

# CERTIFIED COPY OF ORDER

STATE OF MISSOURI

February Session of the January Adjourned

Term. 20 18

County of Boone

} ea.

In the County Commission of said county, on the 20th day of February 20 18

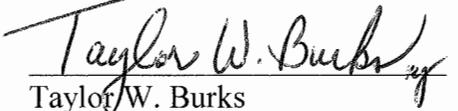
the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the utilization of the State of Missouri Department of Transportation Cooperative Contract IFB605CO18000580 to purchase one (1) 2018 Chevrolet Colorado Crew Cab 4x2 Truck from Roberts Chevrolet Buick of Platte City, MO and dispose of one (1) 2005 Ford Explorer, asset tag 15112.

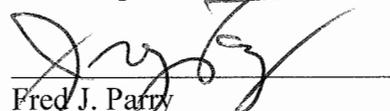
The terms of the Cooperative Contract are stipulated in the attached Purchase Agreement. It is further ordered the Presiding Commissioner is hereby authorized to sign said Purchase Agreement and request for disposal form.

Done this 20th day of February, 2018

ATTEST

  
Taylor W. Burks  
Clerk of the County Commission

  
Daniel K. Atwill  
Presiding Commissioner

  
Fred J. Parry  
District I Commissioner

  
Janet M. Thompson  
District II Commissioner

# Boone County Purchasing

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer



613 E. Ash St, Room 110  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390

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## MEMORANDUM

TO: Boone County Commission  
FROM: Liz Palazzolo, Senior Buyer  
DATE: January 31, 2018  
RE: Cooperative Contract IFB605CO18000580

Purchasing requests permission to use contract IFB605CO18000580 for Model Year 2018 Light Duty Vehicles established by the State of Missouri Department of Transportation with Roberts Chevrolet Buick of Platte City, Missouri as a cooperative contract. The Resource Management Department wishes to purchase one (1) 2018 Chevrolet Colorado 4X4 Crew Cab work truck:

	<u>Unit Price</u>
<b>2018 Chevrolet Colorado Crew Cab 4X2 Truck</b>	\$ 22,743.00
• 4X4 Upgrade	\$ 4,871.00
• Standard Equipment including federal emissions control	Std
• 3.6L Engine DI DOHC V6 VVT	Std
• Automatic Transmission 8-speed	Std
• Limited Slip Rear Axle	Std
• Two (2) sets of keys	Std
• Back-up camera	Std
• Short-bed	Std
• White Exterior	N/C
• Black Cloth Interior	N/C
• Power Windows, Doors, Remote Locks/Cruise Control Included N/C	

**Include the Following Options:**

• Front and Rear Rubber Floor Liners (Factory installed)	Std
• WT Appearance Package: Power-adjustable folding mirrors	\$ 391.50
• Towing Package	\$ 225.00
• Full-size Spare Tire	Std
• Automatic Locking Rear Differential	\$ 292.50

• Bluetooth Connectivity	Std
• Delivery to 5551 Tom Bass Road in Columbia, Missouri	\$ 70.00
<b>Total</b>	<b><u>\$ 28,593.00</u></b>

The contract runs through Model Year 2018 with two (2) renewal options available.

This is a one-time purchase that includes a 3-year or 36,000-miles bumper-to-bumper warranty, and 5 years or 100,000-miles on the power train. The total purchase price of \$28,593.00 is budgeted, and it will be paid from Fund 2045 RM – Design and Construction, Account 92400 Replacement Autos and Trucks.

The Purchasing Department requests permission to dispose of the following surplus: 2005 Ford Explorer SUV, fixed asset tag 15112. Attached is the Disposal Form for signature.

/lp

c: Kelle Westcott  
Contract File

# BOONE COUNTY

CAPITAL

## Request for Disposal/Transfer of County Property

Complete, sign, and return to Auditor's Office

RECEIVED

Date: 1/31/2018

Fixed Asset Tag Number: 15112

JAN 31 2018

Description of Asset: 2005 Ford Explorer

BOONE COUNTY AUDITOR

Requested Means of Disposal:  Sell  Trade-In  Recycle/Trash  Other, Explain:

Other Information (Serial number, etc.): VIN #1FMZU72K55ZA65945

Condition of Asset: Fair to Good

Reason for Disposition: Replace due to age & mileage

= Clark Lot

Location of Asset and Desired Date for Removal to Storage: Park Ln Lot; when replacement arrives

Was asset purchased with grant funding?  YES  NO

If "YES", does the grant impose restriction and/or requirements pertaining to disposal?  YES  NO

If yes, attach documentation demonstrating compliance with the agency's restrictions and/or requirements.

Dept Number & Name: 2045-RM-Design & Constructionnn

Signature 

**To be Completed by: AUDITOR**

Original Acquisition Date 6-6-05

G/L Account for Proceeds 2045-3835 *10*

Original Acquisition Amount \$22,100.00

Original Funding Source 2741

Account Group 1605

**To be Completed by: COUNTY COMMISSION / COUNTY CLERK**

Approved Disposal Method:

Transfer Department Name \_\_\_\_\_ Number \_\_\_\_\_

Location within Department \_\_\_\_\_

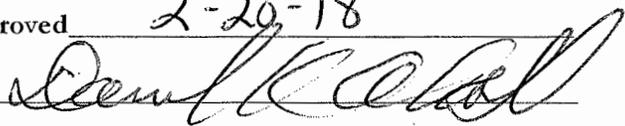
Individual \_\_\_\_\_

Trade  Auction  Sealed Bids

Other Explain \_\_\_\_\_

Commission Order Number 89-2018

Date Approved 2-20-18

Signature 

**PURCHASE AGREEMENT  
FOR  
2018 COLORADO CREW CAB 4X4 TRUCK**

**THIS AGREEMENT** dated the 20<sup>th</sup> day of February 2018 is made between Boone County, Missouri, a political subdivision of the State of Missouri through the Boone County Commission, herein "County" and **Roberts Chevrolet Buick**, herein "Vendor."

**IN CONSIDERATION** of the parties performance of the respective obligations contained herein, the parties agree as follows:

1. **Contract Documents** - This agreement shall consist of this Purchase Agreement for **one (1) 2018 Chevrolet Colorado Crew Cab 4X4 Truck** per the attached **quotation from Mr. Dean Meier of Roberts Chevrolet Buick** pursuant to the **Missouri Department of Transportation Contract IFB605CO18000580 for Light Duty Vehicles**, including any addendums, and Boone County's Standard Terms and Conditions. All such documents shall constitute the contract documents which are incorporated herein by reference. Service or product data, specification and literature submitted with the bid response may be permanently maintained in the County Purchasing Office contract file if not attached. In the event of conflict between any of the foregoing documents, this Purchase Agreement, the Missouri Department of Transportation Contract **IFB605CO18000580** and Boone County's Standard Terms and Conditions shall prevail and control over the vendor's bid response.

2. **Purchase** - The County agrees to purchase from the Vendor and the Vendor agrees to supply the County with **one (1) 2018 Chevrolet Colorado Crew Cab 4X2 Truck** as follows:

	<u>Unit Price</u>
<b>2018 Chevrolet Colorado Crew Cab 4X2 Truck</b>	\$ 22,743.00
• 4X4 Upgrade	\$ 4,871.00
• Standard Equipment including federal emissions control	Std
• 3.6L Engine DI DOHC V6 VVT	Std
• Automatic Transmission 8-speed	Std
• Limited Slip Rear Axle	Std
• Two (2) sets of keys	Std
• Back-up camera	Std
• Short-bed	Std
• White Exterior	N/C
• Black Cloth Interior	N/C
• Power Windows, Doors, Remote Locks/Cruise Control	Included N/C
<b>Include the Following Options:</b>	
• Front and Rear Rubber Floor Liners (Factory installed)	Std
• WT Appearance Package: Power-adjustable folding mirrors	\$ 391.50
• Towing Package	\$ 225.00
• Full-size Spare Tire	Std
• Automatic Locking Rear Differential	\$ 292.50
• Bluetooth Connectivity	Std
• Delivery to 5551 Tom Bass Road in Columbia, Missouri	\$ 70.00
<b>Total</b>	<b><u>\$ 28,593.00</u></b>

3. **Delivery** - Vendor agrees to deliver equipment as set forth in **IFB605CO18000580** within 60 calendar days after receipt of order. Delivery shall be to Boone County Public Works, Attn: Greg Edington or Rickey Harvey, 5551 Tom Bass Rd., Columbia, MO 65201. Prior to delivery, the Vendor shall contact Kelle Westcott at 573-886-4480 to schedule the actual delivery date.

4. **Warranty** – Vendor shall provide the manufacturer standard warranty of three (3) years/36,000 miles bumper-to-bumper with warranty coverage on the powertrain of five (5) years/100,000 miles to commence upon the County’s acceptance.

5. **Title** – Title each vehicle in the name of **Boone County Resource Management**; and send Title to this address: 613 E. Ash Street, Room 109, Columbia, MO 65201.

6. **Billing and Payment** - All billing shall be invoiced to the Boone County Resource Management Department and billings may only include the prices listed in the vendor’s bid response. No additional fees for paper work processing, labor, or taxes shall be included as additional charges in excess of the charges in the Vendor’s bid response to the specifications. The County agrees to pay all invoices within thirty (30) calendar days of receipt of an accurate statement. In the event of a billing dispute, the County reserves the right to withhold payment on the disputed amount; in the event the billing dispute is resolved in favor of the Vendor, the County agrees to pay interest at a rate of 9% per annum on disputed amounts withheld commencing from the last date that payment was due.

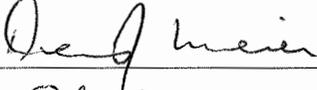
7. **Binding Effect** - This agreement shall be binding upon the parties hereto and their successors and assigns for so long as this agreement remains in full force and effect.

8. **Termination** - This agreement may be terminated by the County upon thirty days advance written notice for any of the following reasons or under any of the following circumstances:

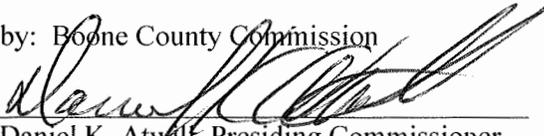
- a. County may terminate this agreement due to material breach of any term or condition of this agreement, or
- b. County may terminate this agreement if in the opinion of the Boone County Commission if delivery of products are delayed or products delivered are not in conformity with bidding specifications or variances authorized by County, or
- c. If appropriations are not made available and budgeted for any calendar year.

**IN WITNESS WHEREOF** the parties through their duly authorized representatives have executed this agreement on the day and year first above written.

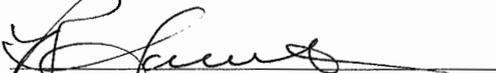
**ROBERTS CHEVROLET  
BUICK**

by   
title Select Manager

**BOONE COUNTY, MISSOURI**

by: Boone County Commission  
  
Daniel K. Atwill, Presiding Commissioner

APPROVED AS TO FORM:

  
County Counselor

ATTEST:

  
Taylor W. Burks, County Clerk

In accordance with RSMo 50.660, I hereby certify that a sufficient unencumbered appropriation balance exists and is available to satisfy the obligation(s) arising from this contract. (Note: Certification of this contract is not required if the terms of this contract do not create a measurable county obligation at this time.)

2045/92400: \$28,593.00

*Jane E. Pitchford*  
Signature by *aj*

*2/8/18*  
Date

Appropriation Account

## STANDARD CONTRACT TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Contractor shall comply with all applicable federal, state, and local laws and failure to do so, in County's sole discretion, shall give County the right to terminate this Contract.
2. Prices shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department.
3. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County. The Purchasing Director reserves the right, when only one bid has been received by the bid closing date, to delay the opening of bids to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) bid received will be retained unopened until the new Closing date, or at request of bidder, returned unopened for re-submittal at the new date and time of bid closing.
4. When products or materials of any particular producer or manufacturer are mentioned in our contracts, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
5. Do not include Federal Excise Tax or Sales and Use Taxes in billing, as law exempts the County from them.
6. The delivery date shall be stated in definite terms.
7. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
8. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Contractor responsible for any excess cost occasioned thereby.
9. Failure to deliver as guaranteed may disqualify Contractor from future bidding.
10. Prices must be as stated in units of quantity specified, and must be firm.
11. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
12. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase advertising from other vendors.
13. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the Federal Transit Administration's Best Practices Procurement Manual – Appendix A. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.

14. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
15. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
16. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County** on all transfer documents including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
17. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.

Please price using using State of Missouri Contract

IFB605CO18000580-Light Duty Vehicles

Item Quoting

Roberts Chevrolet Buick 2018 Colorado	Chevrolet Buick 2018 Colorado
---------------------------------------------	-------------------------------------

MSRP

Boone County  
Contract Price

Standard Equipped 2018 4x2 Crew Cab w	\$ 27,295.00	\$ 22,743.00
4x4 - four wheel drive in lieu of two	\$ 5,200.00	\$ 4,871.00
Engine appropriate for a towing package	Included in 4X4	Included in 4X4
Limited Slip Rear Axle	N/A	N/A
2 sets of keys	Standard	Standard
Back up camera	Standard	Standard
Short bed	Standard	Standard
White exterior	No Charge	No Charge
Black cloth interior	No Charge	No Charge
Power window/doors/remote lock/Cruise control	\$490.00	Included in Bid
Automatic Transmission	Standard	Standard
<b>Additional Equipment</b>		
Front rubber floor liner	Vinyl floors	Standard
Rear rubber floor liner	Vinyl floors	Standard
WT appearance pkg: power adjustable folding mirrors	\$ 435.00	\$ 391.50
Rear defrost	N/A on WT Pkg	N/A on WT Pkg
Towing package	\$ 250.00	\$ 225.00
Full size spare tire	Standard	Standard
Automatic locking rear differential	\$ 325.00	\$ 292.50
Bluetooth Connectivity	Standard	Standard
Fleet Free Maintenance Credit not included in bid	\$ (67.50)	\$ -
<b>Delivery to 5551 Tom Bass Rd, Columbia, MO</b>	<b>\$ 70.00</b>	<b>\$ 70.00</b>
Estimated Delivery Date	60 Days ARO	
If Ordered by	4/1/2018	
GM present cut-off is 04/26/18 No guarantee of time		
<b>Grand Total</b>	<b>\$35,449.50</b>	<b>\$ 28,593.00</b>

B. New standard equipped 2018 or Newer Compact 4 X 2 Crew Cab

<del>10. New standard equipped 2018 or Newer Compact 4 X 2 Crew Cab</del>	<del>LDB BB</del>	<del>PUTNAM CHEVROLET INC</del>	<del>Chevrolet</del>	<del>12M43</del>	<del>\$22,736.00</del>	<del>(% of Discount Off MSRP) 10</del>	<del>(Delivery Timeline) 90</del>	<del>(E-85 Compatible) No</del>	
<del>10. New standard equipped 2018 or Newer Compact 4 X 2 Crew Cab</del>	<del>LDB BB</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>12M43</del>	<del>\$22,743.00</del>	<del>(% of Discount Off MSRP) 10</del>	<del>(Delivery Timeline) 45-75</del>	<del>(E-85 Compatible) No</del>	
<del>10. New standard equipped 2018 or Newer Compact 4 X 2 Crew Cab</del>	<del>LDB BB</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$22,757.00</del>	<del>Bed Length 61.70"</del>	<del>(% of Discount Off MSRP) 10%</del>	<del>(Delivery Timeline) Approx-80 Days</del>	<del>(E-85 Compatible) No</del>
<del>10. New standard equipped 2018 or Newer Compact 4 X 2 Crew Cab</del>	<del>LDB BB</del>	<del>WK Chevrolet Inc</del>	<del>Chevrolet</del>	<del>12M43</del>	<del>\$23,078.00</del>		<del>(% of Discount Off MSRP) 8</del>	<del>(Delivery Timeline) 65</del>	<del>(E-85 Compatible) no</del>
<del>11. OPTION 1: Alternate Larger Gas Engine</del>	<del>LDB OP1</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>LG2</del>	<del>\$1,246.00</del>		<del>(Size/Horsepower) 3.6L V6/308</del>	<del>(E-85 Compatible) No</del>	
<del>11. OPTION 1: Alternate Larger Gas Engine</del>	<del>LDB OP1</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$1,260.00</del>		<del>(Size/Horsepower) 3.6L V6 308HP</del>	<del>(E-85 Compatible) No</del>	
<del>11. OPTION 1: Alternate Larger Gas Engine</del>	<del>LDB OP1</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$1,270.00</del>		<del>(Size/Horsepower) 3.6L V6/308</del>	<del>(E-85 Compatible) NO</del>	
<del>11. OPTION 1: Alternate Larger Gas Engine</del>	<del>LDB OP1</del>	<del>WK Chevrolet Inc</del>	<del>na</del>	<del>na</del>	<del>\$2,078.00</del>		<del>(Size/Horsepower) 3.6L V6 308 HP</del>	<del>(E-85 Compatible) no</del>	
<del>12. OPTION 2: Two full-length factory cab steps or running boards</del>	<del>LDB OP2</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$350.00</del>				
<del>12. OPTION 2: Two full-length factory cab steps or running boards</del>	<del>LDB OP2</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$603.00</del>				
<del>12. OPTION 2: Two full-length factory cab steps or running boards</del>	<del>LDB OP2</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>RVS</del>	<del>\$607.50</del>	<del>5" Black Rectangular Assist Steps</del>			
<del>12. OPTION 2: Two full-length factory cab steps or running boards</del>	<del>LDB OP2</del>	<del>WK Chevrolet Inc</del>	<del>5 inch black assist steps</del>	<del>na</del>	<del>\$725.00</del>				
<del>13. OPTION 3: Limited Slip Rear Axle</del>	<del>LDB OP3</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>G80</del>	<del>\$292.50</del>	<del>Requires Z82 trailering package when ordering V6 or Duramax Diesel.</del>	<del>(Axle Ratio) 4.10 on 4cyl./3.42 on V6 or Diesel</del>		
<del>13. OPTION 3: Limited Slip Rear Axle</del>	<del>LDB OP3</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$293.00</del>		<del>(Axle Ratio) 4.10</del>		
<del>13. OPTION 3: Limited Slip Rear Axle</del>	<del>LDB OP3</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$306.00</del>		<del>(Axle Ratio) 4.10</del>		
<del>13. OPTION 3: Limited Slip Rear Axle</del>	<del>LDB OP3</del>	<del>WK Chevrolet Inc</del>	<del>G80</del>	<del>Locking rear Diff</del>	<del>\$325.00</del>		<del>(Axle Ratio)</del>		
<del>14. OPTION 4: 4WD in lieu of 2WD</del>	<del>LDB OP4</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$4,820.00</del>		<del>(Axle Ratio) 3.42</del>		
<del>14. OPTION 4: 4WD in lieu of 2WD</del>	<del>LDB OP4</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$4,848.00</del>		<del>(Axle Ratio) 4.10</del>		
<del>14. OPTION 4: 4WD in lieu of 2WD</del>	<del>LDB OP4</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>12M43 4WT</del>	<del>\$4,871.00</del>	<del>Price includes V6.</del>	<del>(Axle Ratio) 3.42</del>		
<del>14. OPTION 4: 4WD in lieu of 2WD</del>	<del>LDB OP4</del>	<del>WK Chevrolet Inc</del>	<del>na</del>	<del>na</del>	<del>\$4,991.00</del>		<del>(Axle Ratio)</del>		
<del>15. OPTION 5: Power windows/power door locks</del>	<del>LDB OP5</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$0.00</del>	<del>standard</del>			
<del>15. OPTION 5: Power windows/power door locks</del>	<del>LDB OP5</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$0.00</del>	<del>STANDARD</del>			
<del>15. OPTION 5: Power windows/power door locks</del>	<del>LDB OP5</del>	<del>WK Chevrolet Inc</del>	<del>na</del>	<del>na</del>	<del>\$0.00</del>				
<del>16. OPTION 6: Additional set of Keys (Ignition and door locks)</del>	<del>LDB OP6</del>	<del>Don Brown Chevrolet Inc.</del>	<del>Chevrolet Colorado</del>	<del>12M43</del>	<del>\$38.00</del>				
<del>16. OPTION 6: Additional set of Keys (Ignition and door locks)</del>	<del>LDB OP6</del>	<del>PUTNAM CHEVROLET INC</del>	<del>CHEVROLET</del>	<del>12M43</del>	<del>\$40.00</del>				
<del>16. OPTION 6: Additional set of Keys (Ignition and door locks)</del>	<del>LDB OP6</del>	<del>Roberts Chevrolet Buick</del>	<del>Chevrolet</del>	<del>Dealer</del>	<del>\$45.00</del>	<del>Must be ordered at time of truck order</del>			
<del>16. OPTION 6: Additional set of Keys (Ignition and door locks)</del>	<del>LDB OP6</del>	<del>WK Chevrolet Inc</del>	<del>na</del>	<del>na</del>	<del>\$55.00</del>				

17.OPTION 7: Backup Camera	LDB OP7	PUTNAM CHEVROLET INC	CHEVROLET	12M43		\$0.00	STANDARD				
17.OPTION 7: Backup Camera	LDB OP7	WK Chevrolet Inc	na	na		\$0.00					
17.OPTION 7: Backup Camera	LDB OP7	Don Brown Chevrolet Inc.	Chevrolet Colorado	12M43		\$0.00	standard				

	BLUE SPRINGS FORD SALES INC	Lou Fusz Ford	Midway Ford Truck Center, Inc.	Roberts Chevrolet Buick	Don Brown Chevrolet Inc.
1.What is the 1st Renewal Period Maximum Percentage Increase?	3%	5%	10%	N/A	10%
2.What is the 2nd Renewal Period Maximum Percentage Increase?	3%	10%	10%	N/A	10%
1.Identify any additional fees when payment is issued using the state- purchasing card. If there are no fees, enter \$0.00 in the required response field.	Pay with Wire Transfer	5%	6%	We don't accept P cards for anything except parts and service.	Don Brown Chevrolet does not accept payment for vehicles with a credit card
1.List all certified M/WBE vendors utilized in the fulfillment of this bid. Include percentage of participation for subcontractors and identify the M/WBE certifying agency. If not applicable, enter N/A in the required field.	N/A	N/A	N/A	N/A	Not Available
1.List the names and addresses of an SDV or SDVE providing products or services in relation to this bid. If not applicable, enter N/A in the required field.	N/A	N/A	N/A	N/A	Not Available
1.For all items offered which are not manufactured or produced in the USA, list the item number and location of where the item is manufactured or produced. If not applicable, enter N/A in the required field.	N/A	#100 Valencia, Spain	N/A	52. Sialo, MX 69. Ramos or San Luis, MX 69. Cami, Canada 122. Oshawa, Canada 127. Oshawa, Canada	N/A
1.Is your firm willing to offer such cooperative purchasing for Missouri counties, cities or other political entities?	Yes	Yes	Yes	Yes	Yes
2.If your price varies throughout the state because of different delivery destinations, please indicate the price FOB Shipping Point.	Blue Springs, MO 64015	\$1.50 per mile from 63005	Midway Ford Truck Center KC, MO 64161	\$1.00 per mile one way.	\$0.98/per mile per vehicle round trip from St. Louis, Mo.

# CERTIFIED COPY OF ORDER

STATE OF MISSOURI

February Session of the January Adjourned

Term. 20 18

County of Boone

} ea.

In the County Commission of said county, on the 20th day of February 20 18

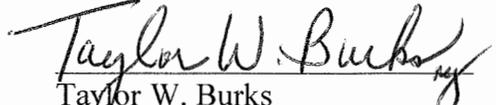
the following, among other proceedings, were had, viz:

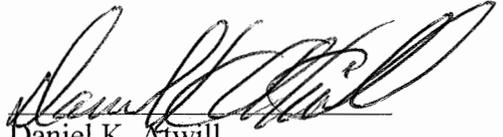
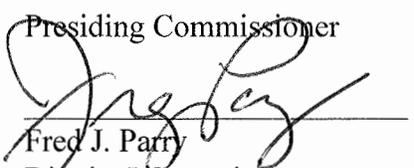
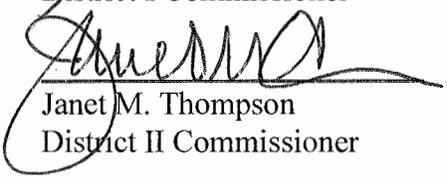
Now on this day the County Commission of the County of Boone does hereby award bid 46-06DEC17 – Computer Output to Microfilm Service to US Imaging, Inc. of Saginaw, MI.

Terms of the bid award are stipulated in the attached Purchase Agreement. It is further ordered the Presiding Commissioner is hereby authorized to sign said Agreement.

Done this 20th day of February, 2018

ATTEST:

  
Taylor W. Burks  
Clerk of the County Commission

  
Daniel K. Atwill  
Presiding Commissioner  
  
Fred J. Parry  
District I Commissioner  
  
Janet M. Thompson  
District II Commissioner

90-2018

# Boone County Purchasing

**Liz Palazzolo**  
Senior Buyer



613 E. Ash, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390

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## MEMORANDUM

TO: Boone County Commission  
FROM: Liz Palazzolo, CPPO, C.P.M.  
DATE: January 30, 2018  
RE: 46-06DEC17 – Computer Output to Microfilm Service

Request for Proposal 46-06DEC17 solicited proposals for Computer Output to Microfilm Service along with Microfilm Storage and Scanning Service for multiple Boone County offices. Two proposals were received and reviewed by the Boone County Evaluation Committee. The bid tabulation and evaluation documentation follow this memo.

The Evaluation Committee recommends an award to US Imaging, Inc. of Saginaw, Michigan for only Computer Output to Microfilm Service. No awards have been recommended for Microfilm Storage or Scanning Services.

The contract will run from Date of Award through 12/31/18 with four (4) one-year renewal options.

Payments for services will be paid from the following Funds and Accounts:

- Department 2800 for Storage & Preservation, Account 71100 for Outside Service;
- Department 2110 for Collector Tax Maintenance Activity, Account 71100 for Outside Service;
- Department 1110 for the Auditor, Account 71100 for Outside Services.

Attachments: Bid Tabulation, Scoring Sheet, Evaluation Summary Memo, and Evaluation Report

/lp

cc: RFP File #46-06DEC17

**Bid Tabulation for RFP 46-06DEC17 - Computer Output to Microfilm, Microfilm Storage, and Scanning Services**

**BASE BID: COMPUTER OUTPUT TO MICROFILM SERVICE FOR ALL BOONE COUNTY OFFICES**

Offerors:	Ray Com Data	US Imaging Inc.	Proscio LLC	Best Buy for Business	
Line Item 1: Price per regular/non-plate image on the Master Roll					
Line Item 2: Price per plate-size image on the Master Roll					
Line Item 3: Price per each duplicate roll					
Line Item 4: Price per roll for index labelling at the beginning of each microfilm roll					
Line Item 5: Price per roll for one-time application of brown-tone/silver-lock to pre-existing film for storage in a pure vault					

96-2018

**Bid Tabulation for RFP 46-06DEC17 - Computer Output to Microfilm, Microfilm Storage, and Scanning Services**

**Renewals**

Line Item 18: Renewal Option Percentage Price Adjustment 1st Renewal Period: January 1, 2019 – December 31, 2019					
Line Item 19: Renewal Option Percentage Price Adjustment 2nd Renewal Period: January 1, 2020 – December 31, 2020					
Line Item 20: Renewal Option Percentage Price Adjustment 3rd Renewal Period: January 1, 2021 – December 31, 2021					
Line Item 21: Renewal Option Percentage Price Adjustment 4th Renewal Period: January 1, 2022 – December 31, 2022					

96-2018

EVALUATION REPORT FORM

PURCHASING DEPARTMENT - BOONE COUNTY - MISSOURI

REQUEST FOR PROPOSAL (RFP) # 46-06DEC17 Computer Output to Microfilm, Microfilm Storage, and Scanning Services

Liz Palazzolo, CPPO, C.P.M., Senior Buyer

Base Bid				For Purchasing Use Only		
	NAME OF OFFEROR	METHOD OF PERFORMANCE (30 points)	EXPERIENCE/EXPERTISE OF OFFEROR (20 points)	TOTAL SUBJECTIVE POINTS (50 points)	COST POINTS (50points)	TOTAL POINTS (Max 100 points)
1	US Imaging, Inc.	30	20	50	41	91
2	Raycom Data Technologies	15	15	30	50	80

We hereby attest that the subjective points assigned to each offeror above were scored pursuant to the established evaluation criteria and represent our best judgement of the subjective areas of the offerors' proposals. We have attached a brief narrative which highlights some, but not necessarily all, of the reasons for our evaluation of the proposals as indicated by the scores above. Our comments represent our opinions only and do not represent the position of the Purchasing Department of Boone County, Missouri, or any other party.

Nora Dietzel 1-30-18 Nora Dietzel Recorder Recorder  
 Evaluator's Signatures Date Evaluator Printed Name Title Dept.

Jennifer Market 1-30-18 Jennifer Market Acct Specialist Auditor  
 Evaluator's Signatures Date Evaluator Printed Name Title Dept.

June Pitchford June Pitchford County Auditor Auditor  
 Evaluator's Signatures Date Evaluator Printed Name Title Dept.

Karen Johnson 1-30-18 Karen Johnson Chief Deputy Recorder Recorder  
 Evaluator's Signatures Date Evaluator Printed Name Title Dept.

90-2018

**BASE BID EVALUATION:**

Offeror 1: US Imaging Inc.

**Experience and Expertise:**

***Strengths:***

- long lasting relationships with customers;
- references include County governments similar to Boone County going back to 2010;
- has been providing computer output to microfilm services to Boone County satisfactorily since 2010
- staff has many years of experience; staff of 5 identified and includes decades of microfilming and storage experience;
- References includes Recorders offices like Boone County.

***Concerns:***

- None

**Proposed Method of Performance:**

***Strengths:***

- Processes large quantities of images;
- Is a beta-testing site using/testing state-of-the-art equipment;
- Can accommodate several formats for electronic records submission;
- Is a certified Kodak InfoGuard Lab -will meet or exceed ANSI, AIIM, ARM, PRIA and Missouri specifications;
- Has a review protocol in place to ensure microfilm quality and accuracy;
- Will comply with County guidance regarding roll indexing and labelling;
- Uses UPS ground tracking to ensure film in transit arrives accurately;
- Have climate-controlled and secure storage;
- The proposal is detailed about microfilm testing policies and methods including testing references to ensure quality and stability;
- Specific about the cost-savings to the County if the County prepares documents prior to microfilming at \$25/hour.

***Concerns:***

- None

**Offeror 2: Raycom Data Technologies Inc**

**Experience and Expertise:**

***Strengths:***

- Developed the software it uses for document imaging and archiving;
- References from a variety of public customers (city, county and state);
- Staff of 6 including upper management has several years relevant microfilming experience including software development.

***Concerns:***

- upper management appears to be available only on part-time basis;
- A Recorder's Offices was not identified as a current customers/reference in the proposal.

**Proposed Method of Performance:**

***Strengths:***

- Using Kodak Document Archive Writer 4800 for creating any archive film and Kodak Ngenuity or Canon DR 7580 scanner – reputable/proven equipment;
- Have an established protocol for ensuring microfilm processing accuracy and quality;
- Have climate-controlled and secure storage;
- Will follow County's guidance on labelling.

***Concerns:***

- Initial proposal stated on Addendum A that film output format is simultaneously recorded on two 16 mm rolls, which prompted clarification because the County needs recording on 35 mm rolls for oversized documents and for archiving. Clarification from RayCom indicated that they will use 35 mm film for County output;
- Did not identify with they are a certified Kodak InfoGuard Lab (would assume they are but it would have been a stronger proposal to have addressed directly);
- Raycom's proposal about its testing methods was not as detailed as US Imaging's getting moreso into what defects would be looked for as opposed to what methods would be used to ensure film quality and stability;
- Indicated that Raycom can remove paperclips, etc. to prepare documents for filming, but failed to indicate what cost savings there would be if the County were to assume preparation tasks. The proposal from Raycom says that there would be a "cost saving" but unlike the proposal from US Imaging, it does not assign a specific cost savings such as \$25/hour.

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

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## MEMORANDUM

TO: File

FROM: Liz Palazzolo 

RE: RFP 46-06DEC17 Computer Output to Microfilm, Microfilm Storage, and Scanning Services – Evaluation Summary

DATE: 1/29/18

Two proposals have been received in response to RFP 46-06DEC17 Computer Output to Microfilm, Microfilm Storage, and Scanning Services for Boone County.

- (1) US Imaging, Inc. of Saginaw, Michigan
- (2) Raycom Data Technologies of El Segundo, California

Evaluation Committee: An evaluation committee has reviewed and evaluated responses. The evaluation committee consists of representatives from the County whose offices will be heaviest users of the services under the contract: Nora Dietzel, the Boone County Recorder; Karen Johnson, Boone County Recorder's Office; June Pitchford, the Boone County Auditor; and Jennifer Market, Boone County Auditor's Office. The Committee decided to conduct consensus scoring and prepare a team evaluation report which follows this memo.

The RFP had three proposal groupings that vendors could propose that were identified in RFP paragraphs 2.1.5 through 2.1.6(d). Vendors proposing just the Base Bid were evaluated with each other; vendors bidding Option One were evaluated with each other, and vendors proposing Option Two were evaluated with each other. The Base Bid consisted of the service of converting computer output to microfilm. Option One consists of microfilm storage for the Recorder's Office. Option Two consists of scanning service for the Auditor's Office.

US Imaging, Inc. proposed all three options, and Raycom Data Technologies proposed the Base Bid and Option Two.

An initial review of the proposals led the Evaluation Committee to conclude that only the Base Bid proposal from US Imaging, Inc. and Raycom Data Technologies would be evaluated and considered for award. The Evaluation Committee decided not to award either Options One or Two consistent with RFP paragraph 2.1.6.

Proposals for the Base Bid have been evaluated using the evaluation criteria stated in RFP paragraph 4.5.1 which says that proposals will be evaluated using both objective and subjective judgment in conducting a comparative assessment of the proposals. Said assessment will include evaluation of cost, the offeror's experience, expertise and reliability, the offeror's proposed methodology for performing services and contractor support. The evaluation committee decided to weight the evaluation components as follows:

Method of Performance and Contractor Support: 30 Points  
Experience/Expertise of the Offeror: 20 points  
Cost: 50 points

Offerors are scored relative to the best in each component of the evaluation.

The evaluation of Cost for the Base Bid (Conversion of Computer Output to Microfilm) is documented in a separate spreadsheet that follows this memo. Cost has been evaluated using historical usage information published in RFP paragraphs 3.4.6, 3.5.1, and 3.6.3. Unit pricing that has been quoted by the offerors has been extended or multiplied using this information, and is shown in the cost evaluation spreadsheet that follows this memo. All extended subtotals for the line items for the Base Bid have been added together and the total cost is used in the formula below to determine each offeror's cost points:

Points for cost have been assessed using this formula:

$$\frac{\text{Lowest Responsive Bidder's Price}}{\text{Compared Bidder's Price}} \times \begin{matrix} \text{Maximum} \\ \text{Cost} \\ \text{Points} \\ (50) \end{matrix} = \text{Cost evaluation points}$$

The lowest cost proposal receives maximum cost points which is 50 points and is documented in the above-referenced cost evaluation.

Purchasing obtained clarification from both offerors to help evaluate their proposals, and their e-mail clarification can be found with each proposal. It is noted for the record that at the time Purchasing requested clarification from Raycom, the vendor introduced a desire to renegotiate their renewal pricing. While it is not possible to allow modification of a proposal after proposals have opened outside of a Best and Final Offer process, Raycom submitted an e-mail on 1/19/18 in their response to my request for them to clarify their final position on their renewal pricing. It is noted for the record that Raycom modified their original quote for renewal options from a 0% adjustment for all four (4) renewal options to a 3% and 5%

e-mail on 1/19/18 in their response to my request for them to clarify their final position on their renewal pricing. It is noted for the record that Raycom modified their original quote for renewal options from a 0% adjustment for all four (4) renewal options to a 3% and 5% increase for the first, and second through fourth renewal options. Because it is not possible to allow a modification of this nature, the cost evaluation has been conducted using their original 0% adjustment quotations from Raycom. Using 0% for renewal option pricing, compared to the modified 3% and 5% adjustments does not change the overall outcome of the evaluation. It is noted that the Evaluation Committee conducted subjective scoring of the two proposals for the Base Bid without knowledge of the cost point evaluation conducted by Purchasing.

Award recommendation for Base Bid: The Evaluation Committee recommends that the Base Bid for Computer Output to Microfilm Service be awarded to US Imaging, Inc. of Saginaw, Michigan as the lowest and best proposal. US Imaging, Inc. has received the highest composite score as a result of the evaluation:

US Imaging, Inc.: 91 Total Points for the Base Bid

Raycom Data Technologies: 80 Total Points for the Base Bid

An award will be prepared to US Imaging, Inc. for the Base Bid.

**RFP 46-06DEC17 - Computer Output to Microfilm, Microfilm Storage, and Scanning Services**

**BASE BID: COMPUTER OUTPUT TO MICROFILM SERVICE FOR ALL BOONE COUNTY OFFICES**

<i>COST EVALUATION</i>	<i>QTY</i>	<i>U.S. Imaging, Inc.</i>	<i>Extended Total US Imaging, Inc.</i>	<i>Raycom Data Technologies, Inc.</i>	<i>Raycom Data Technologies, Inc. Extended Totals</i>
Line Item 1: Price per regular/non-plat image on the Master Roll	255,880	\$ 0.13	\$ 33,264.40	\$ 0.11	\$ 28,146.80
Line Item 2: Price per plat-size image on the Master Roll	220	\$ 0.50	\$ 110.00	\$ 0.11	\$ 24.20
Line Item 3: Price per each duplicate roll	1	\$ 40.00	\$ 40.00	\$ 32.50	\$ 32.50
Line Item 4: Price per roll for index labelling at the beginning of each microfilm roll	100	\$ 1.00	\$ 100.00	\$ -	\$ -
Line Item 5: Price per roll for one-time application of brown-tone/silver-lock to pre-existing film for storage in a pure vault	1	\$ 30.00	\$ 30.00	\$ -	\$ -
<b>Total Price Initial Contract Period For Base Bid Services:</b>			\$ <b>33,544.40</b>		\$ <b>28,203.50</b>

*Continued next page*



**PURCHASE AGREEMENT  
FOR  
COMPUTER OUTPUT TO MICROFILM SERVICE**

**THIS AGREEMENT** dated the 20th day of February 2018 is made between Boone County, Missouri, a political subdivision of the State of Missouri through the Boone County Commission, herein "County" and **US Imaging, Inc.**, herein "Contractor".

**IN CONSIDERATION** of the parties performance of the respective obligations contained herein, the parties agree as follows:

**1. Contract Documents** - This agreement shall consist of this Purchase Agreement for **Computer Output to Microfilm Service**, County of Boone Request for Proposal number **46-06DEC17** in its entirety including the Instructions, Introduction and General Information, Scope of Work, Proposal Submission Information, the un-executed Vendor Response/Pricing Page(s), the Certification Regarding Debarment, the Work Authorization Certification, Attachments One through Five, Boone County's Standard Terms and Conditions, Addendum #1, as well as the Contractor's bid response dated **December 1, 2017**, executed by **Alicia Floyd**, on behalf of the Contractor, and the clarification e-mail from **Alicia Floyd** dated **December 18, 2017**. All such documents shall constitute the contract documents, which are attached hereto and incorporated herein by reference. Service or product data, specification and literature submitted with the bid response may be permanently maintained in the County Purchasing Office bid file for this RFP if not attached. In the event of conflict between any of the foregoing documents, the Instructions, Introduction and General Information, Scope of Work, Proposal Submission Information, the un-executed Vendor Response/Pricing Page(s), the Certification Regarding Debarment, the Work Authorization Certification, Attachments One through Five, Boone County's Standard Terms and Conditions, and Addendum #1, shall prevail and control over the Contractor's bid response.

**2. Contract Period** – The contract period for the Purchase Agreement shall commence on the Date of Award completed by the Boone County Commission as noted above through December 31, 2018, and include four (4) one-year renewal options to be exercised at the discretion of the County.

**3. Purchase** - The County agrees to purchase from the Contractor and the Contractor agrees to supply the County Computer Output to Microfilm Service, i.e., Base Bid Service, as specified and responded to in the documents identified in paragraph #1 above. All service and work product will be provided as required in the RFP specifications and in conformity with the contract documents for the prices set forth in the Contractor's response, as needed and as ordered by the County as follows:

<b>Base Bid: Computer Output to Microfilm Services</b>	
<p>1. Master Roll: Converting Computer Output of regular legal/non-plat size images (e.g., 8-1/2" X 11", or 11" X 14", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image.</p> <p>The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.</p>	<p><u>\$.13</u>/regular legal/non-plat image on the Master Roll</p>

<p>2. Master Roll: Converting Computer Output of plat size images (e.g., 12" X 18", or 24" X 36", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image.</p> <p>The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.</p>	<p><u>\$.50</u>/plat-size image on the Master Roll</p>
<p>3. Duplicate Roll: 35mm Silver Duplicate Roll, minimum 100-foot/roll, that is automatically treated with brown-tone/silver-lock, and then sent to the County for local storage.</p>	<p><u>\$40.00</u>/duplicate roll – Firm and Fixed</p>
<p>4. Cost for index labelling at beginning of each microfilm roll.</p>	<p><u>\$1.00</u>/roll – Firm and Fixed</p>
<p>5. One-time application of brown-tone/silver-lock to pre-existing film for storage in pure vault.</p>	<p><u>\$30.00</u>/roll – Firm and Fixed</p>

**4. Delivery** – All work shall be conducted as needed, if needed upon request of the County. The Contractor agrees to deliver finished work product within the time-frame agreed at the time of order.

**5. Billing and Payment** - All billing shall be invoiced specific to the order and specific to the Boone County office requesting service. Billings may only include the prices listed in the Contractor's RFP response. No additional fees for delivery or extra services or taxes shall be included as additional charges in excess of the charges in the Contractor's bid response to the specifications with the exception of freight charges and shipping charges which shall be reimbursed by the County. The County agrees to pay all correct monthly invoices within thirty (30) calendar days of receipt; the Contractor agrees to honor any cash or prompt payment discounts offered in its bid response if the County makes payment as provided therein. In the event of a billing dispute, the County reserves the right to withhold payment on the disputed amount; in the event the billing dispute is resolved in favor of the Contractor, the County agrees to pay interest at a rate of 9% per annum on disputed amounts withheld commencing from the last date that payment was due.

**6. Binding Effect** - This agreement shall be binding upon the parties hereto and their successors and assigns for so long as this agreement remains in full force and effect.

**7. Entire Agreement** - This agreement constitutes the entire agreement between the parties and supersedes any prior negotiations, written or verbal, and any other bid or bid specification or contractual agreement. This agreement may only be amended in writing by the Boone County Purchasing Office on behalf of any Boone County office using the same formality as this agreement.

**8. Termination** - This agreement may be terminated by the County upon thirty calendar days advance written notice for any of the following reasons or under any of the following circumstances:

- a. The County may terminate this agreement due to material breach of any term or condition of this agreement, or
- b. The County may terminate this agreement if in the opinion of the Boone County Commission if delivery of products are delayed or products delivered are not in conformity with bidding specifications or variances authorized by the County, or

c. If appropriations are not made available and budgeted for any calendar year.

**IN WITNESS WHEREOF** the parties through their duly authorized representatives have executed this agreement on the day and year first above written.

**US IMAGING, INC.**

by

title

Rhonda Nelson  
Project Mgr.

**BOONE COUNTY, MISSOURI**

by: Boone County Commission

Daniel K. Atwill  
Daniel K. Atwill, Presiding Commissioner

APPROVED AS TO FORM:

[Signature]  
County Counselor

ATTEST:

Taylor W. Burks  
Taylor W. Burks, County Clerk

**AUDITOR CERTIFICATION**

In accordance with RSMo 50.660, I hereby certify that a sufficient unencumbered appropriation balance exists and is available to satisfy the obligation(s) arising from this contract. (Note: Certification is not required if the terms of this contract do not create a measurable county obligation at this time.)

DEPT 2800 (Storage & Preservation)/Account 71100  
(Outside Service);

DEPT 2110 (Collector Tax Maintenance  
Activity)/Account 71100 (Outside Service).

DEPT 1110 AUDITOR/ACCOUNT 71100 OUTSIDE SERVICES

[Signature]  
Signature by of

2/9/18  
Date

No Encumbrance Required  
Appropriation Account

**STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI**

1. Contractor shall comply with all applicable federal, state, and local laws and failure to do so, in County's sole discretion, shall give County the right to terminate this Contract.
2. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
3. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
4. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid. The Purchasing Director reserves the right, when only one bid has been received by the bid closing date, to delay the opening of bids to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) bid received will be retained unopened until the new Closing date, or at request of bidder, returned unopened for re-submittal at the new date and time of bid closing.
5. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
6. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
7. The delivery date shall be stated in definite terms, as it will be taken into consideration in awarding the bid.
8. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
9. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
10. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
11. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
12. No bid transmitted by fax machine or e-mail will be accepted.
13. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
14. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase from other vendors.

15. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the *Federal Transit Administration's Best Practices Procurement Manual – Appendix A*. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.
16. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
17. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
18. For all bid responses over \$25,000, if any manufactured goods or commodities proposed with bid/proposal response are manufactured or produced outside the United States, this MUST be noted on the Bid/Proposal Response Form or a Memo attached.
19. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County on all transfer documents** including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
20. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.

Revised 1/17/2018

## Liz Palazzolo

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**From:** Alicia Floyd <afloyd@us-imaging.com>  
**Sent:** Monday, December 18, 2017 5:13 PM  
**To:** Liz Palazzolo  
**Subject:** RE: Clarification for RFP 46-06DEC17 Computer Output to Microfilm Boone County

**Follow Up Flag:** Follow up  
**Flag Status:** Flagged

Liz,

Thank you for the opportunity to clarify. **YES**, since the % increase is applied to the original pricing, there would be a 4% increase for both the 2020 and 2021 renewal option periods.

I apologize for the confusion and again thank you for allowing me to clarify.

Alicia

**From:** Liz Palazzolo [mailto:LPalazzolo@boonecountymo.org]  
**Sent:** Monday, December 18, 2017 4:48 PM  
**To:** Alicia Floyd <afloyd@us-imaging.com>  
**Subject:** Clarification for RFP 46-06DEC17 Computer Output to Microfilm Boone County  
**Importance:** High

Hello Alicia: I am requesting clarification of the renewal options that US imaging submitted for its proposal to RFP 46-06DEC17. US Imaging quoted 0% for line 18, the first renewal; 4% for line 19, second renewal; 0% for line 20, the third renewal; and 8% for line 21, the fourth renewal.

Since the renewal adjustment is computed against the original pricing, the 0% for line item 19, the third renewal (January 1, 2021-December 31, 2021) creates a question.

Please confirm with "Yes" or "No" that line item 19 is actually intended to be a **4%** increase for January 1, 2021-December 31, 2021, just like the 4% quoted for line item 18 for January 1, 2020-December 31, 2020.

Thank you

**Liz Palazzolo**  
*Senior Buyer*  
**Boone County Purchasing**  
Phone: 573-886-4392  
Fax: 573-886-4390  
613 E. Ash, Room 109  
Columbia, MO 65201



5. VENDOR RESPONSE AND PRICING PAGES

In compliance with this Request for Proposal and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: US Imaging, Inc.

Address: 400 S. Franklin Street

Saginaw, MI 48607

Telephone: (989) 753-7933 Fax: (800) 517-4293

Federal Tax ID (or Social Security #): 04-3841775

Print Name: Alicia Floyd Title: Proposal Coordinator

Signature: *Alicia Floyd* Date: 12/1/2017

E-Mail Address: afloyd@us-imaging.com

**NOTE:** The offeror must clearly state in writing any restrictions or deviations from specifications and requirements stated herein. In the absence of such statement, the County will assume that all items/services offered are in strict compliance with specifications stated in the RFP, including all technical and cost requirements, terms and conditions. The vendor must agree that the proposal if selected for award by the County will be included as part of the final contract with the County.

- CHECK BELOW WHICH OPTION(S) THE VENDOR IS RESPONDING TO:

BASE BID: X

OPTION 1: X

OPTION 2: X

*(Continued on next page)*

**5.1. PRICING:**

**Computer Output to Microfilm Services, Storage, and Scanning Services:** The offeror has the option of quoting pricing for these combinations: the Base Bid for Computer Output to Microfilm Services only; the Base Bid for Computer Output to Microfilm Services and Option One for Microfilm Storage; or the Base Bid for Computer Output to Microfilm Services and Option Two for Scanning Services. The offeror may also propose the Base Bid and Options One and Two.

As applicable to the offeror's choice as described above, the offeror must submit firm, fixed pricing that includes all labor, materials, equipment, supplies, facilities and other costs for provision of services as defined herein.

Freight and shipping must not be built into quoted unit pricing since the County will reimburse for actual freight and shipping costs as apply specific to the order with the exception of line item 15 which is an all-inclusive total-guaranteed not to exceed price.

The vendor must price all identified line items within an identified bidding option, for example, the offeror must price line items 1-5 if choosing to provide Base Bid services. if choosing to provide the Base-Bid and Option One, then the offeror must quote pricing for items 1-14; and if the offeror is choosing to submit pricing for the Base Bid and Option Two, then the offeror must submit pricing for line items 1-5 and 15 through 17. Regardless of which pricing option the offeror chooses to submit, the offeror must also complete line items 18 through 21 for renewal option pricing adjustments.

<u>ITEM</u>	<u>DESCRIPTION</u>	<u>UNIT PRICE</u>
	<b><u>BASE BID: COMPUTER OUTPUT TO MICROFILM SERVICE FOR ALL BOONE COUNTY OFFICES</u></b>	
<b><u>BASE BID</u></b>	<p>1. Master Roll: Converting Computer Output of regular legal/non-plat size images (e.g., 8-1/2" X 11", or 11" X 14", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image.</p> <p>The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.</p> <p>Pricing shall include the following consideration:</p> <ul style="list-style-type: none"> <li>• Boone County submits data by FTP, CD, DVD, or other electronic means.</li> </ul> <p>The per image price shall be captured on the master silver halide roll which is brown-toned/silver-locked. The finished roll is then sent for storage either in the pure vault outsourced to Underground Vaults &amp; Storage in Hutchison, Kansas, or to another site designated by Boone County for the Recorder of Deed's Office; or sent to the Missouri Secretary of State's Office for the Collector's Office and the Auditor's Office.</p>	\$ <u>.13</u> /regular legal/non-plat image on the Master Roll

2. Master Roll: Converting Computer Output of plat size mages (e.g., 12" X 18", or 24" X 36", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image. \$ .50 /plat-size image on the Master Roll

The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.

Pricing shall include the following consideration:

- Boone County submits data by FTP, CD, DVD, or other electronic means.

The per image price shall be captured on the master silver halide roll which is brown-toned/silver-locked. The finished roll is then sent for storage either in the pure vault outsourced to Underground Vaults & Storage in Hutchison, Kansas, or to another site designated by Boone County for the Recorder of Deed's Office; or sent to the Missouri Secretary of State's Office for the Collector's Office and the Auditor's Office.

3. Duplicate Roll: 35mm Silver Duplicate Roll, minimum 100-foot/roll, that is automatically treated with brown-tone/silver-lock, and then sent to the County for local storage. \$ 40.00 / duplicate roll
4. Cost for index labelling at beginning of each microfilm roll: \$ 1.00 /roll
5. One-time application of brown-tone/silver-lock to pre-existing film for storage in pure vault. \$ 30.00 /roll

**OPTION ONE BID**

**OPTION ONE – MICROFILM STORAGE FOR THE RECORDER'S OFFICE**

6. Storage of box of silver duplicate brown-toned/silver-locked microfilm rolls, or aperture cards, in a pure vault at a Boone County designated facility such as the Underground Vault & Storage facility in Hutchison Kansas (UV & S) or other facility designated by the County. A box contains 24 rolls of microfilm or 2,000 aperture cards. This price shall include all other applicable fees such as a one-time new receipt of material fee. \$ see below /year/box  
 \$1.50/yr/roll (16mm)  
 \$2.50/yr/roll (35mm)  
 \$2.50/yr/inch (AP Cards)  
 \$3,000 per transport/trip

**Retrieval and Refiling of Stored Microfilm Rolls or Aperture Cards**

- |                                                           | <b><u>Retrieval</u></b>      | <b><u>Refile</u></b>         |
|-----------------------------------------------------------|------------------------------|------------------------------|
| 7. <b><u>Quantity</u></b><br>Range:<br>1-5<br>rolls/cards | \$ <u>2.00</u> /roll or card | \$ <u>2.00</u> /roll or card |

- |    |                            |                              |                                 |
|----|----------------------------|------------------------------|---------------------------------|
| 8. | Range:<br>6-10 rolls/cards | \$ <u>2.00</u> /roll or card | \$ <u>2.00</u> /roll or card    |
| 9. | 11+ rolls/cards            | \$ <u>2.00</u> /roll or card | \$ <u>2.00</u> /roll or<br>card |

**Retrieval of a specific image from a microfilm roll or aperture card.**

- |     |                                            |                         |
|-----|--------------------------------------------|-------------------------|
| 10. | Microform Hard copies (per<br>print)       | \$ <u>.25</u> /print    |
| 11. | Photocopier                                | \$ <u>.25</u> /print    |
| 12. | Fax                                        | \$ <u>.25</u> /print    |
| 13. | Silver or diazo duplicate roll<br>of film. | \$ <u>48</u> /roll      |
| 14. | Research/Retrieval Service,<br>Per Hour    | \$ <u>00</u> / per hour |

**OPTION  
TWO  
BID**

**OPTION TWO –  
SCANNING SERVICES  
OF HARD-COPY  
HISTORICAL RECORDS  
FOR THE AUDITOR’S  
OFFICE**

- |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                         |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| 15. | <b>Total Guaranteed Not To Exceed Price for Scanning Work:</b> Quote a total guaranteed not-to-exceed price that shall be firm and fixed to conduct the scanning work described in paragraphs 3.8.3 - 3.8.4 herein for the Auditor’s Office. The quoted total shall include all labor, support, materials, supply, equipment, the digital copy addressed in paragraph 3.8.8, shipping and freight charges necessary to perform defined scanning services including any travel, food and lodging that may be required if the contractor performs scanning services on-site in Boone County. | \$ <u>\$5,000.00</u> /total<br>guaranteed not to exceed |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|

16. **Per Page Scanning Price:**  
Quote a total price per 8.5 X 11 page for scanning hard-copy records for the Auditor's Office that will be in addition to the scanning work described in paragraph 3.8.4 herein (see paragraph 3.8.5 regarding future scanning work that may be required).

\$ .50 /page  
8.5 X 11

The quoted per price shall be considered firm and fixed and must include all labor, equipment, the digital copy addressed in paragraph 3.8.8, and other materials costs, including travel food and lodging if scanning will be conducted on-site in Boone County. Shipping and handling charges will be reimbursed at actual cost if scanning is done off-site.

17. **Per Page Scanning Price:**  
Quote a total price per non-standard size, i.e., not 8.5 X 11, page for scanning hard-copy records for the Auditor's Office that will be in addition to the scanning work described in paragraph 3.8.4 herein (see paragraph 3.8.5 regarding future scanning work that may be required).

\$ .65 /page  
non-standard size

The quoted per price shall be considered firm and fixed and must include all labor, equipment, including the digital copy addressed in paragraph 3.8.8, and materials costs, including travel food and lodging if scanning will be conducted on-site in Boone County. Shipping and handling charges will be reimbursed at actual cost if scanning is done off-site.

charges will be reimbursed at actual cost if scanning is done off-site.

**5.2 Renewal Options – Apply to all line items, i.e., for the Base Bid, Option One and Option Two**

The County must have the sole option to renew the contract in one-year increments, or any portion thereof, for a total accumulated period of four (4) additional years following the initial term. If the options are exercised, pricing must be the same as quoted for the initial contract period subject to the specific percentage of price adjustment quoted below for the applicable renewal contract period. Prices for the renewal period must not exceed the maximum percent of increase for the applicable renewal period stated on the Pricing Page of the contract.

The vendor must respond with a firm, fixed percentage of increase or decrease. Do not quote BOTH a Maximum Increase and a Minimum Decrease – quote one or the other. Statements such as "a percentage of the then-current price" or "consumer price index" are NOT ACCEPTABLE i.e., reference to a CPI adjustment shall be deemed unacceptable.

If a percentage is not proposed (i.e., left blank), the County must have the right to execute the option at the same price(s) proposed for the initial contract period.

In conducting the cost evaluation, Boone County will evaluate pricing that determines the potential maximum financial liability to the County.

**All percentages must be applied to the firm pricing quoted for the initial contract period.** The offeror is cautioned that percentages that are the same value for successive renewal options must be calculated against original, not compounded, pricing.

**18. Renewal Option Percentage Price Adjustment**

**1<sup>st</sup> Renewal Period: January 1, 2019 – December 31, 2019**

0 %

Applied to original bid pricing

Vendor must identify below by checking appropriately as an INCREASE

OR DECREASE: Maximum Increase: X

OR Minimum Decrease: \_\_\_\_\_

**19. Renewal Option Percentage Price Adjustment**

**2<sup>nd</sup> Renewal Period: January 1, 2020 – December 31, 2020**

4 %

Applied to original bid pricing

Vendor must identify below by checking appropriately as an INCREASE

OR DECREASE: Maximum Increase: X

OR Minimum Decrease: \_\_\_\_\_

20. **Renewal Option Percentage Price Adjustment**  
**3<sup>rd</sup> Renewal Period: January 1, 2021 – December 31, 2021**

0 %

Applied to original bid pricing

Vendor must identify below by checking appropriately as an INCREASE

OR DECREASE: Maximum Increase: X

OR Minimum Decrease: \_\_\_\_\_

21. **Renewal Option Percentage Price Adjustment**  
**4<sup>th</sup> Renewal Period: January 1, 2022 – December 31, 2022**

8 %

Applied to original bid pricing

Vendor must identify below by checking appropriately as an INCREASE

OR DECREASE: Maximum Increase: X

OR Minimum Decrease: \_\_\_\_\_

**5.3 Vendor's Experience, Expertise and Reliability:**

Please refer to  
Tab: "Vendor  
Response"

The evaluation of the vendor's proposed experience, expertise, and reliability must be subjective based on the ability of the vendor to perform the requirements stated herein. Therefore, the vendor should present detailed information regarding their experience and reliability. The following information should be provided by the vendor in order to assist Boone County in evaluation of the vendor's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Failure to submit requested information may negatively impact the evaluation of the proposal. The County is under no obligation to obtain information from the vendor not submitted with the proposal that may impact the subjective evaluation of the vendor's proposal.

**Company History:** The vendor should describe in the available space the company's background in computer output to microfilm services, e.g., when the company was founded, how long the company has been serving the Missouri market, etc:

**Vendor's References:**

Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

=====  
Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

=====  
Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

**Personnel Expertise Summary:**

Expertise of **key personnel** who will be assigned tasks as defined herein will be considered in the subjective evaluation of proposals. The vendor should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform computer output to microfilm services. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

Organizational Chart - In addition, the vendor should provide an organizational chart showing the staffing and lines of authority for the key personnel to be used. The organizational chart should include (1) The relationship of service personnel to management and support personnel, (2) The names of the personnel and the working titles of each, and (3) Any proposed subcontractors including management, supervisory, and other key personnel. The organizational

chart should outline the team proposed for this project and the relationship of those team members to each other and to the management structure of the vendor's organization.

(Also attach resumes for key personnel)

<b>Personnel</b>	<b>Background and Expertise of Personnel</b>
1. _____ (Name)	
_____	
(Title)	
2. _____ (Name)	
_____	
(Title)	
3. _____ (Name)	
_____	
(Title)	
4. _____ (Name)	
_____	
(Title)	

**Vendor's Proposed Method of Performing Computer Output to Microfilm Services**

The offeror should complete the following table to indicate clearly what service the offeror is proposing. Then the offeror should complete the applicable identified questions specific to offering the Base Bid, the Base and Option One, and/or the Base Bid and Option Two.

5.4

Check below as applicable:

<b>Offering</b>	<b>Check if Proposing</b>
Base Bid	
Base Bid and Option One	
Base Bid and Option Two	
Base Bid, Options One and Two	X

**Cooperative Procurement:** The vendor should indicate by checking "Yes" or "No" in the indicated space if the vendor will honor the submitted prices and terms for purchase by other

entities in Boone County that participate in cooperative purchasing with Boone County, Missouri?

