



Request for Proposal:  
Inmate Communication Services

Santa Barbara County Sheriff's Office  
RFP No.: FY2018

Release Date:  
March 01, 2018

Proposal Due Date:  
April 09, 2018

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## TABLE OF CONTENTS

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<b>1. INTRODUCTION .....</b>	<b>3</b>
1.1.REQUEST FOR PROPOSAL.....	3
<b>2. PROPOSAL INSTRUCTIONS, FORMAT, CONTENT AND SUBMISSION .....</b>	<b>4</b>
2.1.RFP FORMAT.....	4
2.2.SCHEDULE OF EVENTS .....	4
2.3.FORMAT REQUIREMENTS.....	5
2.4.SUBMISSION OF PROPOSAL .....	5
2.5.OPTIONAL SITE EVALUATION .....	6
2.6.QUESTIONS OR COMMENTS .....	6
<b>3. PROPOSAL EVALUATION AND SELECTION .....</b>	<b>7</b>
3.1.EVALUATION FACTORS .....	7
<b>4. CORE TECHNOLOGIES – INMATE COMMUNICATION SERVICES.....</b>	<b>8</b>
4.1.EQUIPMENT AND INSTALLATION REQUIREMENTS.....	8
4.2.TECHNOLOGY FEATURES AND USER APPLICATIONS .....	9
4.3.SECURITY FEATURES .....	11
4.4.MONITORING, RECORDING AND DATA REQUIREMENTS .....	12
4.5.ADDITIONAL TECHNOLOGY.....	12
<b>5. FINANCIAL TRANSPARENCY .....</b>	<b>15</b>
5.1.VENDOR INFORMATION.....	15
5.2.VALIDATION.....	15
5.3.AVAILABLE OPTIONS.....	16
5.4.END-USER PAYMENT OPTIONS.....	16
5.5.VENDOR REFERENCES .....	17
<b>6. SERVICE.....</b>	<b>18</b>
6.1.DISASTER RECOVERY PLAN.....	18
6.2.VENDOR PERSONNEL .....	18
6.3.CUSTOMER SERVICE .....	19
6.4.MAINTENANCE .....	19

## 1. INTRODUCTION

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### 1.1. Request for Proposal

- 1.1.1. Santa Barbara County Sheriff's Office ("Customer") invites responses to this Request for Proposal (RFP) from qualified, experienced Vendors who can provide a comprehensive, reliable inmate communications solution including inmate telephone, video visitation and correctional-grade tablet services that meet the requirements described in this RFP at the following Facilities.

Northern Branch Jail (NBJ)  
2301 Black Road  
Santa Maria, CA 93455

Southern Branch Jail (SBJ)  
4436 Calle Real  
Santa Barbara, CA 93110

- 1.1.2. Customer is in the process of completing construction of the Northern Branch Jail which is currently expected to open in early 2019. The Northern Branch Jail will provide 376 minimum, medium, maximum, and special use beds. The successful Vendor shall coordinate installation of NBJ equipment with the General Contractor; the Construction Manager, and County General Services-Capital Projects Project Manager, beginning September 1, 2018 and participate in performance testing related to the operation of the video visitation system and/or inmate telephone system in coordination with NBJ systems prior to, and during the opening of the facility sometime after January 1, 2019. Customer will eventually transition some inmates from the Southern Branch Jail (currently referred to as Main Jail) to the Northern Branch Jail; the housing plan is not yet finalized.
- 1.1.3. Details about the required equipment and inmate population of each Facility can be found in the **Attachment 1, Section H (Facility Specifications) and Section R (Northern Branch Layout/Plans)**. Customer is seeking an experienced Vendor to provide, install and maintain various inmate communication solutions inclusive of an inmate telephone system (ITS), audio recording of standard visitations, coin pay telephones, video visitation solution (VVS) and correctional-grade tablets ("Tablets"). ITS and VVS are required; Customer may or may not elect to implement Tablets at the Facilities. Vendor shall provide all inmate communication services to the inmates in accordance with the requirements and provisions set forth in this RFP and to all of the Facilities listed in **Attachment 1, Section H (Facility Specifications)**.
- 1.1.4. Customer may engage third party consultants both in the process of this procurement and in the management of the day-to-day operations of the selected Vendor. If a consultant or agent ("Designated Agent") is engaged, Vendor will cooperate with the Designated Agent as directed by Customer, including following instructions found in this RFP, and if awarded, the operation of the ITS, VVS and Tablets. Throughout this RFP, Customer shall be deemed to include both Customer and the Customer's Designated Agent or consultant, if any.

