



*The National Insurance Board*

Jumbey Village  
Baillou Hill Road  
P. O. Box N-7508  
Nassau, Bahamas

Telephone: (242) 502-1500  
Fax: (242) 322-3048

*Request for Proposal (RFP)*

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**TELEPHONE AND CONTACT CENTER SYSTEM**

October 2018

**Produced By:**  
NIB Project Team

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### Document Ownership Information

<b>Document Owner</b>	National Insurance Board
<b>Document Preparation</b>	Information Technology Department
<b>Document Confidentiality</b>	Proprietary and Non-confidential

## 1. INTRODUCTION AND BACKGROUND

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The National Insurance Board plans to purchase an integrated Telephone Communications System to better enable customers and employees to have an improved communications network across the Commonwealth of the Bahamas. The upgraded network will also include a state of the art Contact Center with the ability to use Multi Channel communication networks and include Multimedia Capabilities. The intent is to begin the installation of the new system by February 11, 2019. The system installation should be completed in a phased approach and last no longer than six (6) months.

To this end, The National Insurance Board (NIB) is soliciting qualified firms for the procurement, installation, and deployment of an Integrated Telephone and Contact Center System that will meet the both the Customer and Employee's needs.

The engagement will include:

- a. The acquisition and installation of a Telephone and Contact Center, inclusive of all software and hardware required to meet the specified requirements.
- b. Post implementation support and maintenance.
- c. Assistance with process and procedural development for contact center operations.
- d. Provision of User Manuals, Systems Manuals, Training Manuals, and Operational Guides.
- e. Training of system administrators and system super users.

The Telephone and Contact Center Equipment is expected to produce quantifiable benefits that include increases in Contact Center Service Levels, decrease in system down time and errors, greater reporting capabilities; all converging around the primary goal of improving the NIB customer experience.

## 2. ADMINISTRATIVE INFORMATION

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### 2.1.1 TECHNICAL CONTACT

Any questions concerning technical specifications or Statement of Work (SOW) requirements must be directed to:

<b>Name</b>	June Collie, Deputy Director, Information Technology Department
<b>Address</b>	The National Insurance Board Jumbey Village Baillou Hill Road P. O. Box N-7508 Nassau, The Bahamas
<b>Phone</b>	(242) 502-1500
<b>FAX</b>	(242) 322-3048
<b>Email</b>	CallCenterProposal@nib-bahamas.com

### 2.1.2 CONTRACTUAL CONTACT

Any questions regarding contractual terms and conditions or proposal format must be directed to:

<b>Name</b>	Dr. Nicola Virgill-Rolle Director, National Insurance Board
<b>Address</b>	The National Insurance Board Jumbey Village Baillou Hill Road P. O. Box N-7508 Nassau, The Bahamas
<b>Phone</b>	(242) 502-1500
<b>FAX</b>	(242) 322-3048
<b>Email</b>	director@nib-bahamas.com

### 2.1.3 DUE DATES

All proposals are due by 3:00 p.m. (UTC-05:00 Eastern Time) on November 16, 2018. Any proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.

### 2.1.4 SUBMISSION OF RFP

Proposals must be received at the Reception Desk, The National Insurance Board, Jumbey Village, Baillou Hill Road, The Bahamas; or e-mail to the [CallCenterProposal@nib-bahamas.com](mailto:CallCenterProposal@nib-bahamas.com)

If delivered by hand, vendors are requested to deliver four (4) sealed hard copies and one (1) electronic copy of their submissions to:

Delivery: Director  
The National Insurance Board  
Jumbey Village  
Baillou Hill Road  
Nassau, Bahamas  
Labelled: RFP - National Insurance Board, Proposal for Telephone and Contact Center System

Proposals submitted must be received in a sealed envelope/container plainly labelled **“Proposal for The National Insurance Board, Telephone and Contact Center System”**.

Alternatively, proposals can be e-Mailed to [CallCenterProposal@nib-bahamas.com](mailto:CallCenterProposal@nib-bahamas.com) with the Subject: **“Proposal for The National Insurance Board, Telephone and Contact Center System”**.

#### 2.1.5 AMENDMENTS

At any time prior to the close of the RFP, the National Insurance Board may alter, amend, delete or add to, in whole or in part, any terms or provisions of this RFP. The National Insurance Board may modify, amend or revise any provision of this RFP or issue an addendum at any time. The National Insurance Board will publish any such modification or amendment, revision or addendum in writing to all vendors, by hard copy or email.