Yes  No

Please refer to Tab: **BASE BID**  
"Vendor Response"

The offeror should complete the following for the Base Bid:

- A. The vendor should describe the format(s) the vendor can accept for electronic records submission e.g., TIFF, pdf, on DVD, CD, e-mail, etc.:

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- B. The vendor should describe the equipment used for microfilm processing

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- C. The vendor should describe its review processes for ensuring microfilm quality and accuracy:

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- D. The vendor should describe typical labeling and indexing processes used to ensure microfilm quality and accuracy:

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- E. The vendor should describe its microfilm quality testing policies and methods:

---

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- F. The vendor should describe its shipping policies, methods, chain of custody regarding shipment of finished microfilm rolls:

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- G. How would hand-written documents need to be prepared for microfilming and does the offeror or would the County perform the preparation work

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Please refer to Tab:  
"Vendor Response"

**OPTION ONE**

If offering **Option One** in addition to the Base Bid, complete the following

- A. The vendor should identify the physical location(s) for proposed storage of microfilm rolls, and address how the storage facility meets security/safe-keeping requirements:

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- B. The vendor should address the construction materials of the building proposed for storage, including the fire resistance rating of building materials, roofing and flooring materials, and in general how the building is specifically enabled to provide safe-keeping:

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- C. The vendor should address details about the security system in place at the proposed storage facility:

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- D. The vendor should address security policies and protocol in place at the proposed storage facility:

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- E. Describe the access policy for retrieval of microfilm rolls and aperture cards given the following routines:

- "normal" retrieval process which is for document replacement only
- and "disaster recovery" which is for the complete roll(s).

The vendor should specifically describe the Authorization Form(s) used to protect the records through access.

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- F. If permanent archival storage is sub-contracted, the offeror must identify all subcontractors, their assigned tasks that they will perform under the contract, and provide information as well as data regarding the subcontractor's policies, rules, and standards for storage as applicable to their subcontracted role under the contract:

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G. The vendor should describe disaster recovery measures that are in place at the storage facility:

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H. Storing: Address how boxes are stacked and moved in the storage facility:

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I. Access Control: Address how the vendor will restrict access to confidential records in storage:

---

J. Disaster Recovery: Address the vendor's disaster preparedness plan and what policies and protocol the vendor has in place to move stored documents threatened by natural or other disasters:

---

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K. Communication: Address communication with the County in the event stored documents have to be moved:

---

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L. Return Process: The vendor should describe the process for the transport of records back to Boone County upon termination of the contract, and any fees associated with the transfer.

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M. Describe the offeror's "chain of custody" procedure for both receiving documents from the County and sending documents back to the County:

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Please refer to Tab:  
"Vendor Response"

**OPTION TWO**

If offering **Option Two** in addition to the Base Bid, complete the following:

A. Identify a "best-practice" approach to scanning several years of hard-copy fiscal year and budget reports, and other related documentation such as grants for preparation for microfilming:

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B. Identify any requirements the vendor has about the submission of hard-copy records:

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C. Address whether the vendor removes paperclips, staples, binding, tapes split pages, etc. or would the County have to prepare the records before scanning can be conducted:

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D. If the County prepares documents for scanning by removing paperclips, staples, binding, taping split pages, etc., would the County realize a cost-savings?

---

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E. Address if the vendor will be conducting scanning on-site in Boone County or off-site at the contractor's location. If scanning will be done off-site, identify the name of the site and its location (city, state):

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F. Provide the number of hours estimated to complete all scanning work as described in **Attachment Five** that are built into the total guaranteed not to exceed price quoted for item #15. If different personnel classifications are involved, then itemize the number of hours by classification and rate.

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*(The vendor should complete and return with the proposal)*

**Certification Regarding  
Debarment, Suspension, Ineligibility and Voluntary Exclusion  
Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98 Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS FOR CERTIFICATION)

- (1) The prospective recipient of Federal assistance funds certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant must attach an explanation to this proposal.

Alicia Floyd, Proposal Coordinator

\_\_\_\_\_  
Name and Title of Authorized Representative

*Alicia Floyd*  
\_\_\_\_\_  
Signature

December 1, 2017  
\_\_\_\_\_  
Date

**Liz Palazzolo**  
**Senior Buyer**



**Boone County Purchasing**  
**613 E. Ash Street, Room 109**  
**Columbia, MO 65201**  
**Phone: (573) 886-4392**  
**Fax: (573) 886-4390**

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### **INSTRUCTIONS FOR COMPLIANCE WITH HOUSE BILL 1549**

House Bill 1549 addresses the Department of Homeland Security's and the Social Security Administration's E-Verify Program (Employment Eligibility Verification Program) that requires the County to verify "lawful presence" of individuals when we contract for work/service; verify that contractor has programs to verify lawful presence of their employees when contracts exceed \$5,000; and a requirement for OSHA safety training for public works projects.

The County is required to obtain certification that the bidder awarded the attached contract participates in a federal work authorization program. To obtain additional information on the Department of Homeland Security's E-Verify program, go to:

[http://www.dhs.gov/xprevprot/programs/gc\\_1185221678150.shtm](http://www.dhs.gov/xprevprot/programs/gc_1185221678150.shtm)

Please complete and return form *Work Authorization Certification Pursuant to 285.530 RSMo* if the contract amount is in excess of \$5,000. Attach to this form the *E-Verify Memorandum of Understanding* that the vendor completed when enrolling. The link for that form is:

<http://www.uscis.gov/files/native/documents/save-mou.pdf>

Additional information may be obtained from:

<http://www.uscis.gov/files/native/documents/MOU.pdf>

If the vendor is an Individual/Proprietorship, then the vendor must return the attached *Certification of Individual Bidder*. On that form, the vendor may do **one of the three options** listed. Be sure to attach any required information for those options as detailed on the *Certification of Individual Bidder*. If the vendor chooses option number two, then the vendor will also need to complete and return the attached form *Affidavit*.





**ADDENDUM #1 to RFP 46-06DEC17**

**Boone County Purchasing**

613 E. Ash Street, Room 109

Columbia, MO 65201

*Liz Palazzolo, Senior Buyer*

Phone: (573) 886-4392 – Fax: (573) 886-4390

Email: [lpalazzolo@boonecountymmo.org](mailto:lpalazzolo@boonecountymmo.org)

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**BOONE COUNTY, MISSOURI**

**Request for Proposal 46-06DEC17 – *Computer Output to Microfilm,  
Microfilm Storage, and Scanning Service Term and Supply***

**ADDENDUM # 1 - Issued November 21, 2017**

**Prospective bidders are hereby notified of the following revisions to Request for Bid #39-28SEP17:**

- 1) **ADD** the following as paragraph 3.1.11:

3.1.11 If the microfilm order results in a partial roll, the contractor shall send the partial roll to the County. The County has discretion to send the partial roll for completion by the contractor when the specific County office requires additional images to be microfilmed in a later order for service.

- 2) **ADD** the following as paragraph 3.1.12:

3.1.12 Estimates: The quantities indicated in this Request for Proposal are estimates that pertain to the total aggregate quantities that may be ordered throughout the stated contract period. The estimates do not indicate single order amounts unless otherwise stated. Boone County makes no guarantees about single order quantities or total aggregate order quantities.

- 3) The following questions have been posed and the County offers answers for all offerors' benefit:

Question 1: Can services be performed outside the borders of the U.S.?

Answer 1: While there is no specific prohibition against performing service outside the borders of the U.S., the nature of performing work in this manner may pose challenges and risks that the County will consider in its evaluation of proposals.

Question 2: Is Fed Ex or other common carrier/service an acceptable means of pick-up and delivery?

Answer 2: Yes

Question 3: How many electronic files will be released at one time to the vendor?

**Answer 3:** The number of images that will be sent varies month to month. The RFP addresses annual estimates: paragraph 3.4.6 addresses estimated numbers for the Recorder's Office; paragraph 3.5.1 addresses estimated numbers for the Collector's Office; and paragraph 3.6.1 (a)-(i), 3.6.2, and 3.6.3 address estimated numbers for the Auditor's Office for Base Bid services. For Option Two services for the Auditor's Office, see Attachment Five.

**Question 4:** How many images per roll is the County requesting?

**Answer 4:** The number of images requested will vary; the County could request one image, one roll, or multiple rolls in the instance of a disaster recovery.

**Question 5:** Who is the Buyer of Record for the current contract? Can the Buyer's contact information or the current contract be provided?

**Answer 5:** The current contract is #71-01DEC09 and is made available on the Purchasing website.

**The current contract and amendments may be viewed here:**

**Step 1:**

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

**Step 2:**

**Go to Bid Folder 40-16OCT17**

**Step 3:**

**Look at 71-01DEC09**

**Question 6:** Can a sample, photo, or a Xerox copy (none of which will show information) be provided of the microfilm?

**Answer 6:** Yes upon request by contacting the current Buyer of Record, Liz Palazzolo.

**Question 7:** In Option One, is the County requesting the vendor to store and provide records and the rolls as needed?

**Answer 7:** Yes.

**Question 8:** In Option Two, would the County be willing to ship the hard copy documents by the County choice method of shipping or the vendor recommended method?

**Answer 8:** The County is open to the vendor's suggestions about shipping methods.

**Question 9:** In Option Two, will the County require the vendor to create duplicate and original [rolls and] then store the original and send the duplicate.

**Answer 9:** RFP paragraph 3.8.8 addresses this question.

**Question 10:** Since the County is requesting the rolls to be stored in the facility in Kansas, how is the vendor to provide the duplicate?

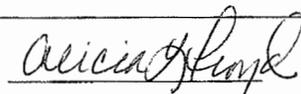
**Answer 10:** RFP paragraph 2.2.3(b) addresses this question. The vendor being acquired under this RFP does not store the duplicate roll for the Recorder's Office under Option One services.

Question 11: Would the County be acceptable to a storage facility near the vendor?  
Answer 7: Yes. It is preferred that the storage center not be in Columbia, Missouri or Jefferson City, Missouri. The duplicate rolls for the three named County offices are already stored in Columbia, Missouri. The original rolls are stored for the Collector's Office and the Auditor's Office in Jefferson City, Missouri. Having geographic sites outside Columbia and Jefferson City ensures safe-keeping in the event of a natural or other disaster impacting the central Missouri locations.

This addendum is issued in accordance with the RFB Response Page in the Request for Bid and is hereby incorporated into and made a part of the Request for Bid Documents. Offerors are reminded that receipt of this addendum should be acknowledged and submitted with Offeror's *Response Form*.

By:   
Liz Palazzolo, Senior Buyer  
Boone County Purchasing

OFFEROR has examined **Addendum #1** to Request for Bid #46-06DEC17 – *Computer Output to Microfilm, Microfilm Storage, and Scanning Service Term and Supply*, receipt of which is hereby acknowledged:

Company Name: US Imaging, Inc.  
Address: 400 S. Franklin Street Saginaw, MI, 48607  
Phone Number: (989) 753-7933 Fax Number: (800) 517-4293  
E-mail: afloyd@us-imaging.com  
Authorized Representative Signature:  Date: 12/1/2017  
Authorized Representative Printed Name: Alicia Floyd

# US★Imaging

December 6, 2017

Boone County Purchasing Department  
Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, MO 65201-4460

RE: County of Boone, Missouri – RFP #46-06DEC17  
Computer Output to Microfilm, Microfilm Storage and Scanning Service Term and Supply

US Imaging is pleased to present this proposal to Boone County, in response to RFP #46-06DEC17, to create archival quality microfilm from digital images for multiple departments within Boone County. Additionally, we have provided responses for Option One and Two. We have been serving the Boone County Recorder's Office archival needs since 2010 and if selected again, our team will continue to provide Boone County with the highest possible quality and accuracy.

If you have any questions, or need additional information regarding this proposal, please contact:

Alicia Floyd  
Proposal Coordinator  
US Imaging, Inc.  
512-505-8783  
[afloyd@us-imaging.com](mailto:afloyd@us-imaging.com)

We appreciate the opportunity to present our services and look forward to working with you. Please contact me should you want to discuss this or any future projects.

Sincerely,



Scott Robinson, CDIA+  
President & CEO  
US Imaging, Inc.  
989-714-9700  
[srobinson@us-imaging.com](mailto:srobinson@us-imaging.com)

## Company History

In 1976 Micro Tec began providing confidential microfilming services for Hospitals and Banks throughout the Mid-West and began scanning paper and microfilm in 1993. In 1996 we merged with 25 other service bureaus nationwide to form a publicly held company called ImageMax; with 500 employees we scanned records for every industry nationwide. The Michigan location performed all microfilm scanning for all 25 locations and provided scanning and indexing for over 100 Counties. During our 10 years as ImageMax we had the unique opportunity to tour all 25 locations and develop the best standard practices in the imaging industry. We also developed key relationships with every scanner manufacturer in the world.

In 2006, the Michigan team formed US Imaging, Inc., to perform on-site book and microfilm scanning exclusively for County Register of Deeds. We developed unique technology that allows our experienced staff to enhance specific areas on TIFF pages to create the most legible images possible. During the past 11 years we have served over 500 Counties, bringing our total experience to over 600 Counties, including 31 in the State of Missouri.

We are a beta test site for several scanner manufacturers. This provides us with the opportunity to utilize state of the art technology 6-12 months before our competitors. We constantly upgrade equipment to the best available on the market at any given time. We have developed unique capture, indexing and enhancing software called *ImageXpert*, retrieval software called *ImageXpress*, inspection and approval software called *ImageReview*. Due to our vast experience and partnerships, we are familiar with every Land Records system on the market, as such we can custom format images for import. We prefer to perform all scanning on-site to eliminate the possibility of losing or damaging original media; however, we also know that this is not always possible. We will work with the County to arrange for a secure transport of all documents to be scanned off-site at our secure facility. All images are captured in color to obtain images with 100% of the details contained in the original. We have developed a 3 Stage process that produces the highest quality images and most accurate indexing in the industry.

US Imaging has been a Certified Kodak lab for 41 years as Micro Tec (1976-1996), ImageMax (1996-2006) and US Imaging (2006-2017). We have been archiving digital images to microfilm since 1997. Our lab meets and exceeds all ANSI, AIIM, ARMA, PRIA and State specifications. We currently archive digital images to microfilm for 317 County Recorders and store over 150,000 rolls of microfilm and are eager to retain Boone County as one of our Archiving customers.

## References

### **Washoe County, Nevada**

1001 East 9th Street

Reno, NV 89520

Contact: Larry Burtness, Recorder

(775) 326-6032

[lburtness@washoecounty.us](mailto:lburtness@washoecounty.us)

Relationship: 2010 - Current

US Imaging has performed multiple projects for various departments within Washoe County.

In addition to archiving approximately 145,000 images quarterly, we perform Polysulfide Treatment for archive and new rolls, we have also scanned over 5 million frames of rollfilm and jackets for the Recorder's Office. The images for the rollfilm scanning project ranged from 1935-1997 and included both acetate and polyester rollfilm. During the rollfilm inspection, our lab detected redox on some of the acetate rolls. We promptly discussed the issue with the County. The County was able to locate the duplicate polyester rolls for those acetate rolls affected by redox, which we also scanned. To provide the best quality image possible, we modified our image review software to be able to toggle between the original acetate roll and the duplicate polyester roll, so that we could replace any original roll images with duplicate roll images where the redox affected the image quality. Additionally, to provide the County with new archive rolls, we duplicated the acetate film to polyester and brown toned. By detecting the redox and enhancing our software, we were able to provide the County with the best quality image possible for the affected rollfilm. We constantly strive to achieve the best image for our customers, and as a result Washoe County was extremely satisfied with the results of this project and continues to utilize our services today.

### **Wayne County, Michigan**

400 Monroe Street, 7th Floor

Detroit, MI 48226

Contact: Bernard Youngblood, Register of Deeds

(313) 224-5850

[byoungbl@co.wayne.mi.us](mailto:byoungbl@co.wayne.mi.us)

Relationship: 2013 – Current

US Imaging has provided image archiving for Wayne County since 2013. We currently archive approximately 80,000 images per month and store 22,034 rolls of microfilm.

In order to offer storage for Wayne County, we expanded and upgraded our storage vault to be state of the art. Film is stored in a constant cool environment, with temperatures no greater than 65 degrees. Temperature and humidity are monitored 24 hours a day seven days a week. The humidity in the vault where silver-gelatin polyester-based film are stored is maintained between 30% and 40%, with a maximum deviation of + or - 5% per hour. The humidity is 15% in the vault where silver-gelatin acetate-base film and other silver and non-silver film are stored. The storage vaults are also fireproof and have an AVTech RoomAlert monitoring system that detects smoke, heat, humidity, flood, airflow and power failures that trigger alarms within our facility and the local Fire Department. The storage vault is equipped with automatic 24-hour fire

detection with an Ecaro25 fire suppression system. No water based fire suppression is utilized in the vault. Our Ecaro25 based clean agent fire suppression system meets all ANSI, ISO & NFPA requirements. Our storage vault has a separate heating, ventilating and air conditioning system (HVAC) from those regulating non-microform storage areas.

In addition to film archiving and storage, we also completed a project with Wayne County to scan over 17 million images from rollfilm. We will have located, indexed and replaced 69,500 missing or incomplete documents for the County in their Recording System.

**San Diego County, California**

1600 Pacific Highway  
San Diego, CA 92101  
Contact: Val Wood, Chief Deputy Recorder/County Clerk  
(619) 236-3771  
[val.wood@sdcounty.ca.gov](mailto:val.wood@sdcounty.ca.gov)

2017 – Current: US Imaging was recently awarded archiving services and began archiving for the County earlier this year.

**Livingston County, Michigan**

200 East Grand River Avenue  
Howell, MI 48843  
Contact: Brandon Denby, Register of Deeds  
(517) 546-0270  
[rod@livgov.com](mailto:rod@livgov.com)

2012 – Current: US Imaging currently archives approximately 15,000 images per month.

**Winnebago County, Illinois**

404 Elm Street, Room 405  
Rockford, IL 61101  
Contact: Nancy McPherson, Recorder of Deeds  
(815) 319-4325  
[recorder@wincoil.us](mailto:recorder@wincoil.us)

2010 – Current: US Imaging currently archives approximately 33,000 images per month.

## **Personnel Expertise Summary**

### **Scott Robinson, CDIA+ - President & CEO**

Scott's grandfather started Micro Tec in 1976 and where Scott worked in production from 1982-1988, in 1988 Scott became the Regional Sales Manager for Micro Tec. In 1996, Scott became a Certified Imaging Architect. From 1996-2006 Scott was consistently in the top 3 out of 50 sales people for ImageMax and became the VP of Government Solutions. In 2006 Scott formed US Imaging, Inc., to focus solely on serving Counties.

### **Eric Nejedly – National Account Manager**

Eric joined our team in 2010 and has managed nearly 300 County projects to date. Eric previously worked in Production management and has a thorough understanding of the production process for County Records. He is now the Account Manager and ensures that the County has a complete understanding of our process. Eric is an advocate for the County and ensures that the County expectations our met at each and every stage of the process.

### **Jody Roach – Lab Manager**

Jody has 34 years of experience of processing microfilm and 20 years of experience of archiving digital images to microfilm. Jody has overseen the archiving and processing of over 3.5 billion images to microfilm and has been instrumental in US Imaging maintaining our Kodak and Fuji Certifications since 1983.

Jody will be managing all services performed by our film lab. He will coordinate with Lisa Gehrke, Office Manager, to securely ship the completed film to the appropriate recipients.

### **Rhonda Olson – Project Manager (Film Archiving / Scanning)**

Rhonda has been with us for 31 years. She has "hands on" experience with every aspect of our business and was Production Manager for 7 years prior to Tina. Rhonda now coordinates proposals, document pickups, retrievals, project tracking, compares estimated totals to actual totals, document returns, satisfaction follow up. All questions regarding transportation, retrievals, returns and project status can be handled by Rhonda.

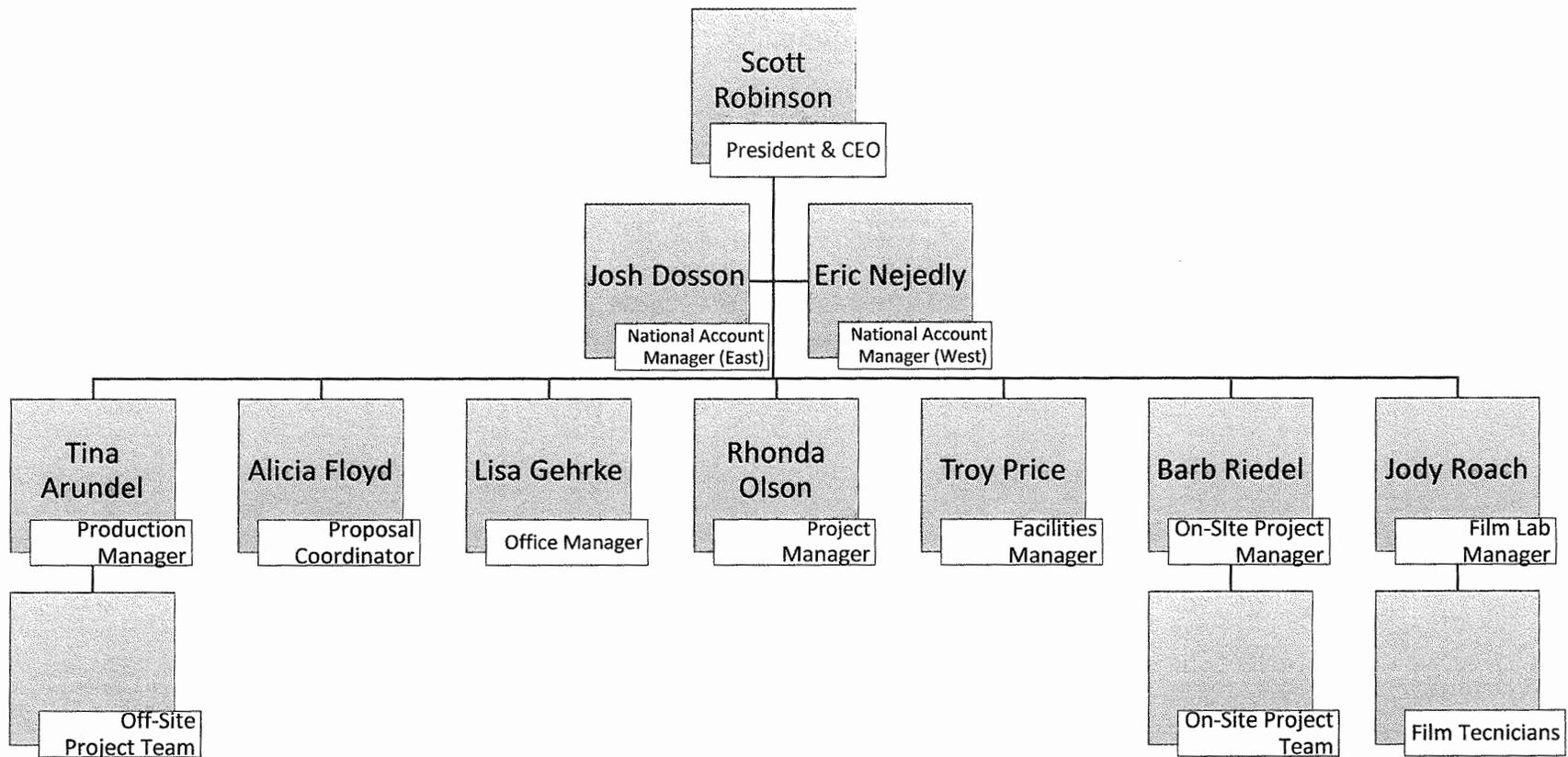
Rhonda will coordinate with each County Agency for their specific filming needs and requirements. Additionally, if we are awarded Option Two, Rhonda will coordinate this effort as well.

### **Troy Price – Facilities Manager (Storage)**

Troy started with Micro Tec in 1997 and became the Facilities Manager of File Safe, US Imaging's in-house storage site, in 2006. Troy manages all the media stored at our facilities.

Troy is be responsible for logging, retrieving, re-filing, delivery, pickups and scheduled destruction. Troy will be the main point of contact for the County, once the media has been received on-site in Saginaw, MI.

# US Imaging, Inc.



**Base Bid**

- A. The vendor should describe the format(s) the vendor can accept for electronic records submission (e.g., TIFF, PDF, on DVD, CD, email, etc.):

US Imaging is able to receive TIFF and PDF records via CD, DVD, Hard Drive, Email, or FTP at the County's preference.

- B. The vendor should describe the equipment used for microfilm processing:

US Imaging is a certified Kodak InfoGuard Lab. All archival microfilm will meet or exceed all ANSI, AIIIM, ARM, PRIA and Missouri specifications.

US Imaging has utilized over 30,000 rolls of microfilm each year since 1976. We are constantly testing microfilm from each manufacturer to obtain the highest quality and lowest price. Kodak was always the highest quality and highest priced.

- C. The vendor should describe its review processes for ensure microfilm quality and accuracy:

US Imaging will review the digital images for sequential Document/Image numbers to ensure that no documents or images are missing. If missing documents or images are discovered, the County will be notified and the document/image will be requested prior to proceeding with the film writing.

Digital images can become corrupt during the copy or FTP process. The files will be present, have a valid name, date and byte size but the image may not open and display properly during the archiving process. US Imaging utilizes a software program to open 100% of the files received to guarantee that they are not corrupt and will display properly. If corrupt images are discovered, the County will be notified and a new file will be requested.

Images will be written in sequential order, consistent with book/page, file number and/or roll/frame.

- D. The vendor should describe typical labeling and indexing processes used to ensure microfilm quality and accuracy:

US Imaging will comply with the County for the pre-arranged order where the microfilm rolls will begin and end. All rolls will be clearly labeled as specified in the provided Attachments of the RFP.

- E. The vendor should describe its microfilm quality testing policies and methods:

All first-generation rolls will be inspected for ANSI microfilm standards of 3' of leader, 100 lines of resolution, 0.9-1.2 density and 3' of trailer, visible defects and missing pages. Resolution and density targets will be included at the beginning of each roll. No splices will be utilized.

All new silver halide microfilm will receive polysulfide treatment, to protect against oxidation. Additionally all microfilm will be washed to reduce the amount of residual Thiosulfate ion.

Methylene Blue Test will be conducted to verify requirements are met; if requested, the certification can be provided to the County with each batch of film.

All new silver halide rolls will be packaged in an acid-free plastic storage boxes that meets ISO standards for preservation. Barcodes will be affixed to each box, per the County's requirements. A packing list will be prepared and all new rolls will be shipped to the County via UPS, with tracking and signature confirmation.

- F. The vendor should describe its shipping policies, methods, chain of custody regarding shipment of finished microfilm rolls:

Once the lab has completed writing and packing the rolls, they are immediately prepared by our Office Manager for shipping. It is our standard practice to ship microfilm via UPS Ground with Tracking.

- G. How would hand-written documents need to be prepared for microfilming and does the offeror or would the County perform the preparation work:

All paper documents are prepared for scanning by removing pages from folders, removing staples, unfolding pages, mending bent corners, verifying that all pages are in their proper order prior to scanning.

US Imaging can perform document preparation of the pages for scanning, our standard rate is \$25.00 per hour.

### Option One

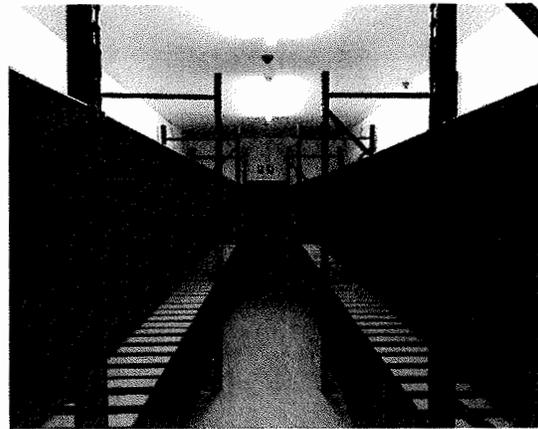
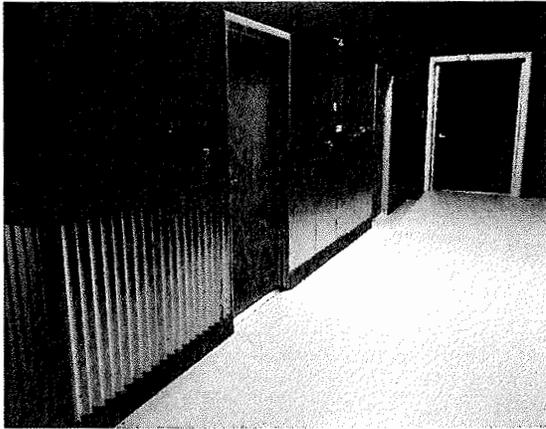
- A. The vendor should identify the physical location(s) for proposed storage of microfilm rolls, and address how the storage facility meets security/safe-keeping requirements:

US Imaging Headquarters & Storage Facility:  
400 S. Franklin Street  
Saginaw, MI 48607

All microfilm is stored within 2 film vaults, 1 for polyester and 1 for acetate. Film will be kept in a constant cool environment, with temperatures no greater than 65 degrees. Temperature will be monitored 24 hours a day seven days a week. The humidity in the vault where silver-gelatin polyester-based film are stored will be maintained between 30% and 40%, with a maximum deviation of + or - five percent per hour. The humidity will be 15% in the vault where silver-gelatin acetate-base film and other silver and non-silver film are stored. Humidity will be monitored 24 hours a day seven days a week.

Our storage vault (designed for preservation of microforms) is fireproof and in accordance with the local building code, Fire Underwriter's Regulations and the National Fire Protection Association (NFPA) requirements. US Imaging utilizes an AVTech RoomAlert monitoring system that detects smoke, heat, humidity, flood, airflow and power that triggers alarms within our facility, local fire department and sends text messages to our management personnel. Our storage vault is equipped with automatic 24-hour fire detection with an Ecaro25 fire suppression system. No water based fire suppression is utilized in the vault. Our Ecaro25 based clean agent fire suppression system meets all ANSI, ISO & NFPA

requirements. Our storage vault has a separate heating, ventilating and air conditioning system (HVAC) from those regulating non-microform storage areas.



- B. The vendor should address the construction materials of the building proposed for storage, including the fire resistance rating of the building materials, roofing and flooring materials, and in general how the building is specifically enabled to provide safe-keeping:

Our facility is the only document storage center in Mid-Michigan, specifically designed for Backfile Scanning, Microfilm Storage and Document Storage. It is all steel construction upon a 4' concrete base, 20 feet above the 100 year flood plain. It has a Duralast roof with a dry sprinkler system. It has 2 indoor loading docks to keep documents out of the weather while unloading. Our industrial shelving system is made of steel uprights, steel beams and steel decking.

- C. The vendor should address details about the security system in place at the proposed storage facility:

Our facility includes strict security procedures and physical deterrents. All doors are constantly locked. There is no public access to the facility and all guests must sign in and be accompanied by an employee. We have 12 security cameras providing surveillance to monitor the warehouse, entrances and exits. The entire facility is climate and humidity controlled with industrial fire protection. We have never experienced a loss or theft from the facility.

Server room and film vaults are also locked and only accessible by 2 authorized key fobs. Alarms are monitored externally for security, temperature, humidity, fire, smoke and activation of dual fire suppression systems.

- D. The vendor should address security policies and protocol in place at the proposed storage facility:

We have a fenced employee parking lot and each employee as a remote control to open the gate. Each employee has a key fob to enter and leave the building and each entrance and exit are logged into a database.

Visitors are visually identified before they are “buzzed” in to a locked lobby area and “buzzed” in after showing picture ID and sign confidentially statements before being escorted anywhere in the facility.

E. Describe the access policy for retrieval of microfilm rolls and aperture cards given the following routines:

- a. “normal” retrieval process which is for document replacement only:

County will contact the Facilities Manager with any document requests. All requests received within business hours will be responded to within 24 hours.

- b. “disaster recovery” which is for the complete roll(s):

County will contact the Facilities manager with any requests. Rolls will be retrieved. Film can be securely transported via UPS Ground with Tracking or Courier. Additionally, duplicate rolls can be created in the event the County prefers not to have original rolls on-site at their facility.

F. If permanent archive storage is sub-contracted, the offeror must identify all subcontractors, their assigned tasks that they will perform under the contract, and provide information as well as data regarding the subcontractor’s policies, rules, and standards for storage as applicable to their subcontracted roll under the contract:

No subcontractors will be utilized for storage.

G. The vendor should describe disaster recovery measures that are in place at the storage facility:

- a. Storage of microform will be in compliance with the Association Information and Image Management – Imaging Media – Processed Safety Photographic Film – Storage, ANSI IT9.11-1998 (as amended or replaced) or the International Organization for Standardization – Photography - Processed Safety Photographic Films – Storage Practices, ISO 18911:2000 (as amended or replaced).
- b. Our storage facility is 20 feet above the 100 year flood plain.
- c. The film will be stored in a vault (designed for preservation of microforms) that is fireproof in accordance with the local building code, Fire Underwriter’s Regulations and the National Fire Protection Association (NFPA) requirements. US Imaging utilizes an AVTech RoomAlert monitoring system that detects smoke, heat, humidity, flood, airflow and power that triggers alarms within our facility, local fire department and sends text messages to our management personnel.
- d. Our storage vault is equipped with automatic 24-hour fire detection with an Ecaro25 fire suppression system. No water based fire suppression is utilized in the vault. Our Ecaro25 based clean agent fire suppression system meets all ANSI, ISO & NFPA requirements.

- e. Our storage vault has a separate heating, ventilating and air conditioning system (HVAC) from those regulating non-microform storage areas.
- f. Our storage vault is separate from other types of storage or work areas.
- g. Film will be stored in acid-free cardboard boxes or inert plastic containers.
- h. Film will be kept in a constant cool environment, with temperatures no greater than 65 degrees. Temperature will be monitored 24 hours a day seven days a week.
- i. The humidity in the vault where silver-gelatin polyester-based film are stored will be maintained between 30% and 40%, with a maximum deviation of + or - five percent per hour. The humidity will be 15% in the vault where silver-gelatin acetate-base film and other silver and non-silver film are stored. Humidity will be monitored 24 hours a day seven days a week.
- j. Our facility has 24-hour monitored security from Audio Central Alarm Company.
- k. We will make daily security checks of the storage vault and facility.
- l. We will limit access to the facility to authorized persons.
- m. No smoking is allowed within our facility.
- n. We facility has a Gentec natural gas generator that can run for an unlimited amount of time in the event of a power outage. Our vaults utilize an independent Munters Dehumidification System and Generac Natural Gas Generator to maintain constant temperature and humidity in the event of a power outage.

H. Storing: Address how boxes are stacked and moved in the storage facility:

All boxes received from the County will be inventoried and re-boxed into 15"x12"x10" archival storage boxes.

Each box will be identified by a label that contains:

- a. Boone County (Dept.)
- b. Media Type
- c. Document Type
- d. Document Range (Roll #, Document #, etc.)
- e. Unique Box # for tracking and locating each box

Box inventory will be loaded into our Total Recall tracking system and made available to authorized Boone County staff via an on-line inventory report. The location of each barcode can be tracked down to a 4' x 4' area or shelf number.

We stack boxes 3 high and 3 deep on our industrial shelving system, which is made of steel uprights, steel beams and steel decking.

- I. Access Control: Address how the vendor will restrict access to confidential records in storage:

Our experienced staff, vehicles and facility are insured to meet or exceed all requirements recommended by the Professional Records and Information Storage Management Association (PRISM) and HIPAA. US Imaging has a detailed confidentiality policy which is strictly enforced. Our employees are all under non-disclosure agreements and have undergone a stringent background check.

After the initial receipt of delivery, the media is not accessed again until a retrieval request is received. All requests will be managed by the Facilities Manager.

- J. Disaster Recover: Address the vendor's disaster preparedness plan and what policies and protocol the vendor has in place to move stored documents threatened by natural or other disasters:

Our storage facility is 20 feet above the 100 year flood plain. Saginaw, MI itself has been spared from natural disasters for decades, the last notable being the Floods of 1986.

Outside of tornado, which provides no advance warning, US Imaging would notify the County of the emanate threat and discuss any the County the potential concerns.

As previously outlined, our facility is equipped to eliminate loss due to fire and power outages.

- K. Communication: Address communication with the County in the event stored documents have to be moved:

In the unlikely event that your stored microfilm requires movement to another facility, either the Facilities Manager or your Account Manager will communicate with the County as quickly as possible. We would work with the County to arrange for the best possible solution in the given circumstances.

- L. Return Process: The vendor should describe the process for the transport of the records back to Boone County upon termination of the contract, and any fees associated with the transfer.

For the initial and final transport of microfilm, we suggest transporting the microfilm ourselves. Our staff would transport the boxes in our company owned utility van in 1-2 business days.

Our vehicle is climate-controlled, properly maintained, equipped with a fire extinguisher, two cell phones and a GPS TrakDot and will be locked at all times. The County will be able to rack the location of the van via a web map interface in real time.

Our fee for this service is all inclusive at \$3,000 per trip.

- M. Describe the offeror's "chain of custody" procedure for both receiving documents form the County and sending documents back to the County:

We highly suggest transporting the microfilm ourselves for the initial and final transports.

If the County is requesting documents from the microfilm, these can be transmitted either electronically or in hard copy form.

If the County is requesting microfilm itself, we can ship the film in airtight, waterproof pelican cases via UPS Ground with Tracking.

## Option Two

- A. Identify a "best-practice" approach to scanning several years of hard-copy fiscal year and budget reports, and other related documentation such as grants for preparation for microfilming:

US Imaging considers all historical documents, no matter what the media form, to be irreplaceable. As such, we will adhere to strict guidelines in handling the paper documents.

During preparation, all pages will be removed from the boxes, we will insert a barcode separator sheet in front of each file (or document), remove all staples, paper clips, brads, unfold pages, tape torn pages, mount pages smaller than 8.5" x 5.5" to the blank backside of an 8.5" x 11" page, stand up 8.5" x 14" or larger pages and lastly place & log all unscannable items into a separate box as requested.

During scanning, all pages and folders will be scanned at 300dpi in duplex mode (front & back simultaneously) as color JPEG images. Our scanners have three ultrasound double feed sensors to eliminate the possibility of 2 pages passing through the scanner simultaneously. 8.5" x 5.5" or smaller pages that are intentionally mounted to the backside of a blank piece of paper are automatically ejected by the scanner and must be manually approved by scanner operators and fed one at a time in order to be captured.

After scanning, all barcode separator sheets will be removed, and pages will be returned to their file/binding.

- B. Identify any requirements the vendor has about the submission of hard-copy records:

US Imaging does not have specific requirements regarding the submission of hard-copy records.

- C. Address whether the vendor removes paperclips, staples, binding, tapes split pages, etc. or would the County have to prepare the records before scanning can be conducted:

Yes, US Imaging can perform document preparation, for an hourly fee.

- D. If the County prepares documents for scanning by removing paperclips, staples, binding, taping split pages, etc., would the County realize a cost-savings?

Yes, if the County elected to perform this task, they would realize a cost-savings of at least \$500. If scanning is performed on-site at the County office, time on-site would also be reduced, which would be an additional savings to the customer.

- E. Address if the vendor will be conducting scanning on-site in Boone County or off-site at the contractor's location. If scanning will be done off-site, identify the name of the site and its location (city, state):

US Imaging can perform the scanning either on-site at the County office or off-site at our secured facility in Saginaw, MI.

- F. Provide the number of hours estimated to complete all scanning work as described in **Attachment Five** that are built into the total guaranteed not to exceed price quoted for item #15. If different personnel classifications are involved, then itemize the number of hours by classification and rate.

US Imaging has estimated 12 hours of scanning time and 20 hours of prep time based on the figures in Attachment Five.

## THE E-VERIFY MEMORANDUM OF UNDERSTANDING FOR EMPLOYERS

### ARTICLE I PURPOSE AND AUTHORITY

The parties to this agreement are the Department of Homeland Security (DHS) and the US Imaging (Employer). The purpose of this agreement is to set forth terms and conditions which the Employer will follow while participating in E-Verify.

E-Verify is a program that electronically confirms an employee's eligibility to work in the United States after completion of Form I-9, Employment Eligibility Verification (Form I-9). This Memorandum of Understanding (MOU) explains certain features of the E-Verify program and describes specific responsibilities of the Employer, the Social Security Administration (SSA), and DHS.

Authority for the E-Verify program is found in Title IV, Subtitle A, of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRIRA), Pub. L. 104-208, 110 Stat. 3009, as amended (8 U.S.C. § 1324a note). The Federal Acquisition Regulation (FAR) Subpart 22.18, "Employment Eligibility Verification" and Executive Order 12989, as amended, provide authority for Federal contractors and subcontractors (Federal contractor) to use E-Verify to verify the employment eligibility of certain employees working on Federal contracts.

### ARTICLE II RESPONSIBILITIES

#### A. RESPONSIBILITIES OF THE EMPLOYER

1. The Employer agrees to display the following notices supplied by DHS in a prominent place that is clearly visible to prospective employees and all employees who are to be verified through the system:
  - a. Notice of E-Verify Participation
  - b. Notice of Right to Work
2. The Employer agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the Employer representatives to be contacted about E-Verify. The Employer also agrees to keep such information current by providing updated information to SSA and DHS whenever the representatives' contact information changes.
3. The Employer agrees to grant E-Verify access only to current employees who need E-Verify access. Employers must promptly terminate an employee's E-Verify access if the employer is separated from the company or no longer needs access to E-Verify.

Company ID Number: 314539

4. The Employer agrees to become familiar with and comply with the most recent version of the E-Verify User Manual.
  5. The Employer agrees that any Employer Representative who will create E-Verify cases will complete the E-Verify Tutorial before that individual creates any cases.
    - a. The Employer agrees that all Employer representatives will take the refresher tutorials when prompted by E-Verify in order to continue using E-Verify. Failure to complete a refresher tutorial will prevent the Employer Representative from continued use of E-Verify.
  6. The Employer agrees to comply with current Form I-9 procedures, with two exceptions:
    - a. If an employee presents a "List B" identity document, the Employer agrees to only accept "List B" documents that contain a photo. (List B documents identified in 8 C.F.R. § 274a.2(b)(1)(B)) can be presented during the Form I-9 process to establish identity.) If an employee objects to the photo requirement for religious reasons, the Employer should contact E-Verify at 888-464-4218.
    - b. If an employee presents a DHS Form I-551 (Permanent Resident Card), Form I-766 (Employment Authorization Document), or U.S. Passport or Passport Card to complete Form I-9, the Employer agrees to make a photocopy of the document and to retain the photocopy with the employee's Form I-9. The Employer will use the photocopy to verify the photo and to assist DHS with its review of photo mismatches that employees contest. DHS may in the future designate other documents that activate the photo screening tool.
- Note: Subject only to the exceptions noted previously in this paragraph, employees still retain the right to present any List A, or List B and List C, document(s) to complete the Form I-9.
7. The Employer agrees to record the case verification number on the employee's Form I-9 or to print the screen containing the case verification number and attach it to the employee's Form I-9.
  8. The Employer agrees that, although it participates in E-Verify, the Employer has a responsibility to complete, retain, and make available for inspection Forms I-9 that relate to its employees, or from other requirements of applicable regulations or laws, including the obligation to comply with the antidiscrimination requirements of section 274B of the INA with respect to Form I-9 procedures.
    - a. The following modified requirements are the only exceptions to an Employer's obligation to not employ unauthorized workers and comply with the anti-discrimination provision of the INA: (1) List B identity documents must have photos, as described in paragraph 6 above; (2) When an Employer confirms the identity and employment eligibility of newly hired employee using E-Verify procedures, the Employer establishes a rebuttable presumption that it has not violated section 274A(a)(1)(A) of the Immigration and Nationality Act (INA) with respect to the hiring of that employee; (3) If the Employer receives a final nonconfirmation for an employee, but continues to employ that person, the Employer must notify DHS and the Employer is subject to a civil money penalty between \$550 and \$1,100 for each failure to notify DHS of continued employment following a final nonconfirmation; (4) If the Employer continues to employ an employee after receiving a final nonconfirmation, then the Employer is subject to a rebuttable presumption that it has knowingly

Company ID Number: 314539

employed an unauthorized alien in violation of section 274A(a)(1)(A); and (5) no E-Verify participant is civilly or criminally liable under any law for any action taken in good faith based on information provided through the E-Verify.

b. DHS reserves the right to conduct Form I-9 compliance inspections, as well as any other enforcement or compliance activity authorized by law, including site visits, to ensure proper use of E-Verify.

9. The Employer is strictly prohibited from creating an E-Verify case before the employee has been hired, meaning that a firm offer of employment was extended and accepted and Form I-9 was completed. The Employer agrees to create an E-Verify case for new employees within three Employer business days after each employee has been hired (after both Sections 1 and 2 of Form I-9 have been completed), and to complete as many steps of the E-Verify process as are necessary according to the E-Verify User Manual. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the Employer's attempting, in good faith, to make inquiries during the period of unavailability.

10. The Employer agrees not to use E-Verify for pre-employment screening of job applicants, in support of any unlawful employment practice, or for any other use that this MOU or the E-Verify User Manual does not authorize.

11. The Employer must use E-Verify for all new employees. The Employer will not verify selectively and will not verify employees hired before the effective date of this MOU. Employers who are Federal contractors may qualify for exceptions to this requirement as described in Article II.B of this MOU.

12. The Employer agrees to follow appropriate procedures (see Article III below) regarding tentative nonconfirmations. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending. Further, when employees contest a tentative nonconfirmation based upon a photo mismatch, the Employer must take additional steps (see Article III.B. below) to contact DHS with information necessary to resolve the challenge.

13. The Employer agrees not to take any adverse action against an employee based upon the employee's perceived employment eligibility status while SSA or DHS is processing the verification request unless the Employer obtains knowledge (as defined in 8 C.F.R. § 274a.1(l)) that the employee is not work authorized. The Employer understands that an initial inability of the SSA or DHS automated verification system to verify work authorization, a tentative nonconfirmation, a case in continuance (indicating the need for additional time for the government to resolve a case), or the finding of a photo mismatch, does not establish, and should not be interpreted as, evidence that the employee is not work authorized. In any of such cases, the employee must be provided a full and fair opportunity to contest the finding, and if he or she does so, the employee may not be terminated or suffer any adverse employment consequences based upon the employee's perceived employment eligibility status

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(including denying, reducing, or extending work hours, delaying or preventing training, requiring an employee to work in poorer conditions, withholding pay, refusing to assign the employee to a Federal contract or other assignment, or otherwise assuming that he or she is unauthorized to work) until and unless secondary verification by SSA or DHS has been completed and a final nonconfirmation has been issued. If the employee does not choose to contest a tentative nonconfirmation or a photo mismatch or if a secondary verification is completed and a final nonconfirmation is issued, then the Employer can find the employee is not work authorized and terminate the employee's employment. Employers or employees with questions about a final nonconfirmation may call E-Verify at 1-888-464-4218 (customer service) or 1-888-897-7781 (worker hotline).

14. The Employer agrees to comply with Title VII of the Civil Rights Act of 1964 and section 274B of the INA as applicable by not discriminating unlawfully against any individual in hiring, firing, employment eligibility verification, or recruitment or referral practices because of his or her national origin or citizenship status, or by committing discriminatory documentary practices. The Employer understands that such illegal practices can include selective verification or use of E-Verify except as provided in part D below, or discharging or refusing to hire employees because they appear or sound "foreign" or have received tentative nonconfirmations. The Employer further understands that any violation of the immigration-related unfair employment practices provisions in section 274B of the INA could subject the Employer to civil penalties, back pay awards, and other sanctions, and violations of Title VII could subject the Employer to back pay awards, compensatory and punitive damages. Violations of either section 274B of the INA or Title VII may also lead to the termination of its participation in E-Verify. If the Employer has any questions relating to the anti-discrimination provision, it should contact OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).

15. The Employer agrees that it will use the information it receives from E-Verify only to confirm the employment eligibility of employees as authorized by this MOU. The Employer agrees that it will safeguard this information, and means of access to it (such as PINS and passwords), to ensure that it is not used for any other purpose and as necessary to protect its confidentiality, including ensuring that it is not disseminated to any person other than employees of the Employer who are authorized to perform the Employer's responsibilities under this MOU, except for such dissemination as may be authorized in advance by SSA or DHS for legitimate purposes.

16. The Employer agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email at [E-Verify@dhs.gov](mailto:E-Verify@dhs.gov). Please use "Privacy Incident – Password" in the subject line of your email when sending a breach report to E-Verify.

17. The Employer acknowledges that the information it receives from SSA is governed by the Privacy Act (5 U.S.C. § 552a(i)(1) and (3)) and the Social Security Act (42 U.S.C. 1306(a)). Any person who obtains this information under false pretenses or uses it for any purpose other than as provided for in this MOU may be subject to criminal penalties.

18. The Employer agrees to cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, which includes permitting DHS, SSA, their contractors and other agents, upon

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reasonable notice, to review Forms I-9 and other employment records and to interview it and its employees regarding the Employer's use of E-Verify, and to respond in a prompt and accurate manner to DHS requests for information relating to their participation in E-Verify.

19. The Employer shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The Employer shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your E-Verify services and any claim to that effect is false.

20. The Employer shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the prior written consent of DHS.

21. The Employer agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see [M-795 \(Web\)](#)) and, other than pursuant to the specific terms of such license, may not be used in any manner that might imply that the Employer's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.

22. The Employer understands that if it uses E-Verify procedures for any purpose other than as authorized by this MOU, the Employer may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.

## **B. RESPONSIBILITIES OF FEDERAL CONTRACTORS**

1. If the Employer is a Federal contractor with the FAR E-Verify clause subject to the employment verification terms in Subpart 22.18 of the FAR, it will become familiar with and comply with the most current version of the E-Verify User Manual for Federal Contractors as well as the E-Verify Supplemental Guide for Federal Contractors.

2. In addition to the responsibilities of every employer outlined in this MOU, the Employer understands that if it is a Federal contractor subject to the employment verification terms in Subpart 22.18 of the FAR it must verify the employment eligibility of any "employee assigned to the contract" (as defined in FAR 22.1801). Once an employee has been verified through E-Verify by the Employer, the Employer may not create a second case for the employee through E-Verify.

a. An Employer that is not enrolled in E-Verify as a Federal contractor at the time of a contract award must enroll as a Federal contractor in the E-Verify program within 30 calendar days of contract award and, within 90 days of enrollment, begin to verify employment eligibility of new hires using E-Verify. The Employer must verify those employees who are working in the United States, whether or not they are assigned to the contract. Once the Employer begins verifying new hires, such verification of new hires must be initiated within three business days after the hire date. Once enrolled in E-Verify as a Federal contractor, the Employer must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.

b. Employers enrolled in E-Verify as a Federal contractor for 90 days or more at the time of a contract award must use E-Verify to begin verification of employment eligibility for new hires of the Employer who are working in the United States, whether or not assigned to the contract, within three business days after the date of hire. If the Employer is enrolled in E-Verify as a Federal contractor for 90 calendar days or less at the time of contract award, the Employer must, within 90 days of enrollment, begin to use E-Verify to initiate verification of new hires of the contractor who are working in the United States, whether or not assigned to the contract. Such verification of new hires must be initiated within three business days after the date of hire. An Employer enrolled as a Federal contractor in E-Verify must begin verification of each employee assigned to the contract within 90 calendar days after date of contract award or within 30 days after assignment to the contract, whichever is later.

c. Federal contractors that are institutions of higher education (as defined at 20 U.S.C. 1001(a)), state or local governments, governments of Federally recognized Indian tribes, or sureties performing under a takeover agreement entered into with a Federal agency under a performance bond may choose to only verify new and existing employees assigned to the Federal contract. Such Federal contractors may, however, elect to verify all new hires, and/or all existing employees hired after November 6, 1986. Employers in this category must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.

d. Upon enrollment, Employers who are Federal contractors may elect to verify employment eligibility of all existing employees working in the United States who were hired after November 6, 1986, instead of verifying only those employees assigned to a covered Federal contract. After enrollment, Employers must elect to verify existing staff following DHS procedures and begin E-Verify verification of all existing employees within 180 days after the election.

e. The Employer may use a previously completed Form I-9 as the basis for creating an E-Verify case for an employee assigned to a contract as long as:

- i. That Form I-9 is complete (including the SSN) and complies with Article II.A.6,
- ii. The employee's work authorization has not expired, and
- iii. The Employer has reviewed the Form I-9 information either in person or in communications with the employee to ensure that the employee's Section 1, Form I-9 attestation has not changed (including, but not limited to, a lawful permanent resident alien having become a naturalized U.S. citizen).

f. The Employer shall complete a new Form I-9 consistent with Article II.A.6 or update the previous Form I-9 to provide the necessary information if:

- i. The Employer cannot determine that Form I-9 complies with Article II.A.6,
- ii. The employee's basis for work authorization as attested in Section 1 has expired or changed, or
- iii. The Form I-9 contains no SSN or is otherwise incomplete.

**Note:** If Section 1 of Form I-9 is otherwise valid and up-to-date and the form otherwise complies with

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Article II.C.5, but reflects documentation (such as a U.S. passport or Form I-551) that expired after completing Form I-9, the Employer shall not require the production of additional documentation, or use the photo screening tool described in Article II.A.5, subject to any additional or superseding instructions that may be provided on this subject in the E-Verify User Manual.

g. The Employer agrees not to require a second verification using E-Verify of any assigned employee who has previously been verified as a newly hired employee under this MOU or to authorize verification of any existing employee by any Employer that is not a Federal contractor based on this Article.

3. The Employer understands that if it is a Federal contractor, its compliance with this MOU is a performance requirement under the terms of the Federal contract or subcontract, and the Employer consents to the release of information relating to compliance with its verification responsibilities under this MOU to contracting officers or other officials authorized to review the Employer's compliance with Federal contracting requirements.

## C. RESPONSIBILITIES OF SSA

1. SSA agrees to allow DHS to compare data provided by the Employer against SSA's database. SSA sends DHS confirmation that the data sent either matches or does not match the information in SSA's database.

2. SSA agrees to safeguard the information the Employer provides through E-Verify procedures. SSA also agrees to limit access to such information, as is appropriate by law, to individuals responsible for the verification of Social Security numbers or responsible for evaluation of E-Verify or such other persons or entities who may be authorized by SSA as governed by the Privacy Act (5 U.S.C. § 552a), the Social Security Act (42 U.S.C. 1306(a)), and SSA regulations (20 CFR Part 401).

3. SSA agrees to provide case results from its database within three Federal Government work days of the initial inquiry. E-Verify provides the information to the Employer.

4. SSA agrees to update SSA records as necessary if the employee who contests the SSA tentative nonconfirmation visits an SSA field office and provides the required evidence. If the employee visits an SSA field office within the eight Federal Government work days from the date of referral to SSA, SSA agrees to update SSA records, if appropriate, within the eight-day period unless SSA determines that more than eight days may be necessary. In such cases, SSA will provide additional instructions to the employee. If the employee does not visit SSA in the time allowed, E-Verify may provide a final nonconfirmation to the employer.

Note: If an Employer experiences technical problems, or has a policy question, the employer should contact E-Verify at 1-888-464-4218.

## D. RESPONSIBILITIES OF DHS

1. DHS agrees to provide the Employer with selected data from DHS databases to enable the Employer to conduct, to the extent authorized by this MOU:

a. Automated verification checks on alien employees by electronic means, and

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- b. Photo verification checks (when available) on employees.
2. DHS agrees to assist the Employer with operational problems associated with the Employer's participation in E-Verify. DHS agrees to provide the Employer names, titles, addresses, and telephone numbers of DHS representatives to be contacted during the E-Verify process.
3. DHS agrees to provide to the Employer with access to E-Verify training materials as well as an E-Verify User Manual that contain instructions on E-Verify policies, procedures, and requirements for both SSA and DHS, including restrictions on the use of E-Verify.
4. DHS agrees to train Employers on all important changes made to E-Verify through the use of mandatory refresher tutorials and updates to the E-Verify User Manual. Even without changes to E-Verify, DHS reserves the right to require employers to take mandatory refresher tutorials.
5. DHS agrees to provide to the Employer a notice, which indicates the Employer's participation in E-Verify. DHS also agrees to provide to the Employer anti-discrimination notices issued by the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC), Civil Rights Division, U.S. Department of Justice.
6. DHS agrees to issue each of the Employer's E-Verify users a unique user identification number and password that permits them to log in to E-Verify.
7. DHS agrees to safeguard the information the Employer provides, and to limit access to such information to individuals responsible for the verification process, for evaluation of E-Verify, or to such other persons or entities as may be authorized by applicable law. Information will be used only to verify the accuracy of Social Security numbers and employment eligibility, to enforce the INA and Federal criminal laws, and to administer Federal contracting requirements.
8. DHS agrees to provide a means of automated verification that provides (in conjunction with SSA verification procedures) confirmation or tentative nonconfirmation of employees' employment eligibility within three Federal Government work days of the initial inquiry.
9. DHS agrees to provide a means of secondary verification (including updating DHS records) for employees who contest DHS tentative nonconfirmations and photo mismatch tentative nonconfirmations. This provides final confirmation or nonconfirmation of the employees' employment eligibility within 10 Federal Government work days of the date of referral to DHS, unless DHS determines that more than 10 days may be necessary. In such cases, DHS will provide additional verification instructions.

## ARTICLE III

### REFERRAL OF INDIVIDUALS TO SSA AND DHS

#### A. REFERRAL TO SSA

1. If the Employer receives a tentative nonconfirmation issued by SSA, the Employer must print the notice as directed by E-Verify. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify

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case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.

2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.

3. After a tentative nonconfirmation, the Employer will refer employees to SSA field offices only as directed by E-Verify. The Employer must record the case verification number, review the employee information submitted to E-Verify to identify any errors, and find out whether the employee contests the tentative nonconfirmation. The Employer will transmit the Social Security number, or any other corrected employee information that SSA requests, to SSA for verification again if this review indicates a need to do so.

4. The Employer will instruct the employee to visit an SSA office within eight Federal Government work days. SSA will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.

5. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

6. The Employer agrees not to ask the employee to obtain a printout from the Social Security Administration number database (the Numident) or other written verification of the SSN from the SSA.

## **B. REFERRAL TO DHS**

1. If the Employer receives a tentative nonconfirmation issued by DHS, the Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.

2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.

3. The Employer agrees to refer individuals to DHS only when the employee chooses to contest a tentative nonconfirmation.

4. If the employee contests a tentative nonconfirmation issued by DHS, the Employer will instruct the

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employee to contact DHS through its toll-free hotline (as found on the referral letter) within eight Federal Government work days.

5. If the Employer finds a photo mismatch, the Employer must provide the photo mismatch tentative nonconfirmation notice and follow the instructions outlined in paragraph 1 of this section for tentative nonconfirmations, generally.

6. The Employer agrees that if an employee contests a tentative nonconfirmation based upon a photo mismatch, the Employer will send a copy of the employee's Form I-551, Form I-766, U.S. Passport, or passport card to DHS for review by:

- a. Scanning and uploading the document, or
- b. Sending a photocopy of the document by express mail (furnished and paid for by the employer).

7. The Employer understands that if it cannot determine whether there is a photo match/mismatch, the Employer must forward the employee's documentation to DHS as described in the preceding paragraph. The Employer agrees to resolve the case as specified by the DHS representative who will determine the photo match or mismatch.

8. DHS will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.

9. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

## **ARTICLE IV SERVICE PROVISIONS**

### **A. NO SERVICE FEES**

1. SSA and DHS will not charge the Employer for verification services performed under this MOU. The Employer is responsible for providing equipment needed to make inquiries. To access E-Verify, an Employer will need a personal computer with Internet access.

## **ARTICLE V MODIFICATION AND TERMINATION**

### **A. MODIFICATION**

1. This MOU is effective upon the signature of all parties and shall continue in effect for as long as the SSA and DHS operates the E-Verify program unless modified in writing by the mutual consent of all parties.

2. Any and all E-Verify system enhancements by DHS or SSA, including but not limited to E-Verify checking against additional data sources and instituting new verification policies or procedures, will be covered under this MOU and will not cause the need for a supplemental MOU that outlines these changes.

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## B. TERMINATION

1. The Employer may terminate this MOU and its participation in E-Verify at any time upon 30 days prior written notice to the other parties.
2. Notwithstanding Article V, part A of this MOU, DHS may terminate this MOU, and thereby the Employer's participation in E-Verify, with or without notice at any time if deemed necessary because of the requirements of law or policy, or upon a determination by SSA or DHS that there has been a breach of system integrity or security by the Employer, or a failure on the part of the Employer to comply with established E-Verify procedures and/or legal requirements. The Employer understands that if it is a Federal contractor, termination of this MOU by any party for any reason may negatively affect the performance of its contractual responsibilities. Similarly, the Employer understands that if it is in a state where E-Verify is mandatory, termination of this by any party MOU may negatively affect the Employer's business.
3. An Employer that is a Federal contractor may terminate this MOU when the Federal contract that requires its participation in E-Verify is terminated or completed. In such cases, the Federal contractor must provide written notice to DHS. If an Employer that is a Federal contractor fails to provide such notice, then that Employer will remain an E-Verify participant, will remain bound by the terms of this MOU that apply to non-Federal contractor participants, and will be required to use the E-Verify procedures to verify the employment eligibility of all newly hired employees.
4. The Employer agrees that E-Verify is not liable for any losses, financial or otherwise, if the Employer is terminated from E-Verify.

