders must complete Cost Table 2.0 and include it in their response. Feel free to make as many copies for this table as required for inclusion with your response.

Country/Location	Per Call Surcharge	Collect Only Rate	Direct Dial Rate

Attachment E

Sample Inmate Telephone Number Request Form

Attachment E

Sample Inmate Telephone Number Request Form

The Bidder must provide a three part form allowing for the request of telephone numbers by the inmate which are used as the inmates "call list" associated with the inmate's PIN. The Bidder must provide these forms during the term of the contract.

The current Inmate Telephone Number Request Form is provided on the following page. The Bidder must provide a form that is similar to this sample form.