## 2. PROPOSAL INSTRUCTIONS, FORMAT, CONTENT AND SUBMISSION

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### 2.1. RFP Format

- 2.1.1. The RFP is inclusive of the following documents:
- 2.1.1.1. **Main RFP Document.** The main RFP document provides instructions for the RFP process. The RFP document also includes several sections and numbered items where Vendor must provide additional information or documentation.
  - 2.1.1.2. **Attachment 1 – Mandatory Requirements. Attachment 1, Sections B through J** includes mandatory specifications which must be met for Vendor to be considered. Vendor shall indicate whether Vendor will comply with the requirement, as written. Vendor shall specify “Read and Agree” or “Read and Do Not Agree” in the VENDOR RESPONSE space. Items answered with “Read and Do Not Agree” require a statement from the Vendor in the VENDOR COMMENT space as to why the requirement cannot be met and an explanation of how the Vendor proposes to meet Customer’s needs without the required item. All statements where Vendor responded with “Read and Do Not Agree” must be listed in **Attachment 1, Section M (Exceptions to RFP)**. Vendor comments will be evaluated in accordance with **Attachment 1, Section C (Evaluation & Selection and Section C.1 (Evaluation Criteria))**.
    - 2.1.1.2.1. Section A - Vendor Instructions
    - 2.1.1.2.2. Section B – RFP Instructions & Format
    - 2.1.1.2.3. Section B.1 – Proposal Order
    - 2.1.1.2.4. Section C - Evaluation & Selection
    - 2.1.1.2.5. Section C.1 – Evaluation Criteria
    - 2.1.1.2.6. Section D - General Conditions
    - 2.1.1.2.7. Section E - User Billing & Payments
    - 2.1.1.2.8. Section F – Customer Service
    - 2.1.1.2.9. Section G - General Installation Requirements
    - 2.1.1.2.10. Section H - ITS System Requirements
    - 2.1.1.2.11. Section I - VVS System Requirements
    - 2.1.1.2.12. Section J -Tablet Requirements
    - 2.1.1.2.13. Section K - Facility Specifications
    - 2.1.1.2.14. Section L - Rates, Fees and Revenue Share/Cost Recoupment
    - 2.1.1.2.15. Section M - Exceptions to RFP
    - 2.1.1.2.16. Section N - Exceptions to Inmate Communications Agreement Terms
    - 2.1.1.2.17. Section O - Receipt of Addenda
    - 2.1.1.2.18. Section P - Site Evaluation Registration Form
    - 2.1.1.2.19. Section Q – Northern Branch Layout
  - 2.1.1.3. **Attachment 2 – Agreement Terms.** Vendor is required to review the standard agreement in its entirety and indicate any exceptions in **Attachment 1, Section N (Exceptions to Agreement)**, including an explanation of how the Vendor proposes to meet Customer’s needs without the required item.
  - 2.1.1.4. Customer shall create an agreement resulting from this RFP which shall incorporate **Attachment 1 – Mandatory Requirements, Attachment 2 – Agreement Terms** and Vendor’s RFP response (“Agreement”).

### 2.2. Schedule of Events

- 2.2.1. The following is Customer’s best estimate of the schedule of events (“Schedule of Events”). Customer reserves the right to revise the Schedule of Events. Unless otherwise specified, the times provided are Pacific Standard Time (PST). Proposals must be received no later than 5:00 p.m. CST on April 09, 2018 (“Proposal Due Date”) at the location specified in **Section 2.6 – Questions or Comments**. Given the

required timing of the Northern Branch Jail, Customer does not anticipate any extensions will be granted during the RFP process.

**Table 1 - Schedule of Events**

Event	Date
Release of the RFP	March 01, 2018
Deadline for Site Evaluation Registration Forms	March 07, 2018
Site Evaluation	March 20, 2018
Deadline for Written Questions from Vendors	March 26, 2018
Dissemination of Answers to Written Questions	March 30, 2018
Proposal Due Date	April 09, 2018
Estimated RFP Award	May 24, 2018
Final Contract	July 10, 2018

**2.3. Format Requirements**

- 2.3.1. Vendor’s proposal shall follow the order specified in **Attachment 1, Section B.1 (Proposal Order)**. Vendor’s proposal shall include the original RFP language where specified. The original text from each section and numbered requirement of the **Main RFP** document shall be inserted into Vendor’s proposal document to be immediately followed by a complete response provided by the Vendor.
- 2.3.2. Vendor’s proposal includes specified sections and numbered items in the **Main RFP** document that require additional explanation. Vendor shall provide specific, concise responses that fully address the question/information requested in that section. Include only those exhibits and/or images that are clearly relevant to the specific section and numbered item.
- 2.3.3. If Vendor is in full compliance with the RFP section or requirement number, Vendor’s response shall be, “Read and Agree.”
- 2.3.4. Otherwise, Vendor’s response shall be, “Read and Do Not Agree” and considered an exception (“Exception”). Exceptions to any section or numbered requirement must be listed in **Attachment 1, Section M (Exceptions to RFP)**.
- 2.3.5. Additional format requirements are provided in **Attachment 1, Section B (RFP Instructions & Format)**.

**2.4. Submission of Proposal**

- 2.4.1. Vendor shall deliver 1 original copy, 6 paper copies, and 1 complete electronic copy. The electronic version shall include all of the required documents and attachments and shall be provided on a labeled CD or USB on or before the Proposal Due Date. Proposals must be directed to the RFP contact specified in **Section 2.6 – Questions or Comments**.
- 2.4.2. The electronic version shall be in a searchable format and shall follow the order specified in **Attachment 1, Section B.1 (Proposal Order)**. Non-searchable documents may be considered non-compliant. Vendor is responsible for ensuring the electronic version and the chosen media are free from any viruses, malware or malicious code. Electronic versions so compromised will be considered non-compliant.
- 2.4.3. The outside of the proposal (including the electronic version) must be labeled **INMATE COMMUNICATION SERVICES PROPOSAL**, and include the RFP number.