## ARTICLE VI PARTIES

- A. Some or all SSA and DHS responsibilities under this MOU may be performed by contractor(s), and SSA and DHS may adjust verification responsibilities between each other as necessary. By separate agreement with DHS, SSA has agreed to perform its responsibilities as described in this MOU.
- B. Nothing in this MOU is intended, or should be construed, to create any right or benefit, substantive or procedural, enforceable at law by any third party against the United States, its agencies, officers, or employees, or against the Employer, its agents, officers, or employees.
- C. The Employer may not assign, directly or indirectly, whether by operation of law, change of control or merger, all or any part of its rights or obligations under this MOU without the prior written consent of DHS, which consent shall not be unreasonably withheld or delayed. Any attempt to sublicense, assign, or transfer any of the rights, duties, or obligations herein is void.
- D. Each party shall be solely responsible for defending any claim or action against it arising out of or related to E-Verify or this MOU, whether civil or criminal, and for any liability wherefrom, including (but not limited to) any dispute between the Employer and any other person or entity regarding the applicability of Section 403(d) of IIRIRA to any action taken or allegedly taken by the Employer.
- E. The Employer understands that its participation in E-Verify is not confidential information and may be disclosed as authorized or required by law and DHS or SSA policy, including but not limited to,

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Congressional oversight, E-Verify publicity and media inquiries, determinations of compliance with Federal contractual requirements, and responses to inquiries under the Freedom of Information Act (FOIA).

F. The individuals whose signatures appear below represent that they are authorized to enter into this MOU on behalf of the Employer and DHS respectively. The Employer understands that any inaccurate statement, representation, data or other information provided to DHS may subject the Employer, its subcontractors, its employees, or its representatives to: (1) prosecution for false statements pursuant to 18 U.S.C. 1001 and/or; (2) immediate termination of its MOU and/or; (3) possible debarment or suspension.

G. The foregoing constitutes the full agreement on this subject between DHS and the Employer.

**To be accepted as an E-Verify participant, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 1-888-464-4218.**

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Approved by:

<b>Employer</b> US Imaging	
Name (Please Type or Print) Rhonda K Olson	Title
Signature Electronically Signed	Date 03/25/2010
<b>Department of Homeland Security – Verification Division</b>	
Name (Please Type or Print) USCIS Verification Division	Title
Signature Electronically Signed	Date 03/25/2010

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## Information Required for the E-Verify Program

### Information relating to your Company:

Company Name	US Imaging
Company Facility Address	400 S. Franklin St. Saginaw, MI 48607
Company Alternate Address	
County or Parish	SAGINAW
Employer Identification Number	4384177
North American Industry Classification Systems Code	541
Parent Company	US Imaging
Number of Employees	20 to 99
Number of Sites Verified for	1

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**Are you verifying for more than 1 site? If yes, please provide the number of sites verified for in each State:**

MICHIGAN

1 site(s)

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**Information relating to the Program Administrator(s) for your Company on policy questions or operational problems:**

Name Lisa M Gehrke  
Phone Number (989) 753 - 7933  
Fax Number (989) 753 - 7333  
Email Address lgehrke@us-imaging.com

Name Scott H Robinson  
Phone Number (989) 714 - 9700  
Fax Number (989) 753 - 7333  
Email Address srobinson@us-imaging.com

Name Rhonda K Olson  
Phone Number (989) 753 - 7933  
Fax Number (989) 753 - 7333  
Email Address rolson@us-imaging.com

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Client#: 59647

USIMA

ACORD™

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/01/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER <b>Saginaw Bay Underwriters</b> Commercial Lines 1258 S. Washington P.O. Box 1928 Saginaw, MI 48605	CONTACT NAME:		
	PHONE (A/C, No, Ext): <b>989 752-8600</b>	FAX (A/C, No):	
INSURED <b>US Imaging, Inc.</b> 400 S. Franklin St Saginaw, MI 48607	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A:	<b>Travelers Property Casualty A++ XV</b>	<b>25674</b>
	INSURER B:	<b>Travelers Indemnity A++ XV</b>	<b>25658</b>
	INSURER C:	<b>Travelers Casualty &amp; Surety A++ XV</b>	<b>31194</b>
	INSURER D:		
	INSURER E:		
	INSURER F:		

## COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			<b>ZPP12P09558</b>	<b>02/03/2017</b>	<b>02/03/2018</b>	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) <b>\$1,000,000</b> <b>\$300,000</b> MED EXP (Any one person) <b>\$10,000</b> PERSONAL & ADV INJURY <b>\$1,000,000</b> GENERAL AGGREGATE <b>\$2,000,000</b> PRODUCTS - COMP/OP AGG <b>\$2,000,000</b> \$
<b>B</b>	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			<b>BA7G634084</b>	<b>02/03/2017</b>	<b>02/03/2018</b>	COMBINED SINGLE LIMIT (Ea accident) <b>\$1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
<b>A</b>	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$ <b>10000</b>			<b>ZUP12P09583</b>	<b>02/03/2017</b>	<b>02/03/2018</b>	EACH OCCURRENCE <b>\$1,000,000</b> AGGREGATE <b>\$1,000,000</b> \$ \$
<b>B</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> N/A If yes, describe under DESCRIPTION OF OPERATIONS below			<b>HKUB9443C324</b>	<b>02/03/2017</b>	<b>02/03/2018</b>	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT <b>\$1,000,000</b> E.L. DISEASE - EA EMPLOYEE <b>\$1,000,000</b> E.L. DISEASE - POLICY LIMIT <b>\$1,000,000</b>
<b>C</b>	<b>Professional Liability</b>			<b>105511397</b>	<b>10/12/2017</b>	<b>10/12/2018</b>	<b>\$1,000,000</b> <b>\$5,000 Ded</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

**Boone County is Additional Insured with respects to the General Liability and Auto Liability. 30 Day Notice of Cancellation(10 Day Notice for nonpayment of premium) applies and will be added to the certificated contingent on award of contract. (11/17)**

## CERTIFICATE HOLDER

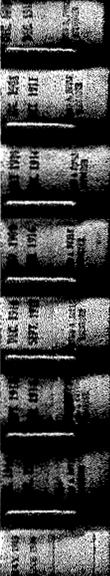
## CANCELLATION

<b>Boone County</b> 801 E Walnut Columbia, MO 65201	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE

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# US★ Imaging



On-Site Scanning

Index & Tract Book Scanning

Bound Book Scanning

Photostat Book Scanning

16/35mm Rollfilm Scanning

Jacket & Fiche Scanning

Aperture Card Scanning

Plat & Map Scanning

Document Scanning

Image Inspection

Image Cropping

Image Enhancement

Backfile & Dayforward Indexing

Backfile Redaction & Verification

**ImageXpress** Retrieval Software

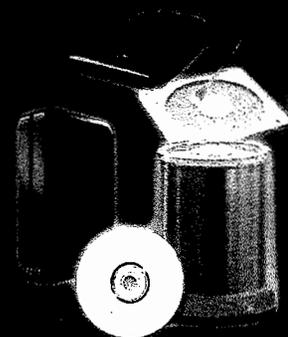
**ImageReview** Inspection Software

Digital Image Archiving to Microfilm

Microfilm Duplication & Brown Toning

Vinegar Syndrome & Redox Testing

Document & Microfilm Storage



US Imaging provides scanning, indexing and microfilming services for Counties Nationwide. Our combination of experience, technology, software and services make us the premier imaging service provider in America

# US★ Imaging



## Experience

We have been in the imaging business since 1976 and have successfully served over 450 Counties. We have digitized media for every County department and specialize in Land, Vital and Court Records. We have formatted images and indexes for over 50 systems including: ACS, AmCad, Aptitude, AtPac, BIS, CIC, CherryLan, Cott, CSA, CSI, DFM, DTS, Exigent, Fidar, FileNet, Harris, Helion, Hyland, IBM, Landata, LaserFiche, Legato, Manatron, NetData, OTG, PaperVision, PropertyInfo, RecordFusion, Sauls Creek, SMI, Tri-Min, Thomson Reuters and Tyler.

## Technology

We have invested over \$2 million in the most advanced scanners in the world and constantly test and acquire new scanners as soon as they are available. We capture 100% of the media as color JPEG images for digital preservation, convert the JPEG to black & white TIFF, enhance poor quality TIFF images and format the TIFF images for the desired retrieval system.

## Software

**ImageXpress** retrieves industry standard TIFF and JPEG images by Book-Page #, Document # or Case # and provides virtual browsing of an entire roll, book, box or folder. Features include: Adjustable Grayscale, Redacting, Masking, Cropping, Deskewing, Zooming, Rotating, Printing behind the Counter and E-Mailing. **ImageReview** allows Counties to quickly review poor quality images that we have identified during the inspection process and approve poor quality images for enhancement. This utility allows the County to inspect and approve the poor quality images and maintain complete control over the image quality and the budget.

## Service

Scanning is completed on-site 24/7 or during County hours to meet and exceed all ISO, ANSI and AIIM Standards. Every image is inspected at full size multiple times and poor quality images are reported to the County for review and approval prior to enhancement. We guarantee the highest quality possible and correct any errors for free, forever.

For a free estimate, please contact Rhonda Olson  
(989) 753-7933 | [rolson@us-imaging.com](mailto:rolson@us-imaging.com)



## **ADDENDUM #1 to RFP 46-06DEC17**

### **Boone County Purchasing**

613 E. Ash Street, Room 109

Columbia, MO 65201

*Liz Palazzolo, Senior Buyer*

Phone: (573) 886-4392 – Fax: (573) 886-4390

Email: [lpalazzolo@boonecountymmo.org](mailto:lpalazzolo@boonecountymmo.org)

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### **BOONE COUNTY, MISSOURI**

#### **Request for Proposal 46-06DEC17 – *Computer Output to Microfilm, Microfilm Storage, and Scanning Service Term and Supply***

#### **ADDENDUM # 1 - Issued November 21, 2017**

**Prospective bidders are hereby notified of the following revisions to Request for Bid #39-28SEP17:**

- 1) **ADD** the following as paragraph 3.1.11:

3.1.11 If the microfilm order results in a partial roll, the contractor shall send the partial roll to the County. The County has discretion to send the partial roll for completion by the contractor when the specific County office requires additional images to be microfilmed in a later order for service.

- 2) **ADD** the following as paragraph 3.1.12:

3.1.12 Estimates: The quantities indicated in this Request for Proposal are estimates that pertain to the total aggregate quantities that may be ordered throughout the stated contract period. The estimates do not indicate single order amounts unless otherwise stated. Boone County makes no guarantees about single order quantities or total aggregate order quantities.

- 3) The following questions have been posed and the County offers answers for all offerors' benefit:

Question 1: Can services be performed outside the borders of the U.S.?

Answer 1: While there is no specific prohibition against performing service outside the borders of the U.S., the nature of performing work in this manner may pose challenges and risks that the County will consider in its evaluation of proposals.

Question 2: Is Fed Ex or other common carrier/service an acceptable means of pick-up and delivery?

Answer 2: Yes

Question 3: How many electronic files will be released at one time to the vendor?

**Answer 3:** The number of images that will be sent varies month to month. The RFP addresses annual estimates: paragraph 3.4.6 addresses estimated numbers for the Recorder's Office; paragraph 3.5.1 addresses estimated numbers for the Collector's Office; and paragraph 3.6.1 (a)-(i), 3.6.2, and 3.6.3 address estimated numbers for the Auditor's Office for Base Bid services. For Option Two services for the Auditor's Office, see Attachment Five.

**Question 4:** How many images per roll is the County requesting?

**Answer 4:** The number of images requested will vary; the County could request one image, one roll, or multiple rolls in the instance of a disaster recovery.

**Question 5:** Who is the Buyer of Record for the current contract? Can the Buyer's contact information or the current contract be provided?

**Answer 5:** The current contract is #71-01DEC09 and is made available on the Purchasing website.

**The current contract and amendments may be viewed here:**

**Step 1:**

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

**Step 2:**

**Go to Bid Folder 40-16OCT17**

**Step 3:**

**Look at 71-01DEC09**

**Question 6:** Can a sample, photo, or a Xerox copy (none of which will show information) be provided of the microfilm?

**Answer 6:** Yes upon request by contacting the current Buyer of Record, Liz Palazzolo.

**Question 7:** In Option One, is the County requesting the vendor to store and provide records and the rolls as needed?

**Answer 7:** Yes.

**Question 8:** In Option Two, would the County be willing to ship the hard copy documents by the County choice method of shipping or the vendor recommended method?

**Answer 8:** The County is open to the vendor's suggestions about shipping methods.

**Question 9:** In Option Two, will the County require the vendor to create duplicate and original [rolls and] then store the original and send the duplicate.

**Answer 9:** RFP paragraph 3.8.8 addresses this question.

**Question 10:** Since the County is requesting the rolls to be stored in the facility in Kansas, how is the vendor to provide the duplicate?

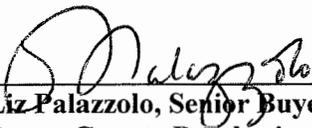
**Answer 10:** RFP paragraph 2.2.3(b) addresses this question. The vendor being acquired under this RFP does not store the duplicate roll for the Recorder's Office under Option One services.

Question 11: Would the County be acceptable to a storage facility near the vendor?

Answer 7: Yes. It is preferred that the storage center not be in Columbia, Missouri or Jefferson City, Missouri. The duplicate rolls for the three named County offices are already stored in Columbia, Missouri. The original rolls are stored for the Collector's Office and the Auditor's Office in Jefferson City, Missouri. Having geographic sites outside Columbia and Jefferson City ensures safe-keeping in the event of a natural or other disaster impacting the central Missouri locations.

This addendum is issued in accordance with the RFB Response Page in the Request for Bid and is hereby incorporated into and made a part of the Request for Bid Documents. Offerors are reminded that receipt of this addendum should be acknowledged and submitted with Offeror's *Response Form*.

By:

  
Liz Palazzolo, Senior Buyer  
Boone County Purchasing

OFFEROR has examined **Addendum #1** to Request for Bid #46-06DEC17 – *Computer Output to Microfilm, Microfilm Storage, and Scanning Service Term and Supply*, receipt of which is hereby acknowledged:

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Authorized Representative Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Representative Printed Name: \_\_\_\_\_

**COUNTY OF BOONE - MISSOURI**



**REQUEST FOR PROPOSAL  
FOR  
COMPUTER OUTPUT TO MICROFILM, MICROFILM  
STORAGE, AND SCANNING SERVICE  
TERM AND SUPPLY**

**RFP # 46-06DEC17**

*Release Date: November 3, 2017*

**Submittal Deadline:  
December 6, 2017  
not later than 2:00 P.M. CST**

Boone County Purchasing  
613 E. Ash Street  
Columbia, Missouri 65201

Liz Palazzolo, Senior Buyer  
Phone: (573) 886-4392 Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)



## NOTICE OF REQUEST FOR PROPOSAL

Boone County is accepting proposals in response to this Request for Proposals (RFP) for the following:

**RFP #: 46-06DEC17 – Computer Output to Microfilm, Microfilm Storage, And Scanning Services - Term and Supply**

Sealed proposals will be accepted until **2:00 P.M. on December 6, 2017** in the Boone County Purchasing Office, Room 109, located at 613 E. Ash Street, Columbia, MO 65201.

Request for Proposals are available in the Purchasing Office and requests for copies may be made by phone (573) 886-4392; fax (573) 886-4390 or e-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org).

Vendors may obtain further information on the Boone County Web Page at <http://www.showmeboone.com>.

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

*Insertion: Sunday, November 5, 2017*  
**COLUMBIA MISSOURIAN**



## 1. INTRUCTIONS AND GENERAL CONDITIONS

- 1.1 Delivery of Proposals: Sealed proposals, subject to Instructions and General Conditions and any special conditions set forth herein, will be received at the Boone County Purchasing office until the proposal closing date and time indicated herein for furnishing the County with services as detailed in the following request for proposal.
- 1.2 Proposal Closing: All proposals must be **delivered before 2:00 P.M.** Central Time on **December 6, 2017** to:
- Boone County Purchasing Department  
Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201-4460
- 1.2.1 The County will not accept any proposals received after 2:00 P.M.  
Late bids may be returned unopened if the vendor requests within ten (10) business days after bid opening. All returns will be made at the vendor's expense.
- 1.3 Sealed Proposals Required: Proposals must be submitted in a sealed envelope identified with the proposal number and date of closing. List the proposal number on the outside of the box or envelope and note "Response to Request for Proposal enclosed." No fax or electronic transmitted proposals will be accepted.
- 1.3.1 If the offeror chooses not to submit a proposal, please return the enclosed *No Bid Response Page* and note the reason.
- 1.4 Copies: The offeror is advised to submit one (1) original proposal, and two (2) copies of the proposal (for a total of three copies), plus an electronic copy of the original proposal on a thumb drive (USB memory stick).
- 1.5 Bid Opening: Proposals will be opened publicly shortly after 2:00 P.M. on December 6, 2017 but only the names of offerors will be read aloud at the proposal opening. Following contract execution or rejection of all proposal responses, all responses will become a part of the public record and will be released to any person or firm who requests access. **Missouri Sunshine Laws:** Due to applicable sunshine laws and regulations concerning public documents (e.g., Section 610.021 RSMo), the County's proposal file becomes part of the public record at time of contract execution or when all proposals have been rejected.

1.6 If the offeror has obtained this proposal document from the Boone County Purchasing Web Page or from a source other than the Boone County Purchasing Department, prior to submitting the proposal the offeror is advised to check with the Boone County Purchasing Department in order to ensure that the RFP solicitation package is complete, i.e., the offeror has all addenda and attachments as applicable. ***The Boone County Purchasing Department must not be responsible for providing RFP addenda if the vendor has not been added to the official Vendor list for this Request for Proposal.***

1.7 Guideline for Written Questions: ***All questions regarding this Request for Proposal should be submitted in writing, prior to the RFP opening and no later than 5:00 P.M., November 28, 2017*** (which allows enough time to issue an addendum answering the questions). All questions must be mailed, faxed or e-mailed to the attention of Liz Palazzolo. All such questions will be answered in writing, and such answers will be provided to all parties having obtained a Request for Proposal packet by the County by posting the addendum on the County Web site at [www.showmeboone.com](http://www.showmeboone.com) (Select Purchasing, then Current Bid Opportunities). Submit questions to:

Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymmo.org](mailto:lpalazzolo@boonecountymmo.org)

1.8 RFP Addenda: In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any addendum to this RFP is valid only if in writing and issued by the Boone County Purchasing Department. Verbal conversations or agreements with any officer, agent, or employee of the County which modify any terms or obligations of this RFP are invalid.



## 2. INTRODUCTION AND GENERAL INFORMATION

### 2.1 Introduction:

2.1.1 This document constitutes a request for sealed proposals for **Computer Output to Microfilm, Microfilm Storage, and Scanning Services - Term and Supply** as set forth herein.

2.1.2 Organization: This document, referred to as a Request for Proposal (RFP), is divided into the following parts:

- 1) Instructions and General Conditions
- 2) Introduction and General Information
- 3) Scope of Work
- 4) Proposal Submission Information
- 5) Vendor Response/Pricing Page(s)
- 6) Certification Regarding Debarment
- 7) Work Authorization Certification
- 8) "No Bid" Response Form
- 9) Attachments One and Two: Label Samples
- 10) Attachment Three: "Missouri Secretary of State Guidelines for Microfilming Public Records"
- 11) Attachment Four: Past Purchases Report
- 12) Attachment Five: Auditor's Records for Scanning
- 13) Boone County Standard Terms and Conditions

2.1.3 Purpose: The purpose of this Request for Proposal (RFP) is to obtain a contractor or contractors to provide **Computer Output to Microfilm Service as a Stand-Alone Service or in combination with Microfilm Storage Services, or with Scanning Services, or with both Microfilm Storage and Scanning Services** of Boone County records. The ultimate goal is to increase efficiency, improve customer service, preserve vital records from further damage, and effectively archive and manage the records inventory for the Boone County Recorder's Office, Collector's Office and Auditor's Office.

2.1.4 The County of Boone - Missouri, hereafter referred to as "County," proposes to contract with an individual(s) or organization(s), hereinafter referred to as the "contractor(s)" for a Term and Supply contract(s) for the service of converting computer records to microfilm, microfilm storage, and scanning services. While the needs of the various Boone County departments are similar, each office has specific needs related to records processing and storage. The proposed amount of work specified herein is based on history but it must be understood that the amounts are estimates and averages. Offerors responding to this RFP are required to quote fixed prices for specified work that includes all costs, i.e., equipment,

labor and material required to perform the work specified in this Request for Proposal.

2.1.5 This RFP requests the offeror to respond to the following in the described combinations shown in paragraph 2.1.6. The following defines the **Base Bid**, **Option One**, and **Option Two**:

- a. **The Base Bid: Conversion of Computer Output to Microfilm** is defined as the on-going conversion of multi-page TIFF or PDF files (or other formats that may be accepted by the County as the national standard format) to 35mm microfilm rolls. All three offices need on-going microfilming service. For this reason, there are three parts to the **Base Bid**, and the vendor must respond to all three parts in order to fully respond to the **Base Bid**: there is a **Base Bid** for the Boone County Recorder of Deeds Office, a **Base Bid** for the Boone County Collector's Office, and a **Base Bid** for the Boone County Auditor's Office.
- b. **Option One: Microfilm Storage** requires only the storage of microfilm which is needed only by the Boone County Recorder's Office.
- c. **Option Two: Scanning Service** requires only the scanning of historical records which is only needed by the Boone County Auditor's Office.

2.1.6 The Base Bid, Option One, and Option Two are described in greater detail herein. Offerors are invited to propose on only the following bidding combinations:

- a. Base Bid only;
- b. the Base Bid and Option One;
- c. the Base Bid and Option Two;
- d. Or, the Base Bid, and Options One and Two.

The only stand-alone offering that the County will accept is for Base Bid, on-going microfilm service. Boone County may award the Base Bid, Option One and/or Option Two. Boone County may award to multiple offerors or to one offeror ("all or none") whichever is in the best interests of Boone County. The County also reserves the right to make no contract award.

## 2.2 Background Information:

2.2.1 U.S. Imaging of Saginaw, Michigan is the current contractor providing computer output to microfilming services for the County. Contract **70-01DEC09** expires 12/31/17. Any questions about the current contract should be referred to the Buyer of Record in the Purchasing office.

2.2.2 Boone County is situated in Central Missouri and includes nine communities: six cities and three towns. The County has a population of approximately 175,000 and contains 685 square miles.

2.2.3 **The Boone County Recorder of Deeds** is an elected official who serves as a repository for public records relating to real estate, the Uniform Commercial Code, marriage licenses, tax liens, servicemen's discharges, and other miscellaneous documents. The service function of the office includes verification of documents presented for record, a cross-referencing retrieval system, and the permanent retention and preservation of records for public use.

- a. The Recorder of Deed's Office conducts its own scanning through an in-house system that uses Iscan software. Approximately 20,000 images are routinely scanned on a monthly basis by the Recorder's Office.
- b. The Recorder of Deed's Office requires off-site storage for the microfilm original rolls. Duplicate rolls are stored in Boone County Missouri through Underground Records Management, LLC located in Columbia, Missouri under contract #35-06SEP17.

2.2.4 **The Boone County Collector of Revenue** is the elected official responsible for collecting current and delinquent property taxes for the state, county, and various political subdivisions having authorized property tax levies within the county. The Collector collects for cities and towns within the County by separate contract as a service to those municipalities. The Collector is charged under Missouri statutes to use any legal means to collect delinquent taxes, fees, and special assessments.

- a. Tax records as far back as 1862 are maintained on microfilm and held for public use within the collector's office. The Boone County Collector's Office requires microfilming of current revenue records. Although records will not be transmitted on a routine monthly basis, the Collector's Office will establish a schedule for transmitting images to the contractor for conversion to microfilm.
- b. The Boone County Collector does not require off-site storage of microfilm records. Its original microfilm rolls are to be sent to the Missouri Secretary of State's office, and the duplicate rolls are to be sent to the Boone County Collector's Office for on-site storage.

2.2.5 **The Boone County Auditor** is an elected official responsible for the County's financial accounting, reporting, and budgeting activities. The County's annual financial statements and annual budget report are permanent records for the office; however, none of these permanent records have been microfilmed. Most of the records from 1994 forward exist in PDF format, although some are only available in hard-copy format. All records prior to 1994 exist in hard-copy format only. The Boone County Auditor intends to microfilm all existing permanent records and implement an annual process going forward to ensure that permanent records are microfilmed.

- a. Following the successful completion of scanning historic documents, and then converting them to microfilm, the Boone County Auditor's Office

intends to establish an annual schedule for transmitting images for conversion to microfilm.

- b. The Boone County Auditor does not require off-site storage services for microfilm records. Its original microfilm rolls are to be sent to the Missouri Secretary of State's office, and the duplicate rolls are to be sent to the Boone County Auditor's Office for on-site storage.



### 3. SCOPE OF WORK:

#### 3.1 **Base Bid: General Requirements for Converting Computer Output To Microfilm Service**

- 3.1.1 The contractor must perform conversion of computer output to microfilm for the Boone County Recorder of Deeds Office, the Boone County Collector's Office, and the Boone County Auditor's Office on an as needed, if needed basis. The contractor must understand and agree that other Boone County offices may choose to request the same service from the contractor at any time throughout the duration of the contract period. The contractor must agree to provide contracted services to other Boone County offices if requested at the same prices and under the same terms as stated herein.
- 3.1.2 Requirements of conversion of computer output to microfilm service that must apply to any office requesting service follow. The contractor must adhere to all performance requirements stated herein regardless of being requested/ordered by the Recorder, Collector, Auditor or other County offices.
- 3.1.3 In performing contractual services and producing microfilm for the County, the contractor must at minimum adhere to current Missouri Secretary of State "Guidelines for Microfilming Public Records" found at this website (see also **Attachment Three**): <http://www.sos.mo.gov/archives/pubs/mfmg>. **Attachment Three** is incorporated into the contract by reference.
- a. Records Retention: The contractor must understand and agree that state law requires human legible/readable copy of digital information, and the contractor's services must assist Boone County's compliance with Missouri Secretary of State requirements.
- 3.1.4 The contractor must have the ability to receive records in a variety of formats used by the specific County office, e.g., via CD, electronically submitted, FTP or other.
- 3.1.5 In producing microfilm for the County, the contractor must use equipment that is like or comparable to Kodak ImageGuard TM Processing Lab for processing the microfilm to archival standards as defined by the Association for Information and Image Management (AIIM) and the American National Standards Institute (ANSI).
- 3.1.6 The contractor must produce one original roll and one duplicate Silver Negative Halide 35 mm roll microfilm roll for all images sent to the contractor for microfilming.

- 3.1.7 Each roll of first-generation Silver Halide 35mm film (preservation master negative) must be inspected by the contractor frame by frame for visible defects and missing pages.
- 3.1.8 The contractor must review the digital images to ensure that there are no missing images.
- 3.1.9 The original microfilm if sent to the Missouri Secretary of State's Office for archiving by the County must be deemed acceptable by the Missouri Secretary of State. The contractor must correct any cited deficiency at no additional cost to the County.
- 3.1.10 The contractor must understand and agree that special conversion projects may be needed throughout the contract that the contractor must perform for the County upon request at quoted pricing on the Vendor Response page.

### **3.2 Images, Labelling and Indexing Requirements**

- 3.2.1 The contractor must understand and agree that the images contained on a roll of microfilm will be determined by the specific Boone County office requesting service. The contractor must provide advice if requested by the specific Boone County office at no additional cost.
  - a. Upon request, the contractor must work with the specific County office to provide an approximation of the total number of images that can be converted to microfilm rolls.
- 3.2.2 Regarding "Group 4," i.e., multi-page TIFF files (or other formats that may be accepted by the County as the national standard format), the contractor must keep the files in book and page order, or by file number as applicable.
- 3.2.3 The contractor must mark each roll as follows: as an "original" or "duplicate" as applicable, with a roll number, and with a brief description of the records contained.
- 3.2.4 Each microfilm roll must contain index marks indicating the beginning of each document and page consistent with Missouri Secretary of State Guidelines for Local Records Microfilming.
- 3.2.5 Labelling: The contractor must label the outside of the microfilm so that a user will have a clear understanding of the information contained on a specific roll. Microfilm labelling must include a designation of the images contained, such as, "deeds from January 1970 through December 1970."
  - a. The contractor must understand and agree that the specific Boone County office will identify the pre-arranged order where the microfilm rolls will begin and end, and the contractor must comply with the designated order.

- b. The contractor's recommendation regarding such labeling may be requested by the specific Boone County office; however, the contractor must understand and agree that the decision of the specific Boone County office regarding labeling to be used must be final.

- 3.2.6 The microfilm roll must contain blip marks indicating the beginning of each document and page.
- 3.2.7 The contractor shall insert an index of all documents on the microfilm at the beginning of each microfilm roll. The index image must describe the roll's entire contents and include the file names of the files that are stored on the microfilm, and include a date range from beginning to end.

### **3.3 Microfilm Quality and Testing Requirements**

- 3.3.1 Microfilm tapes must be processed with a leader and trailer on microfilm rolls sized in accordance with Missouri Secretary of State Guidelines.
- 3.3.2 Under no circumstances must microfilm have splices.
- 3.3.3 Upon request, the contractor must conduct a one-time application of brown-tone/silver-lock prior to storage in the pure vault at no additional charge to the County.
- 3.3.4 The contractor must conduct and document appropriate resolution, density, and methylene blue tests at intervals sufficient to ensure microfilm products meet or exceed the requirements defined in current State of Missouri Guidelines for Local Records Microfilming, and provide results to the specific Boone County office requesting service in a format identified by the County, e.g., written or e-mail, at no additional charge to the County.
- 3.3.5 The contractor must send certified results to the specific County office requesting service that addresses film resolution. Film resolution results must accompany each roll of first-generation film. Resolution test results must be no less than 110 lines/m for images captured by a planetary camera. The contractor must add a resolution and density target at the beginning of each roll.
- 3.3.6 Upon request, the contractor must send certified results for density that must accompany each roll of first and second-generation film to the specific County office that has requested service. The contractor must add a resolution and density target at the beginning of each roll.
- 3.3.7 Upon request, the contractor must send certified results of residual thiosulfate concentration that must accompany each roll of first and second-generation film to the specific County office that has requested service. The methylene blue test specified in ANSI PH4.8-1985 must be used to verify film quality.

### **3.4. Specific Microfilming Requirements for the Recorder of Deeds Office:**

- 3.4.1 In addition to the general requirements stated herein, and as part of performing microfilming services under the Base Bid, the contractor shall perform the following specific tasks for the Recorder of Deeds Office.
- 3.4.2 The contractor must receive Tagged Image Format File (TIFF) version 6 images (Tagged Image File Format – Group IV multi-page TIFF images on CD or electronically transferred) or other formats that may be accepted by the County as the national standard format from CD’s written by the Boone County Recorder of Deeds and convert them to human readable/legible images on 35mm roll microfilm. The images must be indexed with image marks that are compatible with the Recorder of Deed’s imaging platform and automated 35mm microfilm retrieval units.
- 3.4.3 The contractor must accept images that were originally scanned between 100 and 600 dpi. The amount of file space an image must occupy per page on average is 75KB to 100KB.
- 3.4.4 The contractor must scale the images to an image size on microfilm equivalent to that of a reduction ratio selective between 20:1 and 60:1.
- 3.4.5 The contractor must write images in sequential order on microfilm that will be consistent with the specific day’s book/page and roll/frame numbering scheme.
- 3.4.6 Approximate total number of images to be converted to microfilm rolls from January 1, 2018 through December 31, 2018 follow:

Department	Approximate # Images Per Year
Real Estate	228,000
Marriage	3,280
Oversized plats/surveys	220

- 3.4.7 Files will be sent monthly by the County Recorder to the contractor for conversion, or at other time intervals to be determined.
- 3.4.8 Storage of Film Negatives: The contractor shall provide an archival structure to store 35mm film negatives for the Recorder of Deeds Office, such as a Hollinger Metal Edge (or equivalent) microfilm negatives box. One Silver Halide 35mm film negative shall be stored offsite by the contractor in this archival structure. The archival structure must separate film that has been brown-toned/silver-locked from film that has not been brown-toned/silver-locked. Brown-tone/Silver-lock film must be stored in a “pure” vault only with other brown-toned/silver-locked film. Film that has not been brown-toned/silver-locked must be stored with other like film. The contractor shall be reimbursed at actual cost for each archival structure purchased for the Recorder of Deeds Office for storing the film negatives.
- 3.4.9 The contractor shall label the microfilm rolls using the labelling shown in **Attachment One.**

### **3.5 Specific Microfilming Requirements for the Collector's Office:**

3.5.1 The contractor's service must allow the Boone County Collector's Office to digitize its own records, and to convert the digital images to microfilm images. The contractor must conduct the conversion of annual tax book digital images to human readable/legible images on American National Standard Institute (ANSI) quality 35mm roll microfilm. The contractor must understand and agree that annual tax books for the County average approximately 21,000 PDF images per year, and in addition, special conversion projects may be needed throughout the contract.

3.5.2 The contractor must scale the images to an image size on microfilm to that of an appropriate reduction ratio that will be approved and accepted by the Missouri Secretary of State's Office. The Boone County Collector's Office is currently using a 16:1 reduction ratio for annual tax books.

3.5.3 The contractor must convert the digital images in the order received, e.g., typically Book and Page order or document number, to silver roll film at a 29x reduction ratio.

#### **3.5.4 Shipment Requirements:**

- a. Original rolls must be shipped by the contractor to the Missouri Secretary of State for storage and archiving.
- b. Silver duplicate rolls must be shipped by the contractor to the Boone County Collector's Office, 801 E. Walnut, Room 118, Columbia MO, 65203.
- c. The contractor must be responsible for all costs of shipping and freight to the appropriate location, e.g., the storage facility, the Missouri Secretary of State, or the County; all actual shipping and freight costs will be reimbursed to the contractor by the County. The contractor shall invoice for actual freight and shipping costs, and provide supporting documentation about said costs if requested by the County.
- d. All rolls produced shall meet the standards set by the Missouri Secretary of State's Office. A test roll must be produced by the contractor, and sent to the Missouri Secretary of State for approval by the Missouri Secretary of State prior to the contractor's processing the complete order. All rolls subsequently produced must be delivered with the same approved format before shipment.

### **3.6 Specific Microfilming Requirements for the Auditor's Office:**

3.6.1 The contractor's service must allow the Boone County Auditor's Office to digitize its own records, and to convert the digital images to microfilm images.

The Boone County Auditor will provide multiple-page financial reports for a specific fiscal year in PDF format that the contractor must convert to human readable/legible images on ANSI quality 35mm roll microfilm. The PDF records are available for fiscal years 1994 and forward. The approximate average number of PDF images per each report per fiscal year (January – December) follows:

- a. Annual Financial Report (200 pages)
- b. Single Audit Report (federal grants and financial assistance) (15 pages)
- c. Transaction Code Listing (2-3 pages)
- d. Chart of Accounts – Fund/Department Hierarchy (15 pages)
- e. Chart of Accounts – Account Code Descriptions (20 pages)
- f. Balance Sheet Reports (200 pages)
- g. Fund Revenues & Expenditures Report (150 pages)
- h. Encumbrance Activity Reports (200 pages)
- i. Subsidiary Ledger Activity Report (2000-2500 pages)

3.6.2 The Boone County Auditor will provide multiple-page budget reports for a specific fiscal year(s) in PDF format that the contractor must convert to human readable images on ANSI quality 35mm roll microfilm. Each budget report for a fiscal year on average contains approximately 500 pages. The PDF records are available for fiscal years 2003 and forward. The contractor must insert an index image on each microfilm roll to describe the roll's contents.

3.6.3 The contractor must understand and agree that the approximate total number of images to be converted to microfilm rolls for each fiscal year January 1<sup>st</sup> through December 31<sup>st</sup> from 1994 forward is 3,600.

3.6.4 The contractor must scale the images to an image size on microfilm to that of an appropriate reduction ratio that will be approved and accepted by the Missouri Secretary of State's Office.

3.6.5 The contractor must agree to work with the Boone County Auditor's Office to determine the number of documents contained on a roll, and to follow the final direction the Boone County Auditor decides.

3.6.6 Labelling options must be discussed with the Boone County Auditor, and the contractor must understand and agree that the decision of the Auditor must be final regarding the labelling used for Auditor work.

3.6.6 Shipment Requirements:

- a. Original rolls must be shipped by the contractor to the Missouri Secretary of State for storage and archiving.
- b. Silver duplicate rolls must be shipped by the contractor to the Boone County Auditor's Office, 801 E. Walnut, Room 304, Columbia MO, 65203.

- c. The contractor must be responsible for all costs of shipping and freight to the appropriate location, e.g., the Missouri Secretary of State, or the County; all actual shipping and freight costs will be reimbursed to the contractor by the County. The contractor shall invoice for actual freight and shipping costs, and provide supporting documentation about said costs if requested by the County.
- d. All rolls produced shall meet the standards set by the Missouri Secretary of State's Office. A test roll must be produced by the contractor, and sent to the Missouri Secretary of State for approval by the Missouri Secretary of State prior to the contractor's processing the complete order. All rolls subsequently produced must be delivered with the same approved format before shipment.

**3.7 Option 1: Requirements For Storage Of Microfilm For The Office Of The Recorder Of Deeds**

- 3.7.1 The contractor must understand and agree that the off-site storage services described are needed only by the Boone County Recorder of Deeds Office.
- 3.7.2 The contractor must provide permanent archival storage of all microfilm rolls and aperture cards. The contractor must understand that currently there are a total of 3,323 rolls of microfilm available from January 2009 to the present for storage.
- 3.7.3 The contractor must understand and agree that all records will remain the sole property of Boone County, Missouri. The contractor must never reproduce any records for anyone without the prior written consent from authorized personnel for Boone County.
- 3.7.4 The contractor must provide secure microfilm storage in a free standing, concrete or masonry structure of Type 4 protected, non-combustible heavy resistant construction as specified by the Standard Building Code, SBCCI. The storage facility must meet or exceed the recommendations of current State of Missouri Guidelines for Local Records Microfilming and must be equipped with intrusion and fire alarm systems that are monitored 24 X 7 X 365.
- 3.7.5 Storage Facility Requirements: The storage facility used by the contractor to store microfilm for the Boone County Recorder of Deeds Office shall meet the following minimum requirements:
  - a. The contractor must ensure that the storage facility must be equipped with inert gas fire suppression equipment.
  - b. The contractor must ensure that the storage facility must be fully climate-controlled.
  - a. The contractor must ensure that the storage facility's complete security and fire protection systems are protected by uninterrupted power supply(ies).

- d. The records storage facility must meet all applicable requirements of National Fire Protection Association (NFPA) 232-2000 (or current version).
  - e. The contractor must ensure that the storage facility policies, rules and methods meet current Association of Records Managers and Administrators (ARMA) standards.
- 3.7.6 Microfilm must be placed on peroxide-free plastic reels, and placed in a non-corroding material such as an acid-free box, or a peroxide-free plastic container with no rubber bands around the microfilm
- 3.7.7 The contractor must provide the capability to produce a high-quality copy from microfilm for any necessary replacement pages in the Recorder of Deed's books.
- 3.7.8 The contractor must provide any requested copy within 24-hours of the County's request. This turnaround must apply to all County requests including requests for a specific document that the contractor would need to retrieve and copy to fax/scan/e-mail to the County.
- 3.7.9 This turnaround must apply to all County requests including requests for a specific document that the contractor would need to retrieve and copy to fax/scan/e-mail to the County.
- 3.7.10 The contractor must provide duplicate diazo or Silver copies of microfilm rolls upon request by the County.
- 3.7.11 The contractor must provide a written, quarterly index of the County's stored record holdings to the Boone County Recorder's Office at no additional cost. In addition, the contractor must submit confirmation of receipt of County documents for storage when sent to the contractor via e-mail or other written method.
- 3.7.12 The contractor will be paid for shipping and transportation of records to the ANSI-certified storage facility. The County shall only pay actual charges for shipping and transportation. The contractor must provide actual invoicing upon request.
- 3.7.13 The contractor must provide computer indexing.

**3.8 Option Two: Requirements for Scanning Historical Records For the Auditor's Office:**

- 3.8.1 The contractor must understand and agree that only the Boone County Auditor's Office requires services described as "Option 2" services, i.e., the Collector's Office and the Recorder of Deed's Office do not require Option 2 service.

- 3.8.2 The Boone County Auditor will provide financial and budget reports for past fiscal years in hard-copy format that the contractor shall scan. Scanned documents shall then be converted to microfilm by the contractor following requirements stated under the Base Bid. All Option Two tasks performed by the contractor are focused only on scanning services.
- 3.8.3 The hard copy budget reports referenced below exist from approximately 1971 through 2003. The reports typically include plastic comb binding, card stock covers, and tabs. **Attachment Five** is provided to better illustrate the body of work that the Auditor's Office has for scanning. The approximate average number of pages per each historical report for any fiscal year is as follows:
- a. Annual Financial Reports (varies from 50 to 100 pages each report)
  - b. Single Audit Reports, e.g., federal grants and financial assistance (15 pages each report)
  - c. Annual Budget Reports (varies 100 to 200 pages each report)
- 3.8.4 The contractor shall perform scanning services for the quoted total guaranteed not to exceed price quoted on the Vendor Response and Pricing Pages. The total guaranteed not to exceed price shall include all labor, support, materials, supply, equipment, shipping and freight charges necessary to perform defined scanning services described in paragraph 3.8.3 above, including any travel, food and lodging that may be required if the contractor performs scanning services on-site in Boone County.
- a. If scanning is conducted on-site in County offices, the contractor shall make every effort to coordinate work space and time with the County, and shall conduct business in a professional manner consistent with working in a public governmental office.
  - b. The contractor shall understand and agree that the actual number of scanned pages may vary, and that all information provided herein including **Attachment Five** shall be considered non-binding on the County.
- 3.8.5 The contractor shall understand and agree that the Auditor's Office may request scanning of additional public records at a future time. There are additional permanent records (e.g., grants, etc.) with varying page numbers for various fiscal years the Auditor may request be scanned by the contractor, in addition to the scanning work described in paragraph 3.8.3 above. In the event that the contractor's scanning services are needed by the Auditor's Office, the contractor shall perform requested scanning in accordance with requirements stated herein. The contractor will be paid the applicable quoted price per page stated on the Vendor Response and Pricing Pages. Any mailing, freight, and shipping costs that may be incurred by the contractor will be reimbursed at actual expense.

The contractor shall provide supporting documentation for shipping costs upon request.

3.8.6 The contractor's work must be accurate. The contractor shall ensure that the scanned image made from the hard-copy image is legible/readable, that all pages within any report are scanned, that all page-ordering is maintained, and that all labelling such as tables of contents, indices, etc. are included in the scanned record.

3.8.7 All original material supplied to the contractor by the County shall be returned to the County upon completion of scanning service. While original binding need not be restored, all documents must be retained in the same order of pages, indexing, etc. as the original document. For any documents provided for future scanning as described in paragraph 3.8.5 above, the County shall pay shipping and handling charges.

3.8.8 The contractor shall provide a digital copy of all scanned documents to the Auditor's Office at no additional cost to the County. Costs for the digital copy shall be included in the total guaranteed not to exceed price for scanning services conducted as described in paragraph 3.8.4, or in the applicable per page price for scanning services conducted as described in paragraph 3.8.5.

3.8.9 The contractor shall provide no-cost consultation to include on-site visit(s) upon request of the Auditor's Office to plan scanning work and best options for the County.

**3.9 General Requirements For the Provision of Services for the Base Bid, Option 1 and Option 2:**

3.9.1 The contractor must understand and agree that all provisions stated in this section apply to the awarded contract in addition to requirements regarding provision of services described as the Base Bid, Option One, and Option Two.

3.9.2 The contractor must treat all records in a confidential manner.

3.9.3 Upon request by Boone County, the contractor must return all records to the County or other designated storage facility at the County's request in the original condition and arrangement, unless the County otherwise directs.

3.9.4 As applicable, the contractor must re-film any product not meeting contractual quality/standards at no additional cost to the County.

3.9.5 The contractor must provide a copy of any requested record within 24-hour's notice by an authorized County representative. Each document must be indexed by "book page" in the TIFF (or other format that may be accepted by County as the national standard format) image.

- 3.9.6 Sub-Contractors: The contractor must not employ subcontractors without the advance written permission of the County.
- 3.9.7 The contractor must allow inspection of the contractor's process at the request of the County.
- 3.9.8 The contractor must provide a final product that does not require any additional equipment (other than a reader or reader/printer) in order to use the film.
- 3.9.9 As applicable, the contractor must maintain the chronological order of all County records handled. Images must be returned in the same sequence as received by the contractor.
- 3.9.10 Invoices: The contractor must submit itemized invoices for completion of requested service, and submit the invoice as applicable to the specific County office ordering contractual service. Payment will be made within thirty (30) calendar days from receipt of an accurate monthly statement. The contractor's invoice must note any amount and invoices that are past due. Specific billing addresses for each specific office follow:
- a. Boone County Auditor, 801 E. Walnut, Room 304, Columbia, MO 65201
  - b. Boone County Collector, 801 E. Walnut, Room 118, Columbia, MO 65201
  - c. Boone County Recorder of Deeds, 801 East Walnut, Room 132, Columbia, MO 65201.
- 3.9.11 The contractor's invoices, packing slips and delivery tickets must contain the County contract number.
- 3.9.12 Warranty: The contractor warrants that the work including equipment and materials provided must conform to professional standards of care and practice in effect at the time the work is performed, be of the highest quality, and be free from all faults, defects, or errors. Whenever required by the specifications of the Request for Proposal, the contractor warrants that all equipment and materials provided must be new. If the contractor is notified in writing of a fault, deficiency or error in the work provided within one (1) year from completion of the work, the contractor must, at the County's option, either re-perform such portions of the work to correct such fault, defect or error, at no additional cost to the County, or refund to the County, the charge paid by the County, which is attributable to such portions of the faulty, defective or erroneous work, including the costs for re-performance of the work provided by other contractors.
- 3.9.13 Correction of Work: The contractor must promptly correct all work rejected by the County as faulty, defective, or failing to conform to these specifications whether observed before or after substantial completion of the work, and whether or not performed or completed, including rejection of the original microfilm roll by the Missouri Secretary of State's Office. The contractor must bear all costs of correcting such rejected work.

3.9.14 Insurance Requirements: The contractor must not commence work under the contract until they have obtained all insurance required under this paragraph and such insurance has been approved by the County, nor must the contractor allow any subcontractor to commence work on their subcontract until all similar insurance required of the subcontractor has been so obtained and approved. All policies must be in amount(s), form(s) and company(ies) satisfactory to the County which must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the County.

- a. The contractor must purchase and maintain in force, at its own expense, property insurance covering any loss or damage of the County owned records.
- b. Compensation Insurance: The contractor must take out and maintain during the life of the contract, Employee's Liability and Worker's Compensation Insurance for all of their employees employed at the site of work, and in case any work is sublet, the contractor must require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the contractor. Worker's Compensation coverage must meet Missouri statutory limits. Employers' Liability limits must be \$500,000.00 each employee, \$500,000.00 each accident, and \$500,000.00 policy limit. In case any class of employees engaged in hazardous work under the contract at the site of the work is not protected under the Worker's Compensation Statute, the contractor must provide and must cause each subcontractor to provide Employers' Liability Insurance for the protection of their employees not otherwise protected.
- c. Compensation General Liability Insurance: The contractor must take out and maintain during the life of the contract, such comprehensive general liability insurance as must protect them and any subcontractor performing work covered by the contract, from claims for damages for personal injury including accidental death, as well as from claims for property damages, which may arise from operations under this contract, whether such operations be by themselves or for any subcontractor or by anyone directly or indirectly employed by them. The amounts of insurance must be not less than \$1,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death. If the contract involves any underground/digging operations, the general liability certificate must include X, C, and U (Explosion, Collapse, and Underground) coverage. If providing Comprehensive General Liability Insurance, then the Proof of Coverage of Insurance must also be included.
- d. Owner's Contingent or Protective Liability and Property Damage: The contractor must provide the County with proof of Owner's Protective Liability and Property Damage Insurance, which must protect the County against any and all claims which might arise as a result of the operations

of the contractor in fulfilling the terms of this contract during the life of the contract. It is preferred that this policy includes a provision for damage, recovery, and cost of effort to replace damaged records. The minimum amounts of such insurance will be \$1,000,000.00 per occurrence, combined single limits. Should any work be subcontracted, these limits must also apply.

- e. Proof of Carriage of Insurance: The contractor must furnish the County with Certificate(s) of Insurance which name the County as additional insured in an amount as required in the contract, contain a description of the project or work to be performed, and requiring a thirty (30) day mandatory cancellation notice. In addition, such insurance must be on occurrence basis and must remain in effect until such time as the County has made final acceptance of the facility contracted.
  
- f. Indemnity Agreement: To the fullest extent permitted by law, the contractor must indemnify, hold harmless and defend the County, its directors, officers, agents, and employees from and against all claims, damages, losses and expenses (including but not limited to attorney's fees) arising by reason of any act or failure to act, negligent or otherwise, of the contractor, of any subcontractor (meaning anyone, including but not limited to consultants having a contract with contractor or a subcontract for part of the services), of anyone directly or indirectly employed by contractor or by any subcontractor, or of anyone for whose acts the contractor or its subcontractor may be liable, in connection with providing these services. This provision does not, however, require the contractor to indemnify, hold harmless, or defend the County of Boone from its own negligence.

3.9.15 Contract Terms and Conditions: The contractor must be prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its rights, title or interest therein, or its power to execute such agreement to any other person, company or corporation without the prior consent and approval in writing by the County.

3.9.16 Contract Period: The initial contract period shall run **Date of Award through December 31, 2018**. The contract shall have four (4), one (1)-year renewal periods, or any portion thereof, following the completion of the initial/original contract term. After the completion of the final renewal term, the contract will continue on a month-to-month basis until either party terminates the contract by providing the other party with thirty (30) calendar days prior written notice.

3.9.17 Cancellation Agreement: The County reserves the right to cancel the contract without cause by giving not less than thirty (30) calendar days prior notice to the contractor in writing of the intention to cancel, or with cause, if at any time the contractor fails to fulfill or abide by any of the terms or conditions specified. Failure of the contractor to comply with any of the provisions of the contract may be considered a material breach of contract and must be cause for immediate termination of the contract at the discretion of Boone County. Boone County may

allow the contractor reasonable opportunity to cure material breach, but is not required to do so.

- 3.9.18 Fiscal Non-Funding Clause: In the event sufficient budgeted funds are not available for a new fiscal period, the County must notify the provider of such occurrence and the contract must terminate on the last day of the current fiscal period without penalty or expense to the County.
- 3.9.19 Estimated Usage: All orders for Base Bid, Option One, and Option Two will be placed by the respective County office on an “as needed” basis. The services specified herein are estimates based on past usage and anticipated future requirements and as such, do not constitute a guarantee on the part of the County.
- 3.9.20 Pricing: The contract will be awarded on a firm, fixed price basis for the entirety of the initial/original contract period. Prices are subject to adjustment only upon renewal of the contract period, subject to quotations on the Vendor Response Page for the specific renewal period; adjusted pricing must be effective on the renewal date and must remain firm through the entirety of the specific renewal period.
- a. Price Increase: It shall be the responsibility of the contractor to notify the County sixty (60) calendar days prior to the end of the current contract period of any pending price increase which will take effect at the beginning of the ensuing renewal period.
  - b. If the option for renewal is exercised by the County, the contractor must agree that the prices for the renewal period must not exceed the maximum percent of increase for the applicable renewal period stated on the Vendor Response Pages of the contract.
  - c. If renewal percentages are not provided, then prices for the renewal period(s) shall be the same as during the initial/original contract period. All pricing adjustments shall be calculated using the initial/original pricing.
- 3.9.21 Confidentiality: The contractor must be responsible for maintaining the confidentiality of the County records and data, which cannot be sold, shared or otherwise disclosed to other companies or individuals without written permission from the County Employee Benefits Plan officials.



#### 4. PROPOSAL SUBMISSION INFORMATION

##### 4.1. SUBMISSION OF PROPOSALS:

4.1.1 When submitting a proposal, the offeror should include the **original and two (2) copies for a total of three (3) copies**. The offeror should also include an **electronic copy of the proposal on a removable storage drive**.

b. The offeror must submit the proposal to:

Boone County Purchasing Department  
Attn: Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, MO 65201

c. The proposals must be delivered no later than **2:00 P.M. on December 6, 2017**. Proposals will not be accepted after this date and time.

4.1.2 **Terms and Conditions:** The offeror agrees that by submitting an offer, Boone County's Terms and Conditions as incorporated herein must become part of the contract, and in the event of conflict between any terms the offeror submits, the terms and conditions of the County must govern.

##### 4.2 ORGANIZATION OF PROPOSAL:

4.2.1 To facilitate the evaluation process, the offeror is encouraged to organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein.

- a. Each distinctive section should be titled with each individual evaluation category and all material related to that category should be included therein.
- b. The signed response page from the original RFP and all signed amendments should be placed at the beginning of the proposal.
- c. The offeror is advised that the proposal should, at a minimum, address all mandatory and desired services, equipment, materials, etc. Responses will fully describe how the service will be performed and what hardware/software (if any) is required at the County to access the service.

- 4.2.2 The offeror is cautioned that it is the offeror's sole responsibility to submit information related to the evaluation categories, and that the County is under no obligation to solicit such information if it is not included with the proposal. The offeror's failure to submit such information may cause an adverse impact on the evaluation of the proposal. Any offeror whose responses deviate from the outlined specifications may automatically be disqualified.

#### **4.3 OFFEROR'S CONTACTS WITH PURCHASING:**

- 4.3.1 Offeror's Contacts: Offerors and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, the evaluation, etc. to the buyer of record indicated on the first page of this RFP. Offerors and their agents may not contact any County employee other than the buyer of record regarding any of these matters during the solicitation and evaluation process. Inappropriate contacts are grounds for suspension and/or exclusion from specific procurements. Offerors and their agents who have questions regarding this matter should contact the buyer of record.

#### **4.4 VALIDITY OF PROPOSAL RESPONSE:**

- 4.4.1 Offerors must agree that proposals must remain firm for a period of ninety (90) calendar days after the date specified for the return of proposals.

#### **4.5 EVALUATION OF PROPOSALS**

- 4.5.1 Evaluation and Award Process: After determining a responsible offeror and a responsive proposal through the determination that the proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluator(s) must use both objective analysis and subjective judgment in conducting a comparative assessment of the proposal. The evaluation will include an assessment of cost, the offeror's experience, expertise and reliability, proposed methodology, contractor support, and if requested by the County, an assessment of sample(s).
- 4.5.2 In order to conduct an evaluation of proposals, the vendor is advised to complete the Vendor Response Page, all parts, and to return the completed pages with the vendor's proposal. Failure to provide information necessary to evaluate the vendor's response may render the proposal incapable of award consideration. The County is not obligated to obtain information necessary for evaluation from the vendor. When evaluating responses, the County reserves the right to consider relevant information and fact, whether gained from the response, from a vendor, from the vendor's references, or from any other source.
- 4.5.3 After an initial evaluation process, a question and answer interview may be conducted with the offeror, if deemed necessary by the County. In addition, the offeror may be asked to make an oral presentation of their proposal to the evaluation team at a designated Boone County location. Attendance cost must be at the offeror's expense. All arrangements and scheduling will be coordinated by the County.

4.5.4 Competitive Negotiation of Proposals: The offeror is advised that under the provisions of this Request for Proposal, the County reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions must apply:

- a. Negotiations may be conducted in person, in writing, or by telephone.
- b. Negotiations will only be conducted with potentially acceptable proposals. The County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial evaluation phase.
- c. Terms, conditions, prices, methodology, or other features of the offeror's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the offeror may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.
- d. The mandatory requirements of the Request for Proposal must not be negotiable and must remain unchanged unless the County determines that a change in such requirements is in the best interest of the entities.

4.5.5 Evaluation of the Vendor's Experience, Expertise and Reliability: Experience, expertise, and reliability of the offeror's organization are considered subjectively in the evaluation process. Therefore, the offeror is advised to submit any information, which documents successful and reliable experience in past performances, especially those performances related to the requirements of this RFP, and outlines the expertise of key personnel who will be assigned tasks to perform for Boone County.

- a. Qualifications Statement/References/Certifications/Licenses: The offeror should provide the following information related to previous and current services/contracts performed by the Offeror's organization and any proposed subcontractors which are similar to the requirements of this RFP.
- b. State the names and capacity of the professional staff assigned to work on the County account and a brief resume of their background, experience and include any certifications. Indicate professional staff training history. Indicate professional staff experience. The proposal should also include how the professional personnel will operate organizationally and the name and the title of the person who will direct the work.
- c. Name other businesses or preferably any government agencies/municipalities for which the vendor has provided similar services in the last three (3) years and provide a current contact name, email address and phone number for each account.
- d. The offeror should submit a copy of all licenses, certifications, accreditation, and/or permits, which may be required by state, federal, and/or local law, statute, or regulation in the course of conduct of the

offeror's business. If not submitted with the proposal, the County reserves the right to request and obtain a copy of any license or certification required to perform the defined services prior to contract award.

4.5.6 Evaluation of the Vendor's Proposed Method of Performance and Sample Inspection: Proposals will be subjectively evaluated based on the offeror's distinctive plan for performing the requirements of the RFP. Therefore, the offeror should present a written narrative, which demonstrates the method or manner in which the offeror proposes to satisfy these requirements. The language of the narrative should be straightforward and limited to facts, solutions to problems, and plans of action. The County will be evaluating the offeror's adherence to mandatory performance requirements as well as other features of the offeror's proposed approach to performing the work described herein.

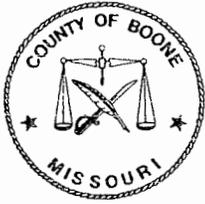
- a. Offerors are cautioned about the use of specific words in the RFP. Where the words "must" or "must" are used, they signify a required minimum function of system capacity that will heavily impact the offeror's final response rating. Where the words "should," "may" or "desired" are used, they signify that the feature or capacity is desirable but not mandatory; therefore, the specifications in question will possess minimal impact on the offeror's final response rating.
- b. The method by which the proposed method of performance is written will be left to the discretion of the offeror. However, the offeror should address each specific paragraph and subparagraph of the specifications by paragraph and page number as an item for discussion. Immediately below these numbers, write descriptions of how, when, by whom, with what, to what degree, why, where, etc, the requirements will be satisfied.

4.5.7 Samples: Boone County reserves the right to request samples as part of the evaluation process, i.e., before any contract award(s) is made. Boone County also reserves the right not to request a sample for evaluation if the County is otherwise familiar with the offeror's work, or deems a sample unnecessary for further evaluation. Boone County will provide data electronically to the offeror, and the offeror must be required to convert the image to microfilm and return it to the County for inspection. The offeror must understand and agree that all samples must be furnished free of expense to the County, and that the sample will not be returned by the County.

4.5.8 Rejection / Withdrawal of Proposals Response:

- a. Rejection of Proposals: The right is reserved by the County at its discretion to reject any or all proposals or parts thereof. The County reserves the right to waive defects or informalities, to negotiate with offerors and to accept the proposal deemed to be in the best interest of the County.

- b. Withdrawal of Proposals: Proposals may be withdrawn on written request from the offeror at the address shown in the solicitation prior to the time of acceptance.
- c. Negligence on the part of the offeror in preparing the proposal confers no right of withdrawal after the time fixed for the acceptance of the proposals.



5. VENDOR RESPONSE AND PRICING PAGES

In compliance with this Request for Proposal and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**NOTE:** The offeror must clearly state in writing any restrictions or deviations from specifications and requirements stated herein. In the absence of such statement, the County will assume that all items/services offered are in strict compliance with specifications stated in the RFP, including all technical and cost requirements, terms and conditions. The vendor must agree that the proposal if selected for award by the County will be included as part of the final contract with the County.