Amendments would not impact the deadline; vendors are asked to make certain that the prescribed deadline is met.

#### 2.1.6 RFP TIMELINE

<i>Event</i>	<i>Start Date</i>	<i>Completion Date</i>
1. Advertisement of RFP	Oct 29, 2018	Nov 02, 2018
2. Distribution of RFP to Vendors	Oct 29, 2018	Nov 09, 2018
3. Responses to Vendors Queries	Nov 12, 2018	Nov 15, 2018
4. Proposal Due Date	Nov 16, 2018	Nov 16, 2018
5. Opening of Submissions	Nov 19, 2018	Nov 19, 2018
6. Target Date for Review of Proposals	Nov 20, 2018	Nov 23, 2018
7. Vendor Demos (Site Visits)	Nov 26, 2018	Nov 30, 2018
8. Vendor Selection/Notification to Selected Vendor	Dec 03, 2018	Dec 07, 2018
9. Contract Signed	Dec 14, 2018	Dec 14, 2018
10. Start of Work	Feb 11, 2019	

### 3. GENERAL TERMS AND CONDITIONS

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#### 3.1.1 *VENDOR RESPONSIBILITY*

It is the vendor's responsibility to ensure that his/her complete comprehension of the requirements and the instructions vis-à-vis products/services/equipment requested by the National Insurance Board. To clarify any discrepancies, it is required that vendors submit their inquiry in writing (as specified in section 2.1.4).

#### 3.1.2 *NEGOTIATIONS*

The National Insurance Board reserves the right to enter into discussions or negotiate with a vendor as it deems essential, or with another vendor or vendors concurrently. In no event will The National Insurance Board be required to enter into discussions or negotiations on similar or other terms or offer any modified terms to any other vendor prior to entering in a bidding contract. The National Insurance Board shall incur no liability to any vendor as a result of these discussions, negotiations or modifications.

#### 3.1.3 *OTHER TERMS AND CONDITIONS*

- 1) The National Insurance Board reserves the right to accept or reject any or all bids.
- 2) All proposals will be considered final. No additions, deletions, corrections or adjustments will be accepted after the time stated for submission has expired.
- 3) Proposals received after the designated time of receipt will be considered as "NO BID" and "VOID". The time stamp for proposals submitted will be calculated based on that of the National Insurance Board. It is the vendor's responsibility to allow sufficient time for delivery and submission to the designated place.
- 4) The successful Vendor must commit to providing a two (2) hour response time for technical issues reported during normal working hours – 9:00am to 5:00pm. In case of an emergency, vendors must be able to respond to an on-site request within a time period deemed reasonable by the National Insurance Board.
- 5) Vendors responding to this proposal will be required to demonstrate quality assurance in their installation, repair/maintenance and service procedures.
- 6) Vendor must disclose and include as part of their proposal, all costs, products and services required for the complete solution with such costs including any and all third party vendors.
- 7) In the case of purchased equipment, the vendor must:
  - a. Fully configure to the user location(s) and, the equipment delivered must have proper vendor identification (stickers) attached including the vendor name and phone contact. Details of all equipment including manufacturer, model number, and serial number must be delivered and documented for future reference.
  - b. Provide a minimum of three (3) years warranty on the solution provided. In the case of critical components, it must be demonstrated that a spare component is available in the case of loss or extensive damages.
- 8) The vendor must:
  - a. Meet at minimum 80% of the required specifications with offering and be able to meet the remaining 20% through customization/modifications and/or creation of new modules/components.
  - b. Be able to integrate with the National Insurance Board systems where applicable.
- 9) The Vendor must disclose any personal or business relationships it has with any members or employees of the National Insurance Board.

## 4. GUIDELINES FOR PROPOSAL PREPARATION

The most responsive Vendor with the most beneficial offer in terms of cost, functionality and other factors as specified elsewhere in this RFP will be awarded the contract.

**The National Insurance Board** reserves the right to:

- > Discontinue this RFP process without obligation or liability to any potential Vendor,
- > Accept other than the lowest priced offer,
- > Award a contract on the basis of initial offers received, without discussions or requests for best and final offers, and
- > Award more than one contract.