## 2.5. Optional Site Evaluation

- 2.5.1. Customer strongly encourages the Vendor attend the site evaluation on the date and time specified in the Schedule of Events. It is optional for Vendor to attend the site evaluation to submit a proposal.
- 2.5.2. To attend the site evaluation, Vendor must complete and email **Attachment 1, Section P (Site Evaluation Registration Form)** to the RFP contact specified in **Section 2.6 – Questions or Comments** on or before the date specified in **Schedule of Events**. Each Vendor will be limited to 2 representatives at the site evaluation. Vendor must confirm attendance via email to the RFP contact including the completed Site Evaluation Registration Form within 2 days of the site evaluation. This will be the only time available for Vendor to visit the Facilities during the RFP process.
- 2.5.3. Oral responses to questions during the site evaluation shall be considered nonbinding on Customer. Vendor's questions regarding the site evaluation and/or this RFP must be submitted by Vendor in writing as specified in **Section 2.6 – Questions or Comments** on or before the date specified in the Schedule of Events.

## 2.6. Questions or Comments

- 2.6.1. Vendor must direct all questions and/or comments to the RFP contact listed below. All questions must be written and submitted electronically and in a comprehensive document.
- 2.6.2. Questions should include the RFP section number title, subsection and page of the corresponding RFP document.
- 2.6.3. Customer shall deliver the answers to the questions and/or comments received on or before the date specified in the Schedule of Events.
- 2.6.4. RFP questions or comments shall be emailed to:

Praeses, LLC  
Attn: Andrew Burns  
Telephone: (318) 841-3118  
Email: [andrew.burns@praeses.com](mailto:andrew.burns@praeses.com)

### 3. PROPOSAL EVALUATION AND SELECTION

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#### 3.1. Evaluation Factors

- 3.1.1. Customer expressly reserves the right to accept or reject any or all proposals, with or without cause, modify, alter, waive any technicalities or provisions, or to accept the proposal which, in its sole judgment, is determined to be the best evaluated offer resulting from negotiation, taking into consideration the relative importance of technology, revenue share offered and other evaluation factors set forth in this RFP, or to award an Agreement to the next most qualified Vendor if the successful Vendor does not execute an Agreement within 30 days after the award of the Agreement.
- 3.1.2. Further information on the proposal evaluation and selection process is covered in **Attachment 1, Section C (Evaluation & Selection) and Section C.1 (Evaluation Criteria).**

## 4. CORE TECHNOLOGIES – INMATE COMMUNICATION SERVICES

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### 4.1. Equipment and Installation Requirements

- 4.1.1. Mandatory Equipment and Installation requirements applicable to all systems are outlined in **Attachment 1, Section G (General Installation Requirements)**.
- 4.1.2. Vendor shall submit a preliminary implementation plan which shall include a proposed installation schedule for the Facilities for ITS, VVS and Tablets. Vendor shall specifically detail the proposed approach for the Northern Branch Jail to ensure completion by January 1, 2019, inclusive of ITS and VVS.
- 4.1.3. Vendor shall indicate any environmental conditions required for the proposed ITS, VVS and Tablets. Include minimum and maximum operating temperatures and humidity levels.
- 4.1.4. Vendor shall indicate the number of hours of back-up power that the provided UPS components supply to the ITS, VVS and Tablets.
- 4.1.5. Vendor shall indicate whether Vendor proposes any changes to Customer's communications room at the Facilities.
- 4.1.6. **ITS**
  - 4.1.6.1. Specific mandatory ITS Equipment and Installation requirements are outlined in **Attachment 1, Section H (ITS System Requirements)**.
  - 4.1.6.2. Vendor shall supply details of Vendor's proposed ITS which shall include, but not be limited to: system version (if Vendor uses multiple ITS versions and/or releases), system design (centralized vs. premise based), technical specifications, software applications, hardware architecture and networking capabilities.
  - 4.1.6.3. Vendor shall include a diagram demonstrating the proposed ITS solution.
  - 4.1.6.4. Vendor must indicate the physical size of the ITS equipment to be installed at the Facilities including information on height, depth, width, weight, abuse tolerances and any limitations.
  - 4.1.6.5. Vendor shall include a description, as well as images, of the inmate and visitation telephone sets, TDD and/or video relay service units, and cart/portable sets proposed for installation at the Facilities.
- 4.1.7. **VVS**
  - 4.1.7.1. Specific mandatory VVS Equipment and Installation requirements are outlined in **Attachment 1, Section I (VVS System Requirements)**.
  - 4.1.7.2. Vendor shall supply details of Vendor's proposed VVS which shall include, but not be limited to: hardware components, operating system, default applications, power options, proposed cabling, and bandwidth parameters.
  - 4.1.7.3. Vendor shall include a diagram demonstrating the proposed VVS solution.
  - 4.1.7.4. Vendor shall indicate whether its proposed VVS is premise-based or centralized.
  - 4.1.7.5. Vendor must indicate the physical size of the VVS equipment to be installed at the Facilities including information on height, depth, width, weight, abuse tolerances and any limitations.
  - 4.1.7.6. Vendor shall include a description, as well as images, of the proposed video visitation stations (inmate, visitor and mobile) proposed for installation at the Facilities.
- 4.1.8. **Tablets**
  - 4.1.8.1. If Customer elects to implement Tablets, Vendor shall be capable of accommodating the Mandatory Tablet Equipment and System requirements outlined in **Attachment 1, Section J (Tablet Requirements)**.
  - 4.1.8.2. Vendor shall provide a detailed description of its Tablets, including security features for the corrections industry, screen size, device size, battery specifications, charging options.
  - 4.1.8.3. Vendor shall include a diagram demonstrating the Tablet solution.



- 4.1.8.4. Vendor shall specify if the speakers on the Tablets can be disabled/enabled at Customer's discretion.
- 4.1.8.5. Vendor shall specify if clear, see-through earbuds are provided with the Tablets.
- 4.1.8.6. Vendor shall indicate how Tablets work for hearing impaired inmates.