- CHECK BELOW WHICH OPTION(S) THE VENDOR IS RESPONDING TO:

BASE BID: \_\_\_\_\_

OPTION 1: \_\_\_\_\_

OPTION 2: \_\_\_\_\_

*(Continued on next page)*

**5.1. PRICING:**

**Computer Output to Microfilm Services, Storage, and Scanning Services:** The offeror has the option of quoting pricing for these combinations: the Base Bid for Computer Output to Microfilm Services only; the Base Bid for Computer Output to Microfilm Services and Option One for Microfilm Storage; or the Base Bid for Computer Output to Microfilm Services and Option Two for Scanning Services. The offeror may also propose the Base Bid and Options One and Two.

As applicable to the offeror's choice as described above, the offeror must submit firm, fixed pricing that includes all labor, materials, equipment, supplies, facilities and other costs for provision of services as defined herein.

Freight and shipping must not be built into quoted unit pricing since the County will reimburse for actual freight and shipping costs as apply specific to the order with the exception of line item 15 which is an all-inclusive total-guaranteed not to exceed price.

The vendor must price all identified line items within an identified bidding option, for example, the offeror must price line items 1-5 if choosing to provide Base Bid services. If choosing to provide the Base-Bid and Option One, then the offeror must quote pricing for items 1-14; and if the offeror is choosing to submit pricing for the Base Bid and Option Two, then the offeror must submit pricing for line items 1-5 and 15 through 17. Regardless of which pricing option the offeror chooses to submit, the offeror must also complete line items 18 through 21 for renewal option pricing adjustments.

ITEM	DESCRIPTION	UNIT PRICE
<b><u>BASE BID</u></b>	<p><b><u>BASE BID: COMPUTER OUTPUT TO MICROFILM SERVICE FOR ALL BOONE COUNTY OFFICES</u></b></p> <p>1. Master Roll: Converting Computer Output of regular legal/non-plat size images (e.g., 8-1/2" X 11", or 11" X 14", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image.</p> <p>The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.</p> <p>Pricing shall include the following consideration:</p> <ul style="list-style-type: none"> <li>• Boone County submits data by FTP, CD, DVD, or other electronic means.</li> </ul> <p>The per image price shall be captured on the master silver halide roll which is brown-toned/silver-locked. The finished roll is then sent for storage either in the pure vault outsourced to Underground Vaults &amp; Storage in Hutchison, Kansas, or to another site designated by Boone County for the Recorder of Deed's Office; or sent to the Missouri Secretary of State's Office for the Collector's Office and the Auditor's Office.</p>	\$ _____/regular legal/non-plat image on the Master Roll

2. Master Roll: Converting Computer Output of plat size mages (e.g., 12" X 18", or 24" X 36", etc.) to Microfilm (i.e., the conversion of TIFF, pdf, or other electronic images to 35mm microfilm images) – Firm, Fixed Price Per Image. \$ \_\_\_\_\_/plat-size image on the Master Roll

The firm, fixed price per image shall include all costs for processing the microfilm imaging including the cost of the film, reel, and other materials/supplies.

Pricing shall include the following consideration:

- Boone County submits data by FTP, CD, DVD, or other electronic means.

The per image price shall be captured on the master silver halide roll which is brown-toned/silver-locked. The finished roll is then sent for storage either in the pure vault outsourced to Underground Vaults & Storage in Hutchison, Kansas, or to another site designated by Boone County for the Recorder of Deed's Office; or sent to the Missouri Secretary of State's Office for the Collector's Office and the Auditor's Office.

3. Duplicate Roll: 35mm Silver Duplicate Roll, minimum 100-foot/roll, that is automatically treated with brown-tone/silver-lock, and then sent to the County for local storage. \$ \_\_\_\_\_/duplicate roll
4. Cost for index labelling at beginning of each microfilm roll: \$ \_\_\_\_\_/roll
5. One-time application of brown-tone/silver-lock to pre-existing film for storage in pure vault. \$ \_\_\_\_\_/roll

**OPTION ONE BID**

**OPTION ONE – MICROFILM STORAGE FOR THE RECORDER'S OFFICE**

6. Storage of box of silver duplicate brown-toned/silver-locked microfilm rolls, or aperture cards, in a pure vault at a Boone County designated facility such as the Underground Vault & Storage facility in Hutchison Kansas (UV & S) or other facility designated by the County. A box contains 24 rolls of microfilm or 2,000 aperture cards. This price shall include all other applicable fees such as a one-time new receipt of material fee. \$ \_\_\_\_\_/year/box

**Retrieval and Refiling of Stored Microfilm Rolls or Aperture Cards**

- |                                                    | <u>Retrieval</u>      | <u>Refile</u>         |
|----------------------------------------------------|-----------------------|-----------------------|
| 7. <u>Quantity</u><br>Range:<br>1-5<br>rolls/cards | \$ _____/roll or card | \$ _____/roll or card |

- |    |                            |                       |                          |
|----|----------------------------|-----------------------|--------------------------|
| 8. | Range:<br>6-10 rolls/cards | \$ _____/roll or card | \$ _____/roll or card    |
| 9. | 11+ rolls/cards            | \$ _____/roll or card | \$ _____/roll or<br>card |

**Retrieval of a specific image from a microfilm roll or aperture card.**

- |     |                                            |                    |
|-----|--------------------------------------------|--------------------|
| 10. | Microform Hard copies (per<br>print)       | \$ _____/print     |
| 11. | Photocopier                                | \$ _____/print     |
| 12. | Fax                                        | \$ _____/print     |
| 13. | Silver or diazo duplicate roll<br>of film. | \$ _____/roll      |
| 14. | Research/Retrieval Service,<br>Per Hour    | \$ _____/ per hour |

**OPTION  
TWO  
BID**

**OPTION TWO –  
SCANNING SERVICES  
OF HARD-COPY  
HISTORICAL RECORDS  
FOR THE AUDITOR’S  
OFFICE**

- |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                            |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| 15. | <p><b>Total Guaranteed Not To Exceed Price for Scanning Work:</b> Quote a total guaranteed not-to-exceed price that shall be firm and fixed to conduct the scanning work described in paragraphs 3.8.3 - 3.8.4 herein for the Auditor’s Office. The quoted total shall include all labor, support, materials, supply, equipment, the digital copy addressed in paragraph 3.8.8, shipping and freight charges necessary to perform defined scanning services including any travel, food and lodging that may be required if the contractor performs scanning services on-site in Boone County.</p> | \$ _____/total<br>guaranteed not to exceed |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|

16. **Per Page Scanning Price:**  
Quote a total price per 8.5 X 11 page for scanning hard-copy records for the Auditor's Office that will be in addition to the scanning work described in paragraph 3.8.4 herein (see paragraph 3.8.5 regarding future scanning work that may be required).

\$ \_\_\_\_\_/page  
8.5 X 11

The quoted per price shall be considered firm and fixed and must include all labor, equipment, the digital copy addressed in paragraph 3.8.8, and other materials costs, including travel food and lodging if scanning will be conducted on-site in Boone County. Shipping and handling charges will be reimbursed at actual cost if scanning is done off-site.

17. **Per Page Scanning Price:**  
Quote a total price per non-standard size, i.e., not 8.5 X 11, page for scanning hard-copy records for the Auditor's Office that will be in addition to the scanning work described in paragraph 3.8.4 herein (see paragraph 3.8.5 regarding future scanning work that may be required).

\$ \_\_\_\_\_/page  
non-standard size

The quoted per price shall be considered firm and fixed and must include all labor, equipment, including the digital copy addressed in paragraph 3.8.8, and materials costs, including travel food and lodging if scanning will be conducted on-site in Boone County. Shipping and handling charges will be reimbursed at actual cost if scanning is done off-site.

charges will be reimbursed at actual cost if scanning is done off-site.

**5.2 Renewal Options – Apply to all line items, i.e., for the Base Bid, Option One and Option Two**

The County must have the sole option to renew the contract in one-year increments, or any portion thereof, for a total accumulated period of four (4) additional years following the initial term. If the options are exercised, pricing must be the same as quoted for the initial contract period subject to the specific percentage of price adjustment quoted below for the applicable renewal contract period. Prices for the renewal period must not exceed the maximum percent of increase for the applicable renewal period stated on the Pricing Page of the contract.

The vendor must respond with a firm, fixed percentage of increase or decrease. Do not quote BOTH a Maximum Increase and a Minimum Decrease – quote one or the other. Statements such as "a percentage of the then-current price" or "consumer price index" are NOT ACCEPTABLE i.e., reference to a CPI adjustment shall be deemed unacceptable.

If a percentage is not proposed (i.e., left blank), the County must have the right to execute the option at the same price(s) proposed for the initial contract period.

In conducting the cost evaluation, Boone County will evaluate pricing that determines the potential maximum financial liability to the County.

**All percentages must be applied to the firm pricing quoted for the initial contract period.** The offeror is cautioned that percentages that are the same value for successive renewal options must be calculated against original, not compounded, pricing.

**18. Renewal Option Percentage Price Adjustment**

**1<sup>st</sup> Renewal Period: January 1, 2019 – December 31, 2019**

\_\_\_\_\_ %  
Applied to original bid pricing  
Vendor must identify below by checking appropriately as an INCREASE  
OR DECREASE: Maximum Increase: \_\_\_\_\_  
OR Minimum Decrease: \_\_\_\_\_

**19. Renewal Option Percentage Price Adjustment**

**2<sup>nd</sup> Renewal Period: January 1, 2020 – December 31, 2020**

\_\_\_\_\_ %  
Applied to original bid pricing  
Vendor must identify below by checking appropriately as an INCREASE  
OR DECREASE: Maximum Increase: \_\_\_\_\_  
OR Minimum Decrease: \_\_\_\_\_

20. **Renewal Option Percentage Price Adjustment**

3<sup>rd</sup> Renewal Period: January 1, 2021 – December 31, 2021

\_\_\_\_\_ %  
Applied to original bid pricing  
Vendor must identify below by checking appropriately as an INCREASE  
OR DECREASE: Maximum Increase: \_\_\_\_\_  
OR Minimum Decrease: \_\_\_\_\_

21. **Renewal Option Percentage Price Adjustment**

4<sup>th</sup> Renewal Period: January 1, 2022 – December 31, 2022

\_\_\_\_\_ %  
Applied to original bid pricing  
Vendor must identify below by checking appropriately as an INCREASE  
OR DECREASE: Maximum Increase: \_\_\_\_\_  
OR Minimum Decrease: \_\_\_\_\_

5.3 **Vendor's Experience, Expertise and Reliability:**

The evaluation of the vendor's proposed experience, expertise, and reliability must be subjective based on the ability of the vendor to perform the requirements stated herein. Therefore, the vendor should present detailed information regarding their experience and reliability. The following information should be provided by the vendor in order to assist Boone County in evaluation of the vendor's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Failure to submit requested information may negatively impact the evaluation of the proposal. The County is under no obligation to obtain information from the vendor not submitted with the proposal that may impact the subjective evaluation of the vendor's proposal.

**Company History:** The vendor should describe in the available space the company's background in computer output to microfilm services, e.g., when the company was founded, how long the company has been serving the Missouri market, etc:

**Vendor's References:**

Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

Company/Entity Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

**Personnel Expertise Summary:**

Expertise of **key personnel** who will be assigned tasks as defined herein will be considered in the subjective evaluation of proposals. The vendor should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform computer output to microfilm services. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

Organizational Chart - In addition, the vendor should provide an organizational chart showing the staffing and lines of authority for the key personnel to be used. The organizational chart should include (1) The relationship of service personnel to management and support personnel, (2) The names of the personnel and the working titles of each, and (3) Any proposed subcontractors including management, supervisory, and other key personnel. The organizational

chart should outline the team proposed for this project and the relationship of those team members to each other and to the management structure of the vendor's organization.

(Also attach resumes for key personnel)

Personnel	Background and Expertise of Personnel
1. _____ (Name)	
_____	
(Title)	
2. _____ (Name)	
_____	
(Title)	
3. _____ (Name)	
_____	
(Title)	
4. _____ (Name)	
_____	
(Title)	

**Vendor's Proposed Method of Performing Computer Output to Microfilm Services**

The offeror should complete the following table to indicate clearly what service the offeror is proposing: Then the offeror should complete the applicable identified questions specific to offering the Base Bid, the Base and Option One, and/or the Base Bid and Option Two.

5.4

Check below as applicable:

Offering	Check if Proposing
Base Bid	
Base Bid and Option One	
Base Bid and Option Two	
Base Bid, Options One and Two	

**Cooperative Procurement:** The vendor should indicate by checking "Yes" or "No" in the indicated space if the vendor will honor the submitted prices and terms for purchase by other

entities in Boone County that participate in cooperative purchasing with Boone County, Missouri?

\_\_\_\_\_ Yes \_\_\_\_\_ No

**BASE BID**

The offeror should complete the following for the Base Bid:

- A. The vendor should describe the format(s) the vendor can accept for electronic records submission e.g., TIFF, pdf, on DVD, CD, e-mail, etc.:

\_\_\_\_\_  
\_\_\_\_\_

- B. The vendor should describe the equipment used for microfilm processing

\_\_\_\_\_  
\_\_\_\_\_

- C. The vendor should describe its review processes for ensuring microfilm quality and accuracy:

\_\_\_\_\_  
\_\_\_\_\_

- D. The vendor should describe typical labeling and indexing processes used to ensure microfilm quality and accuracy:

\_\_\_\_\_  
\_\_\_\_\_

- E. The vendor should describe its microfilm quality testing policies and methods:

\_\_\_\_\_  
\_\_\_\_\_

- F. The vendor should describe its shipping policies, methods, chain of custody regarding shipment of finished microfilm rolls:

\_\_\_\_\_  
\_\_\_\_\_

- G. How would hand-written documents need to be prepared for microfilming and does the offeror or would the County perform the preparation work

\_\_\_\_\_  
\_\_\_\_\_

**OPTION ONE**

If offering **Option One** in addition to the Base Bid, complete the following

A. The vendor should identify the physical location(s) for proposed storage of microfilm rolls, and address how the storage facility meets security/safe-keeping requirements:

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---

B. The vendor should address the construction materials of the building proposed for storage, including the fire resistance rating of building materials, roofing and flooring materials, and in general how the building is specifically enabled to provide safe-keeping:

---

---

C. The vendor should address details about the security system in place at the proposed storage facility:

---

---

D. The vendor should address security policies and protocol in place at the proposed storage facility:

---

---

E. Describe the access policy for retrieval of microfilm rolls and aperture cards given the following routines:

- "normal" retrieval process which is for document replacement only
- and "disaster recovery" which is for the complete roll(s).

The vendor should specifically describe the Authorization Form(s) used to protect the records through access.

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F. If permanent archival storage is sub-contracted, the offeror must identify all subcontractors, their assigned tasks that they will perform under the contract, and provide information as well as data regarding the subcontractor's policies, rules, and standards for storage as applicable to their subcontracted role under the contract:

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G. The vendor should describe disaster recovery measures that are in place at the storage facility:

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---

---

H. Storing: Address how boxes are stacked and moved in the storage facility:

---

I. Access Control: Address how the vendor will restrict access to confidential records in storage:

---

J. Disaster Recovery: Address the vendor's disaster preparedness plan and what policies and protocol the vendor has in place to move stored documents threatened by natural or other disasters:

---

---

K. Communication: Address communication with the County in the event stored documents have to be moved:

---

---

L. Return Process: The vendor should describe the process for the transport of records back to Boone County upon termination of the contract, and any fees associated with the transfer.

---

---

---

M. Describe the offeror's "chain of custody" procedure for both receiving documents from the County and sending documents back to the County:

---

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**OPTION TWO**

If offering **Option Two** in addition to the Base Bid, complete the following:

A. Identify a "best-practice" approach to scanning several years of hard-copy fiscal year and budget reports, and other related documentation such as grants for preparation for microfilming:

---

---

B. Identify any requirements the vendor has about the submission of hard-copy records:

---

---

C. Address whether the vendor removes paperclips, staples, binding, tapes split pages, etc. or would the County have to prepare the records before scanning can be conducted:

---

---

D. If the County prepares documents for scanning by removing paperclips, staples, binding, taping split pages, etc., would the County realize a cost-savings?

---

---

E. Address if the vendor will be conducting scanning on-site in Boone County or off-site at the contractor's location. If scanning will be done off-site, identify the name of the site and its location (city, state):

---

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F. Provide the number of hours estimated to complete all scanning work as described in **Attachment Five** that are built into the total guaranteed not to exceed price quoted for item #15. If different personnel classifications are involved, then itemize the number of hours by classification and rate.

---

---

*(The vendor should complete and return with the proposal)*

**Certification Regarding  
Debarment, Suspension, Ineligibility and Voluntary Exclusion  
Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98 Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS FOR  
CERTIFICATION)

- (1) The prospective recipient of Federal assistance funds certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant must attach an explanation to this proposal.

---

Name and Title of Authorized Representative

---

Signature

---

Date

Liz Palazzolo  
Senior Buyer



Boone County Purchasing  
613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390

### INSTRUCTIONS FOR COMPLIANCE WITH HOUSE BILL 1549

House Bill 1549 addresses the Department of Homeland Security's and the Social Security Administration's E-Verify Program (Employment Eligibility Verification Program) that requires the County to verify "lawful presence" of individuals when we contract for work/service; verify that contractor has programs to verify lawful presence of their employees when contracts exceed \$5,000; and a requirement for OSHA safety training for public works projects.

The County is required to obtain certification that the bidder awarded the attached contract participates in a federal work authorization program. To obtain additional information on the Department of Homeland Security's E-Verify program, go to:

[http://www.dhs.gov/xprevprot/programs/gc\\_1185221678150.shtm](http://www.dhs.gov/xprevprot/programs/gc_1185221678150.shtm)

Please complete and return form *Work Authorization Certification Pursuant to 285.530 RSMo* if the contract amount is in excess of \$5,000. Attach to this form the *E-Verify Memorandum of Understanding* that the vendor completed when enrolling. The link for that form is:

<http://www.uscis.gov/files/nativedocuments/save-mou.pdf>

Additional information may be obtained from:

<http://www.uscis.gov/files/nativedocuments/MOU.pdf>

If the vendor is an Individual/Proprietorship, then the vendor must return the attached *Certification of Individual Bidder*. On that form, the vendor may do **one of the three options** listed. Be sure to attach any required information for those options as detailed on the *Certification of Individual Bidder*. If the vendor chooses option number two, then the vendor will also need to complete and return the attached form *Affidavit*.



**CERTIFICATION OF INDIVIDUAL BIDDER**

Pursuant to Section 208.009 RSMo, any person applying for or receiving any grant, contract, loan, retirement, welfare, health benefit, post-secondary education, scholarship, disability benefit, housing benefit or food assistance who is over 18 must verify their lawful presence in the United States. Please indicate compliance below. Note: A parent or guardian applying for a public benefit on behalf of a child who is citizen or permanent resident need not comply.

**Options**

- \_\_\_\_\_ 1. I have provided a copy of documents showing citizenship or lawful presence in the United States. (Such proof may be a Missouri driver's license, U.S. passport, birth certificate, or immigration documents). Note: If the applicant is an alien, verification of lawful presence must occur prior to receiving a public benefit.
  
- \_\_\_\_\_ 2. I do not have the above documents, but provide an affidavit (*copy attached – see following page*) which may allow for temporary 90-day qualification.
  
- \_\_\_\_\_ 3. I have provided a completed application for a birth certificate pending in the State of \_\_\_\_\_. Qualification must terminate upon receipt of the birth certificate or determination that a birth certificate does not exist because I am not a United States citizen.

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name





**"No Bid" Response Form**

**Boone County Purchasing**  
613 E. Ash Street, Room 109  
Columbia, MO 65201

Liz Palazzolo, Senior Buyer  
(573) 886-4392 Fax: (573) 886-4390  
E-Mail: lpalazzolo@boonecountymo.org

**"NO BID RESPONSE FORM"**

**NOTE: THE VENDOR SHOULD COMPLETE AND RETURN THIS FORM ONLY IF THE VENDOR DOES NOT WANT TO SUBMIT A BID**

If the vendor does not wish to respond to this bid request, but would like to remain on the Boone County vendor list **for this service/commodity**, please remove form and return to the Purchasing Department by mail, e-mail or fax.

**Bid: RFP #46-06DEC17 - Computer Output to Microfilm, Microfilm Storage, and Scanning Services**

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Contact: \_\_\_\_\_

Date: \_\_\_\_\_

Reason(s) for Not Submitting Proposal Response :

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ATTACHMENT ONE**

**Microfilm Labels – Recorder of Deeds**

The following is an example of the labels to be placed on the microfilm rolls for the Recorder of Deeds:

Label for Real Estate as follows:

**Nora Dietzel, Boone County Recorder of Deeds,  
801 E. Walnut, Room 132, Columbia, MO 65201  
573-886-4345**

**Real Estate**

Book 1900 through 1955  
Microfilm Roll # \_\_\_\_\_  
Film type: SILVER ORG. or DUPL. OR DIAZO

Label for Marriage as follows:

**Nora Dietzel, Boone County Recorder of Deeds,  
801 E. Walnut, Room 132, Columbia, MO 65201  
573-886-4345**

**Marriage**

Filing Number 20010001 through 20011100  
Microfilm Roll # \_\_\_\_\_  
Film type: SILVER ORG. or DUPL. OR DIAZO

Label for Tax Liens as follows:

**Nora Dietzel, Boone County Recorder of Deeds,  
801 E. Walnut, Room 132, Columbia, MO 65201  
573-886-4345**

**Tax Liens**

Filing Number 20010001 through 20010500  
Microfilm Roll # \_\_\_\_\_  
Film type: SILVER ORG. or DUPL. OR DIAZO

Label for Plats/Surveys as follows:

**Nora Dietzel, Boone County Recorder of Deeds,  
801 E. Walnut, Room 132, Columbia, MO 65201  
573-886-4345**

**Plats/Surveys  
Book 1950 through 1965**

Microfilm Roll # \_\_\_\_\_  
Film type: SILVER ORG. or DUPL. OR DIAZO

**ATTACHMENT TWO**

**Microfilm Labels – Collector of Revenue**

The following is an example of the labels to be placed on the microfilm rolls for the **Collector of Revenue**:

Labels for Real Estate as follows:

**Brian McCollum, Boone County Collector of Revenue**

801 E. Walnut, Room 118, Columbia, MO 65201

573-886-4285

**YEAR                      Real Estate Index - Alpha Order**

Microfilm Roll #  
\_\_\_\_\_

Film type: SILVER ORIGINAL OR DUPLICATE

**Brian McCollum, Boone County Collector of Revenue**

801 E. Walnut, Room 118, Columbia, MO 65201

573-886-4285

**YEAR                      Real Estate - Parcel Order**

Microfilm Roll #  
\_\_\_\_\_

Film type: SILVER ORIGINAL OR DUPLICATE

Label for Personal Property as follows:

**Brian McCollum, Boone County Collector of Revenue**

801 E. Walnut, Room 118, Columbia, MO 65201

573-886-4285

**YEAR                      Personal Property - Alpha Order**

Microfilm Roll #  
\_\_\_\_\_

Film type: SILVER ORIGINAL OR DUPLICATE

## STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Contractor must comply with all applicable federal, state, and local laws and failure to do so, in County's sole discretion, must give County the right to terminate this Contract.
2. Responses must include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
3. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
4. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid. The Purchasing Director reserves the right, when only one bid has been received by the bid closing date, to delay the opening of bids to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) bid received will be retained unopened until the new Closing date, or at request of bidder, returned unopened for re-submittal at the new date and time of bid closing.
5. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
6. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
7. The delivery date must be stated in definite terms, as it will be taken into consideration in awarding the bid.
8. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
9. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
10. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
11. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
12. No bid transmitted by fax machine or e-mail will be accepted.
13. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
14. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase from other vendors.
15. The County, from time to time, uses federal grant funds for the procurement of goods and services.

Accordingly, the provider of goods and/or services must comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the *Federal Transit Administration's Best Practices Procurement Manual – Appendix A*. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.

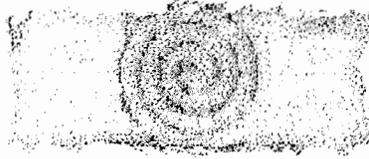
16. In the event of a discrepancy between a unit price and an extended line item price, the unit price must govern.
17. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor must issue a refund check to the County for any over-charges within 30-days of being notified of the same.
18. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County on all transfer documents** including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
19. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.

*End of Document*

ATTACHMENT THREE

RFP#46-06DEC17

Computer Output to Microfilm,  
Microfilm Storage, and Scanning Services



# Guidelines for Microfilming Public Records

**Developed by the  
Local Records Preservation Program,  
Missouri State Archives**

**Last Update: 09/30/2011**



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Other records management publications available through the *website of the Secretary of State* include:

- Conservation Notes* (brief technical leaflets on care of records)
- Digital Imaging Guidelines*
- E-Mail Records Guidelines*
- Preservation Concerns in Planning a Records Center*
- Retention Schedules for County & Municipal Offices & Governmental Districts*
- Statement on Acceptance of Microfilm Created from Digital Sources*
- Supplies & Services for Preservation* (a list of vendors)

Address inquiries to:

Missouri State Archives  
 Local Records Preservation Program  
 Office of the Secretary of State  
 P. O. Box 1747  
 Jefferson City, MO 65102  
 (573) 751-9047  
 E-mail: [local.records@sos.mo.gov](mailto:local.records@sos.mo.gov)  
<http://www.sos.mo.gov/archives/localrecs/program.asp>

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# 1. Introduction

One of the many services provided by the Local Records Preservation Program (a division of the Missouri State Archives) is promoting records management through the appropriate use of microfilm. The staff of the Local Records Program has prepared these guidelines to help local officials ensure that their microfilm meets the necessary criteria to ensure it will be a permanent and useful replacement for paper records.

In an age when computers increasingly pervade every aspect of daily life, microfilm has remained a reliable way to preserve permanent and historical documents. The Secretary of State's Office follows the standards set forth by the American National Standards Institute and the National Archives in accepting microfilm as the only reliable way to substitute for paper records.

Microfilm is accepted as evidence in legal proceedings. Missouri law on public and business records specifies that microfilm copies are legally admissible as evidence in lieu of the original (RSMo 109.130). The conditions governing the admissibility of microfilm require that the micrographic, photostatic, or photographic reproductions of the original writings or records meet the guidelines of RSMo 109.120.

Optical disc systems, such as CD or DVD, have many advantages, but that technology *cannot* create archivally secure information. Among the advantages are improved access and easy dissemination of information. However, digital media have short life expectancy due to evolving technology, and these digital media cannot be considered an archival format. Additional information about electronic records is available *through the Secretary of State's website* at <http://www.sos.mo.gov/records/recmgmt/resources.asp>.

In many organizations, microfilm is being viewed as a "platform for digital access." That is, archives and records offices are recognizing that only microfilm can provide the longevity that is required, but they are also embracing the use of digital technologies for enhanced access (including Web access) to the records. In this "hybrid-system" approach, offices create microfilm that meets the requirements outlined in these *Guidelines* with the intent to migrate the film images to a digital format – either immediately, or sometime in the future. By following the specifications offered in these *Guidelines*, you can have the best of both worlds: a permanent microfilm product that will meet the long-term needs of users, and a product that can be migrated efficiently to a digital format.

Even when an official commits to microfilm the permanent records – either to ensure the safety of the records or to reduce storage space requirements – room still exists for error. It is not enough merely to ensure the microfilm is legible. The longevity and usefulness of microfilm requires that standards be followed in all these areas:

- ❖ The film must be on polyester base, and it must have an LE (for "life expectancy") rating of 500 years.
- ❖ Photographic work at the camera must follow standards to ensure a user-friendly product.
- ❖ Processing and duplication of the film must conform to national standards.
- ❖ Quality-control inspections must be done to ensure conformity with standards and instructions.
- ❖ The film must be stored in a facility that meets national standards for temperature, humidity, air quality, and other factors.

Education is necessary for vendors and local government officials who are just beginning to explore the world of high-quality preservation microfilming. These *Guidelines for Microfilming Public Records* outline the standards that will ensure your information will be secure and available in the future. They also offer recommendations about specifications that will facilitate the migration of microfilm to

a digital format. These guidelines must be followed to ensure that long-lasting, readily usable microfilm is created.

If you receive a grant from this office, you must follow these *Guidelines*. Therefore, it is recommended that you share this publication with your vendor, so that the vendor can assure you that all standards can be met and that the microfilm will not be rejected after Local Records inspection. Having these *Guidelines* in hand may also affect the vendor's cost estimate; since these specifications are more strict than conventional office microfilming, the prices for *preservation* microfilming will generally be higher.

If you are microfilming with your own funds and are interested in storing the master copy of your permanent records on microfilm in the vault at the State Archives, your film must meet these standards. Therefore, your staff must assure that the film conforms to the specifications described in these *Guidelines*.

If you are filming independently and have no wish to store your film with the Archives, this information will still provide you with specifications to ensure that you get the high-quality product you want.

We applaud your efforts to mainstream your office through more efficient records management and your foresight to preserve Missouri's heritage through its historical documents.

## 2. When to Microfilm

In deciding whether a local government needs a microfilming program, the following should be considered:

- ❖ Microfilm can reduce the space devoted to records storage by 98 percent by replacing paper records.
- ❖ Microfilm can simply provide a backup security copy for paper records.
- ❖ Microfilm can eliminate excessive wear on the original records by providing a surrogate for viewing.
- ❖ Microfilm can allow greater efficiency in serving the record needs of the public since a user/reference copy can be stored locally rather than in a records storage facility.
- ❖ Microfilm can solve your need for sharing the same information with other departments, divisions, etc.
- ❖ Microfilm can insure the safety of records that are to be retained for longer than 20 years. Records with less than 20 years retention generally should not be filmed.
- ❖ Microfilm can help to assure file integrity, accuracy, and completeness.
- ❖ Microfilm can serve as a platform for digital access, allowing for effective migration to Internet access.

Many officials microfilm records to protect vital information. Records filmed for this purpose generally fall into three categories:

1. Records required to be retained for long periods.
2. Records that protect the rights of citizens.
3. Records having historical value.

Most records that fall into the first two categories also have historical value. Before commencing any microfilming project, consult the appropriate local records retention schedules to determine how long specific records must be retained. These *retention schedules are available on the Secretary of State's website* at: <http://www.sos.mo.gov/archives/localrecs/schedules/>

Although there are many advantages to having a microfilming program, a few cautionary notes are appropriate:

- ❖ The cost of developing a microfilm system is very high. Creating microfilm is best left to vendors or in-house operations that are already experienced in the creation of film.
- ❖ Citizens who have not used microfilm before may be reluctant to use it instead of paper records. If you create and provide *high-quality* microfilm, that user resistance will be reduced.
- ❖ Great care must be taken to ensure that a quality product is produced since the microfilm may be the only record the government will have of some transactions. Therefore, a large investment of time is required to review the microfilm before it is accepted into your collections.

### **3. Types of Programs**

Once a local government decides to implement a microfilm program, the question arises as to what type of program to support. There are several options.

1. The option that is simplest and generally most cost-effective is to contract with a microfilm service bureau. Appendix A offers some advice about working with microfilm service vendors, and a list of microfilm bureaus in Missouri is available at <http://www.sos.mo.gov/archives/localrecs/conservation/vendor/microfilm.asp>
2. Local records officials may be awarded Local Records grants to cover the cost of capturing permanent public records on high-quality ("archival") microfilm and the cost of acquiring microfilm reader/printers to allow access to the microfilm. The grant application guidelines are at <http://www.sos.mo.gov/archives/localrecs/grants/>.
3. On occasion, the Local Records Program will partner with a county or municipal government to process a collection with a view toward microfilming. In those cases, the local office must provide personnel (staff and/or volunteers) and space to process/organize the records. The Local Records Program will train personnel and provide archival boxes and some supplies. Then the records may be microfilmed by the local office or through a grant from the Local Records Preservation Program.
4. The Local Records Preservation Program occasionally targets small-quantity series of historical records to be microfilmed at the State Archives. Contact 573-751-9047 or e-mail [local.records@sos.mo.gov](mailto:local.records@sos.mo.gov) to explore that possibility.

Regardless of the type of program, all film must meet three criteria: archival quality (how long the film will last); legality (properly targeted, properly documented); and image quality.

## **4. Technical Guidelines**

### **4.1. Archival Requirements**

To meet archival requirements film **MUST** be manufactured, processed and stored according to American National Standards Institute (ANSI) and International Standards Organization (ISO) standards. Archival requirements establish the permanence or life expectancy of the film. Please see Appendix B for a list of relevant standards and other published guidelines.

#### **4.1.1. Manufacturing Requirements**

Manufacturing plays an important role in the longevity of the film. The film used for the master negative (i.e., camera film) must have the following qualities:

- gelatin silver halide emulsion
- polyester-based
- 4 mil or thicker (i.e., no "thin film")
- processed to a silver gelatin black-and-white photographic image
- LE-rating ("life-expectancy" rating) of 500 years – usually expressed as "LE-500"
- 35mm width. Documents smaller than 8½ x 11 inches may be filmed on 16mm microfilm. Local Records grant projects may only use 16mm film if the Local Records Division gives written approval *prior* to the beginning of filming.

#### **4.1.2. Duplicates**

A duplicate negative printing master should be created from the master film, and it must meet the same technical requirements as specified in section 4.1.1.

The printing negative should be used to create a service copy for use by the public. Service-copy film may be produced on either polyester-based silver or diazo film stock; diazo is considerably less expensive. Film used for the service copy should have at least an LE-100 rating.

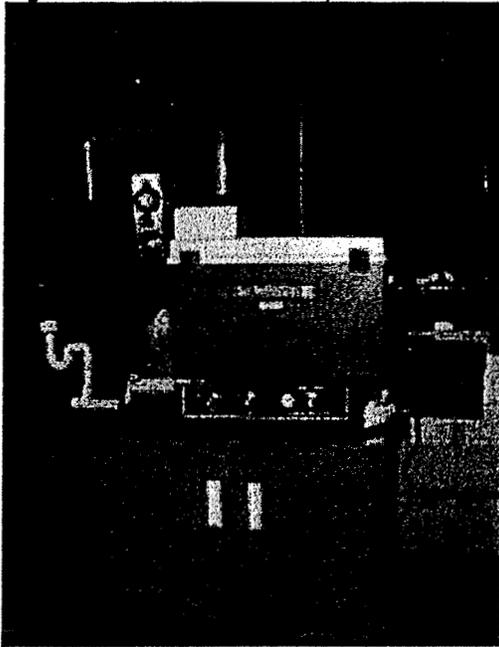
#### **4.1.3. Leader and Trailer**

Microfilm produced with Local Records grant funds must include leader and trailer on each reel. 'Leader and trailer' is blank film found at the beginning and end of a reel. The leader and trailer each must be a minimum of four feet long.

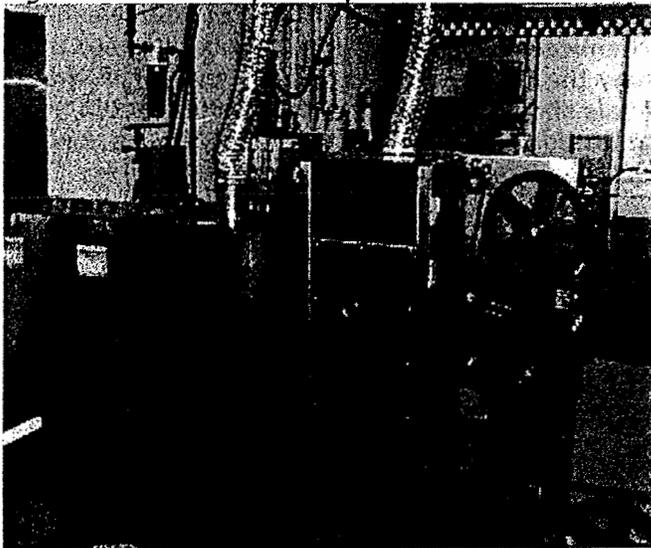
#### **4.1.4. Processing**

Proper processing of the film is the second step toward ensuring an archival film is produced. ANSI and ISO standards require that a conventional process be used, such as a Kodak Prostar or Allen deep tank processor. (See illustrations in Figures 1-3.) This simply means that the film must be processed using a developer, a fixer, a wash, and a dry cycle. These should be individual tanks and not a mixture of any two as in monobath processing.

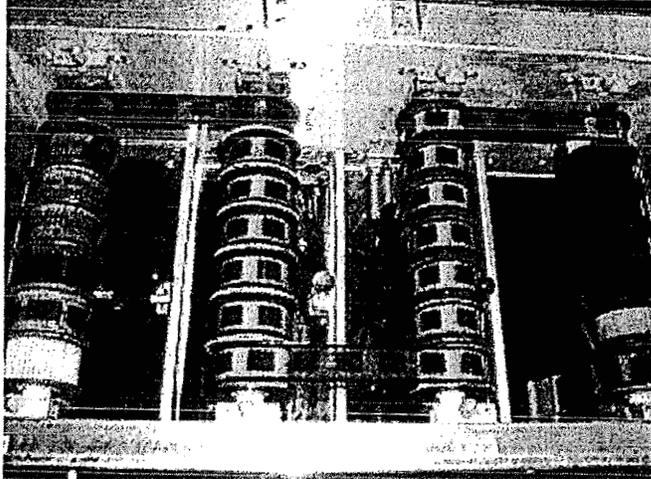
*Figure 1. Kodak Prostar processor*



*Figure 2. Allen deep tank processor*



*Figure 3. Inside view of an Allen deep tank processor*

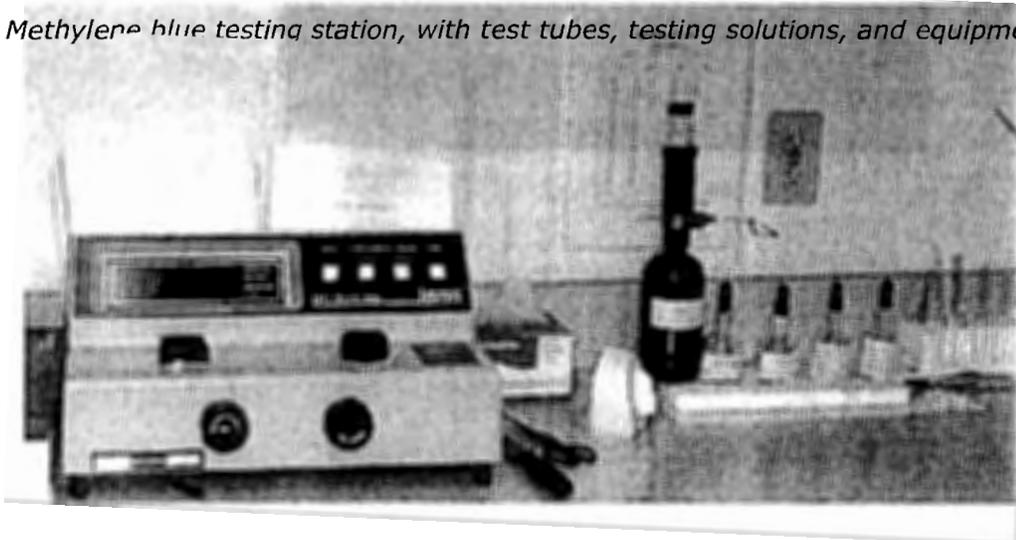


While full reversal processing is considered an archival method of processing, Missouri's Records Divisions do not, at this time, use this method. The proper processing of film is crucial to permanent quality.

Whether sent to a film lab for processing or to a service bureau, a methylene blue test should be performed each day that film is processed. (A typical testing station is shown in Figure 4.) This test checks for residual thiosulfate and will ensure that the film has been washed properly of any excessive amounts of chemicals, which can eventually deteriorate the film. A copy of the test results should accompany the film. If the test results reveal film that does not meet the standards, then the materials should be re-filmed or the film should be rewashed. Maximum permissible concentration is .014. Test results should be confirmed periodically by an outside source such as Kodak or OCLC Online Computer Library Center, Inc.

*Note:* Improperly washed films with unacceptable levels of residual thiosulfate should not be stored with other films.

*Figure 4. Methylene blue testing station, with test tubes, testing solutions, and equipment.*



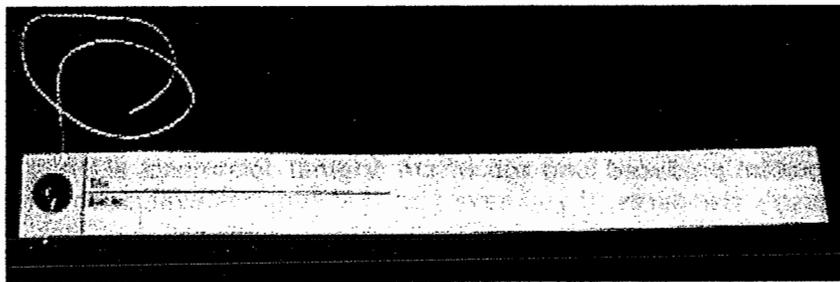
**Polysulfide treatment.** Post-processing microfilm treatments are available to help guard against oxidative attack from atmospheric pollutants, called **redox** or **red spots**. Either SilverLock (created by the Image Permanence Institute and currently manufactured by OCLC Online Computer Library Center, Inc.) or Brown Tone (created and manufactured by Kodak), can be used to help protect film. SilverLock has been proven to convert the silver in film to silver sulfide making the images more stable. If a polysulfide treatment is not used and the film is stored in a less than optimum environment, the information on the film could be obliterated and lost forever. Treatment should be considered as an optional service whenever available. It is strongly recommended but not required.

#### **4.1.5. Storage**

Proper storage of film is the last important step in film maintenance.

- ❖ Film housings/storage cabinets should be made of non-corroding, non-deteriorating, and non-ferrous metals or plastics.
- ❖ Button-and-string ties (illustrated in Figure 5) are appropriate for securing film on the reel as long as they meet the appropriate standards. (See Appendix B.) They are *recommended but not required* in projects funded by the Local Records Program. Do not use tape, strings, rubber bands, or adhesives to secure or fasten film for storage.

Figure 5. Button-and-string tie



- ❖ Cardboard boxes used for storage should be acid-free and lignin-free. When purchasing film or storage boxes, always ensure that the items meet national and international standards for archival storage including the Photographic Activity Test (PAT).
- ❖ Storage areas should be environmentally controlled to the proper temperature and humidity. The international standard, ISO 18911:2010, specifies conditions for master microfilm negatives.
  - Polyester-based silver film requires a temperature cooler than 70°F (2°C); 50-59°F is preferred. The temperature should not vary  $\pm 3^\circ$  F in a 24-hour period. The relative humidity for polyester-base film should have a set-point between 25% and 45%, and should not vary more than  $\pm 5\%$  during a 24-hour period.
  - Cooler storage is critically important for older cellulose-base film (nitrate and acetate). The maximum temperature is 45°F and relative humidity should be 20-30%. The same daily fluctuations apply for cellulose-based film as for polyester film.
- ❖ The film must also be protected from airborne gases, dirt particles or other contaminants. The storage area should have a separate heating/ventilation/air conditioning (HVAC) system. Whenever the storage area is to be sprayed or painted, all films should be moved off-site until the air has been re-purified. The length of time required will be dependent on the environment, equipment, and chemistry of the spray or paint.

Unfortunately, ideal storage conditions are rarely found in courthouses, city halls, and typical "office" facilities. We recommend that you locate an off-site facility with temperature and humidity readings that remain consistent. Several storage companies exist that specialize in the long-term, secure storage of paper and film. In general, bank vaults are not

recommended since they are not in the business of storing large volumes of records for other entities. **Under no circumstances** should the original camera film be stored in spaces that do not meet the strict temperature and humidity standards outlined above. In addition, remote storage should be considered so that at least one copy of the film is stored in a different location. This remote location will provide security against catastrophic loss during a natural disaster or other disasters caused by human forces.

The Missouri General Assembly authorized the building of the Kirkpatrick State Information Center, which includes a vault equipped with the proper storage requirements and the capacity to store microfilm from local and state government. Resembling a huge refrigerator, the vault is kept at the optimal humidity and temperature conducive for long-term storage of microfilm. This service is free of charge, and will continue as long as there is available space for local government film.

If you are interested in having your silver original camera master reels stored at the State Information Center, those reels will have to meet the same requirements as those listed under the Grant Requirements section. The records filmed will have to be either permanent or of historical significance, and the film must meet quality control specifications set by Local Records.

Microfilmed records stored at the Archives are open, public records. They are available for research in Archives reading room. Duplicates are available to the public.

Contact the Local Records Preservation Program (573-751-9047 or e-mail [local.records@sos.mo.gov](mailto:local.records@sos.mo.gov)) for more information. Local Records can determine if your microfilm is eligible for storage and provide you with an agreement form. Selected exceptions may be made for microfilm produced long ago where original documents are not available and film is below industry standards. If you have film that requires evaluation, please send it to:

Missouri State Archives  
Local Records Program Vault Storage  
P. O. Box 1747  
Jefferson City, MO 65102

Upon arrival, the records will be inspected for quality. Unacceptable reels will be sent back for either re-filming or storage at your facilities. Microfiche is not eligible for State Archives storage.

## **4.2. Image Quality**

Image quality is the next important aspect of a good microfilm program. Image quality establishes how well the materials can be read on film. It is determined objectively by measuring the density and resolution of the film, the reduction that was used, and the completeness of the film.

All film should qualify as permanent according to the minimum specifications of ANSI/ISO.

The Local Records Preservation Program suggests initial quality control checks on the first reel of film produced, prior to subsequent filming. Inspecting this "pilot" reel will allow you to find any serious quality or bibliographic problems with the vendor's product. All subsequent film should be inspected to ensure that it continues to meet the quality control standards.

### **4.2.1. Density**

Density is the method of determining the darkness or lightness of an image on film. As with any photographic image, if the image is too dark or too light, the legibility is compromised.

The density test is done with a piece of equipment called a transmission densitometer, which measures the amount of light that travels through the film. (See Figure 6.)

*Figure 6. As part of the quality-control inspection, the density of the film must be checked with a densitometer.*



Two uniform density targets are filmed at the beginning and end of each roll. The uniform density target can be as simple as a blank sheet of white bond paper, but ***it must be as large as, or larger than, the materials being filmed.***

After the film is processed, the microfilm frames containing these targets are placed on the densitometer. Take a minimum of three readings from the center of the image, at the top, middle and bottom; take five readings from the four corners and center. The density should not vary more than .15. Readings should also be taken on the images of material, at least 8 readings on a 100-foot reel and at least 11 readings from a 215-foot reel. Readings should be taken close to the text but not on the text in an area that best represents the majority of the background of the material. Readings should not be taken near the edge of the page or on an area that is stained, faded, or has bleed-through from the text on the opposite page. There may be exceptions to this rule depending on the condition of the material.

In order to ensure that exposures are being filmed at an appropriate density, tests, such as a step test, should be performed prior to any project being started. Step tests are targets filmed at different settings, to determine the best setting on which to film certain documents. If you are working in an in-house film lab, your equipment service vendor should be able to show you how to perform this test when installing the equipment. If you are using a vendor, you should ensure that they are performing the appropriate tests. The target originally used for the step test should remain in use until it becomes soiled. The target should then be replaced with a sheet of white bond paper, or other material, of the same thickness and shade as the previous one. If this is not possible, a new step test should be conducted using the new target. The Local Records staff will check step tests, if submitted.

The acceptable range for density is 0.80 to 1.30. If you have materials that exhibit low contrast between the text and the background (for example, brown ink on a yellowed page), the density should be between 0.80 and 1.00. If you have medium contrast materials, the density should be between 0.90 and 1.10. If your materials are high contrast in nature (for example, black print on white paper), the density should be between 1.00 and 1.30. Extremely low contrast materials may even benefit from density ranges in the .70s. While determining the level of contrast that will yield the best density readings, sometimes it may be difficult to determine the quality of the source material. In those instances, as a basic guideline, handwritten document density should be 0.80 to 1.00 and modern typed documents should be 1.00 to 1.30.

If the contrast on the material is not consistent, it may be necessary to film intentional second exposures of those pages at different densities than the average that has been chosen for the reel. This is also true of materials that contain photos and/or stains.

<b>Acceptable Background Densities</b>	
<i>Background density for the master negative should be based on the characteristics of the original documents.</i>	
<b>High-contrast originals</b>	<b>1.00 - 1.30</b>
<i>High quality, high-contrast printed materials and black typing. Fine-line originals, black opaque pencil writing. Documents with high-contrast printing.</i>	
<b>Medium-contrast originals</b>	<b>0.90 - 1.10</b>
<i>Bold text on moderately darkened paper or on light-colored paper. Faded printing. Very small printing. Pencil and ink drawings.</i>	
<b>Low-contrast originals</b>	<b>0.80 - 1.00</b>
<i>Low-contrast manuscripts and drawings. Documents typed with a worn ribbon. Poorly printed faint documents, especially those on moderately to badly darkened paper. Faint text on tissue, onionskin, or light-colored paper. Text on dark-colored paper. Graph paper with pale, fine colored lines.</i>	
<b>Very low-contrast originals</b>	<b>0.75 - 0.85</b>
<i>Documents with exceptionally poor contrast between printing/writing and paper.</i>	

Density readings should also be consistent on the reel. This means that there should be less than a 0.20 difference in the average density on the reel. Consistent density, with good contrast between the background of the material and the text, is crucial should the film be digitized later to create images for use in databases or websites.

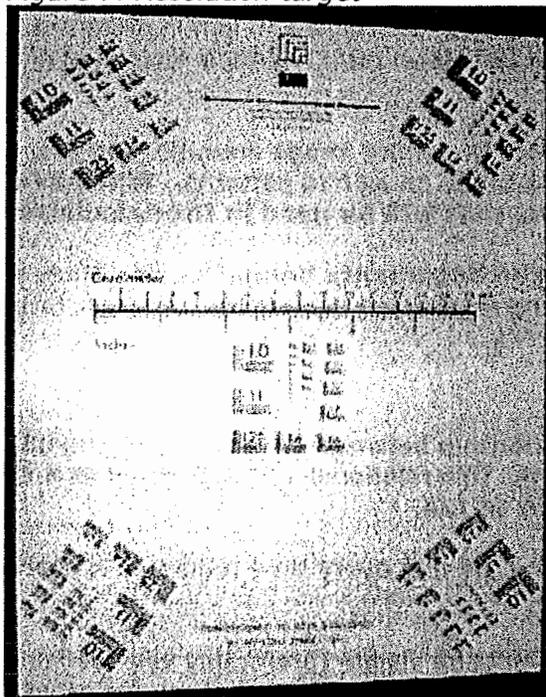
Remember: If you or your vendor are not filming at the correct exposure, your film will appear either too light or too dark, and the characters will appear to blend with the background. If a target is run at the beginning and the end of each roll, this will enable the person taking the density readings to determine if the film has consistent densities from start to end.

#### **4.2.2. Resolution**

Resolution is a test that measures whether the film captured the fine detail or clarity of the document. Both a resolution test pattern target (illustrated in Figure 7) and a target containing the reduction ratio used (e.g., on the Camera Operator's Certificate contained in Appendix C of these *Guidelines*) **must** be present on the film, or the measurement cannot be taken.

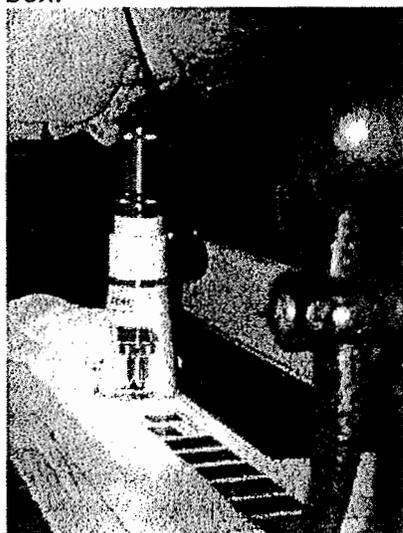
The resolution test pattern target consists of a series of horizontal and vertical lines with a series of numbers located next to each line pattern. Resolution test pattern targets must conform to the requirements of ISO 3334:2006E (Micrographics - ISO Resolution Test Chart No. 2 - Description and Use). Some vendors are listed at the *Secretary of State website* ([http://www.sos.mo.gov/archives/localrecs/grants/fy2010/Vendors\\_Information.pdf](http://www.sos.mo.gov/archives/localrecs/grants/fy2010/Vendors_Information.pdf)). **Copies** of resolution targets are **not acceptable**.

Figure 7. Resolution target



Two resolution targets must be filmed at the beginning and end of each reel and any time that the reduction ratio is changed. This target, after being filmed and processed, will be viewed through a 100-power microscope on a light table, as illustrated in Figure 8.

Figure 8. Resolution is measured using a 100-power microscope, viewing the film on a light box.



The smallest distinguishable line pattern number is taken and then multiplied by the reduction ratio used at the time of filming in order to calculate the resolution of the film. For example, the smallest line pattern number distinguished is 9.0 on a reel filmed at a 14:1 reduction ratio. Multiply 9.0 by 14 to get a resolution reading of 126 lines per millimeter (lpm). The higher the resolution reading, the better the legibility of the images on film and the better the results of future digitization will be.

Microfilm must have a minimum resolution of 100 lpm, although 120 lpm is preferred. There is one exception to this requirement: When the reduction ratio is 24x, a resolution of 96 lpm will be accepted.

Film should have consistent resolution throughout the entire image area, the corners, and the center. Therefore, resolution readings should be taken on all five patterns. **Whichever pattern has the lowest resolution is the one that will be used in the calculation.**

**The resolution target must be as large as the documents being filmed.** Thus, a legal-sized resolution target may be used when filming legal-sized documents. A larger target must be used when filming oversized records.

#### **4.2.3. Reduction Ratio**

"Reduction ratio" is a statement about the relationship between the size of the original material as compared to the image on microfilm. This relationship is expressed as a ratio, such as 12:1. This is also commonly referred to as 12X.

The reduction ratio information should appear on the film every time reduction is changed. This information is crucial for future digitization.

The reduction ratio used at the time of filming must be visible (preferably eye-readable) at the beginning of each roll of film. This should be either on the Camera Operator's Certificate or on the "Start" target, and it should be in large bold print. The reduction ratio chosen should be appropriate to the size of the original materials, the orientation of the materials on film, and the film chosen (35mm or 16mm). **The lowest possible reduction ratio should be chosen; the filmed images should approximately fill the frame.** Using a 24:1 reduction ratio when a 12:1 ratio will work is unacceptable. Besides providing the best image, keeping reduction ratios low helps in future projects of digitization and optical character recognition (OCR).

#### **4.2.4. Reduction Changes**

Reduction changes should be avoided, especially because they complicate automated scanning of microfilm.

**There shall be no more than three reduction changes within a microfilm reel.** When filming materials of different sizes, this method is recommended:

- a. Some records (such as municipal ordinance books) have many foldouts throughout the series. If these foldouts are no more than about 30% larger than the base size of the volume, choose the reduction that is appropriate to the size of the foldouts. This method avoids – or at least minimizes – the need to change reductions.
- b. Many loose record series include a range of document sizes. So long as the largest is roughly legal size, choose the fixed reduction that accommodates them.
- c. Some series include oversize items that are significantly larger than the bulk of the records. For example, a group of letter- and legal-size records may also include a

few maps, blueprints, and certificates that are more than 30% larger than the bulk of the records. The following practice is recommended:

1. Flatten the oversize items and move them to separate folders or boxes. Create cross-references between the original location and the oversized housing location as outlined in the next paragraph. *[Note: Oversize boxes and folders may be purchased with LR grant funds for grant-funded projects. Oversize housing may be available from LR for non-grant projects to microfilm permanent records.]*
  2. Within the series, insert a sheet in place of the oversize item, with wording such as "Large document(s) can be found in oversize storage" and reference the box/folder location.
  3. Film the oversize materials at the end of the series, so that only one reduction change is needed.
- d. This method requires careful preparation by the government entity, but provides a high-quality film product that will facilitate research and scanning.

An alternative is "sectional filming" – in which the reduction level remains unchanged, and sections of the large item are filmed in overlapping sections. Guidelines for sectional filming are available in the national standards, but this method has many drawbacks. Contact the LR office before using this method.

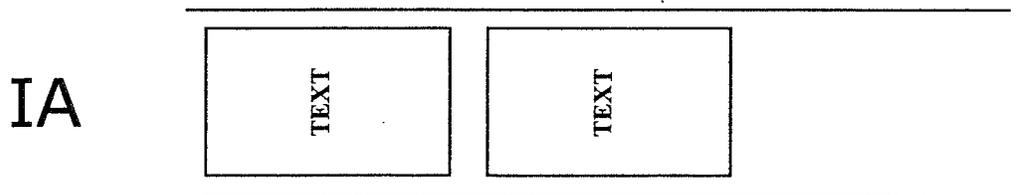
When the reduction ratio is changed within the reel, the camera operator must film a new "uniform density target," an eye-legible target specifying the new reduction, and the resolution test target. That same sequence shall be filmed again after filming the oversize materials and returning to the base reduction ratio.

#### **4.2.5. Image Orientation**

Microfilming projects funded by Local Records grants must be simplex format (one page filmed at a time – i.e., the IA or IB position) in either the cine (A) or comic (B) position. (See Figure 9.)

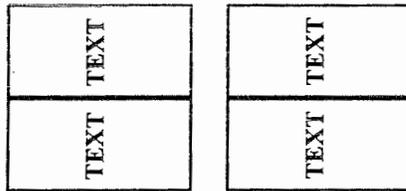
Duplex format (two pages filmed at a time, i.e. IIA or IIB) and duo-format (rotary camera parallel imaging) are not acceptable except with written permission from Local Records. Local Records may grant exceptions in certain instances; these will generally be restricted to documents in which two open leaves comprise one document (as sometimes occurs in indexes and tax records). The exception will only be allowed with written approval from LR.

**Figure 9.**



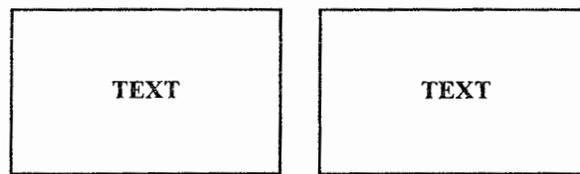
*The IA position is recommended for most LR projects*

IIA



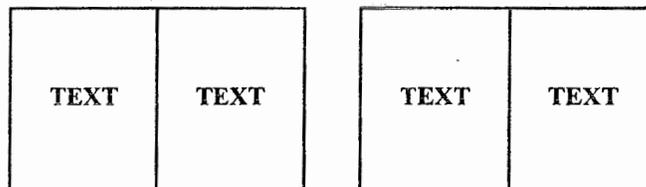
*The IIA position is not acceptable, unless permission is granted.*

IB



*The IB position is allowed in LR projects, especially for documents wider than they are high.*

IIB



*The IIB position is not acceptable, unless permission is granted.*

<b>Suggestions for Reduction Ratio &amp; Orientation Choices</b>	
16mm	Suitable for materials up to 8½" x 11"
35mm	Suitable for materials larger than 8½" x 11"
Cine - "A" position	Suitable up to 17:1
Comic - "B" position	Suitable for materials that will not fit at 17:1 in Cine
1-up (simplex)	Suitable for materials that are or can be disbound
2-up (duplex)	Suitable for materials that cannot be disbound, but only with written exception from LR

The reduction ratio you choose also determines the lens size you will need on the microfilm reader to reproduce the document back to its original form. Most of the newer readers or reader/printers on the market today have multiple size lenses already built in, and these can be changed by a simple adjustment.

### **4.3. Additional Filming Practices**

#### **4.3.1. Skew**

Skew is the degree to which the image that appears on film is "off-square" from the film. The more a filmed document is skewed, the more difficult it is to digitize the document, as software must be written or technicians must intervene to adjust the image.

The image shall not be skewed more than 2% (just under 2 degrees) from parallel with the longitudinal axis of the film. Skew shall be measured from the two corners of the document image parallel to the longitudinal edge of the projected image frame.

#### **4.3.2. Baseline Filming**

In order to facilitate digitization, camera operators shall position documents so that the lower edge of all pages on a reel shall appear at approximately the same distance from the edge of the film. Baseline filming will simplify an agency's efforts to use edge-detection software in an automated process of scanning microfilm into a digital format.

#### **4.3.3. Intentional Second Exposures**

When pages with extreme variation in lightness/darkness of background and color are present in the same frame, the contractor may film the frame more than once, using multiple or special exposures, whenever doing so will allow each part of the image to be captured more effectively.

The exposure required for optimal image capture of one type or portion of an image may vary in another portion of the same frame. Among the types of images for which multiple or special exposure may be required are those characterized by bleed-through or show-through, mottling, multiple-toned or color images, interleaving, overleafing, or multi-faceted openings, pencil markings and fine-lined inscriptions, and documents that have been partially "silked" or "backed."

