



## **Request for Proposals**

**PREPARED BY:**

Regional Income Tax Agency  
10107 Brecksville Road, Brecksville, OH 44141

**PROJECT TITLE:**

Telephone System Upgrade

**ISSUED DATE:**

April 14, 2025

**RESPONSES DUE DATE:**

5:00 p.m. E.D.S.T., May 16, 2025

# **REGIONAL INCOME TAX AGENCY Request for Proposal**

## **Telephone System Upgrade**

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April 14, 2025

The Regional Income Tax Agency (RITA, the Agency) is seeking proposals for a Telephone System Upgrade that will bring the Avaya system to current supported levels for its existing system.

Proposals are to be submitted electronically to [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com) no later than, **5:00 p.m. E.D.S.T., May 16, 2025.**

If your firm is interested in submitting a proposal, please request a Mutual Non-Disclosure Agreement and return to Jackie Zelenka, Project Manager, at [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com).

Upon successful execution of a Mutual Non-Disclosure Agreement, the RFP response spreadsheet and technical addendum worksheet describing the current system will be provided.

Potential vendors may direct questions or requests for clarification to Jackie Zelenka, Project Manager at [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com) through 12:00 p.m. E.D.S.T. on April 25, 2025. A copy of the questions and requests received, along with RITA's responses, will be provided to each party that has executed a Non-Disclosure Agreement, without identifying the source of the question or request. To the extent possible, you are asked to compile your questions and requests and submit them all at one time.

RITA will work with proposing vendors to approve an Avaya Letter of Agency (LOA) to access detailed RITA Avaya inventory information. Please coordinate these LOA requests with Jackie Zelenka, via e-mail at [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com).

Please be aware that the Agency reserves the right to reject all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency deems to be in the best interests of the Agency.

Cordially,

Amy L. Arrighi  
Executive Director

## RFP Introduction and Current Telephone System Description

The Regional Income Tax Agency (RITA, the Agency) is a governmental entity established to administer and collect local income taxes for political subdivisions. As an agent for its municipalities, RITA provides substantial financial services to its members. Municipal income tax is collected from individuals and/or employers withholding salaries, wages, commissions, fees and other forms of compensation. The tax is also collected from business entities based on net profits. As of 2024, there are over 400 taxing jurisdictions in 81 counties served by the Agency (just over 50% of all taxing jurisdictions in Ohio with an income tax) with total annual municipal income tax collections of more than \$2.4 billion.

The purpose of this RFP is to solicit proposals from qualified vendors to perform a telephone system upgrade that will bring the Avaya Telephone System and supporting applications up to current releases. Proposals should also include professional services for annual and maintenance updates for all Avaya Systems for a period of five years.

The current Avaya maintenance contract expires on March 31, 2026. RITA is seeking quotes for a telephone system upgrade to the most current supported levels so that RITA can avoid “end of support” and/or “end of manufacturer support” for Avaya telecom hardware and software through April 1, 2030. In addition, RITA desires to negotiate a five-year extension of the Avaya maintenance contract. This extension must cover the current versions of hardware and software while the upgrades to the current and support software release levels are in progress.

The timing of the maintenance renewal and the need to upgrade the Avaya system coincides with the annual tax filing season—the busiest time of the year for RITA. Telephone system usage ramps up beginning February 1<sup>st</sup> and usually lasts through April 30<sup>th</sup>. In addition, RITA institutes a system-wide freeze on all major system upgrades and/or changes between March 1<sup>st</sup> and April 15<sup>th</sup>. Any upgrade plan submitted must take into consideration both this blackout period and the need for RITA to maintain operations without interruption during regular business hours.

RITA currently has an Avaya telephone system that is configured for high availability with duplicated failover systems. The main Avaya system is located in the Brecksville office with redundant failover systems running in another RITA owned office.