## 4.2. Technology Features and User Applications

### 4.2.1. ITS

- 4.2.1.1. Mandatory ITS and User Application Specifications are outlined in **Attachment 1, Section H (ITS System Requirements)**.
- 4.2.1.2. Vendor shall provide information on how the proposed ITS is capable of recognizing and distinguishing standard or irregular busy signals, standard or irregular ringing signals, answering machines, digital voicemail, cellular telephones, ring-back tones, chain dialing.
- 4.2.1.3. Vendor shall provide a script of the call acceptance information provided to the called party.
- 4.2.1.4. Vendor shall indicate the number of times the ITS plays the call acceptance information to the called party and whether the called party may interrupt the prompts by selecting a digit on the keypad.
- 4.2.1.5. The ITS shall process calls on a selective bilingual basis in English and Spanish. Vendor shall indicate whether the called party (in addition to the inmate) will be able to select the preferred language for call prompts.
- 4.2.1.6. For calls that are not completed, the ITS shall play a recorded message to the inmate detailing why the call was not completed. Vendor shall provide a list of the available recordings as well as a complete description of each.
- 4.2.1.7. Vendor shall provide information on any security configurations available within the ITS to prevent fraud relative to automated phone trees (e.g. inmates pressing digits and getting to a live operator).
- 4.2.1.8. Vendor must specify how international collect calls are processed and completed through the proposed ITS.
- 4.2.1.9. Vendor shall provide detailed information on the frequency Vendor performs remote diagnostics and troubleshooting processes which shall include failure reports, alarms, service history and other steps taken.
- 4.2.1.10. The ITS shall comply with the Americans with Disabilities Act (ADA) requirements including, but not limited to, providing telephones and video relay units which are accessible to persons in wheelchairs and providing devices, including video relay units, that are compatible with Telephone Devices for the Deaf (TDD).
  - 4.2.1.10.1. Vendor must indicate how the TDDs work with the proposed ITS.
  - 4.2.1.10.2. Vendor shall provide detail on how TDD calls can be recorded and monitored via the ITS.
  - 4.2.1.10.3. Vendor shall provide detail relative to the ITS capability to provide a Video Relay System (VRS) to the Facilities at no cost to the Customer.
  - 4.2.1.10.4. Vendor shall provide detail on how call controls configured in the ITS are preserved for calls placed using the VRS (e.g. branding, blocked telephone numbers).
- 4.2.1.12. Inbound, automated voicemail via the ITS is required under the RFP. Vendor shall provide an overview of this technology specifying whether the technology accommodates outbound voicemails in addition to inbound.
  - 4.2.1.10.5. Describe all security features for voicemail messaging and how the voicemail services preserve the call controls configured in the ITS.
  - 4.2.1.10.6. Confirm the ITS is capable of recording and storing all messages.
  - 4.2.1.10.7. Vendor must provide 2 references of facilities where this feature has been implemented for at least 6 months.

- 4.2.2. Internal automated voicemail messaging via the ITS (no cost to Customer) is required under this RFP. Vendor shall provide information on an internal messaging feature available to the inmates to file grievances, request medical/dental, file telephone complaints or receive broadcast messages from Customer (per inmate, group of inmates or facility).
  - 4.2.2.1. Confirm the ITS is capable of recording and storing all messages.
  - 4.2.2.2. Vendor must provide 2 references of facilities where this feature has been implemented for at least 6 months.
  
- 4.2.3. **VVS**
  - 4.2.3.1. Mandatory VVS features, functionalities, and user applications are found in **Attachment 1, Section I (VVS System Requirements)**.
  - 4.2.3.2. Vendor shall detail any unique or distinctive features regarding the proposed VVS, including the capability for the inmate to initiate video visitation sessions.
    - 4.2.3.2.1. If Vendor does not have the capability for the inmate to initiate video visitations sessions, provide information on Vendor's research and development progress.
  - 4.2.3.3. Vendor shall indicate whether it proposes an alternative number of video visitation stations to the quantity specified in **Attachment 1, Section K (Facility Specifications)**.
  - 4.2.3.4. Vendor shall list the requirements for a visitor to complete remote video visitation sessions, including but not limited to minimum bandwidth, equipment, software, browser type.
  - 4.2.3.5. Vendor shall specify whether the VVS provides a countdown clock timer on the video visitation station.
  - 4.2.3.6. Vendor shall specify its proposed process for providing information on upcoming video visits, including reports available in the VVS user application.
  - 4.2.3.7. Vendor shall provide a list of all available reports in the VVS user application.
  - 4.2.3.8. Vendor shall indicate if its VVS can accommodate video arraignment.
    - 4.2.3.8.1. If not, Vendor shall provide information on the capability to provide a stand-alone video arraignment solution along with the information provided in **Section 4.5 (Additional Technology)** of this RFP.
  