If a page is intentionally filmed twice – for example, to correct an improper exposure, ensure that an operator did not skip a page, or provide the duplicate exposures required for retakes – the duplicates will be left as filmed; i.e., duplicate frames will not be edited out. However, an excessive number of duplicate exposures due to operator carelessness must be avoided.

The contractor shall make full use of available mechanical/optical means to ensure optimum legibility of information on film while meeting all technical requirements.

Multiple exposures of a page (at different light settings) shall be filmed only when deemed necessary. When the camera operator makes such multiple exposures, s/he shall insert the "Intentional Second Exposure" target before the 2<sup>nd</sup> exposure.

The "Intentional Second Exposure" target shall not appear as an in-frame target. There shall be no in-frame targets, except as authorized in writing by the Local Records Program.

If the camera operator makes more than one exposure of any image for which normal exposure is inadequate to reproduce the original material, the first shot shall be at the normal exposure and subsequent one(s) shall be at the adjusted exposure(s), not to exceed a total of three exposures per image.

When multiple exposures are made routinely and repeatedly within a folder, series, or collection, the "statement on duplicate images" target shall be filmed as part of the beginning target sequence on each applicable reel. (See *sample in Appendix C.*)

If the total image count of the project exceeds 5% of the estimate, or the contractor projects that possibility during the course of the project, the contractor shall notify the contracting agency.

#### **4.3.4. Blank Pages**

When dealing with unpaginated materials such as loose papers and court case files, blank pages shall not be filmed.

Many records are paginated. For example, record books often have pre-printed page numbers. They shall be filmed as follows:

- a. If there is one blank page in a volume, it shall be filmed.
- b. If there are multiple, consecutive blank pages, they shall not be filmed. Instead, a target such as illustrated in Appendix C.15 should be inserted within the volume and filmed in place of the blank pages.
- c. If a volume has many sections of blank pages, it may be more efficient to insert a target in the opening target sequence, informing users of the film that no blank pages are filmed.

#### **4.3.5. Additional Requirements**

Microfilm should also meet the following specifications.

- ❖ Spools cannot have plugs.
- ❖ Reels cannot be in cartridges.
- ❖ Reels must be at least  $\frac{3}{4}$  full.
- ❖ Film must not have significant scratches.
- ❖ Film must not have fogging (dark areas caused by exposure to light).
- ❖ Film must not have foreign matter adhered to the film.
- ❖ Film must not have images of body parts and other foreign objects. (Fingers used to hold materials in place may be allowed in certain circumstances. Consult the Local Records staff for guidance.)
- ❖ Film must conform to other quality requirements of ANSI/AIIM MS23 (*Standard Recommended Practice - Production, Inspection, and Quality Assurance of First-Generation, Silver Microforms of Documents*)

The Local Records Grant program does not fund microfiche or the creation of aperture cards. The grant program will fund the conversion of aperture cards to roll microfilm.

#### **4.4. Quality Control**

Quality control is vital to maintaining image quality. Both density and resolution should be checked frequently during the filming project, and the results should accompany each roll tested (see example of quality report form in Appendix D). For microfilming projects funded by LR, the vendor should submit a copy of the Quality Control Report form with each microfilm reel.

The client should check each reel of film upon completion or upon receipt from the vendor. The Local Records Grant Program requires that a minimum of 10% of all reels be fully checked.

If the density and resolution are not good on the camera master film, the duplicates made from the master may not be readable. Since the third-generation use copies are your work copy, you will want the best possible original that can be produced. The quality of the second-generation printing negative is also vital because it is used to generate the use copies and is typically the copy used in digitization.

All film should be checked for completeness – that is, to ensure that every document has been captured on the film. If the original documents will be destroyed after filming, it is recommended that staff compare 100% of the film against the originals. This inspection can be very labor-intensive and expensive. (See the “Destruction” section below.)

#### **4.5. Legal Requirements**

A good microfilm program must also ensure that legal requirements are met. Legal requirements determine whether microfilmed records are accepted as legally binding documents, are admissible in court, and otherwise serve the same purposes as the original paper records.

##### **4.5.1. Missouri**

Revised Statutes of Missouri (RSMo) 109.130 states: “Reproduced records deemed original, when. —Such reproduction of the original records *shall be deemed to be an original record for all purposes provided that the reproduction is equal in resolution to microfilm produced under those standards set forth in subsection 4 of section 109.241, and shall be admissible in evidence in all courts or administrative agencies. A facsimile, exemplification or certified copy thereof shall, for all purposes recited in sections 109.120 to 109.140, be deemed to be a transcript, exemplification or certified copy of the original.*”

Missouri law (RSMo 109.241, paragraph 4) requires that microfilm produced for or by the government meet criteria established by organizations such as the American National Standards Institute (ANSI) and International Standards Organization (ISO). Those standards are interpreted by the Division of Records Management and Archives Services. These standards are common in the microfilm industry and can be met by responsible vendors and experienced camera operators.

##### **4.5.2. United States**

Title 28, Sections 1731-1739 of the United States Code require records to be:

- ❖ Microfilmed during the regular course of business;
- ❖ Authorized documents of the organization;
- ❖ Created during the regular course of business;
- ❖ Accurate reproductions of original records and not destroyed if their preservation in original paper form is required by law.

##### **4.5.3. Preparation**

Government officials should take steps to prepare the records before filming, to ensure the legal admissibility of the film and assure adherence to existing statutes. Key steps are the proper use of targets (see Section 4.4.3) and compliance with image quality standards. When splicing film, proper targeting is necessary to insure information has not been added or deleted from the original records. Splicing is the joining of two pieces of film. *Appendix C* contains samples of targets that should be used.

When records are preserved by microfilm, they must be processed in the following manner: *"When files in the custody of a local governmental agency are microfilmed or otherwise reproduced through photographic, video, electronic, or other reproduction processes, including a computer-generated electronic or digital retrieval system, the public official having custody of the reproduced records shall, before disposing of the originals, certify to the director that the official has made provisions for preserving the microfilms or electronically created records for viewing and recalling images to paper or original form, as appropriate, and that the official has done so in a manner guaranteeing the proper retention and integrity of the records in accordance with standards established by the local records board. Certification shall include a statement, written plan, or reputable vendor's certificate, as appropriate, that any microfilm or document reproduced through electronic process meets the standards for archival permanence established by the United States of America Standards Institute or similar agency, or local records board. If records are microfilmed, original camera masters shall not be used for frequent reference or reading purposes, but copies shall be made for such purposes."* (Section 109.241(4) RSMo)

#### **4.5.4. Corrections & Retakes**

Corrections (also called "retakes") are only to be spliced onto the end of the reel. Retakes are errors that are discovered after filming, such as missed documents or pages that do not meet LR's quality-control requirements. The defective pages can be re-filmed and spliced onto the end of the reel. An error can result in the filming of many pages to correct it. Film will be rejected if it contains several errors. **A reel of microfilm will be rejected if the total number of frames re-filmed exceeds 10% of the frames on the reel.**

Splicing should be done with an ultrasonic splicer, but the LR Program will also accept retakes spliced with thermal butt welds. **Absolutely no other splicing methods are allowed**, such as adhesive splicing, use of staples or masking tape. Hole-punching through errors is not allowed without prior written permission.

When filming retakes, the camera operator shall include a uniform density target and a resolution target at the beginning and end of the retake section. The existence of the retake and its location must be identified on the outside of the microfilm reel box; a notation such as "Corrections to this film reel appear at the end of this reel" is acceptable. Retakes should be of a comparable quality to the original film (i.e., resolution and density should match the original).

When filming on a rotary camera, a correction target must immediately follow any camera or paper jams before refilming the documents.

There shall be no more than one splice on any reel of film (i.e., one for trailer to splice on the retakes).

#### **4.5.5. Destruction**

Government agencies shall not destroy original documents until the film product receives Local Records quality control approval and the government office inspects the film for compliance with technical standards, appropriate targets, text legibility, and content completeness. Grantees should anticipate spending roughly one hour per reel to perform a complete bibliographic inspection. This inspection will ensure that the contents of the microfilm are truly complete.

Despite the best efforts of camera operators and vendors, **most large-volume microfilming projects will have some missing original documents.** It is the

responsibility of the government agency that owns the records to do the inspection necessary to identify these, then require remedial filming.

#### **4.6. Preparation for Microfilming**

The government office is responsible for preparing the records for microfilming before the records are delivered to the microfilm vendor. LR staff members are available to provide information, guidance, and training.

##### **4.6.1. Physical Preparation**

Records must be organized and prepared for filming to ensure the best possible quality and usefulness. Archivists from the Local Records Preservation Program are available to assist in the preparation of records. In LR grant-funded projects, the LR archivists will work closely with government entities to ensure that records have been properly prepared before filming. Even in filming projects not funded by LR grants, the staff may be available to assist in preparation of records. *Contact the Local Records Program for assistance.*

Physical preparation generally requires the following steps.

- a. Organize the records to be sure they are in proper order. Generally, records should be arranged within series, then in chronological or alphabetical order.
- b. Remove extraneous materials that do not belong in the records. Remove all duplicates and all non-permanent records. Remove ephemeral items such as grocery lists, bookmarks, and so on.
- c. Clean the records.
  - i. Bound volumes should be vacuumed and dusted if they are dirty.
  - ii. Loose papers should be cleaned, especially if surface dirt obscures text.
  - iii. Instructions are available from the conservation staff, and training may be available.
- d. Remove all fasteners (paper clips, staples, pins, grommets, etc.) so the records are single leaves. Some vendors may be willing to remove fasteners, but they will generally charge extra for that service.
- e. Torn pages may be mended. Use "archival" tape if the records will be retained after filming. Regular or "Scotch" tape is acceptable only if the records will be destroyed after filming.
- f. Unfold and flatten all folded documents. Follow the instructions at <http://www.sos.mo.gov/archives/localrecs/conservation/notes/humidification.asp>. Contact the LR staff for additional guidance.

The physical preparation generally must be done by the local government office. If you are using a vendor for the microfilming, you should discuss with them how they expect to receive the collection. Are they willing to remove staples? Must all of the collection be disbound (loose) pages? Can the binding be removed and destroyed?

##### **4.6.2. Editorial Preparation**

When organizing materials for microfilming, try to consider how the microfilm will be used in the future. Citizens may consult the records to ensure their rights. Genealogists may seek information about their ancestors. Historians may seek information about certain trends. Government officials may need to access older records in the course of their business. All these needs will be supported if the records are well organized and logically arranged.

Develop an accurate index or "finding aid" to the records. If the index is relatively straightforward, it should be filmed as part of the opening sequence of targets. If you

develop an extensive finding aid (one that runs more than about 10 pages), film it after the opening sequence.

Prepare targets as outlined in these *Guidelines* and insert them into the proper series, box, file, or volume as appropriate. LR staff can provide more detailed guidance.

#### **4.6.3. Reel Programming**

Reel programming is the process of deciding what materials will be filmed on an individual reel of microfilm. Reels should be programmed logically. When possible, program the breaks between reels so they occur between volumes, at the end of a year, or at a place that makes sense for your materials, keeping in mind the arrangement of the entire collection. If the vendor is programming the reels, be specific with your instructions on how programming is to be done.

#### **4.6.4. Final Preparation**

Prepare an accurate inventory or shipping list for the vendor.

Place all items in boxes for transport to the vendor. Use standard-size boxes, preferably all the same size. Number each box with the name of the office and the box number (e.g., "box 1 of 5," "box 2 of 5," and so on). Identify boxes on ends and sides.

### **4.7. Targets**

Targets are pieces of paper on which certain information is printed. They must be used, to ensure legal standards are met. Identification targets are generally letter- or legal-size pages generated using a word processing program. (See Appendix C for templates and samples of targets.) Roll number, agency origin, and reduction ratio should be eye-legible on exposed film, meaning that you can read this information as it occurs on the film without any magnification.

Targets are necessary to ensure ready access to the information contained on the film and to assist in meeting the requirements of admissible evidence in court. Targets indicate quality, organization, and validity of the microfilmed collection. Film will be rejected if proper targets are not used. If you are using a vendor, they should provide some targets. The targets that a vendor should provide are indicated below with an asterisk (\*).

**Targets cannot be spliced onto the film.** Only one target should be filmed in each frame. There shall be no in-frame targets, except as authorized in writing by the Local Records Program. Targets must be filmed at the same reduction ratio as the materials.

Targets should appear in the following order on the beginning of each reel:

- ❖ **Start\***: blank sheet of bond paper with START printed on it.
- ❖ **Uniform Density Target\***: plain white sheet of bond paper or non-glossy poster-board free of lines and characters. It must be approximately the same size as the largest documents being microfilmed on the reel.
- ❖ **Camera Operator's Certificate**: must include date, camera operator's name, roll number, county, office, series/record title, inclusive dates for the series, arrangement (for example, "chronological by date"), reduction ratio, and vendor name.
- ❖ **Continued From Last Roll\***: if the filming project from the last roll is continuing on this reel.
- ❖ **Reel Number**: use consecutive numbering system for each project.

- ❖ **Title Target:** must include county and/or city, office, records series title, information content, inclusive dates, and arrangement. Also indicate if the records are of a closed or confidential nature. Please consult the appropriate records retention schedule to determine the exact records series title. If there are multiple volumes or boxes on one reel, a title target is necessary before each. (See discussion at "Additional Bibliographic Targets" below.) Also, make sure each volume is indicated separately on the microfilm box label.
- ❖ **Statement on Duplicate Images Target:** blank sheet of bond paper with Duplicate Images text printed on it.
- ❖ **Corrections Target:** blank sheet of bond paper with Corrections text printed on it.
- ❖ **Additional Bibliographic Targets:** varies depending on the collection being filmed but can include Series Title Targets, Volume or Box Targets, or other informational targets as appropriate. If an index or finding aid runs more than about 10 pages, it should appear after the target sequence.
- ❖ **Resolution Test Target\*:** consists of a series of horizontal and vertical line patterns with a series of numbers located next to each line pattern. This target must meet the ANSI/AIIM MS51 (also ANSI/ISO 3334) and should be of approximately the same size as the material.

Targets should appear in the following order at the end of each reel:

- ❖ **Continued On Next Roll\*:** if the filming project is to continue onto the next reel.
- ❖ **Reel Number:** use consecutive numbering system for each project.
- ❖ **Camera Operator's Certificate:** must include date, camera operator's name, roll number, county, office, series/record title, inclusive dates for the series, arrangement (for example, "chronological by date"), reduction ratio, and vendor name.
- ❖ **Uniform Density Target\*:** plain white sheet of bond paper or non-glossy poster-board free of lines and characters. It must be approximately the same size as the largest documents being microfilmed on the reel.
- ❖ **Resolution Test Target\*:** consists of a series of horizontal and vertical lines with a series of numbers located next to each line pattern. This target must meet ANSI/AIIM MS51 (ANSI/ISO 3334) and should be of the appropriate size for the material.
- ❖ **End Of Reel\*:** blank sheet of bond paper with END OF ROLL – PLEASE REWIND printed on it.

The following targets should appear when retakes are appended:

- ❖ **Start of Corrections/Additions\*:** blank sheet of bond paper with START OF CORRECTIONS/ADDITIONS printed on it.
- ❖ **Uniform Density Target\*:** plain white sheet of bond paper or non-glossy poster-board free of lines and characters. It must be approximately the same size as the largest documents being microfilmed on the reel.
- ❖ **Resolution Test Target\*:** consists of a series of horizontal and vertical lines with a series of numbers located next to each line pattern. This target must meet ANSI/AIIM MS51 (ANSI/ISO 3334) and should be of the appropriate size for the material.
- ❖ *[Film corrections here]*
- ❖ **End of Corrections/Additions\*:** blank sheet of bond paper with END OF CORRECTIONS/ADDITIONS printed on it.

- ❖ **End Of Reel\*:** blank sheet of bond paper with END OF ROLL PLEASE REWIND printed on it.
- ❖ **Camera Operator's Certificate:** must include date, camera operator's name, roll number, county, office, series/record title, inclusive dates for the series, arrangement (for example, "chronological by date"), reduction ratio, and vendor name.
- ❖ **Uniform Density Target\*:** plain white sheet of bond paper or non-glossy poster-board free of lines and characters. It must be approximately the same size as the largest documents being microfilmed on the reel.
- ❖ **Resolution Test Target\*:** consists of a series of horizontal and vertical lines with a series of numbers located next to each line pattern. This target must meet ANSI/AIIM MS51 (ANSI/ISO 3334) and should be of the appropriate size for the material.

The following targets should appear as needed on the reel. Some samples appear in Appendix C.

- ❖ **Sections Target\*:** a white piece of bond paper with text regarding filming in sections. This target should be used when a document is too large and needs to be filmed in sections
- ❖ **Condition Targets:** a white piece of bond paper with text describing the poor condition. Examples of condition targets include BOOK IN POOR CONDITION, LAMINATED PAGES, and TIGHT BINDING. (See examples in Appendix C of these *Guidelines*.)
- ❖ **Blank Pages Target:** a white piece of bond paper with text such as BLANK Page or PAGES 32-89 ARE BLANK.

#### 4.8. Microfilm Box Labeling

Box labeling is critical. If the information that is permanently preserved on the microfilm is not clearly indicated on the label, it will be useless because users will not know what is contained in the record. It is imperative that you provide your vendor a list of exactly what is to be filmed, and in what order, and require that the vendor make accurate labels.

Sometimes the information on the cover of a book is not what is inside. Make sure to communicate the correct data to your vendor. Label each reel fully: "Deed Books, 1-4, 1884-1910" would not be acceptable. Each book, or series, with specific titles and dates must be clearly stated. (See samples in Appendix D).

Each label must have:

- ❖ Agency Origin, e.g., which political subdivision (county, school district, city, etc.) and office (recorder, clerk, etc.) the information comes from.
- ❖ Description of records filmed on the reel – e.g., minutes, ordinances, student records, etc.
- ❖ How the records are arranged – e.g., A-C or 1910-1915. Even if the records are arranged alphabetically, there **must** be inclusive dates on the label.
- ❖ Indication if an INDEX is filmed at the front of a record (if applicable).

## 5. Assistance

The Local Records Preservation Program of the Missouri State Archives shares your concern for the preservation of vital records in your care. A number of services are available to local government entities, including assistance in planning your microfilm program, in purchasing microfilm equipment, and in storing microfilm masters. For more information about the services available, please contact the Local Records Division:

Missouri State Archives  
Local Records Preservation Program  
Office of the Secretary of State  
P. O. Box 1747  
Jefferson City, MO 65102  
(573) 751-9047  
local.records@sos.mo.gov  
<http://www.sos.mo.gov/archives/localrecs/program.asp>

The website is a good source of up-to-date information. The latest version of these *Guidelines for Microfilming Public Records* can be located on the website. The website also lists vendors of microfilm services and equipment at <http://www.sos.mo.gov/archives/localrecs/conservation/vendor/microfilm.asp>. The website also includes record retention schedules at <http://www.sos.mo.gov/archives/localrecs/schedules/>, so you can identify permanent record series that qualify for LR grant funding.

## Appendix A: Contracting for Services

Working with a microfilm vendor can sometimes be challenging. Most microfilming vendors exist to film short-term business records with a goal of space-savings. By contrast, preservation microfilming requires vendors with a view to long-term preservation and a stringent adherence to strict national standards. Communication with the vendor is crucial, to be sure the vendor can meet your long-term goals.

The most important factor in a successful project is a positive relationship with your vendor. Communication is critical to a positive relationship. The first step is to give your vendor a copy of these guidelines in their most up to date version (check our website at <http://www.sos.mo.gov/archives/pubs/mfmg/>). The vendor should be made aware that you want preservation microfilm, not typical business microfilm that will not meet these standards (see Section 4.0 above). The quality control requirements should be clear and agreed upon before you discuss price with the vendor.

In order to assist local government in obtaining archival quality microfilming services from a vendor, the Records Management and Archives Services recommend the following guidelines:

- Request that the vendor provide you a list of references, and contact at least three clients from the list. Make sure that you ask the references when their project was done, and ask enough questions about their projects to make sure they were similar to yours. Make sure that you contact any references that are government entities similar in nature to your own.
- If your government agency has received a grant from the Local Records Program, consult the grant award letter or contracts for any special stipulations about your microfilming project, and convey these to your vendor before entering into a firm agreement.
- Request a cost estimate. This would be a good time to give the vendor a copy of these Guidelines. If you are filming under an LR grant, also give the vendor a copy of any special stipulations in your grant contract. Be specific about what services you want and about what type and what condition of materials you have.
- Request a time estimate for completion. Tell the vendor if you have a deadline by which the project must be complete. If your project is a Local Records grant project, do not forget to leave yourself time to inspect the film, write your final report, and submit it to the Local Records grant administrator by the deadline.
- Inform the vendor about the indexing system you prefer and the information that should be included on the labels (e.g., roll numbers, title targets, new file begins, etc.). See samples in Appendix D.
- Ask questions, such as
  - ❖ Will documents be filmed on-site? If not, who pays for boxing the documents and transportation to the vendor's site? Who is responsible for loss or damage in transit? Is the vendor insured against damage or loss? Are vendor personnel insured during filming conducted at your site?
  - ❖ Will the vendor provide all services or will parts of your project be subcontracted to another vendor? If the vendor plans to use a subcontractor, they must notify you.
  - ❖ What type of security do they have at their facility? Ask what systems are in place to protect material from theft, fire, or other disasters.
  - ❖ What type of material handling skills do their staff members have? Ask them to describe the training that new staff members are given.

- ❖ Do they offer a polysulfide treatment option?
- ❖ What reduction ratio do they plan to use for your collection? (They will need to know the material dimensions.) You will need to check your reader or reader/printer to determine if you will need to purchase a new lens to view that reduction ratio.
- Confidential or closed records require special protection, and archivists in the Local Records staff can provide you with special guidance. Be sure that the vendor treats your records in a confidential manner. Discuss your expectations with the microfilm vendor.
- Contact more than one vendor. Decide which vendor seemed most sensitive to your needs and most experienced with your type of materials.
- Send the vendor three copies of the letter of agreement (see Appendix D), and request a contract. The contract should state that:
  - ❖ Film will be manufactured and processed according to archival quality standards established by the American National Standard Institute (ANSI) and International Standards Organization (ISO). (See Appendix B.) If for any reason the films do not meet applicable ANSI and/or ISO standards, the vendor will re-film the records at no additional cost to you.
  - ❖ Each roll will meet established legal and image quality requirements as established and referenced in this guideline.
  - ❖ If retakes (corrections or additions) are necessary, the vendor will re-film and splice the retakes onto the end of the proper roll with the proper targets. If the retakes are necessary as a result of vendor error, this will be done at no extra charge.
  - ❖ The price will include the cost of the film stock, the filming labor, processing, and a duplicate roll. (Note: Films should be clearly marked as to which is the original and which is the duplicate.) If you have requested additional services, such as preparation, make sure that this is included as well.
- **If the vendor does not wish to enter into a written contract, it may be because of an inability to meet some or all of the requirements. This should be a warning sign to you about the capability of the vendor. If the vendor will not sign a written letter of agreement, then you should explore why they are hesitant to sign the agreement and carefully assess your options.**

Note: Microfilming funded by the Local Records Grant Program must also adhere to RSMo 109.241, the State Archives' interpretation thereof, and additional guidelines promulgated by the Missouri Historical Records Advisory Board. Call 573-751-9047 or contact the Local Records Preservation Program for further details.

## Appendix B: Standards and Guidelines

When the published standards and guidelines listed here conflict with the technical requirements explicit in this document, this document should prevail.

### **Core Resources**

The resources listed here are particularly comprehensive and important. These are especially useful for officials/agencies just beginning to launch a preservation microfilming project.

ANSI/AIIM MS23-2004. *Standard Recommended Practice - Production, Inspection, and Quality Assurance of First-Generation, Silver Microforms of Documents.*

Elkington, Nancy E., ed. *RLG Archives Microfilming Manual.* Mountain View, CA: Research Libraries Group, 1994.

Elkington, Nancy E., ed. *RLG Preservation Microfilming Handbook.* Mountain View, CA: Research Libraries Group, 1992.

Fox, Lisa L., ed. *Preservation Microfilming: A Guide for Librarians and Archivists.* Chicago, IL: American Library Association, 1996.

### **Additional Resources**

These standards and guidelines can be purchased through their publishers. We recommend visiting the websites of the International Standards Organization, the American National Standards Institute, the Association of Information and Image Management, the Research Libraries Group, and the American Library Association.

ANSI/AIIM MS18-1992 (R1998). *American National Standard - Micrographics - Splices for Imaged Microfilm - Dimensions and Operational Constraints.*

ANSI/AIIM MS34-1990. *American National Standard Dimensions for 100-Foot Reels for Conventionally Threaded Processed 16mm and 35mm Microfilm.*

ANSI/AIIM MS43-1998. *American National Recommended Practice for Operational Procedures/Inspection and Quality Control of Duplicate Microforms of Documents and From COM.*

ANSI/AIIM MS45-1990. *American National Recommended Practice for Inspection of Stored Silver-Gelatin Microforms For Evidence of Deterioration.*

ANSI/AIIM MS48-1999. *American National Standard for Information and Image Management - Recommended Practice - Microfilming Public Records on Silver Halide Film.*

ANSI/AIIM MS51-1991 or ANSI/ISO 3334-1991. *Standard for Information and Image Management - Micrographics - ISO Resolution Test Chart No. 2 - Description and Use.*

ANSI/NISO Z39.62-2000. *Eye-Legible Information on Microfilm Leaders and Trailers and on Containers of Processed Microfilm on Open Reels.*

ISO 18901:2010(E) . *Imaging Materials - --Processed Silver-Gelatin-Type Black-and-White Films - Specifications for Stability.*

ISO 18902:2007(E). *Imaging materials – Processed imaging materials – Albums, framing and storage materials*

ISO 18906:2000(E). *Imaging materials – Photographic films – Specifications for safety film.*

ISO 18911:2010(E). *Imaging materials – Processed safety photographic films – Storage practices.*

ISO 18916:2007(E). *Imaging Materials - Processed imaging materials - Photographic activity test for enclosure materials.*

ISO 18917:1999(E). *Photography - Determination of residual thiosulfate and other related chemicals in processed photographic materials - Methods using iodine-amylose, methylene blue and silver sulfide.*

## Appendix C: Sample Targets

***Caveat regarding Sample Targets:*** Throughout this "Sample Targets" section, several targets are provided in two formats.

Targets labeled "template" may be used as document templates to create a government office's own targets. These templates have been created in layouts and font sizes that will conform to these *Guidelines*.

Sample targets are labeled "example only." They have been created to show how a fictional agency might use such a target. None of these "example" targets should be photocopied and used; all require modification for use in a microfilming project.

**C.1: "Start" target**

**START**

# Camera Operator's Certificate

## VENDOR NAME

**Microfilmed at Vendor City, Vendor State**

Date:

Camera Operator:

Roll No.:

County/City:

Office:

Series/Record Title(s):

Inclusive Dates:

Arrangement:

Reduction Ratio:

Funded in part by the  
**Local Records Preservation Program**  
**Missouri State Archives**  
Jefferson City, Missouri

# Camera Operator's Certificate

## MICROFILM COMPANY Q

**Microfilmed at St. Louis, Missouri**

Date: 6/10/2004  
Camera Operator: Susie Q  
Roll No.: 2004-DR10  
County/City: Rose County  
Office: County Collector  
Record Series Title: Real Estate (Land) Tax Books  
Inclusive Dates: 1875 through 1997  
Arrangement: Chronological by collection year,  
then by section, township, and  
range.  
Reduction Ratio: 12:1

Funded in part by the  
**Local Records Preservation Program**  
**Missouri State Archives**  
Jefferson City, Missouri

**CONTINUED  
FROM LAST  
ROLL**

**C.4: Reel Number Target**

**ROLL #**

---

**ROLL # ONLY**  
**EXAMPLE**  
**2004-DR10**

# TITLE TARGET

## Missouri Local Records Preservation Program Grant Project

**COUNTY/CITY:**

**OFFICE:**

**RECORD SERIES TITLE:**

**INFORMATION CONTENT:**

**DATES (Inclusive):**

**ARRANGEMENT:**

**CONFIDENTIAL:            YES            NO**

**CLOSED:                    YES            NO**

TEMPLATE

# TITLE TARGET

## Missouri Local Records Preservation Program Grant Project

**COUNTY/CITY:** Rose County

**OFFICE:** County Collector

**RECORD SERIES TITLE:** Real Estate (Land) Tax  
Books

**INFORMATION CONTENT:** This records series contains information relating taxes collected for land ownership. An alphabetical index accompanies this record.

**DATES (inclusive):** 1875 through 1997

**ARRANGEMENT:** Chronological by collection year, then by section, township, and range.

**CONFIDENTIAL:** YES  NO

**CLOSED:** YES  NO

# STATEMENT ON DUPLICATE IMAGES

This reel of microfilm contains material that has paper color changes, stains, or illustrations (some of which may appear on pages mixed with printed text). In order to ensure that all text and illustrations are legible, exposure settings must be changed. Therefore, when text and illustrations exist in a single image or when material backgrounds differ, such frames may be exposed twice on the microfilm copy.

The first exposure reflects the camera operator's best effort to capture the majority of the text. The second exposure reflects the camera operator's best effort to capture illustrative material or the remaining text. It is hoped that this practice will result in a microfilm product that fully serves the needs of most researchers.

# STATEMENT ON CORRECTIONS

Materials discovered to be missing in the microfilm, or other corrections found to be needed, may be added to the end of the reel.

Researchers should always check the end of the reel for corrections.

**Record Series Title**  
**Volume #, Letter, or Box #**  
**Begin Date – End Date**

TEMPLATE

**REAL ESTATE (LAND)  
TAX BOOKS**

**EXAMPLE ONLY**  
**Volume 14**

**Jan. 1, 1875 – Dec. 31, 1875**

**C.9: Continued on Next Roll target**

**CONTINUED  
ON NEXT  
ROLL**

**END OF  
ROLL**

**PLEASE  
REWIND**

# START OF CORRECTIONS / ADDITIONS

# END OF CORRECTIONS / ADDITIONS

THE FOLLOWING  
DOCUMENT HAS  
BEEN FILMED IN  
SECTIONS TO  
INSURE  
READABILITY.  
SECTIONS  
OVERLAP.

# BOOK IN POOR CONDITION

**C.15: "Blank Pages not Filmed" target**

**PAGES**  
**ARE BLANK**  
**TEMPLATE**

**PAGES 32-89**  
**ARE BLANK**

EXAMPLE ONLY

## Appendix D: Sample Forms



## INDEX OF MICROFILM CONTENTS

OFFICE	City of Clement	VENDOR	Acme Micrographics
COUNTY	County of Rose	DATE	November 21, 2006
CITY	City of Clement	PAGE <u>  1  </u>	OF <u>  1  </u>

BOX # or BOOK#	ROLL#	RECORDS SERIES TITLE	# OF PAGES	REDUCTION RATIO	SHEET SIZE	NOTES
Box 1 of 2		Ordinances	1,500			
Box 2 of 2		Ordinances	1,000			
Box 1 of 2		Building Permits	500			
Box 2 of 2		Building Permits	500			
Box 1 of 1		Resolutions	400			
Box 1 of 3		Board of Aldermen Meetings	3,200			
Box 2 of 3		Board of Aldermen Meetings	3,100			
Box 3 of 3		Board of Aldermen Meetings	3,000			
Box 1 of 1		Board of Aldermen Executive Session Meetings	600			
Box 1 of 4		General Ledgers	4,500			
Box 2 of 4		General Ledgers	4,500			
Box 3 of 4		General Ledgers	4500			
Box 4 of 4		General Ledgers	4,500			
Box 1 of 1		Cemetery Register & Cemetery Maps	1,750			
Box 1 of 2		City Cemetery Internment Record Cards	7,500			
Box 2 of 2		City Cemetery Internment Record Cards	6,000			
Box 1 of 1		Board of Adjustment Minutes	1,000			
Box 1 of 1		Planning & Zoning Minutes	750			
Box 1 of 1		Audit Reports	4,500			

**D.2: Labels**

## Microfilm Box Label

Microfilm box labels should have the dimensions indicated here:

- label width: 3 3/8" (8.5mm)
- label height: 4 13/16" (12.2mm)
- distance from top border to first line: 1.6mm
- distance from 1<sup>st</sup> to 2<sup>nd</sup> line: 1.9mm
- distance from 2<sup>nd</sup> to bottom line: 8.6mm

### Microfilm Labels for Bound Volumes

#### TEMPLATE

#### SAMPLE

<b>ROLL NUMBER</b>		
<b>COUNTY/CITY OFFICE</b>		
SERIES TITLE	<u>VOL.</u>	<u>RANGE</u>
TITLE/CONTENT	BOOK #	DATES
TITLE/CONTENT	BOOK #	DATES

<b>C 48353</b>		
<b>ROSE COUNTY RECORDER OF DEEDS</b>		
DEED RECORDS	<u>VOL.</u>	<u>RANGE</u>
Warranty	441	May 1939 - Feb 1940
Mortgage	442	Nov 1939 - Mar 1941

## Microfilm Labels for Unbound Records

TEMPLATE

SAMPLE

<b>ROLL NUMBER</b>			
<b>COUNTY NAME</b>			
<b>OFFICE</b>			
SERIES TITLE			
BOX #__	FOLDER #	DATE	CONTENT
<i>THRU</i>			
BOX #__	FOLDER #	DATE	CONTENT

<b>C 48678</b>			
<b>ROSE COUNTY</b>			
<b>CIRCUIT COURT</b>			
CASE FILES			
BOX #32	FOLDER #55	1860	
<i>THRU</i>			
BOX #33	FOLDER #74	1867	

**D.3: Quality Control Report**

Missouri State Archives/ Local Records Preservation Program  
Quality Control Report

Institution: \_\_\_\_\_

Preservation Microfilming Project: \_\_\_\_\_

Filming Agent: \_\_\_\_\_

MASTER NEGATIVE STORAGE NUMBER \_\_\_\_\_ Exposures \_\_\_\_\_  
RECORD \_\_\_\_\_ BOX \_\_\_\_\_ FOLDERS \_\_\_\_\_

**1. FILMING**

Technician (Initials) \_\_\_\_\_ Camera: \_\_\_\_\_ Filming Date(Mo/Day) \_\_\_\_\_

Pg# \_\_\_\_\_ Reduction Ratio \_\_\_\_\_

Image Orientation \_\_\_\_\_ Required changes in orientation or reduction? \_\_\_\_\_

**2. INITIAL QUALITY CONTROL**

Processor (Initials) \_\_\_\_\_ Inspector (Initials) \_\_\_\_\_ Processing Date \_\_\_\_\_

Density Readings 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_ 5. \_\_\_\_\_ 6. \_\_\_\_\_ 7. \_\_\_\_\_ 8. \_\_\_\_\_ Avg. \_\_\_\_\_

Resolution pattern required \_\_\_\_\_ Highest Resolution pattern Read \_\_\_\_\_

**3. FILMING ERRORS (give page/frame numbers)**

Overexposed images \_\_\_\_\_ Density: \_\_\_\_\_

Underexposed images \_\_\_\_\_ Density: \_\_\_\_\_

Focus defects \_\_\_\_\_ Cause: \_\_\_\_\_

Obstruction in frame \_\_\_\_\_ Cause: \_\_\_\_\_

Streaks \_\_\_\_\_ Fogging: \_\_\_\_\_

Other \_\_\_\_\_

**4. PHYSICAL DEFECTS (give page numbers)**

Fingerprints \_\_\_\_\_

Scratches \_\_\_\_\_

Water Spots \_\_\_\_\_

Dust/Dirt etc. \_\_\_\_\_

Other/Comments \_\_\_\_\_

**5. ACTIONS TO CORRECT DEFECTS**

Refilming whole title ? \_\_\_\_\_ Refilming of page(s) list \_\_\_\_\_

Splices needed (number) \_\_\_\_\_ Number of exposures refilmed \_\_\_\_\_

Other action/comments \_\_\_\_\_

**6. APPROVAL FOR VARIANCE FROM PROJECT SPECIFICATIONS**

Variant density (check) \_\_\_\_\_ other ? \_\_\_\_\_

Variance approval of Project Manager (initials) \_\_\_\_\_ Date: \_\_\_\_\_

**7. CERTIFICATION OF REPORT**

Filming Agent (Initials) \_\_\_\_\_ Date: \_\_\_\_\_

Project Manager (Initials) \_\_\_\_\_ Date: \_\_\_\_\_

Reel Filmed by: \_\_\_\_\_  
Density & Resolution by: \_\_\_\_\_  
Frame-by-Frame Insp'n by: \_\_\_\_\_  
Corrections spliced by: \_\_\_\_\_

**D.4: Large Document form**

# LARGE DOCUMENTS CAN BE FOUND IN OVERSIZED STORAGE

Location: \_\_\_\_\_

Box: \_\_\_\_\_

Folder: \_\_\_\_\_

# of Items: \_\_\_\_\_

D.5: Sample Letter of Agreement

## Sample Letter of Agreement

<Date>

<Name>

<Microfilm Company>

<Address>

Dear <Name>:

I am pleased to say that you have been awarded our microfilming project: **<insert project name>**. In order to proceed with this project, we ask that you sign the three copies of this letter of agreement, which I have already signed. Please keep one copy for your files, and return the other two to me. I will forward one copy to the Local Records Program of the Missouri State Archives for their grant records.

This letter serves as an agreement that you understand that this project is part of the Local Records Preservation Grant Program and therefore must follow the guidelines set forth by that agency. Those guidelines can be found on the Internet at <http://www.sos.mo.gov/archives/pubs/mfmg/>. The Local Records Program also requires that your company perform all the work as discussed in the estimate. Subcontracting is only allowed with written notification and acceptance by my office. As part of the requirements for this grant program, microfilm will not be accepted and payment will not be made until the Local Records Program completes its quality control and determines that the film meets the requirements of their specifications.

We would also like to sign a formal contract with you for this project. Please send us your standard contract for review.

Thank you for your assistance in preparing for this project. We look forward to the project start. We plan to **<deliver the materials or ship the materials or have the materials ready>** on **<date>**. Please let me know when you plan to begin the filming.

Sincerely yours,

<Name>

<Government office/agency>

<Address>

## Appendix E: Grant Project Workflow

To those who have received a grant from the Local Records Preservation Program involving the production of microfilm, congratulations! The information provided in this guideline will be very important to implement a smooth grant project. Most importantly, before you begin **any** microfilming, fill out and return the "Microfilm Information Sheet" provided in your award packet. This will inform the Local Records Grant Administrator (573-751-2798) which vendor you plan to use for your microfilming. *We can discuss the project with the production staff selected to do the filming (not the sales representative) so that a clear understanding of all standards, specifications, and expectations will be established before the project begins.*

LR grant recipients should also complete and sign a letter of agreement with the chosen vendor. (See sample in Appendix D).

### **WORKFLOW FOR MICROFILM PRODUCED FOR A LOCAL RECORDS GRANT PROJECT**

- 1) Grant awarded by the Secretary of State upon recommendation of the Missouri Historical Records Advisory Board (MHRAB).
- 2) Microfilm Information Sheet and Letter of Agreement completed.
- 3) Local government agency prepares/processes records for microfilming. The work may be done by agency staff and/or volunteers, professional consultant, or vendor.
- 4) Vendor microfilms records, develops them, inspects them, and creates duplicates.
- 5) Vendor sends master (original) silver film and associated quality-control report form to Local Records. Work copies should be sent to grantee.
- 6) Local Records staff enters film into database as being received.
- 7) Local Records staff performs quality-control inspection on master microfilm
  - a. If master microfilm passes Quality Control Inspection, then
    - i. Film released from grant authority when project is complete and
      1. Film is returned to government office.
      2. Or, retained by Archives, labeled, and stored.
    - ii. Silver duplicate made—labeled and stored.
    - iii. Silver or Diazo duplicate made—labeled and goes to Archives Reference.
  - b. If master microfilm does not pass Quality Control Inspection, then film is
    - i. Returned to vendor for re-filming

Grant recipients are notified by postcard whether film is accepted or rejected. The quality control inspection effort of the Local Records Program may reject any reel of film that does not meet the standards and specifications of these *Guidelines*.

Because of the requirements under which the Local Records Program operates, we will not be able to grant any funds for a project which we judge has not met the quality control standards. In the unlikely event there is a situation where grant funds have already been expended by the agency or office for microfilm that does not meet standards, that agency or office will replace the sub-standard film at their expense or reimburse all grant funds to the Local Records Program.

Local government agencies may also request subsequent diazo-film reference copies at any time for direct cost -- currently \$15.00 per reel.

## Appendix F: Glossary of Terms

**ANSI:** American National Standards Institute – a federation of trade associations, technical societies, professional organizations, consumer groups, and private companies that develops national standards, including those that govern the creation of permanent microfilm.

**Archival Master** (also AM, Archival, Master Negative, Camera Negative, or first generation film): The film used in the camera during filming. When manufactured, processed, and stored in accordance with national standards, this film should achieve a Life Expectancy (LE) of at least 500 years. See also *print master* and *service copy*.

**Baseline Filming:** Microfilming practice in which operators position documents so that the lower edge of all pages on a reel appear at approximately the same distance from the edge of the film.

**Bleed-Through:** An effect caused when ink has migrated, generally due to the porousness of the paper, from the surface of a sheet of paper to the surface of the verso.

**Blurred Frame:** An image on the film that is out of focus. Generally occurs when the cradle or pages are moving during filming, the camera experiences a focus problem.

**Brittle:** Describes paper that breaks or cracks when folded or bent. Paper that is acidic as a result of its manufacture becomes brittle as a result of a chemical reaction.

**Cine** (or Position A): Defined as the placement of source materials so that their bottom edges of frames or pages are perpendicular to the long edge of the microfilm. See also *Comic*.

**Collate:** To review an item to ascertain whether it is complete and in the correct order. Other conditions that may be noted during collation include damaged pages or bibliographic irregularities (such as irregular volume/issue numbering, pagination, or title changes). It may also be useful to note foldouts or other unusual features that the camera operator may need to prepare for, and also to keep track of the number of pages present, which can be used for *reel programming*.

**Comic** (or Position B): Defined as the placement of source materials so that their bottom edges of frames or pages are parallel to the long edge of the microfilm. See also *Cine*.

**Condition Target:** Usually an *eye-legible target*, inserted in the target sequence, describing unusual or specific conditions for that title or reel.

**Contrast:** An expression of the relationship between text and background of material or between the high and low *density* of a photographic image. See also *high contrast*, *medium contrast*, and *low contrast*.

**Cradle** (or Book Cradle): A device that supports bound volumes for microfilming (under glass) in a position so that pages are open flat under the lens of the camera.

**D-Max** (Maximum *Density*): A measurement taken on the dark area of the film; used on Archival, Print Master, and Service Copies. Dmax must fall within a specified range dependent on material type and film type.

**D-Min** (Minimum *Density*): A measurement taken on the light/clear area of the film; used on Archival and Print Master. Dmin must fall within a specified range dependent on film type.

**Densitometer, Transmission:** Piece of equipment used to inspect microfilm to measure the amount of light able to pass through the film. This equipment is used to measure *density* during the Quality Assurance process.

**Density:** A measure of the amount of light able to pass through the film. See also *densitometer, transmission and uniform density target*.

**Duplicate** (or Dupe): To make copies of microfilm, from the *archival master* or *print master*. Also used to refer to the reels that have been duplicated (*Print Masters* and *Service Copies*).

**Duplicate frame:** the appearance of an identical *frame* on film due to operator error. See also *Intentional Second Exposure*.

**Eye-legible Target:** Refers to a *target* that can be read by the human eye on microfilm without magnification. In order to achieve this, it is necessary for a *target* to be printed in a font size of at least 60 pts.

**Fade** (or Background *Density*): The background darkness or color of a page.

**Fade Changes:** Fades that vary from one page of text to another or within the same page.

**Flag:** Narrow strip of paper inserted in a volume, generally to alert the camera operator to film a particular *target* or to provide instructions for filming.

**Fog:** A dark patch on film that can be caused by stray light during film manufacture, exposure, or loading/unloading.

**Frame:** Each exposure on film is referred to as a frame.

**Generation:** One of the successive stages of duplication (see *duplicate*) of an original or a master.

**Gutter Glare:** A reflection from the camera lights that appears in the inner margin of the book if volume is too tightly bound, is too thick or is printed on glossy paper. Gutter glare can sometimes obscure text to the point of illegibility on microfilm.

**Gutter Shadow:** Shadow that appears in the inner margin of the book if volume is too tightly bound or is too thick. Gutter shadow can sometimes obscure text to the point of illegibility on microfilm.

**High Contrast:** 1. Film in which the light and dark areas are represented by extreme differences in density. Most black and white film is high contrast film. 2. Material that is easily readable and has bold or clear text. See also *medium contrast* and *low contrast*.

**In-frame Target:** A sheet of paper with technical or explanatory information, which is small in size and appears in the same frame with the document being filmed. Cf. "Target."

In-frame targets are not to be used in microfilm produced with grant funds from the Local Records Program.

**Intentional Second Exposure:** Second exposure of the same page(s) taken intentionally in order to capture the most legible image of everything in the frame, usually for a *fade change*, photograph or illustration.

**Leader:** Clear film added to the front of each reel. Used for protection of images from *fog* and handling *scratches* and for threading into micrographics equipment.

**Light Balance:** Equal amounts of light appearing in all areas of a frame. Achieved by positioning camera lights so that there is an even background *density* across the entire frame.

**Light Box:** Translucent box with a light inside, designed to provide evenly dispersed illumination. Used to check film for *scratches* or other flaws.

**Loupe:** Small hand-held magnifying glass used to inspect film over a *light box*.

**Low Contrast:** 1. Film in which the light and dark areas on a frame are represented by small differences in density. 2. Material that has little or no contrast between text and background – often difficult to read. See also *high contrast* and *medium contrast*.

**Medium Contrast:** 1. Film in which the light and dark areas on frame are represented by moderate differences in density. 2. Material that is legible, with moderate contrast between text and background; onionskin paper and type written material usually fall into this category. See also *high contrast* and *low contrast*.

**Microscope:** A 100X microscope is used to check the *resolution target* patterns.

**Orientation** (or Position): The position of the camera head in relation to the material being filmed. See also *Comic* and *Cine*.

**Print Master (also PM, duplicate negative, or second generation film):** This film is duplicated from the *archival master* and is used to create *service copies* of the film. See also *archive master* and *service copy*.

**Reduction Ratio:** Relationship between the size of the original document and the size of the microfilmed image. Generally referred to with an "X". 12X represents the reduction ratio 12:1. Example: 12X or 12:1 means the size of the image on film will be 1/12<sup>th</sup> the actual size of the original document.

**Reel:** 1. A physical roll of film. 2. Informally used to refer to the corresponding original material that is contained on a reel of film.

**Reel Programming** (or reel breaking): Determining what material is to be filmed on a given reel. This can be done before beginning filming, or at camera during filming.

**Resolution:** A test that measures whether the film captured the fine detail or clarity of the document.

**Resolution Target:** A target that is filmed so that the optical performance of the microfilm equipment can be measured. Consists of a series of successively smaller patterns with

alternating black and white line pairs. Each pattern contains both vertical and horizontal line pairs and is numbered – the smaller the pattern, the higher the number.

**Scratch:** Damage that occurs when film is inadvertently scraped. Can be caused by improper handling or malfunctioning equipment, and can occur on either the emulsion or the polyester base.

**Service Copy** (also SC, Positive Copy, or third generation film): The copy of the microfilm that will be used by readers. Generally a positive service copy is made. See also *archive master* and *print master*.

**Skew:** The degree to which the image that appears on film is “off-square” from the film. Skew is measured from the two corners of the document image parallel to the longitudinal edge of the projected image frame.

**Splice:** A joint made by ultrasonically welding two pieces of film together so they will function as a single piece. Splices can also be made using tape, ultrasonic welding, or thermal methods. However, tape splices do not meet preservation guidelines.

**Splicer:** A device for joining strips of photographic film.

**Target:** Used throughout a reel to convey information a future reader might need (such as a bibliographic record target or a copyright target) or to provide a basis for quality testing of the film (such as a *resolution target* or *uniform density target*).

**Tie-Wrap** (or Button and String Tie): An acid-free covering that protects a reel of microfilm.

**Trailer:** Clear film added to the end of a reel. Used for protection of images from *fog* and handling *scratches* and for threading into micrographics equipment.

**Uniform Density Target:** A single sheet of clean white bond paper or card stock, filmed at the beginning and end of every reel. The target should completely fill the image area and its primary function is to verify light balance.

<b>ATTACHMENT FOUR</b>			
<b>RFP# 46-06DEC17</b>			
<b>Part One: Past Contract Expenditures, Contract #71-01DEC09</b>			
<b>Fiscal/Calendar Year</b>		<b>Total</b>	
2011	\$	76,373.78	
2012	\$	31,395.20	
2013	\$	40,384.80	
2014	\$	54,552.93	
2015	\$	32,199.08	
2016	\$	37,053.96	
2017	\$	20,922.44	
<i>Note: All information herein represents the County's good faith effort to provide reliable historical data. Vendors must understand that the information presented here cannot be construed to represent a guaranteed amount of work under any prospective contract with the County.</i>			
<b>Part Two: Current Contractor's Invoices History Past Year Oct. 2016 through Sept. 2017</b>			

9:49 AM  
10/17/17

**US Imaging, Inc.  
Customer QuickReport**

October 2016 through September 2017

	<b>Type</b>	<b>Date</b>	<b>Num</b>	<b>Memo</b>	<b>Amount</b>
<b>Boone MO</b>	Invoice	10/17/2016	9158		\$ 2,713.32
	Invoice	11/02/2016	9258		\$ 2,248.32
	Invoice	12/16/2016	9447		\$ 2,229.24
	Invoice	01/18/2017	9581		\$ 1,933.20
	Invoice	02/02/2017	9622		\$ 2,563.44
	Invoice	03/13/2017	9789		\$ 1,785.12
	Invoice	04/03/2017	9869		\$ 1,624.56
	Invoice	04/28/2017	9973		\$ 2,251.68
	Invoice	06/13/2017	10154		\$ 2,253.96
	Invoice	07/25/2017	10305		\$ 2,721.24
	Invoice	08/07/2017	10368		\$ 2,425.92
	Invoice	09/07/2017	10496		\$ 2,251.44
					\$ 27,001.44

**RFP# 46-06DEC17  
ATTACHMENT FIVE  
AUDITOR'S OFFICE SCANNING  
FOR OPTION TWO**

Report Year	Annual Budget Book				Annual Financial Statement				Single Audit			
	# of Pages	Includes Cover & Index pages	Tabs (Y or N)	Report Spine	# of Pages	Includes Cover & Index pages	Tabs (Y or N)	Report Spine	# of Pages	Includes Cover & Index pages	Tabs (Y or N)	Report Spine
2002	489	y	y	comb	169	y	y	comb	10	y	n	comb
2001	515	y	y	comb	167	y	y	comb	11	y	n	comb
2000	433	y	y	comb	176	y	y	comb	10	y	n	comb
1999	391	y	y	wire	186	y	n	comb	9	y	n	staple
1998	343	y	y	comb	183	y	n	comb	9	y	n	staple
1997	316	y	y	comb	177	y	n	comb	10	y	n	staple
1996	318	y	y	comb	183	y	n	comb	19	Y	N	staple
1995	362	y	n	comb	180	y	n	comb	19	y	n	staple
1994	328	y	y	comb	141	y	n	comb	18	y	n	comb
1993	284	y	y	comb	135	y	n	comb	18	y	n	comb
1992	211	y	n	comb	137	y	n	comb	18	y	n	comb
1991	148	y	n	comb	124	y	n	comb	19	y	n	prongs
1990	134	y	n	comb	126	y	n	comb	26	y	n	comb

**RFP# 46-06DEC17  
ATTACHMENT FIVE  
AUDITOR'S OFFICE SCANNING  
FOR OPTION TWO**

Annual Budget Book					Annual Financial Statement				Single Audit			
1989	128	y	n	comb	123	y	n	comb	22	y	n	prongs
1988	117	y	n	comb	135	y	n	comb	15	y	n	staple
1987	146	y	n	comb	142	y	n	comb	11	y	n	staple
1986	152	y	n	comb	132	y	n	comb	11	y	n	staple
1985	147	y	n	comb	135	y	n	comb	14	y	n	staple
1984	137	y	n	comb	100	y	n	comb				
1983	120	y	n	comb	93	y	n	comb				
1982	100	y	n	comb	29	y	n	prongs				
1981	41	y	n	comb	27	y	n	prongs				
1980	43	y	n	comb	42	y	n	prongs				
1979	60	y	n	comb	24	y	n	frame/pins				
1978	53	y	n	frame/pins								
1977	41	y	n	staple								
1976	41	y	n	staple								

**RFP# 46-06DEC17  
ATTACHMENT FIVE  
AUDITOR'S OFFICE SCANNING  
FOR OPTION TWO**

Annual Budget Book					Annual Financial Statement				Single Audit				
1975	51	y	n	staple									
1974	51	y	n	staple									
1973	48	y	n	staple									
1972	46	y	n	staple									
1971	43	y	n	staple									
1970													

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER <b>Saginaw Bay Underwriters</b> Commercial Lines 1258 S. Washington P.O. Box 1928 Saginaw, MI 48605	CONTACT NAME: PHONE (A/C, No, Ext): <b>989 752-8600</b>	FAX (A/C, No):	
	E-MAIL ADDRESS: PRODUCER CUSTOMER ID #:		
INSURED <b>US Imaging, Inc.</b> 400 S. Franklin St Saginaw, MI 48607	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A : <b>Travelers Property Casualty</b>		<b>25674</b>
	INSURER B : <b>Travelers Indemnity</b>		<b>25658</b>
	INSURER C : <b>Travelers Casualty &amp; Surety</b>		<b>31194</b>
	INSURER D :		
	INSURER E :		
INSURER F :			

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			ZPP12P09558	02/03/2018	02/03/2019	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$300,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			BA7G634084	02/03/2018	02/03/2019	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$ 10000			ZUP12P09583	02/03/2018	02/03/2019	EACH OCCURRENCE \$1,000,000 AGGREGATE \$1,000,000 \$ \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	HKUB9443C324	02/03/2018	02/03/2019	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	Professional Liability			105511397	10/12/2017	10/12/2018	\$1,000,000 \$5,000 Deductible

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
 Boone County is Additional Insured with respects to the General Liability and Auto Liability. 30 Day Notice of Cancellation(10 Day Notice for nonpayment of premium) applies. (02/18)

CERTIFICATE HOLDER <b>Boone County</b> 801 E Walnut Columbia, MO 65201	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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91 -2018

# CERTIFIED COPY OF ORDER

STATE OF MISSOURI }  
County of Boone } ea.

February Session of the January Adjourned

Term. 20 18

In the County Commission of said county, on the 20th day of February 20 18

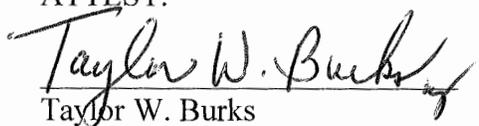
the following, among other proceedings, were had, viz:

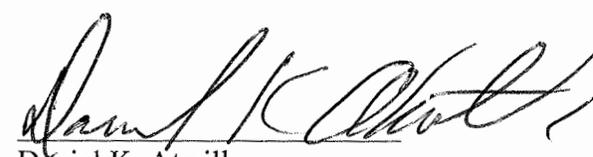
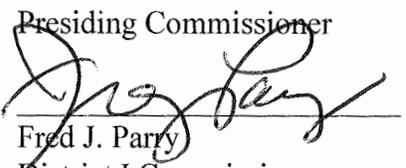
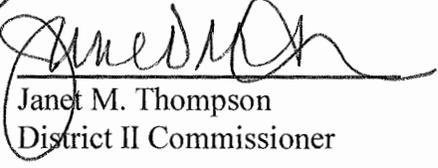
Now on this day the County Commission of the County of Boone does hereby award bid 40-16OCT17 – Detainee Telephone System for the Boone County Detention Center to CenturyLink.

Terms of the bid award are stipulated in the attached Purchase Agreement. It is further ordered the Presiding Commissioner is hereby authorized to sign said Agreement.

Done this 20th day of February, 2018

ATTEST:

  
Taylor W. Burks  
Clerk of the County Commission

  
Daniel K. Atwill  
Presiding Commissioner  
  
Fred J. Parry  
District I Commissioner  
  
Janet M. Thompson  
District II Commissioner

# Boone County Purchasing

**Liz Palazzolo**  
Senior Buyer



613 E. Ash, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390

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## MEMORANDUM

TO: Boone County Commission  
FROM: Liz Palazzolo, CPPO, C.P.M.  
DATE: February 15, 2018  
RE: 40-16OCT17 for a Detainee Telephone System for the Boone County Detention Center

Request for Proposal 40-16OCT17 solicited proposals for a Detainee Telephone System for the Boone County Detention Center. Seven proposals were received and reviewed by the Boone County Evaluation Committee. The evaluation summary, scores, and evaluation narrative prepared by the Evaluation Committee follow this memo.

The Evaluation Committee recommends an award to CenturyLink for their Offer #2 as the lowest and best offer for Boone County. This offer significantly lowers the costs to the users of the system while ensuring an adequate administrative cost recovery for the Boone County Sheriff's Department. The CenturyLink product also represents a significant upgrade in the overall detainee phone system product from the current provider's product.

The award to CenturyLink will result in a basic cost per minute for Prepaid calls, Debit card calls, and Collect calls of \$0.10 per minute. The cost of a 15-minute phone call under the CenturyLink system will therefore be \$1.50 for each of those types of calls. This compares to our current provider's 15-minute call cost of \$8.25 for Prepaid calls and Debit card calls, and \$6.75 for Collect calls. **In other words, the move to CenturyLink will result in a 78%-82% savings to the users of the system over the current provider.**

The contract will have an initial five-year contract period with two additional one-year renewal options. There is no cost to the County for the detainee telephone system.

Attachments: Bid Tabulation, Scoring Sheets, Evaluation Summary, Factors Reviewed Sheet, and Evaluation Report

/lp

cc: Dwayne Carey, Sheriff  
RFP File #40-16OCT17

**PURCHASE AGREEMENT  
FOR A  
DETAINEE TELEPHONE SYSTEM**

**THIS AGREEMENT** dated the 20<sup>th</sup> day of February 2018 is made between Boone County, Missouri, a political subdivision of the State of Missouri through the Boone County Commission, herein "County" and **CenturyLink**, herein "Contractor."

**IN CONSIDERATION** of the parties' performance of the respective obligations contained herein, the parties agree as follows:

**1. Contract Documents** - This agreement shall consist of this Purchase Agreement for a **Detainee Telephone System, Term & Supply**, County of Boone Request for Proposal for a Detainee Telephone System, Term & Supply, **RFP number 40-16OCT17 – Detainee Telephone System, Term and Supply**, and all its parts, i.e., Instructions and General Conditions, Introduction and General Information, Scope of Services, Proposal Submission Information, the blank Vendor Response/Pricing Page, and Boone County's Standard Terms and Conditions; and including **Addendum #1 to RFP 40-16OCT17 Detainee Telephone System, including Attachments One, Two and Three; as well as the Contractor's proposal response dated October 23, 2017** and executed by Amy Allen for Paul N. Cooper on behalf of the Contractor; **Clarification #1** from the Contractor **dated December 1, 2017 signed by Paul Cooper; Best and Final Offer #1 and Clarification #2 dated December 18, 2017 signed by Paul Cooper; and the e-mail dated December 26, 2017 from Paul N. Cooper.** All such documents shall constitute the contract documents which are attached hereto and incorporated herein by reference. Service or product data, specification and literature submitted with the proposal response may be permanently maintained in the County Purchasing Office RFP file for this proposal if not attached. In the event of conflict between any of the foregoing documents, this Purchase Agreement, **RFP number 40-16OCT17 – Detainee Telephone System, Term and Supply**, and all its parts, i.e., Instructions and General Conditions, Introduction and General Information, Scope of Services, Proposal Submission Information, the blank Vendor Response/Pricing Page, and Boone County's Standard Terms and Conditions; and including **Addendum #1** shall prevail and control over the Contractor's bid response.

**2. Contract Duration** - This agreement shall **commence on the award date noted above and extend through five (5) years** subject to the provisions for termination specified below. This contract is subject to annual renewal for **two (2) additional, one-year periods** following the expiration of the first contract period and thereafter on a month to month basis on the same pricing until ninety (90) calendar days written notice is given by either party.