The submitted proposals are to include, but not be limited to, each of the following sections:

<b>1. Executive Summary</b>	A high-level synopsis of the Vendor's responses to the RFP. The Executive Summary should be a brief overview of the engagement, and should identify the main features and benefits of the proposed work.
<b>2. Scope, Approach, and Methodology</b>	This section will act as the Statement of Work (SOW) to be used as the project plan during the engagement. This section should include a description of each major type of work being requested. See further <b>System Requirements Definition (SRD) Document</b> . Complete the table on <b>Functional &amp; Non-functional Requirements</b> of the SRD and return to the National Insurance Board along with vendor proposal. All information provided will be held in strict confidence.
<b>3. Project Management Approach</b>	Include the method and approach used to manage the overall project and client correspondence. Provide an estimated Timeline from project start to completion.
<b>4. Deliverables</b>	Include descriptions and samples of screens and reports of proposed solution.
<b>5. Detailed and Itemized Pricing</b>	Include a fee breakdown <u>by project phase</u> and estimates of travel and living expenses inclusive of third party involvement.  Pricing is to include "Go-live Support" for 2 weeks.  Quote should include cost for the subsequent annual maintenance.
<b>6. Appendix: References</b>	Two (2) current corporate references, including company name, contact name, title, address, telephone number, email, and client relationship synopsis.



**7. Appendix: Project Team Staffing**

Include biographies and relevant experience of key staff and management personnel. List the personnel who will work on this project along with their qualifications and relevant experience.

**8. Appendix: Company Overview**

Official registered company name, business address, main telephone number, toll-free numbers, facsimile numbers, e-Mail address, and website URL.

Key contact name, title, address (if different from above address), direct telephone, fax numbers, e-Mail address.

Person authorized to contractually bind the organization for any proposal against this RFP.

Brief history, including year established and number of years the company has been offering the products requested by this RFP.

Include organization size and structure, and annual turnover rate of staff.

Client list for proposed solution.

**7. Appendix: Company policies on maintenance and support**

Specify maintenance and support agreements and warranty information.

**Maintenance**

- The vendor is expected to provide a renewable yearly maintenance agreement for the solution which covers technical support incidents and bug fixes.
- The maintenance agreement should also cover changes required to the solution in order to ensure continued compatibility with NIB communications needs.
- The vendor must provide contacts for regular technical support during the weekday business hours of 9 a.m. Eastern Time and 5p.m. Eastern Time.
- Emergency support contacts must be provided by the vendor for weekday business off- hours, weekends, and public holidays.
- The maintenance agreement must ensure reasonable response and resolution times for incidents reported to the technical support contacts. These times should be based on the impact, priority, and severity of the reported incident.

**Warranty**

- Any system hardware components must be covered by a warranty period which commences on the Go-Live date, as determined by the National Insurance Board.

Vendors shall respond and document the extent to which they can meet the specific requirement or desirable feature statement of the RFP. It is to the vendor's advantage to provide responses in enough detail that will allow the evaluators to determine how well the proposed product satisfies the requirements.

## 5. GENERAL RFP STIPULATIONS

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### 5.1.1 *DISCLOSURE OF RFP CONTENT*

- A. All submissions become the property of the National Insurance Board and will not be returned to the vendor. All conditions contained in the RFP are considered accepted by the vendor along with any information submitted. All information submitted with the RFP, and the RFP will be handled with the strictest degree of confidentiality.
- B. If a vendor submits trade secret information, the information must be segregated and each pertinent page must be clearly labelled "**trade secret**". The National Insurance Board will maintain the confidentiality of such trade secrets to the extent provided by the laws of the Commonwealth of The Bahamas.

### 5.1.2 *RESPONDENT'S RESPONSIBILITY WITH REGARD TO PROPOSAL*

The respondent, by submitting a proposal represents that:

- A. The respondent has read and understood the RFP in its entirety and the proposal is made in accordance therewith.
- B. The respondent possesses the capabilities, resources, and personnel necessary to provide efficient and successful service to **The National Insurance Board**.
- C. Before submitting a proposal, each respondent shall make all investigations and examinations necessary to ascertain site and/or local conditions and requirements affecting the full performance of the contract and to verify any representations made by The National Insurance Board, upon which the respondent will rely. If the respondent receives an award because of its proposal submission, failure to have made such investigations and examinations will in no way relieve the respondent from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the respondent for additional compensation or relief.

### 5.1.3 *WAIVER OF MINOR IRREGULARITIES*

The National Insurance Board reserves the right to waive minor irregularities in proposals, providing such action is in the best interest of the National Insurance Board. Minor irregularities are defined as those that have no adverse effect on the National Insurance Board's best interests, and will not affect the outcome of the selection process by giving the respondent an advantage or benefit not enjoyed by other respondents.