- 4.2.4. **Tablets**
  - 4.2.4.1. If Customer elects to implement Tablets, Vendor shall be capable of accommodating the Mandatory Tablet features, functionalities, and user applications found in **Attachment 1, Section H (Tablet Requirements)**.
  - 4.2.4.2. Vendor shall detail any unique or distinctive features regarding the proposed Tablets, including all available options for inmates to access the Tablets (e.g. assigned model compared to a shared model).
  - 4.2.4.3. Vendor shall indicate whether it proposes an alternative number of Tablets to the quantity specified in **Attachment 1, Section K (Facility Specifications)**.
  - 4.2.4.4. Vendor shall describe its capability to deliver a comprehensive inmate education solution on the Tablets including all available courses.
  - 4.2.4.5. Vendor shall describe how data associated with usage on the Tablets is stored.
  - 4.2.4.6. Vendor shall specify how, if at all, Tablets become the property of the inmates at the time of release.
  - 4.2.4.7. Vendor shall indicate if its Tablet user application has the capability of live monitoring.
  - 4.2.4.8. Vendor shall provide a list of all available reports in the Tablets user application.
  - 4.2.4.9. Vendor shall detail its ability to interface in real-time with Customer's JMS for inmate grievances and requests through the Tablets allowing the use of the JMS'

existing forms and applications in lieu of Vendor-created, standalone forms on the Tablets.

### 4.3. Security Features

- 4.3.1. Mandatory ITS Security Features requirements are outlined in **Attachment 1, Section G (System Requirements)**.
- 4.3.2. **ITS**
  - 4.3.2.1. Vendor shall provide a detailed explanation of the information displayed on the called party's caller ID each time a call from the Facilities is placed (e.g. unknown number, Vendor's customer service number, dummy ANI).
  - 4.3.2.2. Relative to Vendor's fraud prevention feature, provide a list of the available pre-recorded announcements. Vendor shall describe its process for adjusting the duration of the call or excluding the pre-recorded announcements from the cost of a call.
  - 4.3.2.3. Specify the method used by Vendor to detect three-way calls, specifically if the called party is utilizing a cell phone to place the three-way call.
    - 4.3.2.3.1. Upon detection of a three-way call, indicate whether the ITS is capable of playing a message to the inmate and/or the called party prior to terminating the call.
- 4.3.3. **VVS**
  - 4.3.3.1. Vendor shall describe its registration and scheduling processes including:
    - 4.3.3.1.1. Capability to automatically capture the visitor's photo or identification without manual input from the visitor.
    - 4.3.3.1.2. Capability to verify the visitor's identity.
    - 4.3.3.1.3. Capability to run a warrant search on the visitor.
    - 4.3.3.1.4. Create automated/custom restrictions for the inmate and/or visitor including restricting a specific inmate or visitor from conducting a video visitation session at the same time as another specific inmate or visitor;
    - 4.3.3.1.5. The mandatory fields captured during the registration and scheduling processes.
    - 4.3.3.1.6. Process for designating a visitor to receive confidential/privileged video visits.
    - 4.3.3.1.7. All methods available for visitors to register and schedule a video visit including the use of a mobile application.
      - 4.3.3.1.7.1. If Vendor does not have the capability to allow scheduling through a mobile application, provide information on Vendor's research and development progress.
    - 4.3.3.1.8. Method for avoiding scheduling conflicts.
  - 4.3.3.2. Vendor shall indicate how other contract customers using Vendor's proposed VVS are handling approval of visitors: approved visitor lists compared to passive approval (with required registration).
  - 4.3.3.3. Vendor shall indicate whether the VVS can accommodate a manually-facilitated video visit created by Customer.
  - 4.3.3.4. Vendor shall indicate whether the VVS has the capability to allow Customer to manually reassign the video visitation station initially assigned by the VVS.
  - 4.3.3.5. Vendor shall the process for shutting down the VVS.
- 4.3.4. **Tablets (If Selected by Customer)**
  - 4.3.4.1. Vendor shall specify the modifications to the physical device as well as the operating system which ensure correctional-grade security.
  - 4.3.4.2. Vendor shall specify how mobile device management is handled.

- 4.3.4.3. Vendor shall detail its security and installation approach to ensure inmates cannot access an external wireless network.
- 4.3.4.4. Vendor shall provide information on the default configuration regarding inmate log-in to log-out time limits in the case of a shared Tablet model. Please provide information regarding how individual inmate data and processes are treated by the Tablet application among multiple inmate logins to prevent sharing of data, and message passing.

#### **4.4. Monitoring, Recording and Data Requirements**

- 4.4.1. Vendor shall provide detailed information on its data storage locations, data redundancy practices, and the processes used when copying and storing all data.
- 4.4.2. **ITS**
  - 4.4.2.1. Mandatory Monitoring, Recording and Data Requirements are outlined in **Attachment 1, Section H (ITS Requirements)**.
  - 4.4.2.2. Vendor shall include detailed information on the ITS alert application. The description shall include, at a minimum, the types of alerts available (cell phone, SMS text, email) and whether a security PIN for accessing the live call/visitation session is required.
  - 4.4.2.3. Vendor shall provide a detailed description of the process for copying/exporting recordings. Include information on date/time stamps and how the ITS prevents tampering with a recording.
  - 4.4.2.4. Vendor shall describe its capabilities to allow authorized users of the ITS application to share call recordings (single and bulk) without copying recordings onto a CD or other storage medium.
  - 4.4.2.5. Provide a listing of all available file types for ITS data including reports and recordings.
- 4.4.3. **VVS**
  - 4.4.3.1. Mandatory Monitoring, Recording and Data Requirements are outlined in **Attachment 1, Section I (VVS Requirements)**.
  - 4.4.3.2. Vendor shall include detailed information on the VVS alert application. The description shall include, at a minimum, the types of alerts available (cell phone, SMS text, email) including.
  - 4.4.3.3. Vendor shall specify if the VVS allows the user to stop, pause and restart a live video visitation.
  - 4.4.3.4. Vendor shall indicate whether its VVS has the capability to scan and display random live video visitations.
  - 4.4.3.5. Vendor shall indicate whether the user can customize the view for playback of video visitations and/or add comments to the video visitation recording.
  - 4.4.3.6. Vendor shall indicate the different methods available to shut down individual VVS and groups of VVS stations (i.e. manual cut-off switch, user application, etc.)
  - 4.4.3.7. Vendor shall indicate its capabilities to alert and/or terminate live video visitation sessions in the event Vendor's VVS detects lewd, nude, or inappropriate content. If Vendor does not have the capability available, Vendor shall provide detailed information on Vendor's research and development process to develop this feature.