**3. Basic Services** - The County agrees to the Contractor's provision of a turnkey telephone system for the Boone County Detention Center located at 2121 County Drive in Columbia, Missouri that shall include all system hardware including twenty-six (26) detainee telephone units, eight (8) detainee visitation telephone units, two (2) public use coin phones, and one (1) Bridge Communication Device wall-mounted touch screen kiosk, software, support, maintenance, and service as defined in all documents identified in paragraph #1 above. The award shall be made for Offer #2:

Line Item 8: \$.10/per minute firm and fixed for Prepaid Calls and Debit Calls;

Line Item 9: \$.10/per minute firm and fixed for Collect Calls;

Line Item 10: \$3.00/each transaction firm and fixed for an Automated Payment Fee;

Line Item 11: \$5.95/each transaction firm and fixed for a Live Agent Fee;

Line Item 12: \$.50/minute firm and fixed for International Calls;

And the following fees:

- \$3.00/each transaction firm and fixed for Prepaid Account Funding Fee Via Internet (Prepaid Collect);
- \$3.00/each transaction firm and fixed for Prepaid Account Funding Via Telephone (Prepaid Collect) if completed by the Automated Phone System;
- \$5.95/each transaction firm and fixed for a Prepaid Account Funding Fee Via Telephone (Prepaid Collect);
- \$5.00/each transaction firm and fixed for a transfer of funds from Western Union;
- \$5.99/each transaction firm and fixed for a transfer of funds from Money Gram or similar service.

All service shall be provided as required in the RFP specifications and in conformity with the contract documents for the prices set forth in the Contractor's proposal response, as needed and as ordered by the County.

4. **Delivery** – The Contractor agrees to provide the items and service as specified and as agreed to in the RFP specifications and within **fifty-eight (58) calendar days** after receipt of order.

5. **Billing and Payment** – There shall be no charges submitted to the County for Detainee Telephone System services. The Contractor shall pay the County a 60.2% fixed commission on all Gross Billed Revenue on all call types monthly for the duration of the contract calculated and reported consistent with the terms stated in **RFP number 40-16OCT17 – Detainee Telephone System, Term and Supply**, and all its parts, i.e., Instructions and General Conditions, Introduction and General Information, Scope of Services, Proposal Submission Information, the blank Vendor Response/Pricing Page, and Boone County's Standard Terms and Conditions; and including **Addendum #1 to RFP 40-16OCT17 Detainee Telephone System, including Attachments One, Two and Three.**

6. **Binding Effect** - This agreement shall be binding upon the parties hereto and their successors and assigns for so long as this agreement remains in full force and effect.

7. **Entire Agreement** - This agreement constitutes the entire agreement between the parties and supersedes any prior negotiations, written or verbal, and any other RFP or RFP specification or contractual agreement. This agreement may only be amended by a signed writing executed with the same formality as this agreement.

8. **Termination** - This agreement may be terminated by the County upon ninety (90) calendar days advance written notice for any of the following reasons or under any of the following circumstances:  
a. County may terminate this agreement due to material breach of any term or condition of this agreement, or  
b. County may terminate this agreement if in the opinion of the Boone County Commission if delivery of products or services are delayed or products delivered or services provided are not in conformity with bidding specifications and vendor's response, or variances authorized by County, or  
c. If appropriations are not made available and budgeted for any calendar year.

**IN WITNESS WHEREOF** the parties through their duly authorized representatives have executed this agreement on the day and year first above written.

**CENTURYLINK**  
by Paul Cooper 1-29-2018  
title PAUL COOPER - VP/GM  
address 600 New Century Pkwy  
New Century KS 66031

**BOONE COUNTY, MISSOURI**  
by: Boone County Commission  
Daniel K. Atwill  
Daniel K. Atwill, Presiding Commissioner

APPROVED AS TO FORM:  
C.J. Dykhouse  
C.J. Dykhouse County Counselor

ATTEST:  
Taylor W. Burks  
Taylor W. Burks, County Clerk

**AUDITOR CERTIFICATION**

In accordance with RSMo 50.660, I hereby certify that a sufficient unencumbered appropriation balance exists and is available to satisfy the obligation(s) arising from this contract. (Note: Certification of this contract is not required if the terms of this contract do not create a measurable county obligation at this time.)

1255/3553: \$0

Signature *Jane Pitchford by jg* Date *02/15/2018* Appropriation Account

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390

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## MEMORANDUM

TO: Boone County Commission  
FROM: Liz Palazzolo, CPPO, C.P.M.  
DATE: February 15, 2018  
RE: 40-16OCT17 for a Detainee Telephone System for the Boone County Detention Center

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Attachments: Bid Tabulation, Scoring Sheets, Evaluation Summary, Factors Reviewed Sheet, and Evaluation Report

/lp

cc: Dwayne Carey, Sheriff  
RFP File #40-16OCT17

*Offer One Pricing*

Description	QTY (See Note)	Encartele	IC Solutions	CenturyLink	PayTel Communications, Inc.
Administrative Costs Recovery Commission 1, Fixed Percentage on Gross Revenue	1	\$10,000 at the beginning of each year of the contract adjusted by the CPI or 35% of the total revenue generated, whichever is greater	17% Commission And a \$50,000 Technology Grant available to the County immediately upon activation of IC Solutions' services; this grant can be used at the County's discretion to fund any necessary technology	17% Commission	30%
Paid Call/Debit Call - Price Per Minute	427,130	\$ 0.15	\$ 0.05	\$ 0.04	\$ 0.10
Local Call - Price Per Minute	427,130	\$ 0.15	\$ 0.05	\$ 0.04	\$ 0.10
Automated Payment Fee Per Each Transaction	1	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00
Agent Fee Per Each Transaction	1	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95
International Call - Price Per Minute Minutes of call time transpired for the multiplied by 2 to arrive at an annual total: 213,565 X 2 = 427,130	5	\$ 0.40	\$ 0.50	\$ 0.50	\$ 0.50

<i>Per One Pricing</i>								
	Encartele Unit \$	Encartele Extended Price	IC Solutions Unit \$	IC Solutions Extended Price	CenturyLink Unit \$	CenturyLink Extended Price	PayTel Unit \$	PayTel Communications, Inc. Extended Price
QTY								
427,130	\$ 0.15	\$ 64,069.50	\$ 0.05	\$ 21,356.50	\$ 0.04	\$ 17,085.20	\$ 0.10	\$ 42,713.00
427,130	\$ 0.15	\$ 64,069.50	\$ 0.05	\$ 21,356.50	\$ 0.04	\$ 17,085.20	\$ 0.10	\$ 42,713.00
Per Minute Total		\$ 128,139.00		\$ 42,713.00		\$ 34,170.40		\$ 85,426.00
1	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00
1	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95
5	\$ 0.40	\$ 2.00	\$ 0.50	\$ 2.50	\$ 0.50	\$ 2.50	\$ 0.50	\$ 2.50
Total Extended Price - Initial Year of Five Year Contract Period		\$ 128,149.95		\$ 42,724.45		\$ 34,181.85		\$ 85,437.45
The Above Total Multiplied by 7 for Total Price for the Initial 5-Year Contract Period, plus two one-year renewal:		\$ 897,049.65		\$ 299,071.15		\$ 239,272.95		\$ 598,062.15
Cost Points: Maximum 55		15		44		55		22

*Offer Two Pricing*

Description	QTY	Encartele	IC Solutions	CenturyLink	PayTel Communications, Inc.
Commission and Percentage on Gross	1	0% commission with a guaranteed \$10,000 each year of the contract adjusted by the CPI.	85.1% Commission <b>\$120,000</b> Minimum Annual Guarantee (MAG) is total inmate commissions for each year during the contract term, plus renewal periods, guaranteed regardless of actual call volumes; will be reconciled annually, and the County will receive any additional commission earned above the MAG based on actual call volumes and the 85.1% commission rate.  And a \$50,000 Technology Grant available to the County immediately upon activation of IC Solutions' services;	60.2% Commission	55%
Call/Debit Call - Price Per	427,130	\$ 0.10	\$ 0.21	\$ 0.10	\$ 0.15
Call - Price Per Minute	427,130	\$ 0.10	\$ 0.21	\$ 0.10	\$ 0.15
Fixed Payment Fee Per Each Transaction	1	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00
Initiation Fee Per Each Transaction	1	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95
Long Distance Call - Price Per Minute if call time transpired for the first 2 to arrive at an annual 3,565 X 2 = 427,130	5	\$ 0.35	\$ 0.75	\$ 0.50	\$ 0.75

RFP#: 40-16OCT17		Offer Two Pricing									
Detainee Telephone System			Encartele Unit \$	Encartele Extended Price	IC Solutions Unit \$	IC Solutions Extended Price	CenturyLink Unit \$	CenturyLink Extended Price	PayTel Unit \$	PayTel Communications, Inc. Extended Price	
Cost Evaluation	Description	QTY									
Line Item 2	Pre-paid Call/Debit Call - Price Per Minute	427,130	\$ 0.10	\$ 42,713.00	\$ 0.21	\$ 89,697.30	\$ 0.10	\$ 42,713.00	\$ 0.15	\$ 64,069.50	
Line Item 3	Collect Call - Price Per Minute	427,130	\$ 0.10	\$ 42,713.00	\$ 0.21	\$ 89,697.30	\$ 0.10	\$ 42,713.00	\$ 0.15	\$ 64,069.50	
		Per Minute Total		\$ 85,426.00		\$ 179,394.60		\$ 85,426.00		\$ 128,139.00	
Line Item 4	Automated Payment Fee Per Each Transaction	1	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00	\$ 3.00
Line Item 5	Live Agent Fee Per Each Transaction	1	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95	\$ 5.95
Line Item 6	International Call - Price Per Minute	5	\$ 0.35	\$ 1.75	\$ 0.75	\$ 3.75	\$ 0.50	\$ 2.50	\$ 0.75	\$ 3.75	
		Total Extended Price - initial Year of Five Year Contract Period		\$ 85,436.70		\$ 179,407.30		\$ 85,437.45		\$ 128,151.70	
		The Above Total Multiplied by 7 for a Total Price for the Initial 5-Year Contract Period, plus two one-year renewals		\$ 598,056.90		\$ 1,255,851.10		\$ 598,062.15		\$ 897,061.90	
		Cost Points: Maximum 55		55.00		26.19		54.9995		36.67	

RFP#: 40-16OCT17

**Detainee Telephone System**

*Bid Tabulation*

<b>Encartele</b> LaVista, Nebraska	<b>Securus Technologies</b> Carrollton, Texas	<b>White Horse Support Services, LLC</b> Sturgeon, Missouri	<b>IC Solutions</b> San Antonio, Texas	<b>CenturyLink</b> New Century, Kansas	<b>Telmate, LLC</b> San Francisco, California	<b>PayTel</b> Greensboro, North Carolina
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**EVALUATION REPORT FORM**  
**PURCHASING DEPARTMENT - BOONE COUNTY - MISSOURI**  
**REQUEST FOR PROPOSAL (RFP) # 40-16OCT17 - DETAINEE TELEPHONE SYSTEM**  
 Liz Palazzolo, CPPO, C.P.M., Senior Buyer

Offer Two Pricing				For Purchasing Use Only		
	NAME OF OFFEROR	METHOD OF PERFORMANCE (30 points)	EXPERIENCE/ EXPERTISE OF OFFEROR (15 points)	TOTAL SUBJECTIVE POINTS (45 points)	COST POINTS (55points)	TOTAL POINTS (Max 100 points)
1	Encartele	10	10	20	55.00	75.00
2	PayTel Communications, Inc.	10	12	22	36.67	58.67
3	IC Solutions	20	13	33	26.19	59.19
4	CenturyLink	30	15	45	54.99	99.99
5	Securus Technologies	See File Memo				
6	Telmate. LLC	See File Memo				
7	White Horse Support Services, LLC	See File Memo				

*We hereby attest that the subjective points assigned to each offeror above were scored pursuant to the established evaluation criteria and represent our best judgement of the subjective areas of the offerors' proposals. We have attached a brief narrative which highlights some, but not necessarily all, of the reasons for our evaluation of the proposals as indicated by the scores above. Our comments represent our opinions only and do not represent the position of the Purchasing Department of Boone County, Missouri, or any other party.*

*[Signature]* 1/24/18 *KATH R Hoskins* *Detention Director*

Evaluator's Signatures      Date      Evaluator Printed Name      Title      Dept.

*[Signature]* 1-23-18      *Gary German*      *Captain*      *Sheriff's Dept*

Evaluator's Signatures      Date      Evaluator Printed Name      Title      Dept.

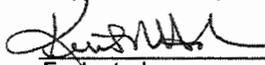
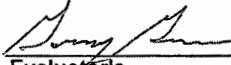
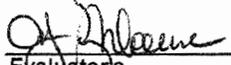
*[Signature]* 1/23/2018      *CT DYKHOUSE*      *County Counselor*      *County Counselor*

Evaluator's Signatures      Date      Evaluator Printed Name      Title      Dept.

**EVALUATION REPORT FORM**  
**PURCHASING DEPARTMENT - BOONE COUNTY - MISSOURI**  
**REQUEST FOR PROPOSAL (RFP) # 40-16OCT17 - DETAINEE TELEPHONE SYSTEM**  
 Liz Palazzolo, CPPO, C.P.M., Senior Buyer

Offer One Pricing				For Purchasing Use Only		
	NAME OF OFFEROR	METHOD OF PERFORMANCE (30 points)	EXPERIENCE/ EXPERTISE OF OFFEROR (15 points)	TOTAL SUBJECTIVE POINTS (45 points)	COST POINTS (55 points)	TOTAL POINTS (Max 100 points)
1	Encartele	10	10	20	15	35
2	PayTel Communications, Inc.	10	12	22	22	44
3	IC Solutions	20	13	33	44	77
4	CenturyLink	30	15	45	55	100
5	Securus Technologies	See File Memo				
6	Telmate, LLC	See File Memo				
7	White Horse Support Services, LLC	See File Memo				

We hereby attest that the subjective points assigned to each offeror above were scored pursuant to the established evaluation criteria and represent our best judgement of the subjective areas of the offerors' proposals. We have attached a brief narrative which highlights some, but not necessarily all, of the reasons for our evaluation of the proposals as indicated by the scores above. Our comments represent our opinions only and do not represent the position of the Purchasing Department of Boone County, Missouri, or any other party.

	1/24/18	KEVIN R. HOSKINS	Detention Director	Sheriff's Department
Evaluator's Signatures	Date	Evaluator Printed Name	Title	Dept.
	1-23-18	Gary German	Captain	Sheriff's Dept
Evaluator's Signatures	Date	Evaluator Printed Name	Title	Dept.
	1/22/2018	CJ DYKHOUSE	County Counselor	County Counselor
Evaluator's Signatures	Date	Evaluator Printed Name	Title	Dept.

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



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## MEMORANDUM

TO: File

FROM: Liz Palazzolo

RE: RFP 40-16OCT17 Detainee Telephone System – Evaluation Summary

DATE: 1/8/18

Seven proposals have been received in response to Request for Proposal (RFP) 40-16OCT17 for a Detainee Telephone System for the Boone County Sheriff's Office:

- (1) CenturyLink of New Century, Kansas
- (2) Encartele, Inc. of LaVista, Nebraska
- (3) Inmate Calling (IC) Solutions of San Antonio, Texas
- (4) Pay Tel Communications, Inc. of Greensboro, North Carolina
- (5) Securus Technologies, Inc. of Carrollton, Texas
- (6) Telmate LLC of San Francisco, California
- (7) White Horse Support Services, LLC of Sturgeon, Missouri

**Evaluation Committee:** An evaluation committee has reviewed and evaluated responses. The evaluation committee consists of CJ Dykhouse, Boone County Counsel, Captain Keith Hoskins of the Boone County Sheriff's Office, and Captain Gary German of the Boone County Sheriff's Office. The Committee decided to conduct consensus scoring and prepare a team evaluation report. The evaluation committee's report follows this memo.

**Unacceptable Proposal:** All proposals were initially reviewed for responsiveness to mandatory requirements of RFP 40-16OCT17. All proposals were considered responsive (i.e., acceptable) with the exception of the proposal from White Horse Support Services for the reason that the proposal presented itself as a non-binding offer. Specifically, the offer from White Horse Support Services (WHS) says "Due to the modifications that will be necessary to the original RFP, WHS reserves the right to negotiate any term or condition they deem necessary, and is not by the submission of this bid agreeing to any specific terms outlined in the RFP." Paragraph 4.1.2.4 of the RFP specifically says that the RFP is not

subject to negotiation: “The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the County determines that a change in such requirements is in the best interest of the entities.” While WHS quoted pricing, WHS did not submit any other information with their proposal that made the proposal capable of evaluation. This coupled with the disclaimer about the binding effect of the offer and the need to negotiate unidentified provisions of the RFP rendered the proposal from White Hose Support Services LLC unacceptable, and it was removed from evaluation and award consideration.

The Evaluation Committee reviewed the remaining six proposals. The review of per minute pricing allowed the evaluation committee to see that several offers were made for per minute pricing at \$.10 or less. This prompted the committee to short-list proposals based on offers that included a \$.10/per minute rate. RFP paragraph 4.1.2.2 allows the County to limit negotiations to proposals which receive the highest ranking during the initial evaluation phase.

These four offerors quoted pricing in at least one of their offers that was at or under \$.10 per minute:

- CenturyLink
- IC Solutions
- Encartele
- Pay Tel

Securus’s per minute pricing ranged from \$.15 to \$.40 per minute. Telmate’s pricing ranged from \$.18 to \$.21 per minute. For these reasons, Securus and Telmate were excluded from further evaluation, although both proposals were deemed responsive to RFP terms. It is noted for the record that Telmate submitted revised pricing for items 3 and 9 when clarification of the “N/A” originally quoted was pursued for the per minute price for collect calls. While modified pricing is inadmissible as clarification, it is noted for the record that Telmate’s revised pricing was viewed as a moot issue since no pricing was under the \$.10 per minute price. Since neither Securus or Telmate had any offer with pricing at or below \$.10 per minute, the Committee did not conduct any further evaluation of either proposal.

This approach is consistent with representations the County made to the public in the RFP about its contracting goals. Paragraph 3.16.8 of Addendum #1 of the RFP states this:

“3.16.8 The contractor shall understand and agree that the phone system will be provided consistent with the County’s goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.”

In addition, the County's objective stated in RFP paragraph 3.1.2 is involved: "The County wishes to contract for detainee telephone services that offer the lowest cost to detainees and to the County while also including system features that allow the County to administer necessary safeguards and protections suitable for a correctional setting. Proposals will be evaluated consistent with this objective."

The Evaluation Committee evaluated system functionality and durability along with the specific technical features of the system that provided law enforcement and user cost containment objectives while also providing the County with recovery of administrative costs involved in supporting the service for detainees. Proposals from CenturyLink, IC Solutions, Encartele, and Pay Tel have been evaluated consistent with criteria stated in paragraph RFP 4.1.3.1, sub-paragraphs (a) through (c) covering the offeror's Method of Performance, Experience/Expertise, and Financial Offering. The evaluation committee decided to weight the evaluation components as follows:

Method of Performance: 30 Points  
Experience/Expertise of the Offeror: 15 points  
Financial Offering: 55 points

Offerors are scored relative to the best in each component of the evaluation. The evaluation is based on objective and subjective considerations as stated in RFP paragraph 4.1.3.1.

The evaluation of the Financial Offer includes a review of cost and commission. The evaluation committee focused on a review of the offerors' financial offering consistent with paragraph 4.1.3.1(c) which states that the County's focus will be to evaluate costs in terms of "...a system that provides revenues sufficient to operate and maintain the system while keeping the costs to the users of the system as low as possible."

Cost has been evaluated using historical usage information published in RFP paragraphs 3.2.1.1 and 3.2.3. A separate cost evaluation has been done for Offer #1 and Offer #2, i.e., only Offer #1 cost was compared between vendors as one cost evaluation, and only Offer 2 cost was compared between vendors as a second cost evaluation. The manner of conducting the cost evaluation is the same for Offer #1 and Offer #2. Unit pricing that has been quoted by the offerors has been extended or multiplied using this information, and is shown in the cost evaluation spreadsheets that follow this memo. It is noted that because the statistical information provided in paragraph 3.2.3 covers only 6-months of system usage, it has been doubled to arrive at an annual estimate for minutes that is used in the cost evaluation. The cost evaluation takes into account an initial five-year contract period and two additional one-year renewal options, so the total contract price anticipates seven (7) years of system usage. All extended subtotals for the line items have been added together and the total cost is used to determine each offeror's cost points.

Points for cost have been evaluated separately for each Offer, and assessed using this formula:

$$\frac{\text{Lowest Responsive Bidder's Price For Offer \#1 or Offer \#2}}{\text{Compared Bidder's Price for Offer \#1 or Offer \#2}} \times \text{Maximum Cost Points (55)} = \text{Cost Evaluation Points For Offer \#1 or for Offer \#2}$$

The lowest cost proposal receives maximum cost points which is 55 points. The cost evaluation is documented in spreadsheets that follow this memo. The assessment of cost points (55 out of 100 points) is based on the costs to users of the detainee telephone system.

The return to the County or revenue-generating commission aspect of the financial offering has been evaluated subjectively. It is not included in the assessment of cost points consistent with RFP paragraph 3.1.2 quoted above.

Purchasing obtained two rounds of clarification and one Best and Final Offer from CenturyLink, IC Solutions, Pay Tel and Encartele. The first clarification was sent November 21, 2017, and the second clarification and Best and Final Offer were combined together as a request, and sent to the same offerors on December 13, 2017. All four offerors responded, and their specific requests and responses can be found with each respective proposal. The clarifications and Best and Final Offers have been used in the final evaluation of proposals.

The evaluation also included the offerors' demonstration of their web-based telephone system as mentioned in RFP paragraph 4.1.3.2. Demonstration sessions were conducted with CenturyLink, IC Solutions, Pay Tel and Encartele on December 11, 2017 and December 12, 2017 (see further documentation after this memo).

It is noted for the record that the evaluation committee attempted to contact at least one reference for CenturyLink, IC Solutions, Pay Tel and Encartele. Reference questions asked were the same for each. Reference information obtained is documented following this memo.

Award recommendation: The Evaluation Committee recommends an award to CenturyLink for their Offer #2 as the lowest and best offer for Boone County. This offer significantly lowers the costs to the users of the system while ensuring an adequate administrative cost recovery for the Boone County Sheriff's Department.

## **FACTORS REVIEWED IN JAIL DETAINEE PHONE SYSTEM RFP**

**Goal of Evaluation Committee:** The Evaluation Committee evaluated system functionality and durability along with the specific technical features of the system that provided law enforcement and user cost containment objectives while also providing the County with recovery of administrative costs involved in supporting the service for detainees. The factors considered include, but are not limited to, the following:

- Pricing to user of system
- Administrative cost recovery (commissions)
- User/Family/Detainee on-boarding experience
- Hardware deployment
- In-person visitation phones
- Free booking room phone (nationwide, toll-free)
- Lobby phones for public use
- Privileged / Non-recorded phone numbers programming into system
- User Dashboard / Interface – user experience: responsive web page, mobile applications, automatic transcription, etc.
- System Reporting abilities – call data, financial reports, etc.
- Audio player
- Ability to interface with and download call recordings
- RMS/JMS integration
- Commissary integration
- Help Desk/Support Staff/Repairs/Service Response Times
- Investigative tools
- Fraud detection – voice biometrics, challenge questions, PINs
- TTY & Video Relay Service as additional service for hearing-impaired
- Product innovation history and future plans

## EVALUATION REPORT FOR REQUEST FOR PROPOSAL

### 40-16OCT17 – DETAINEE TELEPHONE SYSTEM

#### OFFEROR #1: ENCARTELE

X	It has been determined that <b>Encartele</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
	It has been determined that <b>Encartele</b> has submitted a <b>non-responsive</b> proposal.

#### EXPERIENCE/EXPERTISE OF OFFEROR

##### Strengths:

- Proposal states that Encartele has been in the Inmate Telephone System (ITS) business for 15+ years which is a strength, but the information also raises a concern - see note in Concerns below;
- Have named an account representative for Boone County, Larry Hammerschmidt, who has experience in the ITS industry (40+ years);
- Have identified an experienced Project Manager (Isac Galvan with 13+ years) who will be 100% dedicated to the project;
- Other key personnel identified and their experience and expertise is relevant to the project;
- Encartele has experience in the State of Missouri with over 50 facilities being served;
- Encartele is in growth-mode – provide inmate telephone service to over one hundred and fifty inmate facilities in 16 states across the country.

##### Concerns:

- Encartele says that over the last year, (4) four customers have lost service for more than 24 hours: Crawford, OH; Bates, MO; Monroe, MO; and Putnam, MO. Out of these four, 75% were directly related to thunderstorms that were beyond Encartele's control, and the other 25% was related to a network interruption issue. The concern raised pertains to what may be a less-robust back-up/redundancy capability of Encartele's network system;
- Encartele indicates it was incorporated in 2004 and that it has been in the ITS business for 15 years, which is concerning because the math does not work-out;
- Encartele says on page 58, #17 that they are the only inmate phone company able to set free call thresholds by call destination, but this is not proven true for the County as the current ITS provider (Securus) has provided this function to the County for years.
- Some reference information obtained from entities that switched from Encartele is concerning (see reference documentation).

#### METHOD OF PERFORMANCE

##### Strengths:

- Hardware for inmate phones is detailed; phones appear suitable for detainee use in a detention environment (using the Wintel phone);
- PINS can be 2 to 20 characters which is reasonable to control and easier to remember;

- ECHO voice recognition provides fraud deterrence;
- All call records are stored throughout the span of the contract, and for 5 years thereafter;
- All call records are backed-up through Encartele's three data centers to allow for storage-redundancy;
- Reports on page 76 of the proposal, easy-to-read, clear format.

**Concerns:**

- Only TTY is offered whereas the competitors offered Video Relay Service as an alternative assistive technology;
- Encartele's response times are specific but only for business-hour calls. Encartele's "Priority 1" calls, i.e., 40% or more inoperable phones, have a 1-hour guaranteed response time during business hours; Encartele will respond outside of business hours but the "response time will vary." Similar statements are made about their Priority 2 and 3 levels;
- A weakness in their response is not explaining how or providing more detail about the notification the caller receives once 75% of the credit limit has been reached;
- Encartele says it will meet the 4-hour on-site requirement but does not make clear in its proposal where the technician is coming from;
- Encartele never explains what the acronym "PFE" stands for in the context of describing 3-way calls;
- Encartele's proposal lacks detail about how the detainee is prevented from using extra digits to dial-out of the detainee phone system;
- Encartele's voice biometric solution requires staff to monitor calls to confirm voice prints;
- It is not clear whether or not the visitation phone (Wintel 7429VST) has a PIN option; if not then County staff has to make sure each detainee sits at the assigned phone which is how this is currently done;
- The 15-second time shown in the event report on page 74 from "Off Hook" to "Recording Name" is excessive.

**FINANCIAL OFFERING**

**Strengths:**

- Encartele's per minute pricing was among the lower prices offered;
- Encartele offers a commission that will cover administrative costs;
- Encartele says that there are "zero disputes" on its commission calculations and payments.

**Concerns:**

- Their "Other Fees" table on page 56 of their proposal identifies only Prepaid Collect calls and leaves it open to interpretation about Direct Billed and Debit Card calls, however this was clarified in Clarification #1.

**OFFEROR #2: PAYTEL COMMUNICATIONS, INC.**

<b>X</b>	It has been determined that <b>PayTel Communications, Inc.</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
	It has been determined that <b>PayTel Communications, Inc.</b> has submitted a <b>non-responsive</b> proposal.

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

- Been in ITS business for 30+ years;
- Key personnel are identified, and their experience and expertise is relevant to the project;
- Pay Tel has experience in the State of Missouri, and services 175 facilities nationwide

**Concerns:** None

**METHOD OF PERFORMANCE:**

**Strengths:**

- Proposal promises 99.99% system up-time;
- IVR notifies user when their account is “running low”;
- Call Audio Recording Authentication feature provides fraud prevention;
- Pay Tel uses their own proprietary phone, which indicates they know their product, and the product appears suitable for use in detainee environment;
- IntelliKey feature which turns any phone into an enrollment phone is a good idea, but it is not clear from the proposal how this feature integrates into the complete enrollment process;
- Inteliproof feature certifies recordings any time or place;
- InvestigatorPro—identifies all inmates on a call. It allows identification of inmates’ voices throughout the call to aid investigators in identifying inmates who are using or stealing other inmates’ PINs in order to hide their identities, and it is part of the system, i.e., included in package;
- Additional product (HomeWav) for video visitation is offered at a specific price of \$.30 minute;
- HomeWav-Inmate and visitor schedule visits can be made directly by the user without operator assistance being required.
- Pay Tel’s product prompts a low-balance warning for users;
- Pay Tel offers Purple Communication VRS as an assistive product in addition to TTY’s;
- All call records are stored throughout the span of the contract, and for 5 years thereafter.

**Concerns:**

- Attorney calls are not recorded, but they are tracked by the Centurion system, and the tracking is of concern;

- Screen shots of the Centurion ITS system appear to use older technology compared to some competitors, particularly regarding the user interface;
- Redundant data centers are located in close proximity which is not the best in terms of protecting data;
- The other side to the use of proprietary phones is that they are more difficult to compare to competitors using name-brand products with identified/third-party supported robust durability features;
- The Video Relay Service offered (Purple Communication VRS) in addition to TTY's does not record calls.
- The above is addressed in this manner: TTY recording is available through use of a printer that PayTel provides. The printer will require space and storage (somewhat cumbersome outcome);
- Statements about minor and major telephone repair turn-around were confusing and prompted clarification to determine Pay Tel's specific offering;
- The proposal mentions use of a "local technician" to perform on-site repairs as needed but there is no specificity about the name or location of the service technician which would have been preferred;
- Pay Tel's PDF-version proposal was sometimes hard to navigate/search – got "no renderable text" message sometimes when searching;
- Pay Tel does not define what a "low balance" is regarding its Just1Call feature;
- Pay Tel indicates that the date and time stamp remains with the recorded file but it is not clear if the date/time refers to when the file was recorded, downloaded, or some other event;
- Pay Tel's proposal is not detailed about who performs the actual voice recording of the detainee's voice at the time of the enrollment process; i.e., it is not clear if Pay Tel would conduct the recording one-time at start-up, or on-going, or if the County would conduct the recording;
- It is not clear how the Site Administrator works in tandem with law enforcement staff conducting daily tasks;
- First Call Free (Just1Call) feature allows a call to continue when an account has not been set-up, but it requires that the called party to set-up an account after the call. By agreeing to accept the complimentary call, the called-party is deemed to have agreed to discuss billing arrangements with Pay Tel after the call. The concern is primarily semantics inasmuch as this is presented by Pay Tel as a method to decrease the incidence of unbillable calls;

## **FINANCIAL OFFERING**

### **Strengths:**

- Pay Tel's per minute pricing was among the lowest offered;
- Pay Tel offers a commission that will cover administrative costs;
- Pay Tel indicates that it has no disputes on its commissions calculations.

### **Concerns:**

- Add-on user fees include fees for Western Union and Money Gram transactions which are similar to competitors, but Pay Tel also includes a paper statement fee of \$2 and a "Pay Near Me" fee of \$1.99;
- The sample Account Statement includes a disclaimer that says that fees shown may not be actual fees, and the user being billed is referred to Pay Tel's website for accurate fees;
- Pay Tel excludes interstate calls from the commission calculation. Competitors include interstate calls in the commission calculation.

**OFFEROR #3: IC SOLUTIONS**

<b>X</b>	It has been determined that <b>IC Solutions</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
	It has been determined that <b>IC Solutions</b> has submitted a <b>non-responsive</b> proposal.

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

- IC Solutions has been in the ITS business for 15+ years;
- IC Solutions is a subsidiary of the Keefe Group which has been serving the correctional industry since 1975;
- Key personnel are identified, and their experience and expertise is relevant to the project;
- IC Solutions has experience in the State of Missouri

**Concerns:** None

**METHOD OF PERFORMANCE**

**Strengths:**

- 99.99% system up-time;
- Redundant (dual) system carriers;
- Offers Purple Communication Video Relay Service (VRS) as an additional assistive technology;
- The Case Maker feature is a strength, but also see Concern below.
- All call records are stored throughout the span of the contract, and for 5 years thereafter;
- Hardware for inmate phones appears suitable for detainee use in a detainee environment;
- Using Wintel phone which is durable/suitable for detention center usage;
- Enforcer investigative suite includes biometric identification/applications which will provide better fraud detection;
- The Visitor Visitation Management System can streamline visitations.

**Concerns:**

- The Video Relay Service offered (Purple Communication VRS) in addition to TTY's does not record calls;
- The Enforcer product does not allow in-coming calls, but it has voicemail which seems contradictory;
- IC Solutions' initial equipment listing had 22 instead of 26 phones, and 4 lobby phones instead of 2. Related but minor, there are two references to provision of 24X7X**265** coverage in the proposal, but other references are appropriately described as 24X7X365;
- Their application requires a workstation which requires space which is limited;

- It is unclear from the proposal if the Law Library Case Maker is used with the video visitation system or the commissary kiosk, or both. It makes a difference because the County may not opt-in for the video visitation system so the actual benefit may not be realized;
- Users cannot receive direct billing since direct billing is only available to professional system users like bails bondsmen and attorneys;
- The user has to specifically request Help Desk tracking data;
- It is not clear from the proposal if the system expansion capabilities referenced in Section 5A, page 7 are included in the offer or would be available at a re-negotiated cost to system users as suggested in Section 7, page 2.

## **FINANCIAL OFFERING**

### **Strengths:**

- IC Solution's per minute pricing was among the lowest offered.
- IC Solutions offers a commission that will cover administrative costs.

**Concerns:** None

**OFFEROR #4: CENTURYLINK**

<b>X</b>	It has been determined that <b>CenturyLink</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
	It has been determined that <b>CenturyLink</b> has submitted a <b>non-responsive</b> proposal.

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

- Over 25 years ITS experience;
- One of two commercial service providers authorized by the Department of Homeland Security to provide enhanced cyber security services;
- A division of the 3<sup>rd</sup> largest telecommunications company in the US;
- Name and location of local technician who will be assigned to Boone County is provided (Ray Suddarth with 25+ years telecom experience).

**Concerns:** None

**METHOD OF PERFORMANCE**

**Strengths:**

- Hardware for inmate phones is detailed; phones appear suitable for detainee use in detainee environment (using the Wintel phone);
- iCON software seems very intuitive and user friendly; parameters for user are user-defined with its customized dashboards, and it includes integrated HelpDesk tickets;
- Robust list of language interpreters beyond Spanish good for Columbia’s university community;
- Offer two options on debit cards allowing the County a choice on how these are sold to detainees;
- iCON system can interface with any installed JMS to automatically generate PINs;
- iCON system includes a comprehensive Voice Biometric fraud prevention solution at no additional cost;
- The PIN can be set up by the detainee if necessary;
- Additional layers of fraud prevention are available with AccuPIN which includes “challenge questions”;
- A PIN can only be used at one time;
- Centurylink, unique among its competitors, is an interexchange carrier, local service provider, and operator service provider, and this lends itself to CenturyLink having a very high degree of capability to prevent three-way calling fraud;
- iCON reporting capabilities are versatile and comprehensive;
- Dashboards and reporting can be personalized which the County anticipates will save administrative time;
- In general, CenturyLink’s dashboard feature which is unique to CenturyLink is a definite plus allowing user-customization that streamlines administrative interaction with the system from the Sheriff’s Office’s viewpoint;
- iCON’s Contact Link is a good detention facility management tool;

- iCON's Service Ticket utility as a service reporting feature has great potential for optimizing system operation and offers superior transparency;
- 99.99% system up-time;
- Specificity about the system technician's location for deployment;
- System updates for the Boone County Detention Center will be provided to the County as they become available through the duration of the contract at no additional cost and with no service interruptions;
- Technical response times are the best, and service definitions for outage levels are more sensitive – exceptional service response time;
- Comprehensive training offered to all stakeholders including staff;
- Additional and on-going training offered at no cost;
- Have a three-tiered redundant data center in multiple geographic locations;
- iCON data protection firewall seems to be comprehensive;
- 24X7X365 live customer support with multi-lingual options;
- All call records are stored throughout the span of the contract, and for 5 years thereafter;
- CenturyLink's demo covered the iCON system's robust recording and reporting capabilities;
- The iCON system's transcription feature which was shown in the demo allows for spoken, recorded conversation to be transcribed automatically into text. This feature is a definite strength and it promises to be a great time-saving tool for the County;
- Help Desk tracking data is accessible through the web-based user interface.

**Concerns:** None

## **FINANCIAL OFFERING**

### **Strengths:**

- CenturyLink's per minute pricing was among the lowest offered;
- CenturyLink offers a commission that will cover administrative costs.

**Concerns:** None

**OFFEROR #5: SECURUS TECHNOLOGIES**

<b><u>X</u></b>	It has been determined that <b>Securus Technologies</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
	It has been determined that <b>Securus Technologies</b> has submitted a <b>non-responsive</b> proposal.

*See the Evaluation Summary Memo for further explanation about the evaluation of the Securus Technologies proposal.*

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

**Concerns:**

**METHOD OF PERFORMANCE**

**Strengths:**

**Concerns:**

**FINANCIAL OFFERING**

**Strengths:**

**Concerns:**

**OFFEROR #6: TELMATE, LLC**

<input checked="" type="checkbox"/>	It has been determined that <b>Telmate, LLC</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
<input type="checkbox"/>	It has been determined that <b>Telmate, LLC</b> has submitted a <b>non-responsive</b> proposal.

*See the Evaluation Summary Memo for further explanation about the evaluation of the Telmate LLC proposal.*

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

**Concerns:**

**METHOD OF PERFORMANCE**

**Strengths:**

**Concerns:**

**FINANCIAL OFFERING**

**Strengths:**

**Concerns:**

**OFFEROR #7: WHITE HORSE SUPPORT SERVICES, LLC**

	It has been determined that <b>White Horse Support Services, LLC</b> has submitted a <b>responsive</b> RFP response meeting the requirements set forth in the original Request for Proposal.
<b><u>X</u></b>	It has been determined that <b>White Horse Support Services, LLC</b> has submitted an <b>unacceptable</b> proposal.

*See the Evaluation Summary Memo for further explanation about the evaluation of White Horse Support Services LLC proposal.*

**EXPERIENCE/EXPERTISE OF OFFEROR**

**Strengths:**

**Concerns:**

**METHOD OF PERFORMANCE**

**Strengths:**

**Concerns:**

**FINANCIAL OFFERING**

**Strengths:**

**Concerns:**

**RFP 40-16OCT 17 Detainee Telephone System**

**DEMONSTRATION INVITATIONS**

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

November 22, 2017

Pay Tel Communications, Inc.  
4230 Beechwood Drive  
Greensboro, NC 27410

*Via E-mail*

## **RE: RFP 40-16OCT17 Detainee Telephone Services**

Dear Mr. Townsend:

The Evaluation Team reviewing proposals for RFP 40-16OCT17 for Detainee Telephone Services wishes to see your detainee telephone system in operation. A Demonstration Session is scheduled to begin at 11:30 A.M. on December 11, 2017 in the Boone County Annex Building located at 613 E. Ash Street in Columbia, Missouri. You may have access to the conference room to set-up the demonstration beginning at 11:00 A.M. to set-up for the session. The session should show the Evaluation Team the system's following features:

1. Web-based operation
2. User configuration capabilities, e.g., setting up a user dashboard
3. Call analytics, statistics accessible to the web-based user
4. Reporting, with a special focus on financial reporting
5. Copying recorded calls to other media including use of e-mail to send recorded calls
6. Help Desk/Trouble ticket processing
7. Investigative tools
8. Fraud prevention tools including voice biometrics if available
9. How a user sets-up and maintains an account, e.g., initial account set-up, funds transfers, deposits, etc.
10. How a detainee uses the system to place a call with a focus on fraud detection
11. Demonstrate the warning messages specifically about receipt of a call from a detention center, that the call is being recorded, and that 75% of funds have been used.
12. Assistive technology including VRS if offered

The target should be to cover the above topics within about forty-minutes to an hour. Please try to construct your demonstration to address the above within no longer than an hour so that time may be provided after the session for questions. Please also feel free to include whatever other aspects of your system that you believe would benefit the County.

If you have any questions or need additional information, please do not hesitate to contact me. Boone County looks forward to the scheduled demonstration session, and appreciates your interest in doing business with the County.

Sincerely,

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: RFP 40-16OCT17 File

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

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November 22, 2017

CenturyLink  
600 New Century Parkway  
New Century, KS 66031

*Via E-mail*

**RE: RFP 40-16OCT17 Detainee Telephone Services**

Dear Mr. Cooper:

The Evaluation Team reviewing proposals for RFP 40-16OCT17 for Detainee Telephone Services wishes to see your detainee telephone system in operation. A Demonstration Session is scheduled to begin at 9:00 A.M. on December 12, 2017 in the Boone County Annex Building located at 613 E. Ash Street in Columbia, Missouri. You may have access to the conference room to set-up the demonstration beginning at 8:30 A.M. to set-up for the session. The session should show the Evaluation Team the system's following features:

1. Web-based operation
2. User configuration capabilities, e.g., setting up a user dashboard
3. Call analytics, statistics accessible to the web-based user
4. Reporting, with a special focus on financial reporting
5. Copying recorded calls to other media including use of e-mail to send recorded calls
6. Help Desk/Trouble ticket processing
7. Investigative tools
8. Fraud prevention tools including voice biometrics if available
9. How a user sets-up and maintains an account, e.g., initial account set-up, funds transfers, deposits, etc.
10. How a detainee uses the system to a place a call with a focus on fraud detection
11. Demonstrate the warning messages specifically about receipt of a call from a detention center, that the call is being recorded, and that 75% of funds have been used.
12. Assistive technology including VRS if offered

The target should be to cover the above topics within about forty-minutes to an hour. Please try to construct your demonstration to address the above within no longer than an hour so that time may be provided after the session for questions. Please also feel free to include whatever other aspects of your system that you believe would benefit the County.

If you have any questions or need additional information, please do not hesitate to contact me. Boone County looks forward to the scheduled demonstration session, and appreciates your interest in doing business with the County.

Sincerely,

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: RFP 40-16OCT17 File

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

November 22, 2017

Inmate Calling (IC) Solutions, LLC  
2200 Danbury Street  
San Antonio, TX 78217

*Via E-mail*

## **RE: RFP 40-16OCT17 Detainee Telephone Services**

Dear Mr. Laurita:

The Evaluation Team reviewing proposals for RFP 40-16OCT17 for Detainee Telephone Services wishes to see your detainee telephone system in operation. A Demonstration Session is scheduled to begin at 2:00 P.M. on December 11, 2017 in the Boone County Annex Building located at 613 E. Ash Street in Columbia, Missouri. You may have access to the conference room to set-up the demonstration beginning at 1:30 P.M. to set-up for the session. The session should show the Evaluation Team the system's following features:

1. Web-based operation
2. User configuration capabilities, e.g., setting up a user dashboard
3. Call analytics, statistics accessible to the web-based user
4. Reporting, with a special focus on financial reporting
5. Copying recorded calls to other media including use of e-mail to send recorded calls
6. Help Desk/Trouble ticket processing
7. Investigative tools
8. Fraud prevention tools including voice biometrics if available
9. How a user sets-up and maintains an account, e.g., initial account set-up, funds transfers, deposits, etc.
10. How a detainee uses the system to place a call with a focus on fraud detection
11. Demonstrate the warning messages specifically about receipt of a call from a detention center, that the call is being recorded, and that 75% of funds have been used.
12. Assistive technology including VRS if offered

The target should be to cover the above topics within about forty-minutes to an hour. Please try to construct your demonstration to address the above within no longer than an hour so that time may be provided after the session for questions. Please also feel free to include whatever other aspects of your system that you believe would benefit the County.

If you have any questions or need additional information, please do not hesitate to contact me.  
Boone County looks forward to the scheduled demonstration session, and appreciates your interest  
in doing business with the County.

Sincerely,

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: RFP 40-16OCT17 File

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

November 22, 2017

Encartele, Inc.  
8210 S. 109<sup>th</sup> Street  
LaVista, NE 68128

*Via E-mail*

## **RE: RFP 40-16OCT17 Detainee Telephone Services**

Dear Mr. Moreland:

The Evaluation Team reviewing proposals for RFP 40-16OCT17 for Detainee Telephone Services wishes to see your detainee telephone system in operation. A Demonstration Session is scheduled to begin at 9:00 A.M. on December 11, 2017 in the Boone County Annex Building located at 613 E. Ash Street in Columbia, Missouri. You may have access to the conference room to set-up the demonstration beginning at 8:30 A.M. to set-up for the session. The session should show the Evaluation Team the system's following features:

1. Web-based operation
2. User configuration capabilities, e.g., setting up a user dashboard
3. Call analytics, statistics accessible to the web-based user
4. Reporting, with a special focus on financial reporting
5. Copying recorded calls to other media including use of e-mail to send recorded calls
6. Help Desk/Trouble ticket processing
7. Investigative tools
8. Fraud prevention tools including voice biometrics if available
9. How a user sets-up and maintains an account, e.g., initial account set-up, funds transfers, deposits, etc.
10. How a detainee uses the system to a place a call with a focus on fraud detection
11. Demonstrate the warning messages specifically about receipt of a call from a detention center, that the call is being recorded, and that 75% of funds have been used.
12. Assistive technology including VRS if offered

The target should be to cover the above topics within about forty-minutes to an hour. Please try to construct your demonstration to address the above within no longer than an hour so that time may be provided after the session for questions. Please also feel free to include whatever other aspects of your system that you believe would benefit the County.

If you have any questions or need additional information, please do not hesitate to contact me.  
Boone County looks forward to the scheduled demonstration session, and appreciates your interest  
in doing business with the County.

Sincerely,

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: RFP 40-16OCT17 File

**RFP 40-16OCT17 Detainee Telephone System**

## **REFERENCE QUESTIONS ASKED**

**REFERENCE CHECK QUESTIONS**

WHO IS THE COMMISSARY PROVIDER?

HOW LONG HAVE YOU USED THEM?

TELL US ABOUT THE COMMISSARY SYSTEM YOU CURRENTLY HAVE IN PLACE AT YOUR FACILITY.

TELL US ABOUT THE IMPLEMENTATION PROCESS AND TRAINING OF STAFF? DID YOU REQUIRE ANY SPECIAL MODIFICATIONS, CUSTOMIZATION OF THE SYSTEM AND HOW WAS IT HANDLED?

WHAT JMS SYSTEM DOES YOUR AGENCY USE? DOES COMMISSARY INTERFACE WITH IT? DOES THE INTERFACE MEET YOUR EXPECTATIONS? DOES STAFF HAVE TO MANUALLY ENTER INFORMATION INTO THE COMMISSARY PROGRAM? HOW SOON AFTER ENTRY IN JMS IS THE INFORMATION IN THE COMMISSARY PROGRAM?

**EASE OF USE-**

HOW WAS THIS RECEIVED BY THE DETAINEE POPULATION?

BY DETENTION STAFF?

BY ACCOUNTING STAFF?

OTHER COUNTY OFFICES?-TREASURER

WHAT HAS BEEN THE IMPACT ON STAFF TIME AND DUTIES WITH THE IMPLEMENTATION OF THIS COMMISSARY SYSTEM?

WHAT COMMISSARY VENDOR DID YOU HAVE BEFORE THE CURRENT VENDOR?

WHY DID YOU LEAVE THEM? ARE YOU HAPPY WITH YOUR CURRENT VENDOR?

DETAINEE POPULATION SIZE?

NUMBER OF KIOSKS AND LOCATION?-BOOKING, LOBBY, HOUSING UNITS

WHAT SERVICES DO YOU UTILIZE THE VENDOR FOR CURRENTLY? PHONES, FOOD SERVICES, EMAIL, SMS TEXT, ETC.

WHAT IS THE ACCURACY RATE OF COMMISSARY ORDERS BEING DELIVERED?

DESCRIBE THE METHOD USED TO CORRECT ORDER ISSUES?

ARE THE PRODUCTS OUTDATED OR STALE UPON RECEIPT AT THE FACILITY? HOW OFTEN DOES THAT HAPPEN?

VENDOR TROUBLESHOOTING VARIOUS ISSUES?-SERVICE CALLS, REMOTING INTO THE SYSTEM, VENDOR STAFF KNOWLEDGE, RESPONSE TIME

IS THE SYSTEM DOWN OFTEN? HOW DO YOU HANDLE PROLONGED OUTAGES OF THE COMMISSARY SYSTEM? HOW DOES THE COMMISSARY VENDOR RESPOND TO THOSE OUTAGES OR "BUGS" IN THE SOFTWARE OR HARDWARE?

FREQUENCY OF KIOSK MALFUNCTION? DO YOU HAVE SPARES ON HAND? DOES YOUR STAFF HANDLE MINOR REPAIRS OR SWAPPING OUT UNITS? HOW ARE DAMAGED UNITS HANDLED? SERVICE CHARGES?

DOES THE VENDOR STAFF OR HAVE STAFF THAT HANDLES YOUR COMMISSARY? PLEASE DESCRIBE.

IS THE VENDOR RECEPTIVE TO SPECIAL REQUESTS-CUSTOM FORMS/REPORTS, NEW PRODUCT OFFERINGS, UPDATES, ETC.? HOW LONG HAS IT TAKEN FOR THE VENDOR TO COMPLETE REQUESTS?

DO YOU UTILIZE A COIN COUNTER AT YOUR FACILITY CURRENTLY?

WHERE ARE THEY LOCATED?

WHAT ACCOUNTING ISSUES HAS IT CAUSED?

WHAT DOES YOUR FACILITY PROVIDE FOR INMATE INCENTIVES? TOBACCO, E-CIGARETTES, TABLETS, EXTRA EMAILS, PRIVILEGES.

ACCOUNTING PROCESSES-

WHO HANDLES THE CASH DEPOSITS OR EMPTIES THE LOBBY/BOOKING KIOSKS?

IF COMMISSARY STAFF HANDLES, HOW DOES THAT PROCESS WORK? ANY ISSUES?

WAS THE SYSTEM EASY TO LEARN FOR PERSONNEL HANDLING THE ACCOUNTING PROCESS?

WAS THE INITIAL REPORTING SUFFICIENT TO HANDLE YOUR NEEDS? WERE ADDITIONAL REPORTS REQUIRED?

HOW IS THE RECONCILIATION PROCESS? FREQUENCY, ANY ADDITIONAL STEPS NOT HANDLED BY SOFTWARE

**RFP 40-16OCT17 Detainee Telephone System**

## **REFERENCE RESPONSES**

# Detainee Telephone System

**Facility Name:** Franklin County Sheriff's Office

**Reference:** of Services from Paytel Inmate Phone Service

**Contact Information:** 636-584-6825 dboehm@franklinmo.net

## Reference Check Questions

Who is your Detainee Telephone provider?

PayTel

How long have they been your provider?

Approximately April 2017

What version of the providers DTS are you currently on?

Most recent

Your impression of the detainee telephone system (DTS) you currently use?

We are done with the inmate phone installs and are using them. We are still working with the JMS company to do some integrating so we can use pin #s and voice biometrics for phone and video visitation monitoring

Tell us about the implementation process and training of the staff.

Did you require any special modifications or customization of the system?

They will work with you to set it up however it works best for you. It is a little slower than I expected. But it is because of the JMS integration. They are doing it on their time not ours.

How was it handled?

We have to wait until JMS is ready to move before the kiosk for video visitation and pin numbers can be installed

How long did it take for full/complete implementation?

Still in the process

Provider training and effectiveness? Not to that facet yet.

What JMS system does your facility use? ITI

# Detainee Telephone System

Does your DTS interface with it? They are building an interface at the phone co. expense

Does the interface meet your expectations? Remains to be seen

Does staff have to manually enter information into the DTS? Unk

How long does it take the JMS system to update/transfer information to the DTS? Unk

What Commissary system do you use? Keefe

## Ease of Use

How was the DTS received by the detainee population? Ok with the phones because the per minute is cheaper. Very much so looking forward to using the kiosk for commissary orders and remote visitation

By Detention Staff?

They were explained to whole project and are looking forward to the completed install

By Accounting staff? They have no comment

Other County Offices (IE, Treasurer)? They have no comment

By members of the public/detainee families and friends? Any complaints? Nothing past the normal getting used to a new system

What has been the impact on staff time and duties with the implementation of the DTS?

We are not able to use it to it's fullest capabilities yet. To be able to determine that answer

Reporting capabilities? unk

Was the provider willing to help with custom reports if needed? /That is the indication they give me

## Investigative tools

How easy is it to listen to calls? Live? Recorded?

I have only listened to recorded calls and they seem to be easily accessible as well as clear and easy to hear.

How easy is it to download calls? Click of a button

Can the calls be emailed? yes

# Detainee Telephone System

Is linking available for calls? (system showing graphical information of who is calling who) I do believe that is correct

## Financial Questions

Is the detainee able to monitor their balance? /yes

Is the detainee able to be provided with a call log detailing cost(s) of calls on where their funds went? unk

Have you had any issues with family or friends using the lobby kiosk or on-line portal for setting up or adding funds to a detainee account? no

What happens when there is an issue? Any issues we have had that can be repaired remotely us usually the same day. Mechanical repairs are usually the next day

How did it take to get these issues resolved?

## Other Questions

Who was your previous DTS? Encartelle

Why did you change? Upgrade in technology

Are you happy with your current provider? As far as we are in the process-yes

What kind of feedback do you receive from phone system users? Very little complaints

Your detainee population size? ADP for 2017 148

Number of telephones? 17

Number of visitation handsets? 5

Are there any other services you utilize from your DTS provided? Call in commissary orders

DTS provider troubleshooting various issues? yes

How often is the DTS down/inoperable? seldom

Any prolonged outages? I have had nothing more than I think 6 hrs once

Does the DTS provider have spare units on-site? Not at this time

Is your staff allowed to switch out malfunctioning units? Not at this time

# Detainee Telephone System

Are you charged for damaged units? no

Are you charged for service calls? no

Service Call Response time?

Telephone? Remote repair usually 1 hour or less

Remoting in? Remote repair usually 1 hour or less

Physical person on-site? Worst case about 24 hours

## Release Questions

Do you use debit cards and/or checks when a detainee is released or transferred to another facility?

Debit cards except when the release is to MDC then it is a check

How do you handle the funds the detainee has left on his account when released? Released to them on a debit card through commissary system

**Is there anything else you would like to state about your current DTS provider?**

# Detainee Telephone System

**Facility Name:** Marion County Jail

**Reference:** Sgt Kevin Coates

**Contact Information:** 573-769-2077

## Reference Check Questions

*IC Solutions*

Who is your Detainee Telephone provider? ICS

How long have they been your provider? Apx 2 ½ years

What version of the providers DTS are you currently on? Unsure

Your impression of the detainee telephone system (DTS) you currently use? Very pleased, no complaints

Tell us about the implementation process and training of the staff.

Did you require any special modifications or customization of the system? Very little

How was it handled? Satisfactory

How long did it take for full/complete implementation? A few days

Provider training and effectiveness? Very Good

What JMS system does your facility use? Lawman

Does your DTS interface with it? Yes

Does the interface meet your expectations? Yes

Does staff have to manually enter information into the DTS? No

How long does it take the JMS system to update/transfer information to the DTS?

What Commissary system do you use? Keefe Commissary

## Ease of Use

How was the DTS received by the detainee population? Very well

By Detention Staff? Very well

By Accounting staff? Very well

# Detainee Telephone System

Other County Offices (IE, Treasurer)?

By members of the public/detainee families and friends? Any complaints? None

What has been the impact on staff time and duties with the implementation of the DTS? Very minimal

Reporting capabilities?

Was the provider willing to help with custom reports if needed?

## Investigative tools

How easy is it to listen to calls? Live? Recorded? I can listen to live calls or recorded, very easy to use

How easy is it to download calls? Easy

Can the calls be emailed? Im not sure

Is linking available for calls? (system showing graphical information of who is calling who)

## Financial Questions

Is the detainee able to monitor their balance? Yes

Is the detainee able to be provided with a call log detailing cost(s) of calls on where their funds went?  
Yes

Have you had any issues with family or friends using the lobby kiosk or on-line portal for setting up or adding funds to a detainee account? A few

What happens when there is an issue? Customer support line is contacted

How did it take to get these issues resolved? A few days at the most

## Other Questions

Who was your previous DTS? Encartele

Why did you change? Unsatisfactory service

Are you happy with your current provider? Very much

What kind of feedback do you receive from phone system users? All positive

# Detainee Telephone System

Your detainee population size? 105

Number of telephones? 11

Number of visitation handsets? 2

Are there any other services you utilize from your DTS provided?

DTS provider troubleshooting various issues?

How often is the DTS down/inoperable?

Any prolonged outages? None

Does the DTS provider have spare units on-site? Yes

Is your staff allowed to switch out malfunctioning units? Yes

Are you charged for damaged units? No

Are you charged for service calls? No

Service Call Response time?

Telephone?

Remoting in?

Physical person on-site?

## Release Questions

Do you use debit cards and/or checks when a detainee is released or transferred to another facility?

Debit cards

How do you handle the funds the detainee has left on his account when released? Accounting department handles those funds

**Is there anything else you would like to state about your current DTS provider? Very pleased with ICS. Our point of contact is Vince Laurita. He is very dependable and reliable. If he misses a phone call, a return call is received very promptly. He has been great to work with.**

# Detainee Telephone System

**Facility Name:** Platte County Detention Center

**Reference:** Captain Joseph N. King, Detention Division Commander

**Contact Information:** joseph.king@plattesheriff.org 816-858-3463

## Reference Check Questions

Who is your Detainee Telephone provider? CenturyLink Correctional Communications

How long have they been your provider? Since May 2017

What version of the providers DTS are you currently on? (V 7.1.29-f)

Your impression of the detainee telephone system (DTS) you currently use? I am impressed.

Tell us about the implementation process and training of the staff.

Did you require any special modifications or customization of the system? Yes. We have a local court rule that requires a free 3-minute phone call following court appearance.

How was it handled? The provider assisted us in developing an on-site process which provides the credit to the detainee's account, which can be accessed on any of the phones provided by the vendor.

How long did it take for full/complete implementation? Most of it was prep work for ensuring detainee IDs were ported into the software. The implementation and on-site support was a couple of days. It was seamless to the detainee user experience.

Provider training and effectiveness? The vendor provided specific training to the small group of people managing the user accounts, problem solving, and evidentiary recording. This was done on-site while the system was being implemented. The vendor has come on-site to provide training updates on the software and services. They also continually offer, but the system is very user friendly and when questions come up, they are able to assist through phone support.

What JMS system does your facility use? JailTracker

Does your DTS interface with it? Yes. We have a script that assigns the PIN for the detainee based on the current booking.

Does the interface meet your expectations? Yes.

Does staff have to manually enter information into the DTS? No.

# Detainee Telephone System

How long does it take the JMS system to update/transfer information to the DTS? A few minutes. Once the ID is created through the JMS, it is less than 15 minutes before the account is available for detainee use.

What Commissary system do you use? TurnKey Corrections

## Ease of Use

How was the DTS received by the detainee population? It was positive. The issue was the excessive high cost of phone calls, even a local call at the time. Our goal was to make calling affordable and consistent for the detainee population.

By Detention Staff? It was a non-issue for staff as we managed issues at the supervisory level and above directly with CenturyLink.

By Accounting staff? It was a non-issue. The vendor provides monthly reports detailing call volume, call type and commissions earned. Other detailed reports are provided upon request.

Other County Offices (IE, Treasurer)? It is a non-issue. The commissions a paid by check consistent with the report received. We have had no issues that required any investigation into the call rates, call types, or commissions paid.

By members of the public/detainee families and friends? Any complaints? Nothing reported regarding the quality or consistency of service or calling rates.

What has been the impact on staff time and duties with the implementation of the DTS? Detainees and their families would complain about the excessive cost of calls prior to our move to CenturyLink. Phone calls are a vital link to the community and when cost makes it prohibitive, it results in poor conduct and behavior. I believe that we have gained more time since the transition than can be properly accounted for.

Reporting capabilities? Again, reports are provided. Special reports can be requested. Most of which can be ran by the local administrator of the system.

Was the provider willing to help with custom reports if needed? Yes.

## Investigative tools

How easy is it to listen to calls? Live? Recorded? Very easy and secure by user name and password. You can also set up remote access for are investigators, prosecutors, etc. to monitor calls.

How easy is it to download calls? Very easy. Again, this is secure by user name and password.

# Detainee Telephone System

Can the calls be emailed? Yes.