The core Avaya platforms used for delivering calls include, but are not limited, to the following:

- Avaya Session Boarder Controllers
- Avaya Session Manager
- Avaya Communications Manager
- Avaya Gateways

The Agency also uses:

- Avaya Experience Portal for IVR
- Avaya Application Enablement Services to integrate with its CRM
- Avaya Call Management System for reporting
- Avaya IX Messaging for voicemail
- Avaya OneX for soft phone access
- Avaya Breeze for attendant and presence

The following 3<sup>rd</sup> party applications directly integrate the Agency’s Avaya Telephone systems and will need to be upgraded or replaced and covered by support as part of any proposals.

- Nuance speech servers that integrate with the IVR
- Datel Call Reporting
- Avaya CT for Siebel
- Nice call/video recording solution

- Redsky e911

These systems currently run on isolated hardware. The current telephone system software is running two virtual VMware pods, each with its own SAN. Responding vendors need to review the hardware capacity and determine if there are enough computing resources to accommodate the upgrade during and after the project.

In order to respond accurately to the proposal, each vendor will be required to execute an LOA through Avaya to gain access to and verify the existing versions of hardware and software running on RITA's existing system. Each vendor will also need to execute a mutual non-disclosure agreement with RITA before receiving additional detail system information. This additional information will be provided as a separate addendum to this RFP.

It's important to note that all upgrades being recommended for both hardware and software should be for on-premise telephone system installations. Cloud based solutions or version upgrades requiring a cloud installation are not preferred at this time. If proposed solutions require cloud integration, please expect additional follow-ups and requirements.

In addition, the Agency desires an upgrade plan that minimizes system down time and one that can be implemented in phases versus a "big bang" or "all at once" go-live. Vendors will be responsible for providing support resources for each go-live for the day of and the days following each phase of the project. This will ensure product-related issues resulting from the go-live are resolved in a timely manner.

While vendors are required to provide a response to this entire proposal, RITA reserves the right to award separate portions of the proposal to different vendors.

A contract shall be awarded to the most responsive and responsible vendor as soon as practicable after the opening of proposals. The vendor to whom the award is made shall enter into a written contract in a form acceptable to RITA within ten (10) days of notification of the award.

The Regional Income Tax Agency is not responsible for any costs incurred by the respondent in preparation of a proposal. RITA reserves the right to negotiate with vendors submitting quotes to obtain the most favorable terms, conditions and pricing for the Agency as determined by the Agency in its sole discretion. Also, as deemed in the best interest of the Agency by the Board of Trustees, RITA reserves the right to reject any or all parts of the quotes.

## RITA Telephone System Upgrade Objectives

Upgrade the Avaya Telephone System and supporting applications up to current releases so that RITA is not at “end of support” and/or “end of manufacturer support” for five years.

RITA Objectives	
1.	Extend the maintenance agreement that expires on 3/31/2026 for five more years commencing 4/1/2026 and include interim support for the existing versions of hardware and software. (See addendum for complete list)
2.	Ensure the upgrade will include all dependent third-party applications. (See addendum for complete list)
3.	Replace existing call recording solution with a new product.
4.	Upgrade software for each Avaya hardware and software component required to maintain Avaya maintenance and support. (See addendum for complete list)
5.	Provide annual update maintenance and support for all new hardware and software after the upgrade for a period of 5 years.
6.	Include any value-add services during and after the upgrade to keep the hardware and software current for the next 5 years.
7.	Ensure system hardening and security best practices are implemented according to IRS Publication 1075 Requirements. (See addendum for the complete list of requirements)
8.	Remediate security vulnerabilities within the Avaya software.
9.	Identify known security vulnerabilities in versions of software being installed that are required to run the system but have not yet been remediated by Avaya.
10.	Ensure ability to continually upgrade applications supported using Solution Deployment Manager (SDM).

## Proposal Responses

Proposals must be submitted in the format and order outlined below. All proposals should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely.

It is more desirable to give additional information than less when the answer could be misinterpreted. There should be no additional attachments, enclosures, or exhibits other than those considered by the proposer to be essential to a complete understanding of the proposal submitted.