#### **4.5. Additional Technology**

- 4.5.1. Customer is interested in additional technology products that can be provided as part of the Vendor's proposal offering for this RFP. Customer may, at its sole option, elect to implement any proposed Additional Technologies throughout the life of the Agreement. If Vendor is interested in providing information for additional technology products it should supply information on the following items.

- 4.5.2. Commissary ordering via the ITS (no cost to Customer): Vendor must provide an overview of this technology which shall include details on the process for selecting and ordering commissary items. Refer to **Attachment 1, Section K (Facility Specifications)** for information on the commissary services provider.
  - 4.5.2.1. Detail any fees or charges associated with this technology; and
  - 4.5.2.2. Vendor must provide 2 references of facilities where this technology has been implemented for at least 6 months. References should include facility name and address, contact name, contact number and contact email.
- 4.5.3. Debit release cards (no cost to Customer): Vendor must provide an overview of its debit release card program.
  - 4.5.3.1. Explain how funds are applied to the debit release card and how the card is used by the inmate after release.
  - 4.5.3.2. Detail all rates, fees, and surcharges associated with the inmate's use of the card.
  - 4.5.3.3. Vendor must provide two (2) references of facilities where this feature has been implemented for at least six (6) months.
- 4.5.4. Automated Information Technology System (AITS) (no cost to Customer): Vendor shall describe its AITS feature which shall provide both inmates and external users with information relative to the facility or to a specific inmate.
  - 4.5.4.1. Vendor must provide 2 references of facilities where this feature has been implemented for at least 6 months.
- 4.5.5. Touch screen payment kiosk (no cost to Customer): Vendor shall describe the kiosk services including, but not be limited to, deposits into an inmate trust, commissary, pre-paid collect or debit account.
  - 4.5.5.1. Detail all fees or surcharges applicable to end users utilizing such kiosks.
  - 4.5.5.2. Indicate method of revenue-share with Customer.
  - 4.5.5.3. Vendor must provide 2 references of facilities where this feature has been implemented for at least 6 months.
- 4.5.6. Electronic messaging: Vendor shall provide an overview of this technology specifying whether the technology accommodates outbound electronic messages in addition to inbound.
  - 4.5.6.1. Describe security features of the electronic messaging feature.
  - 4.5.6.2. Describe any required interfaces.
  - 4.5.6.3. Detail the charge per electronic message and method of revenue-share with Customer.
  - 4.5.6.4. Vendor must provide 2 references from facilities where this feature has been implemented for at least 6 months.
- 4.5.7. Mobile inmate education: Provide information on secure, correctional grade devices, such as tablets, for use by the inmates for the purposes of learning, including a learning management application education partners.
  - 4.5.7.1. Provide detailed description of the device(s) including the required infrastructure and security features that make the device(s) suitable for use in a correctional environment.
  - 4.5.7.2. Describe any additional, free applications and features and how any applications are added to the device.
  - 4.5.7.3. Detail the costs associated with the device(s), including any initial hardware costs, license costs, replacement costs and charging options.
  - 4.5.7.4. Vendor must provide 2 references of facilities where this feature has been implemented for at least 6 months.
- 4.5.8. Any additional Vendor technology or optional features: Provide a description of any additional technology that may be of interest to Customer (e.g. jail management system,

RFID technology). Provide detailed information on each application, production and the functionalities of each as well as a complete description of the features proposed.

4.5.8.1. Detail any cost associated and/or commission with the additional technology or optional features offered/proposed.

Vendor must provide 2 references of facilities where the optional features have been implemented for at least 6 months.

## 5. FINANCIAL TRANSPARENCY

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### 5.1. Vendor Information

- 5.1.1. Vendor shall supply the following in its proposal.
  - 5.1.1.1. Documentation that Vendor is registered to do business in the state of California.
  - 5.1.1.2. Documentation that all necessary requirements of the Federal Communications Commission (FCC) for the ITS are met.
  - 5.1.1.3. A copy of its telecommunications service tariff, for the ITS, for the state of California.
  - 5.1.1.4. Vendor's current annual report and its 2 most recent Dun and Bradstreet or similar reports.
  - 5.1.1.5. If Vendor has operated under a different name, or affiliate, in the past 3 years, provide names, dates, addresses and state where incorporated.
  - 5.1.1.6. If Vendor has participated in an acquisition or merger in the last 6 months, provide information about the acquiring company or the company to be acquired and information regarding the stage of negotiations.
  - 5.1.1.7. A synopsis of any and all inmate telephone, video visitation and tablet RFP or contract related protests within the last 3 years. Include location and outcome of the protest.
    - 5.1.1.7.1. A response indicating this information is confidential and/or proprietary will be considered an Exception.
  - 5.1.1.8. A synopsis of any and all litigation(s) within the last 5 years where Vendor or Vendor's ITS, VVS or Tablet is a party. Include venue, style of case and status of litigation.