Is linking available for calls? (system showing graphical information of who is calling who) There are investigative tools like Data Detective which shows numbers called by multiple offenders. Calls phone registered numbers can be identified on Google Maps. There are options for security features that prevent calls between detainees. We are implementing a voice authentication system next week to reduce the trading/stealing of phone time. We are excited to get this implemented.

## Financial Questions

Is the detainee able to monitor their balance? When the detainee makes a call, a recording in the specified language details the available balance of the account, the cost rate for the call dialed and the available length of the call, either by available funds or the facility schedule where the phones will be shut off.

Is the detainee able to be provided with a call log detailing cost(s) of calls on where their funds went? This report can be requested at the facility under a records request. Fees apply.

Have you had any issues with family or friends using the lobby kiosk or on-line portal for setting up or adding funds to a detainee account? We have not had any reported issues. Most of the transactions are made to the commissary company, then the detainee purchases phone time from available funds. Family can go on-line to ICSolutions.com and place funds directly onto the phone system. We do not transfer funds between the commissary provider and phone provider.

What happens when there is an issue? There have been very few issues reported. Typically, we investigate to determine where the issue lies. If it is an issue with either the commissary or phone provider, we immediately work with them to resolve the issue. The most significant issue has been detainees reporting the theft of their phone time. Most instances were tracked back to the inappropriate sharing of the phone pins by the detainees. This is why we are implementing the voice verification software next week.

How did it take to get these issues resolved? When there has been an issue, it has always been resolved in the same business day it was reported.

## Other Questions

Who was your previous DTS? Securus

Why did you change? Horrible service and excessive fees placed on detainees and their families

Are you happy with your current provider? Very much so. I would strongly recommend other facilities see if CenturyLink would be as good of a fit for them as we have found them to be for us.

# Detainee Telephone System

What kind of feedback do you receive from phone system users? Very little feedback. I am more likely to hear complaints than compliments on this topic.

Your detainee population size? ADP is 180, highest population in 2017 was 217 Detainees

Number of telephones? 20

Number of visitation handsets? 12 (6 stations 1 phone on each side)

Are there any other services you utilize from your DTS provided? No.

DTS provider troubleshooting various issues? I am not sure what this question is asking. I can tell you that there is a call list with priorities for various issues and I have always been able to resolve my issues with CenturyLink in a very short time frame.

How often is the DTS down/inoperable? We have had two interruptions of the phone service. Both were fiber optic lines that were cut, not the fault of CenturyLink or Platte County. In both cases, the outage was a couple of hours. Also, CenturyLink notified me prior to the facility notifying me of the issue.

Any prolonged outages? No.

Does the DTS provider have spare units on-site? We opted not to maintain equipment on site. If a handset or phone needs replaced, a certified technician responds with the equipment and handles the work.

Is your staff allowed to switch out malfunctioning units? No.

Are you charged for damaged units? No.

Are you charged for service calls? No.

Service Call Response time? Consistent with their service priority list.

Telephone? Usually, less than 24-hours. We have 2 phones in each housing unit and these are inspected during each headcount. Issues are reported immediately. I can tell you that if I had two phones down in the same area, I am confident the call would be prioritized for service.

Remoting in? If there is server maintenance that requires them accessing remotely, I am notified that they are performing maintenance and to report any service issues immediately. There have been none.

Physical person on-site? I know they have multiple licensed technicians in the area to respond for maintenance issues. If I report a handset that is not working, I am notified generally within 4 hours of a time that we can expect the technician. Usually, it is confirming that the time is convenient to facility operations.

# Detainee Telephone System

## Release Questions

Do you use debit cards and/or checks when a detainee is released or transferred to another facility?

We issue cash to ICE Detainees as per our agreement with ICE. We issue checks to detainees being delivered to the Department of Corrections. All other releases are handled on Debit Cards. These funds are only from the Commissary account. To receive funds from CenturyLink they must contact customer service.

How do you handle the funds the detainee has left on his account when released? We cannot release less than \$1 on a debit card. The detainee handbook states that in instances where the detainee has funds that were less than \$1 or includes credits from medication returned to the pharmacy, they can send a self-addressed stamped envelope for the funds. After 90-days, funds are deemed abandoned and are sent to the Treasurer's Office.

Is there anything else you would like to state about your current DTS provider?

Our experience has been only positive with CenturyLink. If there were any concerns, I would definitely share them with you. We went through an extensive process in our review and selection of them. There were 6 companies with 9 proposals. I also submitted surveys to area customers and could not find a negative comment from any of them. This included the Jackson County Department of Corrections (over 900 detainees); Johnson County (KS) Detention (2 facilities) and the Kansas Department of Corrections (all facilities). Like them, I have found CenturyLink to be an excellent business partner in providing quality phone service to a sometimes difficult population.

**RFP 40-16OCT 17 Detainee Telephone System**

**COST EVALUATION**

## STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Contractor shall comply with all applicable federal, state, and local laws and failure to do so, in County's sole discretion, shall give County the right to terminate this Contract.
2. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
3. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
4. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid. The Purchasing Director reserves the right, when only one bid has been received by the bid closing date, to delay the opening of bids to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) bid received will be retained unopened until the new Closing date, or at request of bidder, returned unopened for re-submittal at the new date and time of bid closing.
5. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
6. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
7. The delivery date shall be stated in definite terms, as it will be taken into consideration in awarding the bid.
8. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
9. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
10. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
11. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
12. No bid transmitted by fax machine or e-mail will be accepted.
13. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
14. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase from other vendors.

15. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the *Federal Transit Administration's Best Practices Procurement Manual – Appendix A*. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.
16. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
17. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
18. For all bid responses over \$25,000, if any manufactured goods or commodities proposed with bid/proposal response are manufactured or produced outside the United States, this MUST be noted on the Bid/Proposal Response Form or a Memo attached.
19. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County on all transfer documents** including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
20. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.

Revised 1/17/2018





## Liz Palazzolo

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**From:** Cooper, Paul N <Paul.N.Cooper@centurylink.com>  
**Sent:** Tuesday, December 26, 2017 10:22 PM  
**To:** Liz Palazzolo; Smith, Skip  
**Subject:** Re: Clarification Item - RFP 40-16OCT17 Boone County Detainee Telephone System

Ms. Palazzolo,

We apologize for the mistake on page 89. Confirmed that 58 days is the correct timeline for implementation.

Paul

Paul Cooper  
CenturyLink Public Communications  
913.353.7388

----- Reply message -----

**From:** "Liz Palazzolo" <LPalazzolo@boonecountymmo.org>  
**To:** "Cooper, Paul N" <Paul.N.Cooper@centurylink.com>, "Smith, Skip" <Skip.Smith@centurylink.com>  
**Subject:** Clarification Item - RFP 40-16OCT17 Boone County Detainee Telephone System  
**Date:** Tue, Dec 26, 2017 11:09 AM

Good morning: Please clarify the information about the time it will take CenturyLink to fully implement the detainee telephone system:

The chart on pp. 147-148 seems to indicate a total of 58 calendar days whereas p. 89 of says 90 days. Please clarify. Thank you

### Liz Palazzolo

*Senior Buyer*

#### **Boone County Purchasing**

Phone: 573-886-4392  
Fax: 573-886-4390  
613 E. Ash, Room 109  
Columbia, MO 65201

This communication is the property of CenturyLink and may contain confidential or privileged information. Unauthorized use of this communication is strictly prohibited and may be unlawful. If you have received this communication in error, please immediately notify the sender by reply e-mail and destroy all copies of the communication and any attachments.



**CenturyLink®**

600 New Century Parkway  
New Century, KS 66031

**December 18, 2017**

Ms. Liz Palazzolo, CPPO, C.P.M  
Boone County Purchasing  
613 E. Ash Street, Room 109  
Columbia, MO 65201

**Re: BAFO Request #1 and Clarification #2  
40-16OCT17 – Detainee Telephone System**

Dear Ms. Palazzolo:

Enclosed please find CenturyLink's response to BAFO Request #1 and Clarification #2 for the Detainee Telephone System RFP.

Please contact Sr. Account Manager Skip Smith at 816.351.3511 (skip.smith@centurylink.com) or me with any questions

Sincerely,

Paul Cooper

VP/GM

913.353.7388

paul.n.cooper@centurylink.com

# Boone County Purchasing



Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)

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December 13, 2017

CenturyLink  
600 New Century Parkway  
New Century, Kansas 66031

Via E-mail: [paul.n.cooper@centurylink.com](mailto:paul.n.cooper@centurylink.com)

**RE: Best and Final Offer (BAFO) Request #1 and Clarification #2 to 40-160CT17 Detainee Telephone System**

Dear Mr. Cooper:

This letter shall constitute an official request by the Boone County - Missouri to enter into competitive negotiations with your organization. Included with this letter are two attachments.

The first attachment is a Best and Final Offer Form for this Request for Proposal. The Best and Final Offer Form must be completed, signed by an authorized representative of your organization, and returned with your detailed BAFO response.

The second attachment is a Clarification List #2, and it requests clarification of certain statements in the proposal and in Clarification #1 which require further information and/or clarification.

Your detailed clarification response should address each area identified on the clarification question list using the same numbering outline as the list. Please understand that your response to this BAFO request is your final opportunity to ensure that (1) all mandatory requirements of the RFP have been met, (2) all RFP requirements are adequately described since all areas of the proposal are subject to evaluation, and (3) this is your company's best offer.

Please provide a **written sealed response** no later than by **Noon (12:00 P.M.) on December 20, 2017**. Your company's Best and Final Offer will be subject to evaluation in addition to the original proposal.

You are reminded that pursuant to Section 610.021 RSMo, proposal documents including any best and final offer documents are considered closed records and shall not be divulged in any manner until after a contract is executed or all proposals are rejected. Furthermore, you and your agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all questions or comments regarding the RFP, the evaluation, etc., to me, the Buyer of Record. Neither you nor your agents may contact any other County employee or evaluation committee member regarding any of these

matters during the negotiation and evaluation process. Inappropriate contacts or release of information about your proposal response or BAFO are grounds for suspension and/or exclusion from specific procurements.

If you have any questions regarding this request, please call (573) 886-4392 or e-mail [lpalazzolo@boonecountymmo.org](mailto:lpalazzolo@boonecountymmo.org). I sincerely appreciate your efforts in working with Boone County - Missouri to ensure a thorough evaluation of your proposal.

Sincerely,

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: Evaluation Committee Members  
Proposal File

Attachments: Best and Final Offer (BAFO) Form and Clarification #2

BEST AND FINAL OFFER FORM #1  
BOONE COUNTY, MISSOURI  
PROPOSAL NUMER AND DESCRIPTION: 40-16OCT17-Detainee Telephone System

BEST AND FINAL OFFER FORM #1

This Best and Final Offer (BAFO) is issued in accordance with the Instructions to Offerors and is hereby incorporated into and made a part of any resulting Contract Documents between the offeror and Boone County.

The offeror hereby declares understanding, agreement and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all terms and conditions, requirements, and specifications of the original RFP as modified by any previously issued RFP amendments and by this and any previously issued BAFO requests. The offeror agrees that the language of the original RFP as modified by any previously issued RFP amendments and by this and any previously issued BAFO requests shall govern in the event of a conflict with offeror's proposal.

By:

  
**Liz Palazzolo, CPPO, C.P.M.**  
**Senior Buyer**

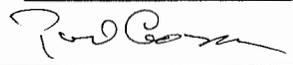
Company Name: CenturyLink

Address: 600 New Century Parkway, New Century, KS 66031

Telephone: 913-353-7388 Fax: 720-264-8121

Federal Tax ID (or Social Security #): 59-3268090

Print Name: Paul Cooper Title: VP/GM

Signature:  Date: 12/12/2017

Email: paul.n.cooper@centurylink.com – alternate  
skip.smith@centurylink.com

BOONE COUNTY - MISSOURI

PROPOSAL NUMBER AND DESCRIPTION: 40-160CT17 - Detainee Telephone System

CLARIFICATION FORM #2

This Clarification is issued in accordance with the Instructions to Offeror and is hereby incorporated into and made a part of the Request for Proposal Documents. The offeror is reminded that receipt of this Clarification must be acknowledged and submitted along with the Best and Final Offer via sealed mail to:

Boone County Purchasing  
Attn: Liz Palazzolo  
613 E. Ash Street  
Columbia, Missouri 65201

CLARIFICATION - please provide a response to the following requests.

- 1) RFP paragraphs 3.8.2 and 3.11.1 require that call records be maintained and accessible for five (5) years. This means in effect that any calls made on the last day of the contract be retained and accessible for five (5) years beyond the final day of the contract period. Please indicate below by circling "Yes" or "No" that the offeror agrees:

Yes

No

- 2) Please address the adjusted estimated quantity in call minutes that Centurylink noted in its clarification #1 response. While it is understood that lower call rates may result in increased call volume, Centurylink has indicated verbally that a projected increase would be between 20% and 25%, while the Clarification #1 chart shows as much as a 50% increase. However, the actual numbers shown on the Pricing table in Clarification #1 show a jump from 213,565 minutes to 1,428,009 minutes for prepaid calls and 601,970 for collect calls for Part One. Both adjustments greatly exceed a 50% increase. Similar extreme increases are shown for Part Two. Please clarify the inconsistency.

**CenturyLink Response:** We apologize for the confusion on this point. The verbal indication of 20 to 25% more calling volume is what we typically see when transitioning an account from another provider, without any change in rates – i.e. CenturyLink typically generates 20 to 25% more reported/commissioned calls than the County's current provider all things being equal.

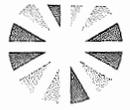
With the dramatic proposed decrease in rates, we expect to see a much greater increase in calling volume than 20 to 25%. For example, at Jackson County, MO we've seen usage of 743 minutes per inmate per month after reducing rates to \$0.10 per minute – similar usage numbers were used in the Part Two Cost Clarification. We also note this increased usage appears to reach a limit around 800 minutes per inmate per month – in McDowell County, WV at \$0.03/minute, we've seen 776 minutes per inmate per month. Similar usage numbers were in the Part One Cost Clarification.

- 3) CenturyLink indicated verbally during the demo as it explained its Video Relay Service (VRS) that one (1) Bridge Communication Device (BCD) which is a wall-mounted touch screen kiosk could be provided without impacting CenturyLink's financial offer. Clarification #1 states that provision of the Bridge Communication Device for provision of Video Relay Service could be provided at the County's option but that it would impact the financial offer. Please clarify the inconsistency between the verbal and written statements regarding CenturyLink's offer to provide one (1) Bridge Communication Device (BCD) for VRS at no additional impact to the financial offers CenturyLink has presented to the County.

**CenturyLink Response:** CenturyLink will provide one BCD at no impact to the financial offers previously presented to the County.

- 4) Related to #3 above, CenturyLink must reaffirm that if it provides one (1) Bridge Communication Device (BCD), then CenturyLink will also provide the TTY/TDD machines included in its original proposal and Clarification #1 without impact to its financial offers.

**CenturyLink Response:** Reaffirmed. CenturyLink will provide one (1) BCD and the TTY/TDD machines in our original proposal and Clarification #1 without impact to our financial offers.



**CenturyLink®**

600 New Century Pkwy - 1D  
New Century, KS 66031

**CenturyLink Response to  
BAFO Request #1 and Clarification #2  
40-16OCT17 – Detainee Telephone System**

# Boone County Purchasing



Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)

---

December 13, 2017

CenturyLink  
600 New Century Parkway  
New Century, Kansas 66031

Via E-mail: [paul.n.cooper@centurylink.com](mailto:paul.n.cooper@centurylink.com)

## **RE: Best and Final Offer (BAFO) Request #1 and Clarification #2 to 40-160CT17 Detainee Telephone System**

Dear Mr. Cooper:

This letter shall constitute an official request by the Boone County - Missouri to enter into competitive negotiations with your organization. Included with this letter are two attachments.

The first attachment is a Best and Final Offer Form for this Request for Proposal. The Best and Final Offer Form must be completed, signed by an authorized representative of your organization, and returned with your detailed BAFO response.

The second attachment is a Clarification List #2, and it requests clarification of certain statements in the proposal and in Clarification #1 which require further information and/or clarification.

Your detailed clarification response should address each area identified on the clarification question list using the same numbering outline as the list. Please understand that your response to this BAFO request is your final opportunity to ensure that (1) all mandatory requirements of the RFP have been met, (2) all RFP requirements are adequately described since all areas of the proposal are subject to evaluation, and (3) this is your company's best offer.

Please provide a **written sealed response** no later than by **Noon (12:00 P.M.) on December 20, 2017**. Your company's Best and Final Offer will be subject to evaluation in addition to the original proposal.

You are reminded that pursuant to Section 610.021 RSMo, proposal documents including any best and final offer documents are considered closed records and shall not be divulged in any manner until after a contract is executed or all proposals are rejected. Furthermore, you and your agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all questions or comments regarding the RFP, the evaluation, etc., to me, the Buyer of Record. Neither you nor your agents may contact any other County employee or evaluation committee member regarding any of these

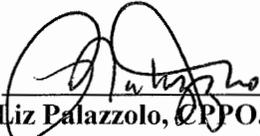
**BEST AND FINAL OFFER FORM #1**  
**BOONE COUNTY, MISSOURI**  
**PROPOSAL NUMER AND DESCRIPTION: 40-16OCT17 – Detainee Telephone System**

**BEST AND FINAL OFFER FORM #1**

This Best and Final Offer (BAFO) is issued in accordance with the Instructions to Offerors and is hereby incorporated into and made a part of any resulting Contract Documents between the offeror and Boone County.

The offeror hereby declares understanding, agreement and certification of compliance to provide the items and/or services, at the prices quoted, in accordance with all terms and conditions, requirements, and specifications of the original RFP as modified by any previously issued RFP amendments and by this and any previously issued BAFO requests. The offeror agrees that the language of the original RFP as modified by any previously issued RFP amendments and by this and any previously issued BAFO requests shall govern in the event of a conflict with offeror's proposal.

By:

  
\_\_\_\_\_  
**Liz Palazzolo, CPPO, C.P.M.**  
**Senior Buyer**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-mail: \_\_\_\_\_

- 4) Related to #3 above, CenturyLink must reaffirm that if it provides one (1) Bridge Communication Device (BCD), then CenturyLink will also still provide the TTY/TDD machines included in its original proposal and Clarification #1 without impact to its financial offers.

# Boone County Purchasing

Liz Palazzolo  
Senior Buyer



613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
lpalazzolo@boonecountymo.org

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November 22, 2017

CenturyLink  
600 New Century Parkway  
New Century, KS 66031

*Via E-mail*

## **RE: RFP 40-16OCT17 Detainee Telephone Services**

Dear Mr. Cooper:

The Evaluation Team reviewing proposals for RFP 40-16OCT17 for Detainee Telephone Services wishes to see your detainee telephone system in operation. A Demonstration Session is scheduled to begin at 9:00 A.M. on December 12, 2017 in the Boone County Annex Building located at 613 E. Ash Street in Columbia, Missouri. You may have access to the conference room to set-up the demonstration beginning at 8:30 A.M. to set-up for the session. The session should show the Evaluation Team the system's following features:

1. Web-based operation
2. User configuration capabilities, e.g., setting up a user dashboard
3. Call analytics, statistics accessible to the web-based user
4. Reporting, with a special focus on financial reporting
5. Copying recorded calls to other media including use of e-mail to send recorded calls
6. Help Desk/Trouble ticket processing
7. Investigative tools
8. Fraud prevention tools including voice biometrics if available
9. How a user sets-up and maintains an account, e.g., initial account set-up, funds transfers, deposits, etc.
10. How a detainee uses the system to place a call with a focus on fraud detection
11. Demonstrate the warning messages specifically about receipt of a call from a detention center, that the call is being recorded, and that 75% of funds have been used.
12. Assistive technology including VRS if offered

The target should be to cover the above topics within about forty-minutes to an hour. Please try to construct your demonstration to address the above within no longer than an hour so that time may be provided after the session for questions. Please also feel free to include whatever other aspects of your system that you believe would benefit the County.

**CENTURYLINK  
 DEMONSTRATION SESSION  
 RFP40-16OCT17 – Detainee Telephone System  
 12/12/17 9:00 A.M.**

	<b>Representative Name</b>	<b>Business Name</b>	<b>Telephone Number</b>
1.	Liz Palazzolo	Boone County Purchasing	886-4392
2.	Keith Hoskins	Boone County Sheriff's Office	875-1111
3.	Gary German	Boone County Sheriff's Office	875-1111
4.	CJ Dykhouse	Boone County Counselor's Office	886-4313
5.	Ryan Irish	Boone County IT Department	886-4445
6.	<i>SKya Smith</i>	<i>CENTURYLINK</i>	<i>816-351-3511</i>
7.	<i>FRANK FLORES</i>	<i>CENTURYLINK/LEGACY</i>	<i>562-244 8491</i>
8.	<i>JAMES LOWERY</i>	<i>CENTURYLINK/LEGACY</i>	<i>626-991-3304</i>
9.			
10.			
11.			
12.			
13.			
14.			
15.			

**Boone County Sheriff's Office  
Inmate Telephone System**

December 12, 2017



# What makes our solution different

## ***97% of all Inmate Telephone System features are the same:***

- ✓ Personal Identification Numbers
- ✓ Personal Allowed Numbers
- ✓ Blocking
- ✓ Monitoring & Recording
- ✓ Announcements
- ✓ Positive Acceptance
- ✓ 3 way call detect
- ✓ Alerts
- ✓ Reporting - Unlimited
- ✓ On/Off Settings
- ✓ Multilingual Prompts
- ✓ Payment Options / Debit / Prepaid
- ✓ Incoming call blocking
- ✓ Cut-off keys
- ✓ Remote diagnostics
- ✓ Call pattern analysis
- ✓ Word Search
- ✓ Call restriction tables
- ✓ Remote called party blocking
- ✓ Free call capabilities
- ✓ Automated name / recording
- ✓ Number history
- ✓ Frequently called number
- ✓ Calls by inmate
- ✓ Fraud Prevention features
- ✓ Remote Investigative Functionality
- ✓ System operation logs and reports
- ✓ Call limits by usage and frequency
- ✓ User Access log
- ✓ User Privilege log



# What makes our solution different

*However, the remaining 3% makes a MAJOR difference*

**(1) Service &  
Integrity**

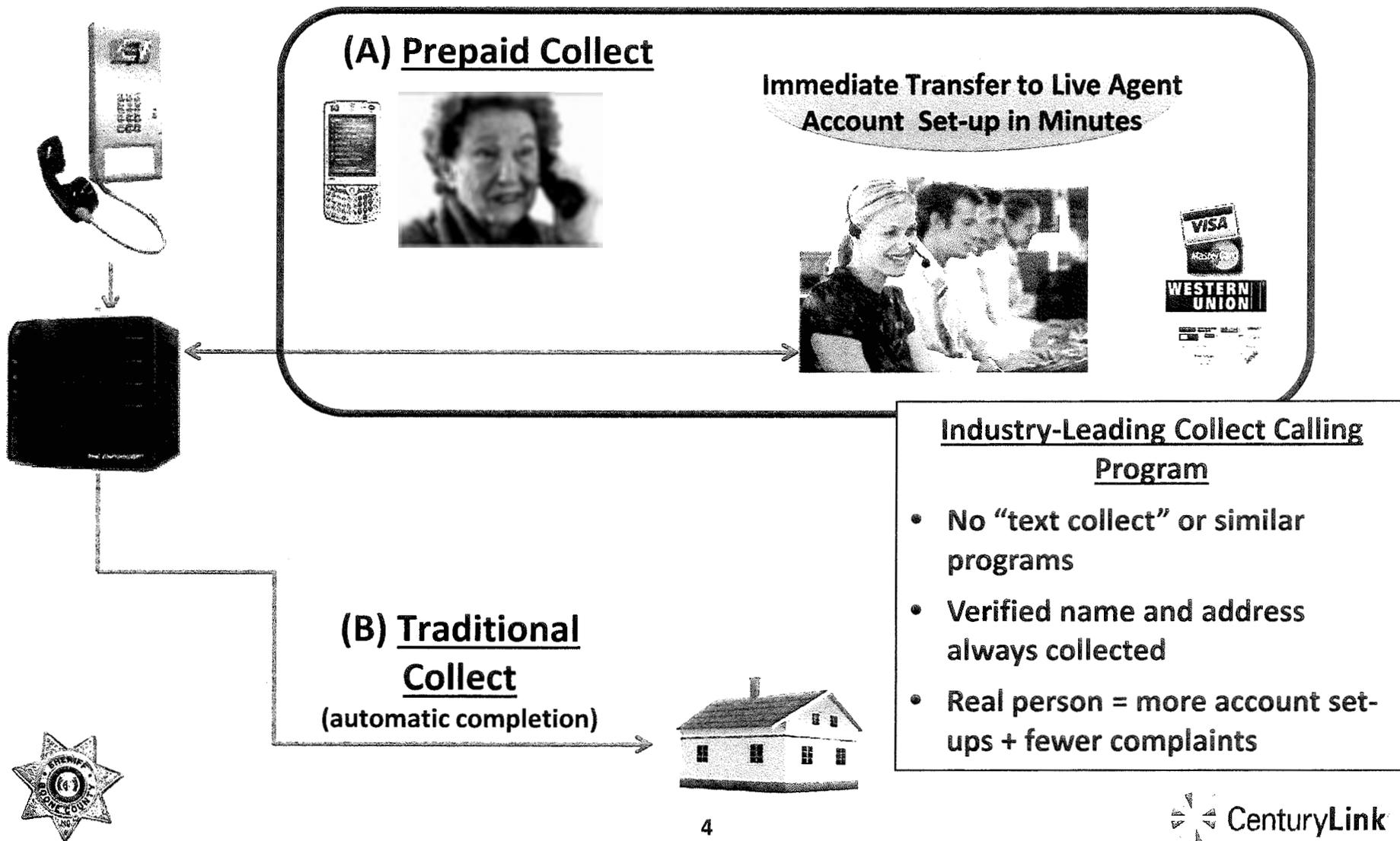
**Impacts to  
Compliance,  
Operations,  
Revenue AND  
Security**

**(2) End-User  
Service & Billing  
Options**

**(3) System  
Usability**



# End-User Service: CenturyLink approach makes a MAJOR difference



## (2) Service Program Impact to Revenue: Completing more calls = more revenue + less complaints

	Previous Provider			CenturyLink Performance					
	Avg \$ / call	Avg calls / inmate	Avg \$ / inmate	Avg \$ / call		Avg calls / inmate		Avg \$ / inmate	
County #1	\$2.82	22.2	\$62.68	\$2.67	-5%	28.6	29%	\$76.25	22%
County #2	\$4.75	20.8	\$98.58	\$3.89	-18%	28.4	37%	\$110.36	12%
County #3	\$2.15	23.5	\$50.54	\$2.05	-5%	34.2	46%	\$70.20	39%
County #4	\$2.57	13.6	\$35.04	\$2.96	15%	19.0	39%	\$56.19	60%
County #5	\$3.02	13.0	\$39.05	\$1.92	-36%	25.8	99%	\$49.46	27%
					<b>-10%</b>		<b>50%</b>		<b>32%</b>

*With 30% more commissioned revenue, another provider would have to offer almost 80% to beat just 60% from CenturyLink...even ignoring our low rates and better service*

- ✓ More connections
- ✓ More revenue
- ✓ Fewer complaints





**CenturyLink®**

CenturyLink Public Communications, Inc.  
600 New Century Parkway  
New Century, KS 66031

December 1, 2017

Boone County Purchasing  
613 E. Ash, Room 109  
Columbia, MO 65201  
Attn, Liz Palazzolo, Senior Buyer

**By Email to [LPalazzolo@boonecountymo.org](mailto:LPalazzolo@boonecountymo.org)  
Re: RFP 40-16OCT17 Detainee Telephone Services Clarification Letter**

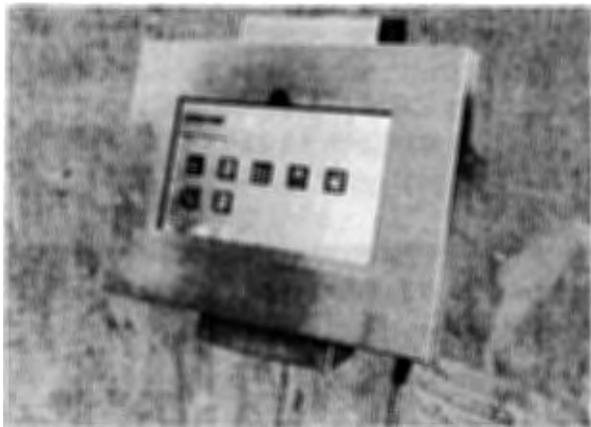
Dear Ms. Palazzolo,

CenturyLink submits the following clarification questions in regard to your email dated November 21<sup>st</sup>.

Please call me or Senior National Account Manager Skip Smith at 816.351.3511 if the County requires any further clarification.

Sincerely,

Paul Cooper  
Vice President / General Manager  
[paul.n.cooper@centurylink.com](mailto:paul.n.cooper@centurylink.com)  
913.353.7388



Video Relay Service (VRS) from a BCD kiosk works as follows. When a deaf or hard-of-hearing detainee attempts to make a phone call using a BCD, they dial the number which is already registered with the VRS and the number then rings into a phone with a Video Relay Service application (much like Video Visitation) so people who know sign language can sign to each other directly.

Additionally, in situations where a deaf or hard-of-hearing detainee dials a voice telephone user that does not know how to sign, they are connected to a Video Relay Service interpreter on the screen. This interpreter relays the call between the parties, using sign language with the detainee and verbal communication with the hearing party. These interpreters serve as the intermediary and provide 24/7 VRS service in both English and Spanish. The VRS application is simple and easy to use. Using our multipurpose Bridge Communication Device, the detainee selects the VRS app and dials the called party. All the subsequent steps are fully automated.

There is no cost for VRS calls to users (the detainee and the called party). By default, there is not an option to record and monitor VRS calls, however that functionality can be added through the Tidal Wave add-on, which may have an additional effect on our financial offer (commission percentage and/or overall call rates applied at the facility) due to integration costs that would need to be absorbed by CenturyLink. There are no technical/file interface demands on the County for VRS services.

- 3) Address your company's experience interfacing with Superior (formerly SunGard), the County's JMS provider using the JMS One Solution product.
  - a. Address how interfacing has worked with Superior and your system if previously conducted.
  - b. Address the costs for interfacing between the two systems and specifically what if any costs the County will be expected to pay for the interface.
  - c. How often do files sync between the two systems?

Also, the integration of our detainee communication system with the JMS and Commissary systems allow the following integrated features to increase staff and system efficiency while reducing the facility's operating costs:

- Automatic PIN Generation during Booking
- Automatic Detainee Location and Restriction Updates (i.e. if a detainee is moved to a different cell, iCON updates once facility staff have entered the new location in the JMS)
- Expanded Calling Options
- Increased Call Completion
- Reduction in Paper Use and Data Entry

Upon contract award, CenturyLink will request that the JMS and Commissary vendor send us a sample data file in their system's native file format (we have no limitation of file type so this can be any file format). After this is complete, every time the JMS or Commissary system is updated, their system will automatically forward the updated information to our server and iCON will immediately update itself.

When a detainee places a commissary order over the telephone iCON sends the appropriate data to the commissary vendor via the same integration, letting them know what item and quantity has been ordered. As soon as the file is delivered, their system will be updated and send a response to iCON updating the detainee's account balance to reflect the deduction in funds for the purchased item.

- 5) The Clarification 1 Cost Attachment (attached hereto) shows the pricing/commissions the County has identified from your proposal. CenturyLink must confirm the County's understanding of the prices to the users, and the Commissions offered to the County. In addition, CenturyLink must quote ancillary fees CenturyLink will invoice users of the detainee telephone system by quoting a specific price or clearly indicating "No Fee." If the listing provided does not identify one of Century Link's ancillary fees, then that fee must be added, priced and the frequency of assessment identified.

**CenturyLink response:** The County's understanding of our pricing offers with respect to rates and commissions is correct. However, we note the call volumes used to calculate forecasted Commission Payments are much lower than ours.

Our experience in other facilities consistently shows that call volume will increase significantly following rates declines such as those we've proposed. This increase is further helped by our consumer-friendly policies, easy access to live operators, and refusal to implement "Single Pay" services such as those implemented by the County's current provider.

Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System."

CenturyLink's clarification shall clarify that all calls, i.e., local, intraLATA intrastate, interLATA intrastate, interLATA interstate, and international calls, shall be included as gross revenue used in calculating its commission calculation, and that its calculation complies with Paragraph 3.16.9(c) of RFP 40-160CT17.

**CenturyLink Response:** Confirmed. Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System.

CenturyLink has based our commission calculation on Gross Billed Revenue on all calls including: local, intraLATA intrastate, interLATA intrastate, interLATA interstate, and international calls.

## Attachment #2 Prepaid Collect Account Reconciliation

### **Prepaid Account Balances displayed on Account Dashboard**

ACCOUNT ▾
PREPAID CALLING
VIDEO VISITATION ▾
MESSAGING ▾
LOGOUT

Eduardo J

Balance: \$649.47

10833 Valley View St  
Cupertino, California, 95002  
United States  
earendeo@legacymate.com

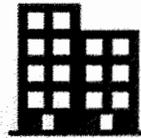
#### Select a Service



**Prepaid Calling**



**Remote Video Visitation**



**Onsite Video Visitation**



**Send Message**

#### Contact Us

(877) 553-4440  
 info@legacymate.com  
 Legacy Finance Communications  
10833 Valley View Street Suite 450

#### About Us

At Legacy, we are dedicated to providing unparalleled service while connecting friends and families through our industry leading, worldwide, carrier-grade network. Since our inception in 1996, Legacy has been committed to providing advanced communications.

### **Billed Prepaid calls Searched and Displayed on Call History Page**

ACCOUNT ▾
PREPAID CALLING
VIDEO VISITATION ▾
MESSAGING ▾
LOGOUT

#### Prepaid Calling

To begin receiving calls, click here to add fund to your account.

To allow an inmate to call anyone, click here to add fund his/her account.

To view your call records, select a "from" date and "to" date below and click search.

From date: 1/1/2015

To date: 1/12/2015

Search

From City	From State	Called Number	To City	To State	Call Date	Bill Type	Call Duration	Total Charge
McCormick	SC	714 [REDACTED]	CYPRESS	CA	1/6/2015 2:06:43 PM	Prepaid Collect	0:22:00	\$0.15
Rierce	NE	714 [REDACTED]	CYPRESS	CA	1/12/2015 4:06:47 PM	Prepaid Collect	0:00:07	\$0.25

**Other Ancillary Fees Charged to Users**

**CenturyLink must identify all other charges/ancillary fees to users below. If fees other than those identified are charged to users, then CenturyLink must identify them in the clarification. Failure to identify any additional fees shall be interpreted as meaning that system users will not be billed any fees in addition to those identified. Ancillary charges include but are not limited to account set-up fees, transfer of funds fees, pass-through fees for processing third-party connections or funds transfers, charges per card for prepaid debit cards, paper statement fees, and/or refund fees. In addition address the frequency at which the account is charged with the identified fee.**

	<b>Other Fees Charged to Users</b>	<b>Fee Amount</b>	<b>Charge Frequency, e.g., per month, each transaction, one-time, etc.</b>	
1	Single Bill Fee	No fee	Not applicable	
2	Prepaid Account Set-Up Fee (Prepaid Collect)	No fee	Not applicable	
3	Prepaid Account Funding Fee Via Internet (Prepaid Collect)	\$3.00	Each transaction	
4	Prepaid Account Funding Fee Via Telephone (Prepaid Collect)	\$5.95	Each transaction	<i>*\$3.00 fee if completed by automated phone system</i>
5	Refund Fee (prepaid Collect)	No fee	Not applicable	
6	Prepaid Account Close-Out Fee (Prepaid Collect)	No fee	Not applicable	
7	Account Maintenance Fee (Prepaid Collect)	No fee	Not applicable	
8	Inactive Account Fee (Prepaid Collect)	No fee	Not applicable	
9	Regulatory Cost Recovery Fee	No fee	Not applicable	
10	Transfer of funds from Western Union, MoneyGram or similar	\$5.00/\$5.99	Each transaction	<i>*\$5.00 WU, \$5.99 MoneyGram with no add-on charges</i>
11	Paper Statement	No fee	Not applicable	
12	Transfer from Commissary Fund	No fee	Not applicable	
13	Price per Debit Card	No fee	Not applicable	

# Boone County Purchasing



Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)

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November 21, 2017

CenturyLink  
600 New Century Parkway  
New Century, Kansas 66031

E-mail: [paul.n.cooper@centurylink.com](mailto:paul.n.cooper@centurylink.com)

RE: Clarification to *40-16OCT17 Detainee Telephone System*

Dear Mr. Cooper:

Following the County's initial evaluation meetings, the evaluation committee identified some questions that need clarification. The attached Clarification Form contains the questions the Evaluation Committee has identified at this time. The Form must be completed, signed by an authorized representative of your organization, and returned with your detailed Clarification response. You are requested to provide written response by **2:00 p.m. December 1, 2017** by e-mail to [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org).

Please let me remind you that pursuant to Section 610.021 RSMo, proposal documents are considered closed records and shall not be divulged in any manner until after a contract is executed or all proposals are rejected. Furthermore, you and your agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all questions or comments regarding the RFP, the evaluation, etc., to me, the Buyer of Record. Neither you nor your agents may contact any other County employee or evaluation committee member regarding any of these matters during the negotiation and evaluation process. Inappropriate contacts or release of information about your proposal response(s) are grounds for suspension and/or exclusion from specific procurements.

If you have any questions regarding this Clarification request, please call (573) 886-4392 or e-mail [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org). I sincerely appreciate your efforts in working with Boone County - Missouri to ensure a thorough evaluation of your proposal.

Sincerely,

A handwritten signature in black ink, appearing to read "Liz Palazzolo".

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: Evaluation Committee Members

**CLARIFICATION FORM #1**

This completed clarification will be incorporated into the offeror's proposal, and made a part all Request for Proposal documentation. The offeror must acknowledge and respond to this Clarification, and submit the completed Clarification Form #1 by e-mail to [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org).

**I. CLARIFICATION – please provide a response to the following requests.**

- 1) Provide more detail about the video relay service CenturyLink is proposing, e.g., what equipment is necessary, how would the County have to accommodate it, what would the costs be to users, are there technical/file interface issues that have to be accommodated by the County, and will it have the capability to record sessions as well as be actively monitored the same as a phone call?
- 2) Is Video Relay Service provided in addition to TTY assistive phone or instead of TTY assistive phones?
- 3) Address your company's experience interfacing with Superior (formerly SunGard), the County's JMS provider using the JMS One Solution product.
  - a. Address how interfacing has worked with Superior and your system if previously conducted.
  - b. Address the costs for interfacing between the two systems and specifically what if any costs the County will be expected to pay for the interface.
  - c. How often do files sync between the two systems?
- 4) Address your company's experience interfacing with CBM Managed Services, the County's new contractor for commissary services that includes kiosks.
  - a. Address how interfacing has worked with CBM and your system if previously conducted.
  - b. Address the costs for interfacing between the two systems and specifically what if any costs the County will be expected to pay for the interface.
  - c. How often do files sync between the two systems?
- 5) The Clarification 1 Cost Attachment (attached hereto) shows the pricing/commissions the County has identified from your proposal. CenturyLink must confirm the County's understanding of the prices to the users, and the Commissions offered to the County. In addition, CenturyLink must quote **all** ancillary fees CenturyLink will invoice users of the detainee telephone system by quoting a specific price or clearly indicating "No Fee." If the listing provided does not identify one of CenturyLink's ancillary fees, then that fee must be added, priced and the frequency of assessment identified.
- 6) Provide a sample system user invoice showing all potential charges, i.e., all ancillary fees as well as call-time, and allowed taxes, fees and surcharges.

- 7) Paragraph 3.16.9(c) of RFP 40-16OCT17 requires that the commission be paid on all Gross Billed Revenue: “Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System.”

CenturyLink’s clarification shall clarify that all calls, i.e., local, intraLATA intrastate, interLATA intrastate, interLATA interstate, and international calls, shall be included as gross revenue used in calculating its commission calculation, and that its calculation complies with Paragraph 3.16.9(c) of RFP 40-16OCT17.

In compliance with this request, the offeror agrees to furnish the services requested and proposed, at the pricing quoted and commissions offered, and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of the RFP and this clarification request, and is authorized to contract on behalf of the firm.

**Note:** This form must be signed. All signatures must be original and not photocopies.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-mail: \_\_\_\_\_

RFP#: 40-16OCT17		Centurylink			
Detainee Telephone System					
Cost Clarification 1	Description	Commission Or Price	Estimated Annual Quantity	Extended Price	Commission Payment
<b>Part One</b>					
Line Item 1	Administrative Costs Recovery Commission Firm, Fixed Percentage on Gross Revenue	17% Commission	1		17%
Line Item 2	Pre-paid Call/Debit Call - Price Per Minute	\$ 0.04	213,565	\$ 8,542.60	
Line Item 3	Collect Call - Price Per Minute	\$ 0.04	213,565	\$ 8,542.60	
Line Item 4	Automated Payment Fee Per Each Transaction	\$ 3.00	220	\$ 660.00	
Line Item 5	Live Agent Fee Per Each Transaction	\$ 5.95	220	\$ 1,309.00	
Line Item 6	International Call - Price Per Minute	\$ 0.50	5	\$ 2.50	
	TOTAL PRICE FOR COMMISSION PAYMENT CALCULATION			\$ 19,056.70	\$ 3,239.64
<b>Part Two</b>					
Line Item 7	Other Commission Firm, Fixed Percentage on Gross Revenue	60.2% Commission	1		60.2%
Line Item 8	Pre-paid Call/Debit Call - Price Per Minute	\$ 0.10	213,565	\$ 21,356.50	
Line Item 9	Collect Call - Price Per Minute	\$ 0.10	213,565	\$ 21,356.50	
Line Item 10	Automated Payment Fee Per Each Transaction	\$ 3.00	220	\$ 660.00	
Line Item 11	Live Agent Fee Per Each Transaction	\$ 5.95	220	\$ 1,309.00	
Line Item 12	International Call - Price Per Minute	\$ 0.50	5	\$ 2.50	
	TOTAL PRICE FOR COMMISSION PAYMENT CALCULATION			\$ 44,684.50	\$ 26,900.07
<b>Other Ancillary Fees Charged to Users</b>					
<p><i>Centurylink must identify all other charges/ancillary fees to users below. If fees other than those identified are charged to users, then Centurylink must identify them in the clarification. Failure to identify any additional fees shall be interpreted as meaning that system users will not be billed any fees in addition to those identified. Ancillary charges include but are not limited to account set-up fees, transfer of funds fees, pass-through fees including fees for processing third-party connections or funds transfers, charges per card for prepaid debit cards, paper statement fees, and/or refund fees. In addition, address the frequency at which the account is charged with the identified fee.</i></p>					
	<b>Other Fees Charged to Users</b>	<b>Fee Amount</b>	<b>Charge Frequency, e.g., per month, each transaction, one-time, etc.</b>		
1	Single Bill Fee				
2	Prepaid Account Set-Up Fee (Prepaid Collect)				
3	Prepaid Account Funding Fee Via Internet (Prepaid Collect)				
4	Prepaid Account Funding Fee via Telephone (Prepaid Collect)				
5	Refund Fee (prepaid Collect)				
6	Prepaid Account Close-Out Fee (Prepaid Collect)				
7	Account Maintenance Fee (Prepaid Collect)				
8	Inactive Account Fee (Prepaid Collect)				
9	Regulatory Cost Recovery Fee				

<b>RFP#: 40-16OCT17</b>	<b>Centurylink</b>						
<b>Detainee Telephone System</b>							
10	Transfer of funds from Western Union, MoneyGram or similar						
11	Paper Statement						
12	Transfer from Commissary Fund						
13	Price per Debit Card						



October 23, 2017

Boone County Purchasing  
C/O Liz Palazzolo, Senior Buyer  
613 East Ash Street, Room 109  
Columbia, MO 65201

Dear Ms. Palazzolo,

On behalf of the CenturyLink Public Communications, Inc. ("CenturyLink") account team, we welcome the opportunity to respond to the Boone County Request for Proposal Detainee Telephone Systems. CenturyLink is confident that our response to the RFP for Boone County will help the County identify the current state of technology services available from CenturyLink. Our Vice President/General Manager, Paul Cooper (913-353-7388), will be your primary contact for any questions regarding our response.

CenturyLink has over 26 years of Inmate Electronic Communication Systems implementation and support experience. CenturyLink proposes the Legacy ICON Inmate Telephone System, along with Wintel telephones and enclosures. Further, we believe our combination of in-state presence, financial resources, customer service, technical expertise, in-depth operational experience, and qualified personnel are unmatched in the industry. We currently provide inmate communication services for approximately 310,000 inmates nationwide.

*CenturyLink has a consistent and documented history of meeting and exceeding every contractual requirement; time after time we have proven our flexibility by implementing new services beyond the scope of the original proposal and subsequent contract. We encourage Boone County to call any of our current or previous accounts to verify this and we strongly urge that you compare our references to those from the other bidders.*

At CenturyLink, we believe that a product is only as good as the people standing behind it. Our fully staffed support center is always on call, and our entire staff is dedicated to providing the best customer support in our industry.

Sincerely,

Paul Cooper, VP/GM

## Executive Summary

CenturyLink is pleased to submit a fully compliant proposal to Boone County for RFP No. 40-16OCT17.

As you will see throughout our technical response, CenturyLink is a leader in inmate communications technology and has extensive experience serving state Departments of Correction and county facilities nationwide. We confidently state that by partnering with us, Boone County will receive the most state-of-the-art inmate communications system, increasing safety for the public, staff, and inmates while further serving its constituents with improved customer service.

CenturyLink Public Communications, Inc. ("CenturyLink") has been providing best-in-class services to correctional facilities for over 25 years, connecting inmates with their families while providing the highest level of security to correctional staff and the public. During this time, CenturyLink has a demonstrated track record of exceptional service to correctional facilities nationwide.

As part of a network and managed service provider CenturyLink is also uniquely positioned in the Corrections Industry. While recent trends in the industry include growth in video visitation solutions, delivering content to tablets, and other bandwidth intensive products, these types of solutions will quickly bring any network problems to the attention of a facility. CenturyLink understands these network demands and has the assets and expertise to engineer network solutions that alleviate service issues for our customers.

In recent years, we have continued to emphasize a couple of key differentiators that are the pillars of our success. First, we embrace a partner model where CenturyLink has the flexibility and integration experience to bring customized, best in class, technology solutions to the facilities we serve.

Second, in an industry where the word "service" often times has a hollow meaning, CenturyLink prides itself on service that truly differentiates us from our competition in our approach to how we meet the needs of facilities as



### CENTURYLINK SUMMARY

- **25+ years experience** in inmate telephone systems with 9 implemented state DOC contracts
- **Fastest growing inmate communications provider since 2013** (measured by inmates), now serving 310,000 inmates nationwide
- **Extensive presence in the State of Missouri** providing service to Cole County, Jackson County and Platte County.
- Part of the 3<sup>rd</sup> largest local telecommunications company in the U.S., with 40,000 employees and **unmatched financial strength**
- The only facilities-based telecom in inmate communications, with **unique access to carrier databases and cost-effective network capacity**
- Only publicly held, currently **Sarbanes-Oxley compliant** company in inmate communications
- **Full suite of inmate communications, kiosk, and security services**

# Executive Summary

well as inmates, friends & families. This dedication to service has benefited us well as CenturyLink is now the fastest growing company in the ITS industry when measured on additional inmates served.

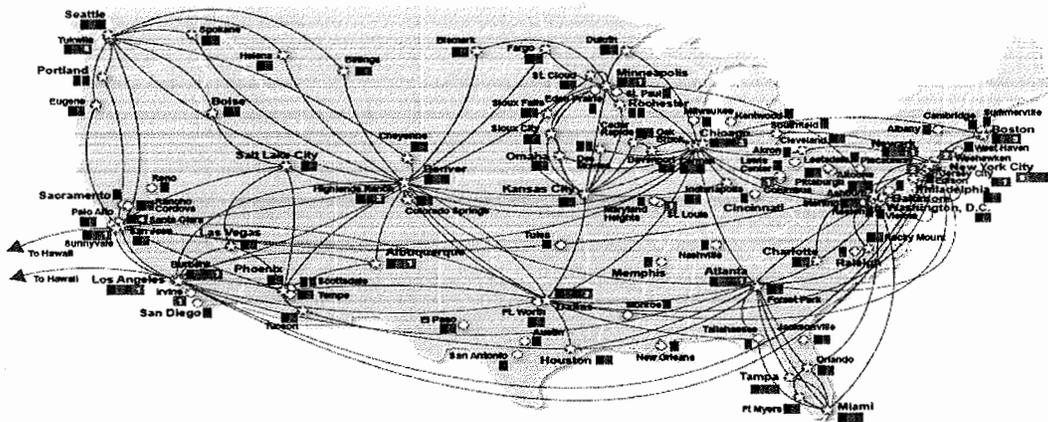
While we take pride in this growth story, the retention of our existing customers is a better testament to the CenturyLink approach, service model, and the customer centric product development of the ITS platform. CenturyLink has only lost one customer from the proposed ITS solution – a small County facility - since our first installation with this technology nearly ten years ago. This is a story we take great pride and appreciate the customer loyalty over the last decade.

## CenturyLink Technology Assets & Capabilities

Inmate communications involve managed IT services requiring a broad range of technical, financial, and service capabilities, and no company is positioned as well as CenturyLink to successfully integrate the ITS with any other systems now or in the future.

The capabilities of CenturyLink Public Communications, Inc. coupled with the extensive corporate resources of parent company, CenturyLink, Inc., allow us to provide end-to-end technology solutions that others in the industry simply can't duplicate. As a leading network and IT provider some of the capabilities and resources that set us apart are:

- ✓ Worldwide 500,000 mile fiber optic network
- ✓ Carry 20% of world's internet traffic
- ✓ One of two commercial service providers authorized by Department of Homeland Security to provide Enhanced Cybersecurity Services
- ✓ Cloud and collocation services
- ✓ Full portfolio of managed services including voice, data, hosting, and security



# Executive Summary

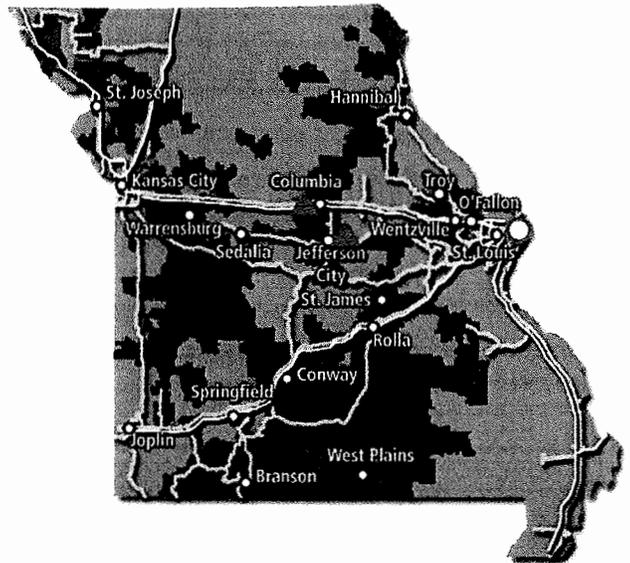
## CenturyLink Presence in Missouri

CenturyLink has an extensive customer base across Missouri and has motivation to perform at a high level, exceed the department's expectations, and continue to build on our reputation with the State. Highlights of our unique position and approach to our customers relative to our competition are as follows:

- Provider of voice, internet, & video services for nearly 380,000 residential and business customers in Missouri
- Network investment in excess of \$2.9 billion within the State
- An employee base in Missouri of approximately 1,800 associates with approximately \$135 million in annual payroll

In addition to these Missouri-based assets, CenturyLink is the inmate communications providers to neighboring **Kansas DOC**, in addition to Missouri **county jails representing 40% of the State's population**, including but not limited to **St. Louis, Jackson, and Cole Counties**.

With this extensive customer base and corporate investment made within the state of Missouri it is easy to see how CenturyLink has more at stake than any other ITS provider. CenturyLink is excited to expand our business with the Missouri state agency and continue to demonstrate our corporate values of service, integrity, and ethics.



## CenturyLink & Customer Advocacy as it relates to the FCC

- CenturyLink has demonstrated its commitment to ethics throughout the proceeding
  - Advocacy in favor of correctional institutions
  - Continuing to honor contractual requirements. See especially Alabama PSC filing at [https://apps.fcc.gov/edocs\\_public/attachmatch/DOC-325090A1.pdf](https://apps.fcc.gov/edocs_public/attachmatch/DOC-325090A1.pdf).
- CenturyLink is the only major provider to truly advocate in favor of correctional facilities in the FCC proceeding:
  - Providing a detailed legal analysis regarding the FCC's lack of any authority over in-state inmate calling services
  - Explaining that if the FCC is to assert authority over inmate calling services, it must allow

***CenturyLink is the only major provider to truly advocate in the FCC proceeding and maintains that if the FCC is to assert authority over inmate calling services, it must allow correctional facilities the ability to recover costs through commission payments.***

# Executive Summary

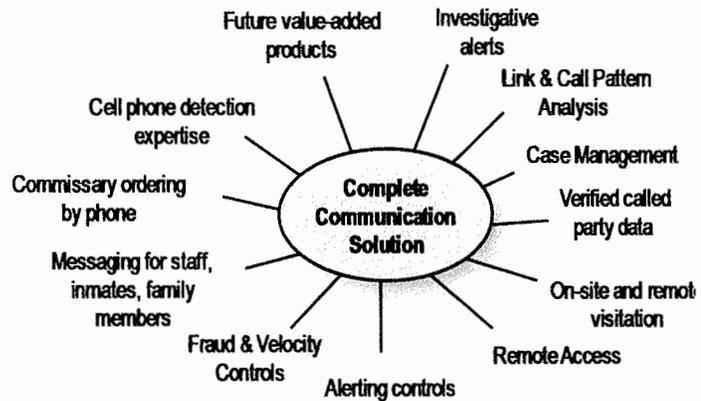
correctional facilities the ability to recover costs through commission payments

- Also explaining that ancillary fees - which hurt consumers and divert revenue away from correctional facility commissions - must be curbed.
- See CenturyLink's initial comments at <http://apps.fcc.gov/ecfs/solr/search?proceeding=12-375>

## The ITS Solution & Technology

The proposed ITS centralized platform is a state of the art system that is browser based with anytime/anywhere access, has an intuitive user interface, and boasts an extensive list of product features that are fully integrated into the platform.

This emphasis on integration is critical, and the ITS has a broad feature set fully integrated in the platform to ensure usability for County users today AND the ability to add additional functionality as future needs arise. Investigative tools such as link analysis, keyword search, voice biometrics, and our enhanced call player are all inherent in the platform and are not separate "modules" cobbled together from third party acquisitions, nor do they require installation of software supplements



We are confident that the County will find our inmate communications solution to meet and/or exceed all the requirements in this RFP. In addition, CenturyLink has extensive technology partners to bring additional services to the County as future needs arise.

## CenturyLink Solution At A Glance

System Features	
<ul style="list-style-type: none"> <li>✓ Multi-layer redundancy <i>*Industry Leading*</i></li> <li>✓ Browser-based Easy to Use Interface</li> <li>✓ Online Reporting Capabilities</li> <li>✓ Remote Access</li> </ul>	<ul style="list-style-type: none"> <li>✓ Integrated TDD <i>*Industry Leading*</i></li> <li>✓ Centralized Call Processing</li> <li>✓ Lifetime Online Storage of CDRs</li> <li>✓ Extensive Call Controls</li> </ul>
Service Features	
<ul style="list-style-type: none"> <li>✓ Lifetime Repair &amp; Warranty</li> <li>✓ Inmate &amp; Called Party Training</li> <li>✓ Free Software Upgrades</li> </ul>	<ul style="list-style-type: none"> <li>✓ 24 x 7 x 365 Technical Service</li> <li>✓ Ongoing Staff Training</li> <li>✓ Inmate &amp; Called Party Instruction</li> </ul>

## Executive Summary

### Calling Services

- ✓ Collect, Prepaid Collect & Debit Calling Programs *\*Industry Leading\**
- ✓ Custom Call Prompts & Voice Overlays
- ✓ Automated PIN/PAN and other OMS data interfaces
- ✓ Self-Learning PAN Capability
- ✓ Multiple Language Prompts – additional languages at no cost
- ✓ Inbound inmate voice messaging

### Facility Operational Tools

- ✓ “The Communicator” Voice-Verified inmate communications portal, including staff-to-inmate messaging and appointment scheduling *\*Industry Leading\**
- ✓ Emergency auto-dial service to family members
- ✓ Integration with other County systems, *always* at no cost
- ✓ Voice-Verified Information Line, including account balance and other confidential information *\*Industry Leading\**
- ✓ “The Attendant” Interactive Voice Response system for automated responses to family inquiries
- ✓ Phone-based commissary ordering

### Fraud Controls

- ✓ Three-Way Detection *\*Industry Leading\**
- ✓ Call Forward Detection *\*Industry Leading\**
- ✓ Hook Switch & Secondary Dial Tone Prevention
- ✓ Chain Dialing Prevention
- ✓ Custom Call Restrictions
- ✓ Inmate-to-Inmate Communications Detection *\*Industry Leading\**
- ✓ Incoming Call Block
- ✓ Real-Time Call Validation
- ✓ Extra Dialed Digit Prevention
- ✓ Global and inmate-specific number blocking

### Investigative Tools

- ✓ Unlimited Reverse Directory with Satellite Mapping *\*Industry Leading\**
- ✓ 4-channel Audio Separation – Critical for Voice Biometrics & Word Search *\*Industry Leading\**
- ✓ Unlimited Billing Name and Address Lookup
- ✓ Frequently Called Number Reports
- ✓ 100% Monitoring & Recording of Non-Confidential Calls
- ✓ Data Mining & Link Analysis
- ✓ Voice Biometrics (Pre-call validation included in offer) *\*Industry Leading\**
- ✓ Funding Alerts *\*Industry Leading\**
- ✓ Crime Tip & PREA Lines
- ✓ Access to CenturyLink Carrier Database information
- ✓ Call Alerts
- ✓ Barge In Capability & Call Forwarding to Investigators

### Value Added Services\*

## Executive Summary

- ✓ Phone-Based Commissary Ordering
- ✓ Inmate Medical Scheduling
- ✓ Edovo Education & Entertainment Tablets
- ✓ Location Data Services (LocAid)
- ✓ Continuous Voice Biometrics
- ✓ Word Detective (Keyword Search)
- ✓ Contraband Cellular Solutions
- ✓ Inmate-to-Inmate Call Detection
- ✓ CRIMES Data Mining & Investigation

***\*\*Broad Offering of Value Added Services Above and Beyond Basic Inmate Telephone Services \*\****

### Consistent Commitment to Service

#### Service to the County

Our service plan for the County is multi-faceted. By taking excellent care of inmates and their family members, complaints and overall frustration with the Inmate Telephone System (ITS) is minimized. And by meeting our commitments and maintaining flexibility throughout the contract, County can be assured that their cost of administering the contract will be absolutely minimized:

- ✓ **Dedicated Service Team:** Although we are a part of a large national corporation, our Correctional Markets Division is a standalone entity focused on managing complex inmate telephone system installations. Bottom line: Boone County can be assured of focused, quality attention and service.
- ✓ **“Enterprise-grade” system,** with no lost call records or voice recordings. Since the CenturyLink Team cut over its first ITS we have processed over 100 million call detail records (CDRs) and audio recordings. Not a single CDR or audio recording has been lost. No other provider’s ITS can match the redundancy, fault-tolerance, and overall performance of our system.
- ✓ **Consistent history of meeting or exceeding commitments.** Time after time, CenturyLink has proven its flexibility in implementing new services beyond the scope of the original RFP proposal process or contract.

***“We at the Department of Corrections have been pleased with every aspect of their service.”***

Robert Brantley – Alabama DOC  
Asst. Accounting Director &  
ITS Contract Administrator

#### Service to Inmates

Service to inmates requires high system availability and prompt responses to inquiries and complaints, but it also means transforming the ITS from just a one-way calling system to a true administrative tool for the County:

## Executive Summary

- ✓ System availability. Inmate perceptions of the ITS begin with exceptional system availability. With our redundant architecture, no other provider can deliver the system availability that we can.
- ✓ Timely response to inmate complaints. Unhappy inmates mean unhappy staff.
- ✓ Inmate Training. Transition planning also includes inmate training as well as day room posters.
- ✓ Ability to implement commissary ordering by phone and other automated functions.