Please complete the vendor response worksheet (Vendor Response Worksheet.xls) for each of the corresponding sections below. This is provided to prospective vendors who have an executed mutual non-disclosure agreement on file with the Agency.

### **Section I – Company Background, Qualifications, Experience**

*The following items must be provided in narrative format*

- Provide an overview of your company, including your history, mission, and core values.
- Describe your firm’s experience in providing Telephony solutions to organizations like ours.
- Provide a list of customers/references.
- Provide case studies or success stories that demonstrate the effectiveness of your products.

## **Section II – Complete Vendor Response Worksheet**

*Vendors, when completing the vendor response worksheet should identify their solution capability with (y/n) and describe how their solution meets each question in detail.*

- RITA will use the following rating scale to score:
  1. Poor
  2. Below Average
  3. Average
  4. Good
  5. Excellent

## **Section III – Project Plan**

*Provide a Project Plan based on RFP requirements.*

- Include Milestones, High Level Tasks, Duration (Estimated start/end dates of Project and start/end dates of Milestones), Owner of Tasks (Vendor or RITA).
- When assembling the project plan, responding vendors should consider RITA's production freeze period. RITA typically does not deploy major system upgrades during the time frames from March 1st through April 30th and from September 15th through October 15th each calendar year.

## **Section IV – Cost/Pricing**

*Provide a pricing sheet as a separate Microsoft Excel document that contains the following information.*

- A breakdown of the costs (separate line items) by hardware, software, hardware maintenance, software maintenance, licensing and professional services.
- For any professional services costs, please provide the number of man hours by skill set (if more than one) that are required to complete the upgrade and an explanation of why each skill is required for the project.
- List any costs outside of the required resource hours as separate line items with an explanation.
- All pricing provided must be valid for 60 days.
- RITA prefers that all proposals be fixed bid.
- Where applicable, indicate whether pricing is at or below Ohio State Term Schedule (STS) pricing.

## Proposal Instructions

RITA requires a signed mutual Nondisclosure Agreement (MNDAs) on file prior to providing the Vendor Response Questionnaire (Vendor Response Worksheet\_Phone System Upgrade.xls) and the Technical Addendum Worksheet (Addendum\_ Phone System Upgrade.xls) explaining the Agency's Infrastructure.

All proposals must be submitted in the format and order outlined in the Proposal Responses section and submitted electronically to [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com).

All proposals must be received by the Executive Director, Regional Income Tax Agency, **by 5:00 p.m. E.D.S.T., May 16, 2025**. All Proposals shall be emailed to [RFP-IS@ritaohio.com](mailto:RFP-IS@ritaohio.com).

It is RITA's intention to enter into a contract as soon as practical after the proposals are evaluated and Board approval is received. The successful vendor shall enter into a contract with the Regional Income Tax Agency within ten (10) days of the notification of award or as soon as practical thereafter as determined by RITA. Implementation work is expected to begin no earlier than the first business day of the month following the execution of the contract.

Proposals will be evaluated on several factors including the degree of fit to the requirements and cost.

The Agency reserves the right to reject any and all proposals, or any part of any proposal, or to waive informalities or defects in proposals, as the Board of Trustees of the Agency shall deem to be in the best interests of the Agency. By submitting a proposal, each respondent is ensuring that complete confidentiality of all Agency information will be maintained by all vendor personnel.

By submitting a proposal, each respondent is ensuring that the vendor is an Equal Opportunity Employer and that their employees and applicants for employment are not discriminated against because of their race, color, religion, national origin, disability, age, genetic information, military status or sexual orientation. By signing a contract with RITA, the successful vendor guarantees that they comply, or will comply with the above provision and all other applicable state and federal laws regarding public contract work, and agrees to indemnify and hold the Regional Income Tax Agency harmless from any claims or damages incurred against or by the Regional Income Tax Agency resulting from any non-compliance by the successful vendor.

By submitting a proposal, each respondent is declaring that they are not in arrears to RITA for municipal income taxes or any other obligation to the Agency.