### 5.2. Validation

- 5.2.1. **ITS**
  - 5.2.1.1. Vendor shall describe its call validation methods, indicating if real-time.
    - 5.2.1.1.1. Identify all other methods used for call validation.
    - 5.2.1.1.2. Vendor shall subscribe to the LEC Line Information Data Base (LIDB). Vendor shall query this database for each collect inmate call and process only those calls which do not have Billed Number Screening (BNS). Vendor must assume all responsibility for the cost and accuracy of validation.
    - 5.2.1.1.3. Specify the process for unblocking a phone number that is restricted for non-payment or exceeding a daily/weekly/monthly collect calling limit ("Collect Call Threshold").
    - 5.2.1.1.4. Vendor shall describe its capability to accommodate a monthly minimum Collect Call Threshold specified by Customer.
    - 5.2.1.1.5. Include the timeframe for removing a restriction once payment is received by the Local Exchange Carrier (LEC).
- 5.2.2. **VVS**
  - 5.2.2.1. Specify Vendor's process for restricting visitors for any fraudulent activity or credit card chargebacks.
- 5.2.3. **Tablets**
  - 5.2.3.1. Specify Vendor's process for capturing any orders for the device, media or communication.
  - 5.2.3.2. Confirm the timeframe for processing inmate orders and making the purchased media or communication available to the inmate.
  - 5.2.3.3. Detail Vendor's process for validating the inmate's available balance at the time of purchase request.

### 5.3. Available Options

#### 5.3.1. ITS - Calling Options

- 5.3.1.1. If available, describe the collect calling option of the ITS.
  - 5.3.1.1.1. Vendor shall specify the name and phone number of the billing company used to bill collect calls on its behalf.
  - 5.3.1.1.2. Describe the process for collecting, rating, sorting, distributing and billing of collect calls.
  - 5.3.1.1.3. Provide a diagram demonstrating the collect calling process.
  - 5.3.1.1.4. Specify how taxes and required fees are applied to the total cost of a collect call in preparation for billing.
  - 5.3.1.1.5. Describe any and all additional fees (including those from third parties) which are charged to the end user's telephone bill (e.g. monthly billing fee, carrier administrative fee, cost recovery fee).
- 5.3.1.2. Vendor must specify its process for maximizing call completion especially for calls that would otherwise be blocked because of Competitive Local Exchange Carriers (CLEC), cell phones and other unbillable issues. Vendor shall also identify the average percentage of calls that fail validation because of CLEC, cell phones and unbillable issues.
  - 5.3.1.2.1. Provide a diagram demonstrating each additional calling option.
  - 5.3.1.2.2. Relative to pre-paid collect, specify the timeframe for a pre-paid account to become dormant/expire. If applicable, Vendor shall state whether the timeframe is configurable.
    - 5.3.1.2.2.1. Describe the refund process including how a refund should be requested and the timeframe associated with processing a refund.
  - 5.3.1.2.3. Specify the minimum amount required on a pre-paid collect account to complete a call.
  - 5.3.1.2.4. Describe in detail what happens when an inmate attempts a call to a pre-paid collect account that has insufficient funds.
  - 5.3.1.2.5. Relative to pre-paid cards, specify the process for allowing access to unused funds once an inmate is released.
  - 5.3.1.2.6. Relative to debit accounts, describe the process for accommodating real-time refunds.
- 5.3.1.3. Describe billing options available to professional called parties such as attorneys and bail bondsmen in the event they cannot receive collect calls.

#### 5.3.2. VVS – Available Applications

- 5.3.2.1. Vendor shall specify if additional/external applications, text or information, as approved by Customer, can be added to the VVS and displayed on the video visitation station(s) including video arraignment.

#### 5.3.3. Tablets – Available Applications

- 5.3.3.1. Vendor shall provide a list of all available applications, features and functionalities available on Tablets.

### 5.4. End-User Payment Options

- 5.4.1. Provide a detailed description of all payment/deposit methods and the process for applying payments for the purpose of any of the inmate communication services specified in this RFP.
- 5.4.2. Describe the process by which end-users can make pre-payments for a specific phone number, pre-paid collect account or inmate account for any of the inmate communication services specified in this RFP.
- 5.4.3. Indicate the timeframe it takes for funds to post and become available for use by the inmate or end-user/visitor.



5.4.4. Describe how taxes and fees are applied to all payments.

**5.5. Vendor References**

- 5.5.1. Provide a list of agreements not renewed, lost or prematurely cancelled in the last 5 years.
  - 5.5.1.1. If applicable, include the reason for non-renewal and/or cancellation(s) of the agreement(s). A response indicating this information cannot be provided because it is confidential and/or proprietary will be considered an exception.
- 5.5.2. Provide a list of clients/agencies who have notified Vendor of unauthorized fees/charges, overbillings or revenue share owed within the last 3 years and the status of resolution of those claims.
  - 5.5.2.1. A response indicating this information cannot be provided because it is not monitored, confidential and/or proprietary will be considered an Exception.
- 5.5.3. Provide 3 client references for facilities where Vendor provides the equipment and services comparable to the requirements in this RFP.
  - 5.5.3.1. References provided must be currently under contract with Vendor and have been operating under that contract for at least 6 months.
  - 5.5.3.2. Vendor shall ensure updated references and accurate contact information is provided.
  - 5.5.3.3. References may be contacted at any time during the RFP process.
- 5.5.4. Using the format in **Table 2 (Vendor Reference Format)**, provide the requested information for each reference.