#### 5.1.4 *INCURRED EXPENSES*

This RFP does not commit The National Insurance Board to award a contract. Nor shall The National Insurance Board be responsible for any cost or expense which may be incurred by the respondent in preparing and submitting the proposal called for in this RFP, or any cost or expense incurred by the respondent prior to the execution of a contract agreement.

#### 5.1.5 *PRESENTATIONS BY RESPONDENTS*

- A. The National Insurance Board, at its sole discretion, may ask individual respondents to make oral presentations and/or demonstrations without charge to NIB. The purpose of an oral presentation is to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. The response must be complete in all respects, as presentations and demonstrations MAY or MAY NOT be scheduled. All costs incurred by the vendor to conduct the presentation and/or demonstration are the responsibility of the vendor. Additionally, any requests for clarification, if required, will be issued in **writing** and written responses from the Vendor will become an integral part of the vendor's response.
- B. By submitting a proposal, the vendor certifies that the specified product/equipment/service is in productive use and capable of demonstration in the proposed configuration. In the case of a custom developed product, the vendor certifies that a comparable solution is in productive use and capable of demonstration in the proposed configuration. The National Insurance Board reserves the right to require Vendors to demonstrate the functionality of the proposed product/solution to its satisfaction prior to making an award decision. The demonstration is intended to show that the Vendor's proposed products/solutions will perform in a completely satisfactory manner, and that they will meet or exceed the performance specifications contained in the RFP. Failure by any vendor to promptly comply with a request for demonstration could result in their proposal being rejected. Failure to reject shall not relieve the Vendor, if awarded a contract, of its obligation to fully comply with all requirements of the contract.
- C. If requested by the National Insurance Board, vendors might be required to facilitate site visits to vendor customer sites where the proposed solutions are installed and functioning.
- D. The National Insurance Board reserves the right to require any respondent to demonstrate to the satisfaction of the Board that the respondent has the fiscal and managerial abilities to properly furnish the products and/or services proposed and required to fulfil the contract. The demonstration must satisfy The National Insurance Board.

#### 5.1.6 *RESPONSIBILITY TO RESPONDENT'S PERSONNEL*

The respondent shall be responsible for ensuring that its employees, agents and subcontractors comply with all applicable laws and regulations and meet all governmental and local requirements related to their employment and position. The respondent certifies that it does not and will not during the performance of the contract employ immigrant or illegal alien workers or otherwise violate any **Immigration Regulations** set forth by the provisions of the **Immigration Act, Statute Laws of the Bahamas**, as amended.

During the performance of the contract, the respondent agrees to the following:

- > The respondent shall not discriminate against any employee or applicant for employment because of race, religion, colour, sex, age, handicap or national origin, except when such condition is a

bona fide occupational qualification reasonably necessary for the normal operations of the respondent.

- > The respondent shall include the provisions of the foregoing paragraphs A, B, and C above in every subcontract or purchase order so that the provisions will be binding upon each respondent or vendor.
- > The respondent and any subcontractor shall pay all employees working on this contract not less than minimum wage specified in the Employment Act as amended.
- > Any information concerning The National Insurance Board, services, operations, personnel, policies or any other aspect of its business, unless it is deemed public information, learned by the respondent or personnel furnished by the respondent in the course of providing services pursuant to the Agreement, shall be held in the strictest of confidence and shall not be disclosed by the respondent or any employee or agents of the respondent or personnel furnished by the respondent, without the prior written consent of the Director of The National Insurance Board. The respondent and any subcontractors will be required to sign confidentiality statements prior to submitting a proposal.

#### 5.1.7 *OWNERSHIP OF INTELLECTUAL PROPERTY*

All copyright and patent rights to all papers, documents, reports, forms, materials, creations, or inventions created or developed strictly for the performance of this contract shall become the sole property of The National Insurance Board. Upon request, the vendor shall promptly provide an acknowledgement or assignment in a tangible form satisfactory to the The National Insurance Board.