**Table 2 - Vendor Reference Format**

<b>Customer Name:</b>	
<b>Contact Person and Title:</b>	
<b>Telephone Number(s):</b>	
<b>Email Address:</b>	
<b>City, State:</b>	
<b>Number of Facilities:</b>	
<b>ADP:</b>	
<b>Agreement Effective Date:</b>	
<b>Total Number of Inmate Phones:</b>	
<b>Total Number Visitation Phones:</b>	
<b>Total Number of VVS stations:</b>	
<b>Total Number of Tablets:</b>	

6. SERVICE

6.1. Disaster Recovery Plan

- 6.1.1. Vendor shall detail its Disaster Recovery Plan (DRP). This plan should provide the Vendor processes, policies and procedures relating to the recovery of services and data requirements as specified in this RFP preceding and/or following a natural or human-induced disaster.
- 6.1.2. The DRP shall address the Vendor’s recovery processes following a natural or human-induced disaster for these scenarios.
  - 6.1.2.1. A localized event affecting only the Vendor’s facilities, infrastructure, and personnel;
  - 6.1.2.2. A localized affecting only the Customer’s facilities, infrastructure, and personnel; and
  - 6.1.2.3. A broad geographic event affecting both the Vendor and the Customer.

6.2. Vendor Personnel

- 6.2.1. Vendor shall provide the names of Vendor’s employees, consultants, and subcontractors that will be involved in providing the requirements in this RFP and the Agreement using format of the table below. Vendor may add additional rows to the table as necessary.

Table 3 - Vendor Personnel

Full Name	Employee/ Contractor OR Consultant	Title/Position	Contact Phone Number	Email Address

- 6.2.2. Vendor shall supply resumes for all employees, consultants and subcontractors that will be working under the terms of this RFP and Agreement. There is no limit on the number of resumes that the Vendor may submit and shall be included in Vendor’s proposal as indicated in **Attachment 1, Section B.1 (Proposal Order)**. All resumes shall be no more than 2 pages and include the following information.
  - 6.2.2.1. Each shall contain the name, position, qualifications, certifications, years of experience, and educational background information.
  - 6.2.2.2. The amount of time that the individual will devote to work related to the requirements outlined in this RFP. Indicate clearly whether the given response is being expressed in hours per month or a percentage of time per month.
  - 6.2.2.3. Two related, past performance references for projects of comparable size and complexity where the team member has performed duties similar to the ones outlined in this RFP.
    - 6.2.2.3.1. Vendor must include a contact name, number and email address of someone who has knowledge of the team member’s work for that project.
  - 6.2.2.4. Work experience for no more than the last 10 years. List relevant current/recent work experience, employers, dates and duties in reverse chronological order.

- 6.2.3. Vendor shall provide information regarding maintenance personnel using the format provided in **Table 4 (Vendor Technicians)**.
  - 6.2.3.1. Indicate the number of technicians directly employed by Vendor as well as the number of technicians which will be subcontracted for service at the Facilities.
  - 6.2.3.2. Indicate the names, company, primary physical work location, telephone numbers, and proximity to the Facilities for the technicians who will be maintaining, servicing and performing work under the Agreement.

**Table 4 - Vendor Technicians**

Technician Name	Company	Location (Address, City, State)	Contact Phone Number	Proximity (In Miles)

- 6.2.4. Vendor shall disclose, with percentages clearly shown, the specific work tasks for the Facilities that will be subcontracted and the specific work tasks that will be performed by Vendor employees.

**6.3. Customer Service**

- 6.3.1. Provide the following information regarding Vendor’s processes for handling inmate/end-user service matters for any of the inmate communication services specified in this RFP.
  - 6.3.1.1. Describe procedure(s) for handling inmate/end-user complaints including the contact options available for end-users to request assistance from Vendor;
  - 6.3.1.2. Indicate whether Vendor’s customer service center defaults to an Interactive Voice Response (IVR) or a live customer service representative;
  - 6.3.1.3. The hours during which live customer service representatives are available to speak with end-users via telephone; and
  - 6.3.1.4. Indicate the average on-hold time to reach a live representative; and
  - 6.3.1.5. Describe procedure(s) for handling inmate or end-user refund requests and the timeframe for completing such requests.

**6.4. Maintenance**

- 6.4.1. Vendor shall provide Customer with the escalation procedures for handling customer support issues including, but not limited to, maintenance, outages and reporting issues for the ITS and VVS. Procedure description shall include the contact names, contact numbers, email addresses and level of authority for the person(s) responsible for escalated issues.
- 6.4.2. Vendor shall provide Customer with the proposed process for handling maintenance and service issues surrounding Tablets including warranty timeframe, replacement process and storage of spare Tablets.
- 6.4.3. Vendor shall provide the on-site response time, priority levels and escalation schedule for emergency outage/service issues at and/or related to the Facilities as an exhibit to its RFP response and as outlined in **Attachment 1, Section B.1 (Proposal Order)**.
- 6.4.4. Vendor shall describe its detailed approach to routine and emergency maintenance as an exhibit to its RFP response and as outlined in **Attachment 1, Section B.1 (Proposal Order)**.
- 6.4.5. Vendor shall provide a synopsis of all ITS, VVS and Tablet outages lasting longer than 4 hours in a single day for the past 6 months. Include reason and outcome of the outage.

Vendor shall also provide its average monthly up-time percentage for ITS, VVS and Tablets.

- 6.4.5.1. A response indicating this information cannot be provided because it is confidential and/or proprietary will be considered an exception.