#### 5.1.8 *OWNERSHIP OF SOURCE CODE*

In the event the vendor ceases to maintain experienced staff and the resources needed to provide required software maintenance, The National Insurance Board shall be entitled to have, use, and duplicate for its own use, a copy of the source code and associated documentation for the software products covered by the contract. Until such time as a complete copy of such material is provided, the National Insurance Board shall have exclusive rights to possess all physical embodiments of such vendor owned materials. The rights of the National Insurance Board in this respect shall survive for a period of ten (10) years after the expiration or termination of the contract. All lease and royalty fees necessary to support this right are included in the initial license fee as contained in the pricing schedule.

#### 5.1.9 *TITLE TO SOFTWARE*

By submitting a proposal, the respondent represents and warrants that it is the sole owner of the software or, if not the owner, that it has received all legally required authorizations from the owner to license the software, has the full power to grant the rights required by this solicitation, and that neither the software nor its use in accordance with the contract will violate or infringe upon any patent, copyright, trade secret, or any other property rights of another person or organization.

## 6. EVALUATION FACTORS FOR AWARD

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Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the Vendor's responsiveness to the RFP and the price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted proposals and in the selection of a Vendor or Vendors:

1. Completion of all required responses in the correct format.
2. The extent to which Vendor's proposed solution fulfils **The National Insurance Board's** stated requirements as set out in this RFP.
3. An assessment of the Vendor's ability to deliver the indicated service in accordance with the specifications set out in this RFP. Scalability of product solution should also be included.
4. The Vendor's stability, experiences and record of past performance in delivering such services.
5. Availability of sufficient high quality Vendor personnel with the required skills and experience for the specific approach proposed.
6. Vendor's acceptance of **The National Insurance Board's** contractual terms and conditions.
7. Overall cost of Vendor's proposal.

The National Insurance Board may, at their discretion and without explanation to the prospective Vendors, at any time choose to discontinue this RFP without obligation to such prospective Vendors.

## 7. STATEMENT OF WORK AND DELIVERABLES

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### 7.1.1 *PURPOSE*

The purpose is to implement a Telephone Communications and Contact Center. Implementation start date for the project February 11, 2019

The full system Implementation, including all Family Island Sites testing and handover is to be completed by July 12, 2019.

### 7.1.2 *SCOPE OF WORK*

The following requirements are expected of the project:

- > An analysis of the current system and provide all details of infrastructure, hardware and software needs for new system being proposed.
- > Design and Develop a solution that meets the functional and non-functional requirements of **The National Insurance Board** as determined by the analysis of the current system
- > Implement and test all modules – as stand-alone and integrated.

- > Training of end-users and technical staff.
- > Provide "Go-live Support" for a period no less than (2) weeks.
- > System backup and recovery procedures and guidelines should be fully documented, implemented and tested.
- > Provide Final Executive Summary Report summarizing the scope, approach, results, findings and recommendations.

Written documentation is to be provided for each requirement. The following documentation is required:

- > User documentation and training manuals
- > System documentation
- > Operational manuals

The vendor is to supply all software, materials and personnel required to complete the installation. The vendor is to configure the system and make any or all essential adjustments to ensure optimum functionality. The National Insurance Board will not be required to make any modifications to the system to get it operational in accordance with the functional requirements specified.

At any point in the process vendors might be asked to make a formal presentation to the evaluating committee.

#### 7.1.3 *SCHEDULE ESTIMATE*

The project is expected to be implemented in a **phased approach** preferably not to exceed a period of **6** months inclusive of integration with the Family Island Offices.

Phases can run consecutively or parallel.

#### 7.1.4 *BUSINESS OBJECTIVES*

1. To improve communications between The National Insurance Board and all Stakeholders
2. To improve the efficiency in how telephone calls are answered
3. To support the establishment of a quality monitoring program for call handling
4. To provide real time and historical data to facilitate management decision making and reporting
5. To allow for a workforce management program for call handling
6. To allow for users to have more control in call routing and messaging in real time
7. To enhance communications and support multimedia and multichannel communications
8. To connect the Family Islands to New Providence more efficiently

#### 7.1.5 *STAKEHOLDER*

- > The National Insurance Board

#### 7.1.6 *CHAIN OF COMMAND*

The project is owned by the **National Insurance Board**, whose daily operations are supervised by the Director. The Information Technology Department, led by the Deputy Director, will have IT responsibility.

Project Managers will be assigned from the National Insurance Board. A project team consisting of Project Leaders and Officers will be staffed with Operations, Family Islands, and IT personnel. Final decisions must be approved by the Director of National Insurance. Matters with financial or policy implications may have to be referred to the Board.

A Project Management Committee (PMC) exists for oversight of the project.

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**Date**