### Service to Family Members

Poor service to family members is a major problem in our industry and the reason is simple: cost. Live agents are expensive to staff and train, and most providers purposely make it difficult to reach one. The CenturyLink Team's approach is different:

- ✓ U.S.-based representatives *who answer the phone*. **Please call all vendors' customer service lines and compare:**

(ICS) Our call center can be reached at (888) 506-8407. Our average hold times are consistently under 90 seconds – less than 10 seconds during peak weekday times during which we are more heavily staffed.

- ✓ Real-time routing to customer service. When an inmate calls a number, if the called party does not have an account with us (for example, a first call to a cell phone) or has depleted the funds in their account, they are *immediately* routed to our call center and presented with options to complete the call.
- ✓ No "alternative billing programs". Many providers have implemented programs to artificially inflate commission offers. Automated payment systems that include Voice Response Systems or Enhanced Text Messages charge hefty fees – up to \$15 per call – and do not obtain called party information for investigators.

***CenturyLink account setups are NEVER anonymous, ensuring family members they will never be charged \$15 fees, and ensures the County that called party information is available to investigators.***

- ✓ Audits and accountability. As a division of a Sarbanes-Oxley compliant company, CenturyLink completes monthly audits to verify call rating and billing accuracy.

***Single Pay calls, while not prohibited by the FCC, are costly to friends and family and facilities are not commissioned equitably. CenturyLink does not utilize any of these programs.***

***A Single Pay call of \$14.95 with a \$1.80 bonus payment to the facility is only a 12% commission.***

### The CenturyLink Difference

We recognize that many of the vendor responses and proposed solutions will appear very similar. And as most any Inmate Telephone System users know, despite all the salesmanship, claims of exclusive patents, and focus on features, over 97% of all functions are the same. Call restrictions, link analysis, reporting, even voice biometrics, cell phone detection, and location services are features any top-tier provider, including CenturyLink, can provide.

But the Differences show up “around the edges” when real money has to be spent in order to provide a total package:

- ✓ Features developed from the ground up directly within the system; no separate “modules” cobbled together from acquisitions
- ✓ 4-channel audio separation – critical for word search and voice biometrics
- ✓ Network capacity, scalability, and redundancy
- ✓ Consumer service model – industry leader by far and critical for regulatory compliance
- ✓ Proven willingness to work with any 3<sup>rd</sup> party vendor
- ✓ Carrier database access (to aid in investigation)
- ✓ Dedicated and proven service, support and account management to support Boone County

In closing, the corrections industry continues to be a very important focus in our business and we are excited about the opportunity to work with Boone County. We also understand that some items that are vital to our success, such as, **ethics and service** are difficult to score during an evaluation. With that said, we urge the County to call any of our accounts to learn more about our service model and our commitment to our customers.

### 3. SCOPE OF SERVICES

#### 3.1. Project Description:

3.1.1 The County of Boone – Missouri, hereafter referred to as the *County*, seeks a qualified firm to provide for the furnishing, delivery and installation of hardware and software, including wiring and on-going system maintenance, for a **Detainee Telephone System** at the Boone County Detention Facility in Columbia, Missouri. The Detainee Telephone System (referred to as “system” herein) shall provide for local and long distance telephone service, and shall include a recording and monitoring system to record and monitor detainee calls.

3.1.1.1 The Detainee Telephone System shall be a complete turnkey telephone system with complete service and support.

☼ CenturyLink Response: Read, understood and will comply.

3.1.2 **Objective:** The County wishes to contract for detainee telephone services that offer the lowest cost to detainees and to the County while also including system features that allow the County to administer necessary safeguards and protections suitable for a correctional setting. Proposals will be evaluated consistent with this objective.

☼ CenturyLink Response: Read, understood and will comply.

#### 3.2. Background Information:

3.2.1 Background: The system currently in operation at the Boone County Detention Facility (hereafter referred to as “facility”) is provided and operated by Securus Technologies using the current version of the Securus phone system.

3.2.1.1 The facility has a maximum of 246 beds and the average detainee population is 220.

3.2.1.2 There are four (4) housing buildings at the facility with a current total of twenty-six (26) detainee phones. There are two public use coin phones located in the lobbies. The facility has four (4) holding cells each equipped with a telephone that allows "free" calls to anyone local including bondspersons and family. There are eight (8) pair of visitation handsets that are not allowed to make external calls.

3.2.2 Additional information about the County of Boone – Missouri can be obtained from the following internet web site at: <http://www.showmeboone.com>.

3.2.3 Historical Call Information: Call volume for the Boone County Detention Facility for the period January 01, 2017 through June 30, 2017 follows:

# Technical Response

70,429 Completed Calls  
388,261 minutes  
Average call length 5 mins 30 seconds

- 3.2.4 Although an attempt has been made to provide accurate and up-to-date information, the County of Boone – Missouri does not warrant or represent that the background information provided herein reflects all relationships or existing conditions related to this Request for Proposal.

☼ CenturyLink Response: Read, understood and will comply.

### 3.3 General Requirements:

- 3.3.1 Any item not specifically specified herein but that is otherwise necessary for the successful delivery and operation of the Detainee Telephone System shall be included by the offeror in the proposal response.

☼ CenturyLink Response: Read, understood and will comply.

- 3.3.2 System Overview: The Detainee Telephone System shall be a complete turnkey system that shall consist of a minimum of twenty-six (26) detainee telephone units installed throughout the four housing buildings, and an additional (8) phones that shall be recording detainee visitation telephone units installed in the designated detainee visitation areas. Four (4) of the total number of phones shall be holding cell phones that should allow the detainee to make “free” local calls to anyone including bondspersons and family. In addition to system phones that will have recording-capability, there are two (2) public use coin phones, i.e., one (1) in each of two (2) public lobbies that must be provided and that do not have recording capability.

☼ CenturyLink Response: Read, agreed and will comply.

CenturyLink will provide Boone County with twenty-six (26) detainee telephone units, eight (8) detainee visitation telephone units (with four (4) of the total number of detainee telephones allowing “free” local calls), and two (2) public use coin phones.

### **Detainee Telephones**

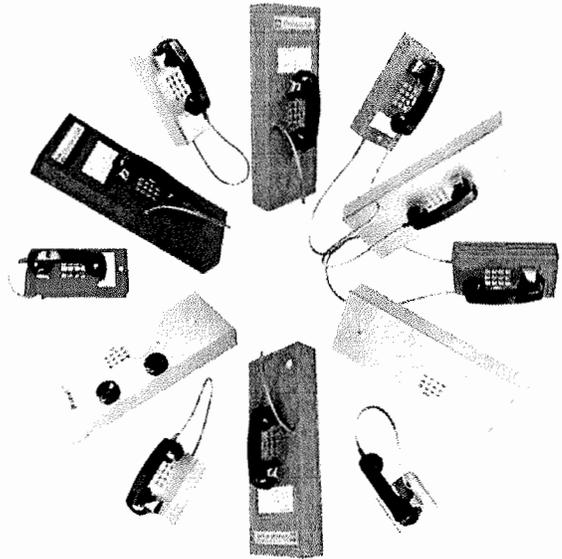
CenturyLink proposes the Wintel inmate telephone and visitation telephone sets, which is the overwhelming choice for inmate facilities throughout the industry.



## Inmate Telephones and Visitation HeadSets

The Wintel ITC7090SS Coinless Inmate Phone with volume control has been constructed to be tamperproof and is constructed of 14-gauge stainless steel and designed for indoor or outdoor inmate use. Features and benefits of the Wintel ITC7090SS are listed below:

- Magnetic hook switch
- Built-in user controlled volume "LOUD" button on all inmate telephones
- Meets all ADA requirements for user controlled amplification
- Rugged vandal resistant housing especially designed for inmate use
- Sealed handset suitable for heavy use and abuse areas
- Security screws to minimize tampering
- Confidencer technology filters out background noise at the user's location
- Armored handset cord equipped with a steel lanyard (1000 lb. pull strength) and secured with vandal resistant retainers
- Hearing aid compatible and FCC registered (DF4USA-75652-CC-E)



If Boone prefers a different color, size, design, etc., other Wintel models are available. Wintel manufactures the highest quality inmate telephones, handsets, visitation kits, visitation phones, private speakerphones, cord free phones, and associated replacement parts for all.

Studies done in actual inmate facilities have shown that Wintel phones and handsets have a significantly lower replacement rate (by a factor of at least 4-times) than any competing brand. This is important because it means fewer out of service conditions and less disruption to operations from technician repairs.

## Visitation Telephones

CenturyLink will also provide Visitation Telephone Service that includes call recording. Visitation phone management functions are fully accessible from the very same iCON system used to manage detainee calling. This allows Investigators to listen to recordings of detainee calling as well as on-site visits through a single system. Listening to visitation recordings can be done from any PC from on or off-site. If desired by the County, the system can be set to prompt the Detainee to enter his/her PIN prior to allowing the visitation call to proceed. The utilization of a

## Technical Response

PIN will further authenticate the visitation recording should it be needed in any criminal proceeding.

### Payphones

CenturyLink will provide the requested two (2) public use coin phones for the two public lobbies. The coin-operated payphones will be designated as a public pay phone and will be maintained by CenturyLink at no cost to the County. Our local technicians will collect coins from the coin-operated public use pay station at the facility during proactive facility visits. The calling rates for the public pay telephones will mirror the collect calling rates chosen for detainee calling.

Elcotel Series 5-XG



- 5 Series Advanced Housing and Circuit Board
- Tamper Resistant Locking System
- Heavy-Duty Armored Handset
- Adjustable Steel Lanyard
- Hearing Aid Compatible
- Anti-Static Receiver
- Accepts \$0.25, \$0.10, and \$0.05 Coins
- Credit and Calling Card Compatible
- On-Board Solid-State Transient Surge Protector
- Line Powered

3.3.2.1 The contractor shall provide all wiring necessary for complete installation of all system components to make the system completely functional in accordance with all manufacturer recommendations. This shall include all wiring required to facilitate visitation recording and monitoring.

☼ CenturyLink Response: Read, agreed and will comply.

CenturyLink will provide all wiring necessary for complete installation of all system components to make the system completely functional in accordance with all manufacturer recommendations.

3.3.2.2 All system requirements shall apply to all calls placed through the telephone system including local calls. Calls within the Local Access Transport Area (intraLATA), calls outside the Local Access Transport Area (interLATA), interstate calls, and international calls. The contractor shall understand and agree that the County shall determine whether or not international calling will be allowed.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

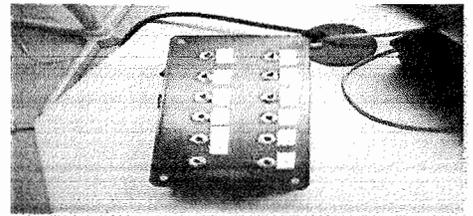
All system requirements and features apply to all calls placed through the iCON system, including all call types: local, interLATA, intraLATA, interstate, international, etc. and collect, prepaid, or debit call types.

CenturyLink acknowledges that Boone County will determine whether or not international calling will be allowed. CenturyLink offers prepaid/debit international calling to virtually every location worldwide, and we uniquely offer traditional collect calling to many international destinations as well, including Mexico, Canada, the United Kingdom, Japan, Germany, and the Caribbean Islands.

- 3.3.3 Each detainee telephone shall be connected through individual on/off switches located at each housing building control room. The contractor shall be responsible for on-going maintenance on all equipment installed for the length of the contract at no cost to the County.

☼ CenturyLink Response: Read, understood and will comply.

Manual shutdown can be performed on any individual phone, set of phones, or on all phones (i.e., a full shut down) directly through the Facility Phone Schedule Utility within iCON. In addition, our installation team will install manual cutoff switches (as pictured to the right) to be located in any area requested by the County including at the demarcation location, central security control center, and select housing units.



- 3.3.4 The Detainee Telephone System shall provide all of the functions necessary to operate and control all features and related accessories. The contractor shall make every effort to provide a Detainee Telephone System that shall be sufficiently flexible to meet the requirements of the County.

☼ CenturyLink Response: Read, understood and will comply.

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).

CenturyLink will make every effort to provide a system that is flexible to the requirements of the County. CenturyLink is aware that in today's world of constantly developing technology and safety challenges, many correctional facilities' needs are changing with each coming year. By choosing CenturyLink, you will be partnering with a vendor that can meet your needs both now and well into the future.

## Technical Response

We offer a comprehensive, fully integrated package of communication services, hardware, and technology to aid in the administration and investigation of detainee communication as well as the operational efficiency of a correctional facility. Even though the County may not wish to implement these services today, CenturyLink provides them and can work with the County to implement them if and when desired, at any point through the contract term or subsequent contract terms.

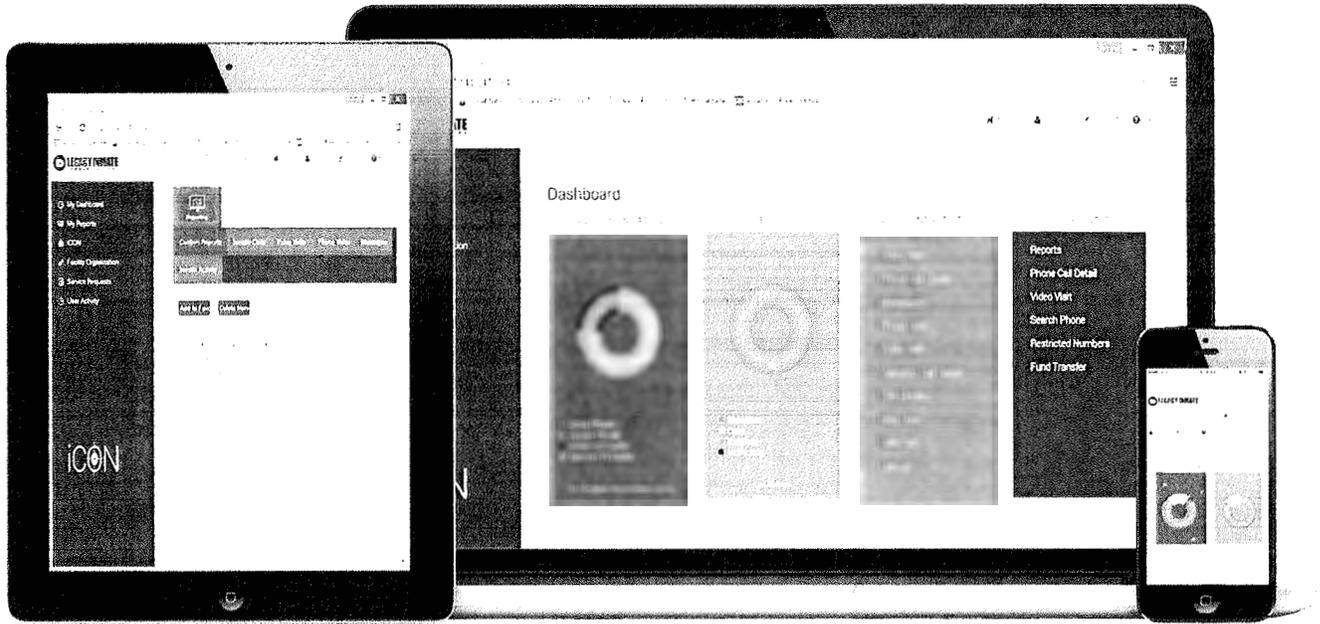
CenturyLink has available six different communication services, some of which are accessed through our wall-mounted Bridge Communication Device (BCD) kiosk: calling, voicemail, video visitation, video messaging, secure messaging (e-mail), and photo sharing. Should the County wish to explore the option of implementing detainee BCD kiosks and some or all of these other communication services, CenturyLink will work with the County to grow its technology infrastructure at the pace that works best for your agency.

Our philosophy is to constantly work to improve our system and technology to meet our clients' growing needs. We genuinely take our clients' feedback into consideration when working on product development or iCON system improvement projects.

- 3.3.5 Web-Based Interface: The Detainee Telephone System shall provide a web-based interface for administering the detainee phone system. Such interface shall include but not be limited to administrative rights control for adding, deleting and reporting on user activity, blocking numbers, PIN administration, call detail listings, and recording and playback of telephone calls. The interface shall also have the ability for the administrator of the system to monitor and report on user activities within the interface.

☼ CenturyLink Response: Read, understood and will comply.

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).



**A Comprehensive, Turnkey Solution**

iCON offers correctional agencies complete control over the detainee communications occurring at its facilities.

iCON Overview		
Security Functions	Administrative Functions	Investigative Functions
<p><b>Voice Biometrics:</b> Verifies the identity of detainees on communications by comparing the audio input to a database of detainee voiceprints.</p> <p><b>AccuPIN:</b> Alternate method of verifying detainees' identities on communications to guard against PIN sharing and PIN theft.</p> <p><b>Three-Way/Fraudulent Calling Detection and Prevention</b></p>	<p><b>Easy Multi-Facility Management</b></p> <p><b>Scheduling</b></p> <p><b>Call Blocking / Number Restrictions</b></p> <p><b>Call Duration Time Limits</b></p> <p><b>Free Call Configuration</b></p> <p><b>Privileged, Non-Recorded Call Configuration</b></p> <p><b>Personal Identification</b></p>	<p><b>Recording</b></p> <p><b>Live Monitoring</b></p> <p><b>WatchList:</b> Allows investigators to setup watch lists of suspicious detainees or destination numbers and receive Hot Alerts when the detainee places a call or a destination number is called.</p> <p><b>WatchWord+:</b> iCON's advanced audio transcription, audio mining, and keyword search utility.</p>

## Technical Response

<p><b>User Access Levels:</b> Allows for the designation of user types (finance, investigator, administrator, etc.)</p> <p><b>User Activity Log:</b> Records the actions of users in the system for review</p>	<p><b>Numbers (PINs)</b></p> <p><b>Personal Allowed Number (PAN) Lists</b></p> <p><b>Personal Restricted Number (PRN) Lists</b></p> <p><b>Reporting:</b> iCON features many built-in investigative and administrative reports and allows users to generate their own custom reports using any of the massive amount of data parameters we capture and store. All reports that a user consistently runs can be saved to their “My Reports” profile making the report available directly from their personalized Dashboard.</p>	<p><b>iCONTracker:</b> iCON's called party GPS locator</p> <p><b>Social Network Investigator:</b> Quickly helps users investigate the social media profiles of detainees and their public contacts.</p> <p><b>Data Link:</b> Allows investigators to access and compare investigative data from surrounding correctional facilities.</p>
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### A Smart, Intuitive System Designed Around You

The iCON® detainee communication management system is **all about you**, the user. The system pays attention to the tools and features you use the most in your daily work, and ensures that those tools are ready and accessible where and when you need them.

We understand that many types of correctional facility staff members use an detainee communication management system—from investigators to administrative users to finance users and more. The iCON system is powerful. It tracks extremely large amounts of data about all the different communications occurring at a correctional facility—but not every user needs access to all of this data all the time. **iCON is all about filtering out what is important and relevant for you.**

### The iCON User Dashboard

Design & Build Your Own Unique Dashboard in Minutes

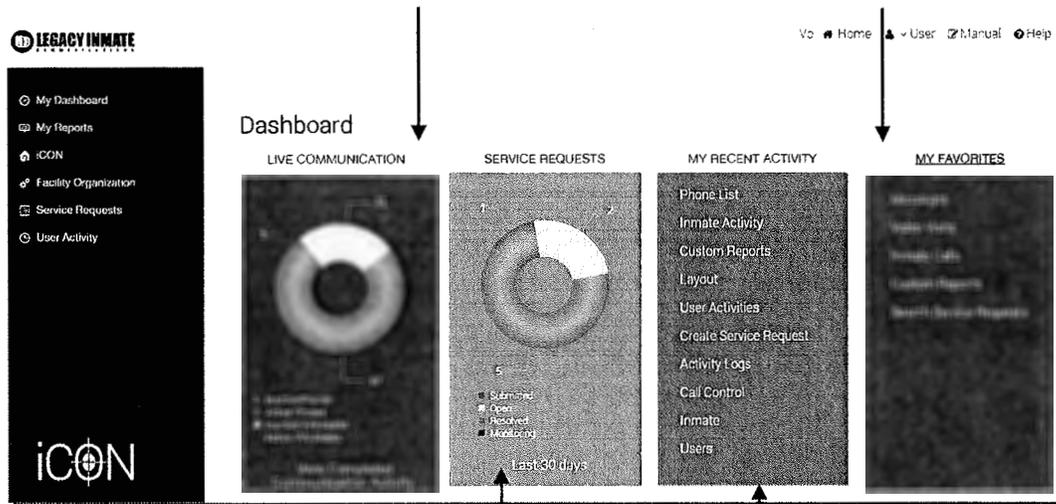
The best example of how iCON delivers a custom, user-specific experience is the Dashboard. The Dashboard is the first screen a user sees when opening iCON—their homepage. The Dashboard gives each user a birds-eye view of all communication activity occurring live at the facility. It also provides **easy, immediate access to the exact tools and data you are most likely to need.** It does so by learning from your recent activity in the system and by giving you the control to pick and choose exactly what you do and do not want to see on your personal Dashboard. No two users' Dashboards will look the same because the iCON Dashboard is a truly customized, user-

# Technical Response

specific engine designed to make navigation through the system as personalized and efficient as possible.

See a birds-eye view of every live communication going on at the facility.

Customize your Favorites list to show only the tools you want to see right on your homepage.



Keep an eye on any open service tickets and know exactly when they are resolved.

Pick up right where you left off with the task you were working on last, even if it was a week ago.

"My Dashboard" is a commanding solution that delivers an at-a-glance overview of your Key Communication Performance Indicators (KCPIs) and **relevant data particular to investigations or tasks you are interested in.**

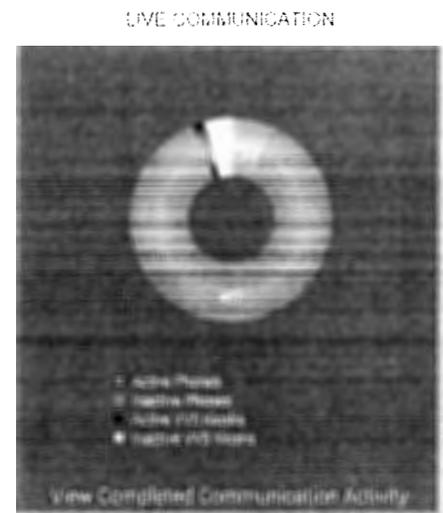
The result is actionable data immediately when you log in, leading to a more productive investigation. iCON's My Dashboard will give you insight into **your facility's live and historical communication patterns** while easily identifying suspicious activity. My Dashboard is divided into four (4) key summaries that help you manage and investigate the communications of your detainee population.

## Live Communication

Gives You Quick Access to Live and Historical Activity

## Active Communication

The Live Communication summary provides the user with an **overview of all current communication** taking place within your facility as well as the ability to review historical communication activity.



# Technical Response

At a moment's glance you will be able to see all active communication, enabling you to strategically decide which type of service to live monitor or to quickly identify inconsistencies in usage.

The Live Communication summary visually displays your facility communication on an interactive doughnut graph, segmented by type of communication and corresponding activity level.

In the example to the right, there are 36 active phone calls (with 467 inactive phones) and 10 active video visits (with 24 inactive video visitation kiosks).

When one of these segments is clicked (e.g., active calls or active video visits), the **live monitoring utility for that service is immediately opened** so that the investigator may begin listening to these active communications.

Live Call Monitoring Utility (Opens After Clicking on the Active Call Portion of the Doughnut Chart)

Live Call Monitoring

Call ID	Status	Phone Number	Time	Duration	Other Info
16528	Active	...	...	...	...
16529	Active	...	...	...	...
16530	Active	...	...	...	...
16531	Active	...	...	...	...
16532	Active	...	...	...	...
16533	Active	...	...	...	...
16534	Active	...	...	...	...
16535	Active	...	...	...	...
16536	Active	...	...	...	...
16537	Active	...	...	...	...
16538	Active	...	...	...	...
16539	Active	...	...	...	...
16540	Active	...	...	...	...
16541	Active	...	...	...	...
16542	Active	...	...	...	...
16543	Active	...	...	...	...
16544	Active	...	...	...	...
16545	Active	...	...	...	...
16546	Active	...	...	...	...
16547	Active	...	...	...	...
16548	Active	...	...	...	...
16549	Active	...	...	...	...
16550	Active	...	...	...	...
16551	Active	...	...	...	...
16552	Active	...	...	...	...
16553	Active	...	...	...	...
16554	Active	...	...	...	...
16555	Active	...	...	...	...
16556	Active	...	...	...	...
16557	Active	...	...	...	...
16558	Active	...	...	...	...
16559	Active	...	...	...	...
16560	Active	...	...	...	...

Live Video Visit Monitoring Utility (Opens After Clicking on the Active VVS Portion of the Doughnut Chart)

Call ID	Status	Kiosk Name	Inmate Name	PIN	Appt. Date	Visitor Name
16528	Conferencing	(D) CON-HCA-03	PERRY MCPHERSON	559919396	1/4/2016 1:30:00 PM	TABETHA PORI
16591	Conferencing	(N) CON-HCA-12	SHAMWARA FIELDS	484681205	1/4/2016 4:30:00 PM	Bobby Fields

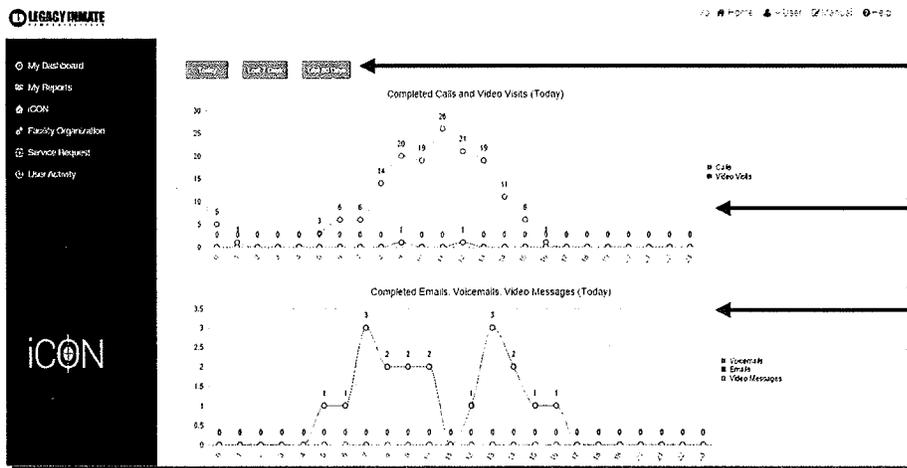
# Technical Response

## Historical Communication

At the bottom of the Live Communication summary there is a “View Completed Communication Activity” button. This button will bring up a visual summary of the facility’s recently completed communications.

This utility is perfect for forecasting future usage, adjusting the communication schedule and length, and uncovering suspicious activity such as abnormal call volume levels. The communication charts are **easy to read** and deliver an intuitive graphical representation of historical trends.

Historical Communication Charts (Available Charts: Today, Last 7 Days, or Last 30 Days.)



Click the appropriate button to display the communication totals for today, the last 7 days, or the last 30 days.

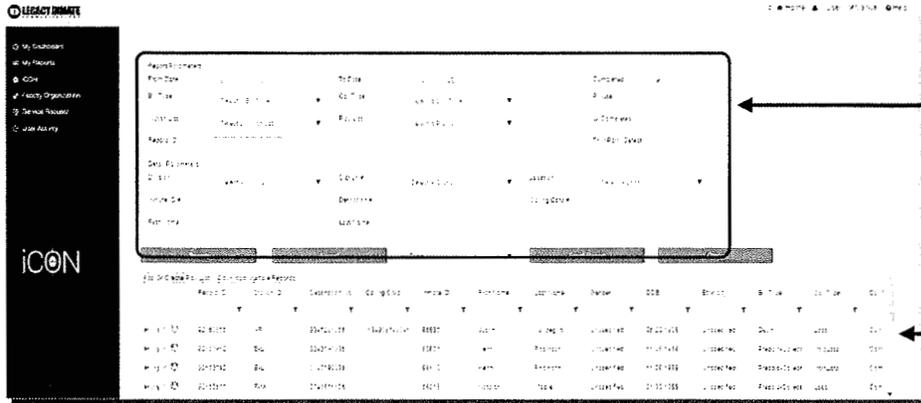
This chart details the historical Call and Video Visit data.

This chart details the historical Voicemail, Email, and Video Messaging data.

To review (listen or watch) any communication recording displayed on one of the charts, users may simply click on the point of interest in the chart. They will be immediately redirected into either a call or video visit detail report for the communication that took place on that specific date and time. For example, if a user clicks on the 26 calls that took place at 11:00 am on the chart above, iCON® will automatically run a report and display the relevant call recordings for the user to listen to. The user can further filter the call recordings using the Reports and Detail Parameters at the top of the page.

# Technical Response

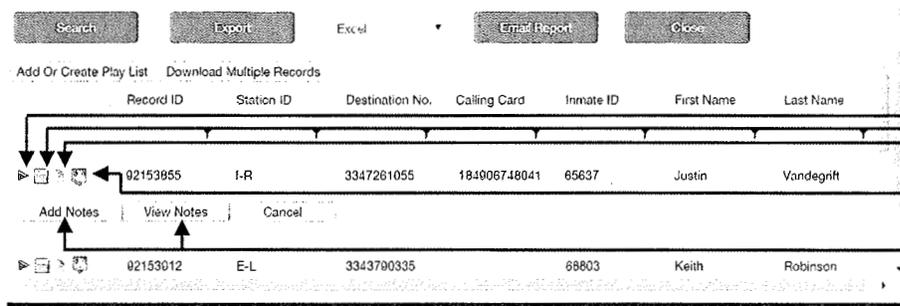
## Automated Call Detail (Opens After Clicking on a Point on the Completed Call Chart.)



Additional parameters that may be used to further filter through the communication recordings.

The call recordings selected from the communication chart.

## Expanded Call Detail (Add and View Notes, Recording Playback, Download and Save Recording, Recording Details, View Called Party's Address)



Recording Playback

Download, Save & Email Recording

Recording Details

View Called Party's Address

Add and View Notes

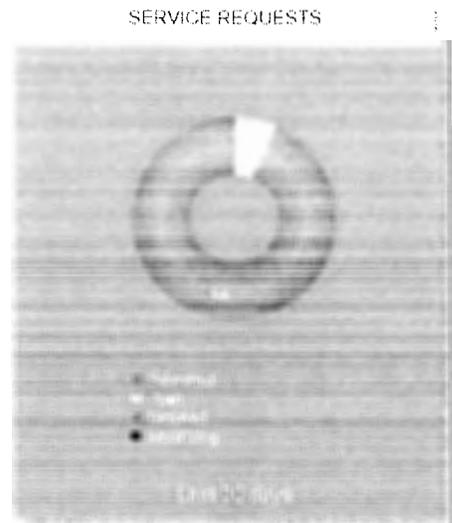
## Service Requests

Bringing Service to the Forefront, Where It Belongs

iCON's Service Requests summary provides the user with an **overview of all current and recent service requests** at your facility.

At a moment's glance you will be able to review the current status of every request made by your facility, and assess the quality of service you are receiving from our support team.

The doughnut chart in the Service Requests summary displays the number of Submitted, Open, Monitoring, and Resolved requests from the last 30 days. This information is updated automatically as CenturyLink's service team works on your requests so that you are always aware of the status of any outstanding issues.

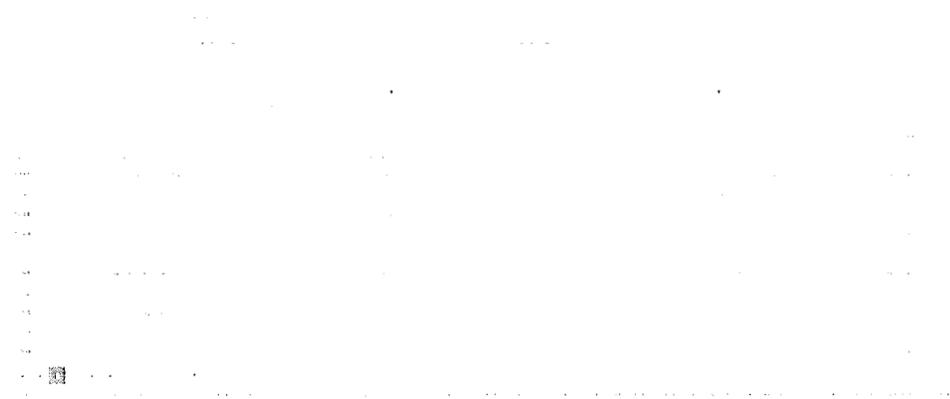


When a user clicks on the Service Requests chart from the Dashboard, they are redirected to the full Service Requests utility where they can review all service requests and read or add notes.

# Technical Response

## Active Service Requests (Opens After Clicking on the Service Requests Summary Chart)

Service Request List



Request ID	Status	Request Description
12345	Open	Service request for...
67890	Pending	Service request for...
11111	Completed	Service request for...

### My Recent Activities

Getting You Back to Your Investigation as Quickly as Possible

iCON's My Recent Activities summary provides the user with an **overview of their most recent activity within iCON.**

When you take a break, regardless if it is a short lunch break or a two-week vacation, the next time you log into iCON the dashboard allows you to immediately resume your last activity by using the My Recent Activities summary.

iCON automatically tracks and logs the user's activity as they navigate through the system. As the user works, iCON catalogs the usage and details of that workflow on the user's dashboard.

Putting these important utilities upfront on the user's personalized dashboard lets the user work more efficiently by allowing them to **navigate directly to the same page they were last on with one simple click.**

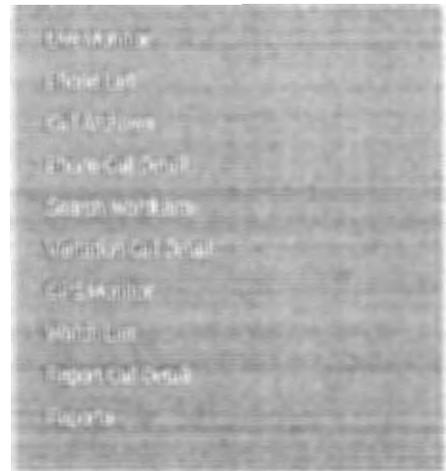
### My Favorites

Save Your Favorite Utilities on Your Personalized Dashboard

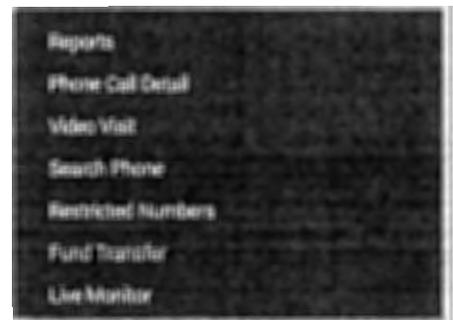
**My Favorites is the most customizable and intuitive piece of the User Dashboard.**

iCON 5.0 lets **each individual user** save their favorite (most used and customized) utilities right on iCON's landing page. Any utility within iCON can be saved, meaning this summary can be configured in a myriad of combinations, **giving each user a unique working system optimized to perform their tasks.**

#### MY RECENT ACTIVITIES



#### MY FAVORITES



## Technical Response

As an investigator your time is finite and needs to be used efficiently. Now with My Favorites an investigator would be able to create a customized query in iCON's call detail report and save those exact search parameters to their My Favorites list. The next time that investigator needs to run that same query, he/she simply clicks the saved CDR search. iCON® will automatically enter the saved search parameters, run the report, then display the results for the investigator to quickly review the call recordings.

3.3.6 The Detainee Telephone System shall allow outgoing calls only.

☼ CenturyLink Response: Read, understood and will comply.

The iCON system only permits detainees to make outgoing calls via its automated operator. The system will never allow incoming calls to the facility. iCON only permits outgoing collect calls, one-way outgoing, station-to-station (landline or cell phone) calls billed to the called party, or outgoing calls charged to a debit card, cardless debit, and prepaid system.

3.3.7 System Features: The Detainee Telephone System shall allow detainee calls to be restricted to a maximum duration of fifteen (15) minutes. The Detainee Telephone System shall allow for County representatives to change the call duration limit by detainee PIN, specific telephone, or by group of Detainee Telephone System telephones. The duration may be increased up to thirty (30) minutes at the Detainee Telephone System's operator's discretion.

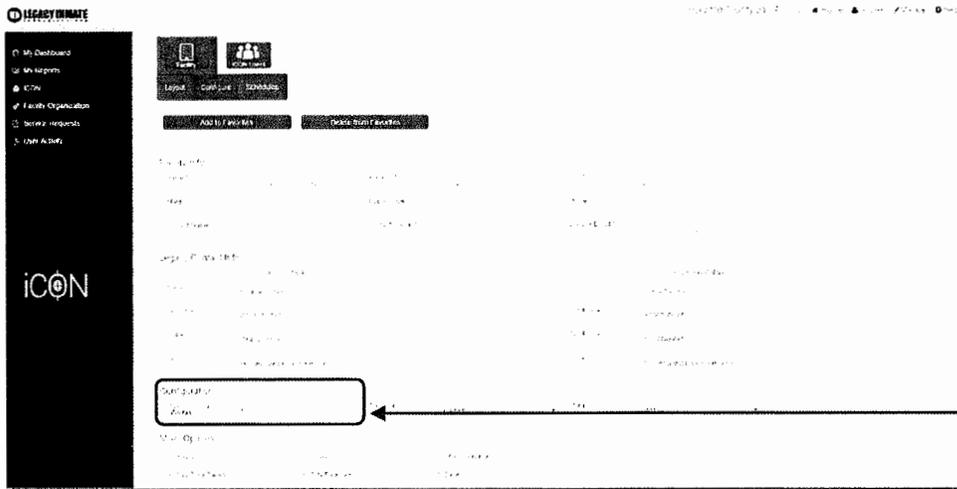
☼ CenturyLink Response: Read, understood and will comply.

### Call Duration Time Limits

Boone County and/or iCON personnel can set a maximum call time limit for the facility, individual detainee or group of phones, in the Facility Configuration Utility of iCON. Call durations may also be set by called number and, if the facility is utilizing iCON's PIN application, the maximum time limit on each call can be set by detainee PIN as well. **The automated operator will notify the detainee and called party two (2) minutes prior to disconnecting the call.** The PAN feature also allows for set durations by dialed number. CenturyLink will pre-set the system to allow a maximum of fifteen (15) minutes for all calls. Maximum duration can be applied to one detainee telephone or group of telephones as needed.

# Technical Response

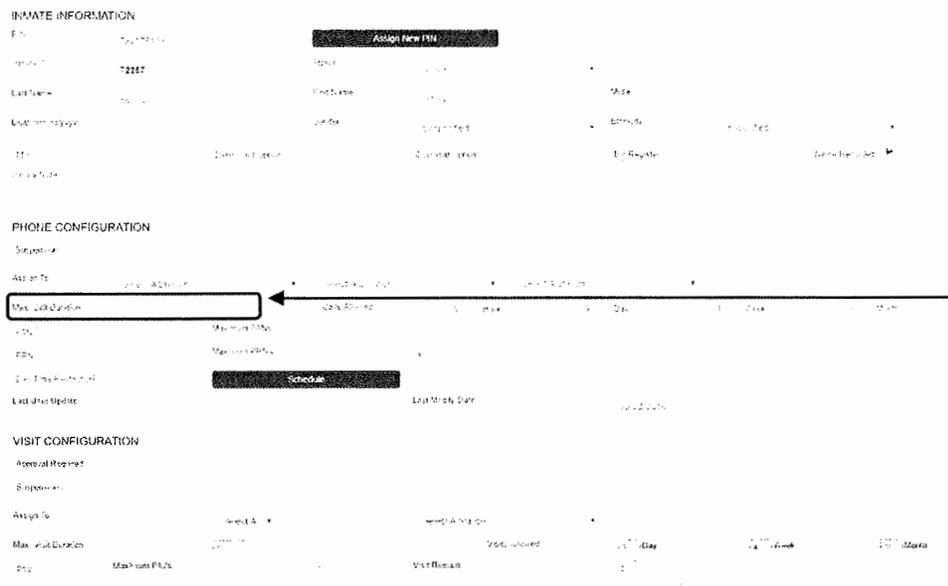
## Facility Configuration Utility



Maximum call duration for detainee calling can be set in the Facility Configuration if the facility wishes to set a maximum duration that applies to all detainees.

The PAN feature also allows the facility to set maximum call durations by PIN. The facility will have the ability to change the maximum call duration at any time. An Administrator level password is required to change any facility configuration.

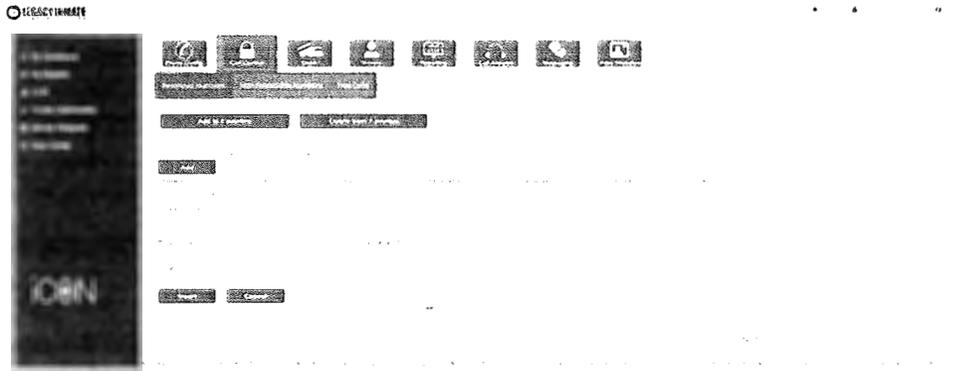
## Detainee Registry – Call Duration Set by PIN



Maximum call duration can also be set by Detainee PIN should the facility wish to utilize different maximums depending on detainee.

Maximum call durations can also be set by destination number, as seen in the following screenshot.

# Technical Response



3.3.7.1 The Detainee Telephone System users, both detainee and called-party, shall be notified of the call time limit in advance of the system terminating the call.

☼ CenturyLink Response: Read, understood and will comply.

The automated operator will notify the detainee and called party two (2) minutes prior to disconnecting the call.

3.3.8 As part of the Detainee Telephone System, the contractor shall supply one (1) text telephone (TTY) to the facility. The TTY must be compatible with system billing, recording, and monitoring the same as the regular detainee phone. In the event a better technological solution becomes available, the contractor shall advise the County for consideration of updated technology to assist the hearing impaired.

☼ CenturyLink Response: Read, understood and will comply.

## TTY / TDD Units

CenturyLink's TTY/TDD service includes an advanced feature that will allow each facility the ability to provide TTY/TDD service to selected detainees while providing security that unauthorized users cannot access the Call Relay Service. Hearing impaired detainees will be identified through the iCON portal as hearing impaired and TTY/TDD phone eligible in the Detainee Registry. This is available as an "detainee" level configuration in the Registry; starting at the main screen by clicking on the "Detainee" tab, then selecting the "Detainee List," then selecting the appropriate detainee name, and then checking the "TTY" box:

# Technical Response

The image shows a screenshot of a web-based form for a detainee profile. The form is titled 'INMATE INFO' and contains several sections. The first section is a header with fields for 'JIN', 'Assign Facility', 'Inmate ID', 'Status', and 'Release'. Below this is a section for 'Last Name', 'First Name', and 'Middle Name'. The 'DOB' section includes 'Inmate ID', 'Gender', 'Race', 'Ethnicity', and 'Religion'. A 'TTY' checkbox is highlighted with a red box and is checked. Below this is a 'Phone Card' section with 'Status' and 'Update' buttons. The 'PHONE CONFIGURATION' section includes 'Suspension', 'Assign To', and 'Max. Call Duration'. The 'VIDEO CONFIGURATION' section includes 'Calls Allowed'.

By checking the "TTY" box on a detainee's profile, the facility can allow access to TTY/TDD services only to selected detainees.

## Video Relay Service (VRS)

CenturyLink also has available Video Relay Service (VRS), which is accessible through our wall-mounted Bridge Communication Device (BCD) kiosks and mobile detainee tablets. While neither of these devices are proposed in our current offer, we are willing to discuss options with the County to install BCDs and/or tablets equipped with Video Relay Service (VRS) at any time the County deems it appropriate.

When a deaf or hard-of-hearing detainee attempts to make a phone call using a BCD, they dial the number which is already registered with the VRS and the number then rings into a phone with a Video Relay Service application (much like Video Visitation) so people who know sign language can sign to each other directly.

Additionally, in situations where a deaf or hard-of-hearing detainee dials a voice telephone user that does not know how to sign, they are connected to a Video Relay Service interpreter on the screen. This interpreter relays the call between the parties, using sign language with the detainee and verbal communication with the hearing party. These interpreters serve as the intermediary and provide 24/7 VRS service in both English and Spanish. VRS calls may also be recorded and monitored to ensure security and safety.

The VRS application is simple and easy to use. Using our multipurpose Bridge Communication Device, the detainee selects the VRS app and dials the called party. All the subsequent steps are fully automated.

3.3.9 The Detainee Telephone System must require active acceptance by the called party.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink will not connect a call from any detention facility without positive acceptance from the called party. The Company utilizes Intel Dialogic telephony cards to power its IVR responses and answer supervision. **A call cannot be connected without call positive acceptance under any circumstance.** DTMF, pulse-dial and Rotary responses are 100% accurate utilizing this technology – without exception. Calls cannot be billed to answering machines, fax

## Technical Response

machines, or computer modems. A DTMF, pulse-dial or Rotary signal of "1" must be received for a call to bridge and connect. Billing time does not begin until the called party has pressed "1" to accept the call.

iCON's automated operator provides notification to a detainee of the call status (e.g., busy, no answer, etc.) eliminating the need for detainees to hear the call progress. iCON places the detainee "on-hold" and does not allow the detainee to hear the called party prior to the actual positive acceptance (via touch tone entry) of the call. The automated operator will provide called parties with a rate quote prior to accepting the detainee's call.

All operator service call attempts are first validated through the national Line Information Database (LIDB) as required by your state's Public Utility Commission as well as the Federal Communications Commission (FCC). Once a call has passed validation the call is extended to the destination number. Billing time for the call will only begin once the called party has pressed "1" to accept the call. Once the call is bridged billing time will begin. Upon termination of the call by either end, the call record is completed and rated in real time.

3.3.10 The Detainee Telephone System shall include user prompts in English and Spanish in addition to other languages that may be requested by the County.

☼ CenturyLink Response: Read, understood and will comply.

The iCON system will provide detainees with simple voice prompt instructions to follow while making a call. **The standard language settings include English and Spanish** automated responses and the facility may request any language to be added to the system throughout the contract period. **The system can play up to any ten (10) language options** to the detainee. Detainees may choose the preferred language by using a single digit code. CenturyLink will customize its automated IVR's to meet the requirements of the facility.

Our IVR can play back any language required by the facility, including but not limited to:

English	Armenian	Korean	Japanese
Spanish	French	Russian	French Creole
Vietnamese	German	Polish	Greek
Cantonese	Tagalog	Arabic	Hindi
Mandarin	Italian	Portuguese	Persian

3.3.11 The Detainee Telephone System should have the ability to complete outgoing collect, prepaid debit, calling card, and called party credit card calls. For prepaid debit transactions, the end-users funds must be made available for use within fifteen (15) minutes after the funds have been received by the contractor.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

### CALLING OPTIONS (COLLECT, PREPAID, DEBIT)

CenturyLink's wide variety of calling options will ensure a thriving revenue stream that the County can rely on. We are uniquely set apart by our ability to allow traditional collect calling to many international destinations, as well as to all cellular telephones. And for numbers that are restricted from receiving traditional collect calls, we provide a broad spectrum of calling methods and payment options, delivering the most flexible, easy-to-use suite of calling services available in the detainee communications marketplace today. CenturyLink makes it easy for detainees and their friends and family to establish calling accounts and to keep them funded.

#### Traditional Collect Calling

Detainees will be able to place traditional collect calls to any national Line Information Database (LIDB) approved call destination in North America. A collect call is only connected upon acceptance by the called party and, as with every call, the called party will be provided with call rates without request and will be notified that the call is from a detainee at the Boone County Detention Facility.

Most traditional collect calls are billed to the accepting party by way of their chosen Local Exchange Carrier, but they may also be accepted by using a credit card. Collect calls are billed instantaneously upon completion. We have direct billing agreements with all major Local Exchange Carriers and wherever agreements are not direct calls are billed by CenturyLink through a selected telecommunications billing clearinghouse. Billing is available to every destination point that has selected a local provider that accepts operator service and long-distance billing.

#### Collect Calling to Cell Phones



Today's communications market is dominated by cell phones, with a much higher number of cell phones distributed than land lines. For this reason, one of the major headaches faced by correctional facilities is the inability for detainees to place calls to cell phones, significantly restricting collect calling and, in turn, facility revenue. **CenturyLink offers collect calling to all cellular telephones.**

#### Collect Calling to International Destinations



CenturyLink is unique in that it allows traditional collect calling to many international destinations. Unlike most other vendors, our unique standing as both a local exchange carrier (LEC) and an international exchange (a.k.a. "long distance") carrier (IXC) allows us to provide **traditional collect calling to Mexico, Canada, the United Kingdom, Japan, Germany, and the Caribbean Islands.**

iCON provides traditional collect calling to Mexico and will allow detainees to place collect calls to most destinations within that country. Where traditional collect calls cannot be made, virtually

## Technical Response

any destination point in the world can be called using any one of CenturyLink's prepaid calling options.

The iCON system has the capacity to speak any language the County desires. English and Spanish are standard language options for the automated operator, but virtually *any* other language may be added to the system at no cost to the County. In addition, our 24/7/365 Friends & Family Call Center is staffed with live multi-lingual operators ready to answer questions on billing, pre-paid accounts, or any other aspect of service.

### **When Traditional Collect Calls are Not Accepted**

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

### **Prepaid Services**

Prepaid services generally represent over 80% of detainee telephone calling, so the quality of these services is of utmost importance to ensure that Boone County is receiving its optimal revenue from detainee calling. We have developed a prepaid program that we believe is the best in the industry, offering four dynamic methods of connecting detainees to their loved ones:

- Friends & Family Prepaid Collect
- Detainee Debit Card Calling
- Detainee Cardless Debit
- Direct Billing

### **Friends & Family Prepaid Accounts**

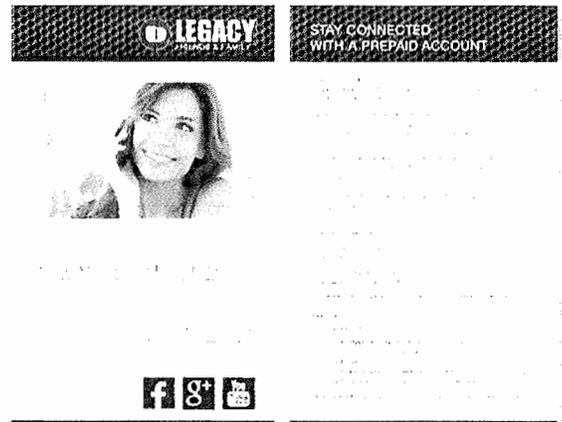
Called parties can pay in advance for collect calling time by opening a prepaid account. This offers a more cost-effective calling option for staying in touch with an incarcerated loved one, as well as an alternative option if their telephone is unable to receive traditional collect calls.

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

## Technical Response

Friends and Family can easily replenish existing accounts or check their account balance by visiting our website or by calling our toll-free customer service number, both available 24 hours a day, 365 days a year. Additionally, upon acceptance of a call from your facility an automated prompt will inform the called party of the amount of funds they have available in their account.

CenturyLink will also provide the facility with pamphlets in both Spanish and English that provide information about how to set up and replenish a Friends & Family Prepaid Account. This information will also be posted on bulletin boards and in other public areas as requested. These materials will help to generate interest in the program.

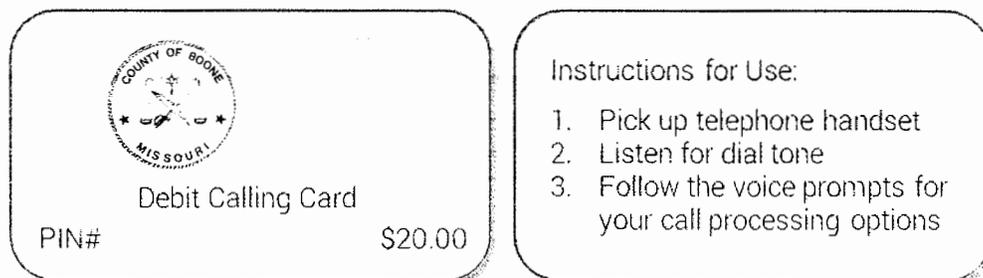


Payment options for prepaid accounts include Cashier's Check, Money Order, and:



### Detainee Debit Cards

CenturyLink will provide the Boone County Detention Facility with the ability to offer Debit Card or Cardless Debit services to its detainees for their phone calls. The cards are construction paper-based, ensuring that they cannot be utilized as a weapon.



Standard denominations for Debit Cards are \$5, \$10, \$20, \$30, \$40, and \$50. The facility will sell the Debit Cards via the Commissary or Cash Office and retain the funds. The facility will be

## Technical Response

invoiced for all Debit Cards purchased, and will receive the offered commission percentage as a discount on each purchased card.

### Detainee Cardless Debit Accounts

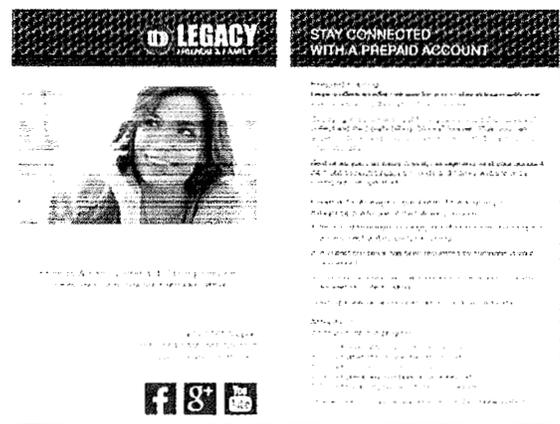
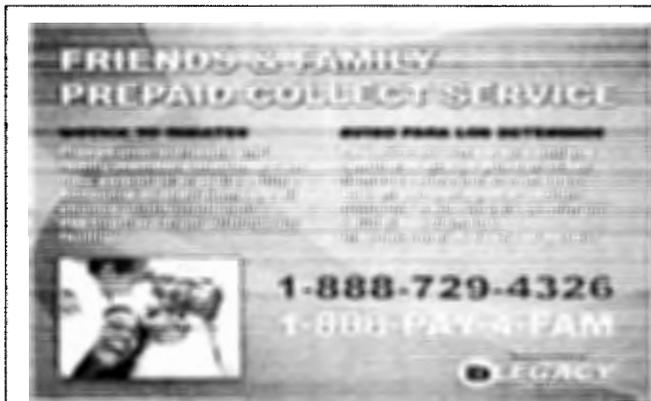
Cardless Debit calling can also be sold at the facility, allowing detainees to deposit any dollar denomination they may require. Detainees can pre-pay for their calling at the Commissary and have those funds applied to their assigned PIN number without the need for a card. The cost of each call will be automatically deducted from their account, which can either be created upon booking or through the Commissary. Friends and Family can also deposit money into a detainee's debit account through our website, from the Cash Office, or by Payment Kiosk. Using Debit Cards or Cardless Debit services, a detainee can call any County-approved telephone number in virtually any destination point in the world.

- 3.3.12 Call Accounts: The contractor should have a program that will proactively attempt to set-up an account for individuals who are not able to accept collect calls, enabling families to quickly communicate with incarcerated individuals.

☼ CenturyLink Response: Read, understood and will comply.

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

CenturyLink will also provide the facility with pamphlets in both Spanish and English that provide information about how to set up and replenish a Friends & Family Prepaid Account. This information will also be posted on bulletin boards and in other public areas as requested. These materials will help to generate interest in the program.



## Technical Response

3.3.13 The contractor must notify the end user when the end user has reached 75% of its site or personal credit limit.

☼ CenturyLink Response: Read, understood and will comply.

If an end user is approaching their credit limit, our automated operator will advise them of their nearing depletion of their account balance and provide them with an opportunity to connect to one of our 24-hour Live Operators so that they may add funds to their account to further their communications with the incarcerated individual.

3.3.14 Toll Free Calls Required: The Detainee Telephone System shall be able to provide toll free calls to local phone numbers. This feature may be restricted to the “holding cell area only” of the detention facility.

☼ CenturyLink Response: Read, understood and will comply.

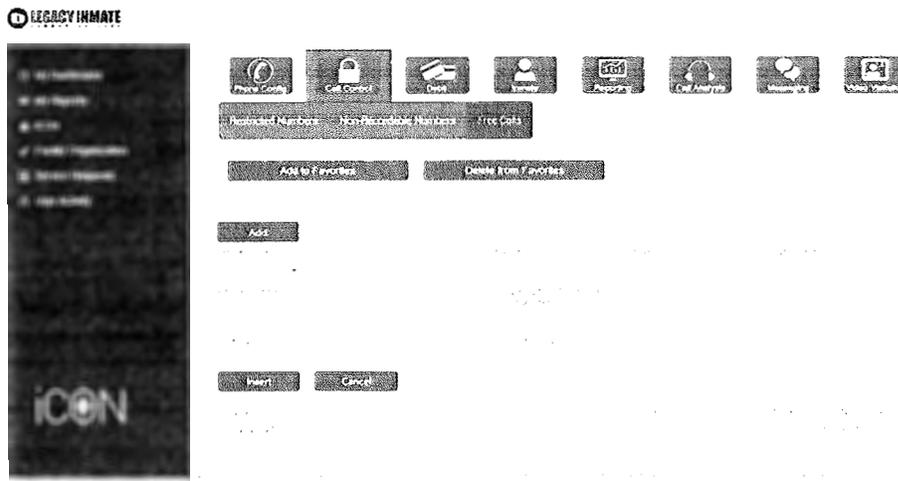
The iCON system has the ability to designate numbers (e.g. attorneys, bonding companies, relay service numbers) that detainees are allowed to call at no cost. Additionally, the facility can designate facility locations/phones (e.g., the holding cell area) to be set up as no cost.

The system allows approved facility staff to designate free call numbers to the entire detainee population, a segment of the detainee population (e.g., detainees with impairments), or individual detainees. CenturyLink can also pre-load any existing “free” numbers in the system as part of the installation process.

Every call attempt will be recorded unless designated as “not recordable” by the facilities. The iCON system’s Call Control Utility also provides a Non-Recording/Monitoring feature that will allow the facilities to enter a limitless amount of destination numbers that cannot be recorded or monitored (such as attorney numbers). As part of our installation process we will ensure that all destination numbers that are currently blocked from monitoring or recording are still blocked when we transfer the facilities to our service.

# Technical Response

## Free Call Assignment Screen



3.3.15 Tracking Requirement: The Detainee Telephone System shall provide the capability to track and identify specific telephone numbers called by each individual detainee telephone, as may be required. The Detainee Telephone System shall provide the capability of monitoring and recording all calls, from both the detainee phones and visitation phones, made by each detainee, and it shall have the capability to screen calls to exclude attorney-client calls.

✱ CenturyLink Response: Read, understood and will comply.

All call attempts made through the system, including from visitation telephones, are recorded (unless designated as privileged non-recordable communication, i.e., attorney calls) and a Call Detail Report (CDR) is generated for each. The CDR contains all information about the call including the phone it was made from, the detainee PIN used to place the call, the called number, the date, time, and duration of the call, and much more. CDRs are stored for a minimum of ten (10) years and are easily searchable by the system at all times.

### Live Monitoring

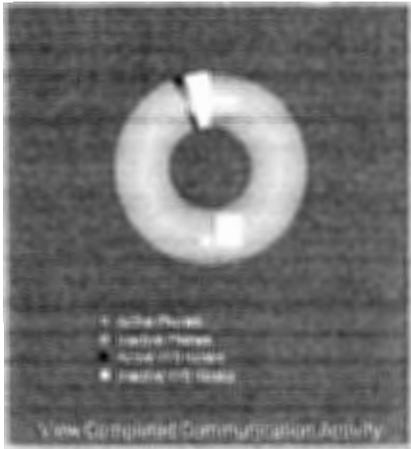
Boone County investigators can monitor any in-progress call from any Internet-ready device (including a smart phone) and from any location on or off-site. Neither the detainee nor the called party will be aware when an investigator is listening to a call. iCON's Live Call Monitoring feature allows the investigator to disconnect any call in progress. It also allows the user to "barge in" or conference into the call if desired.

The Live Monitoring utility allows investigators to view all live calls in progress at the facility. In fact, when a user logs into their system, right on their Dashboard (i.e., homepage) they are presented with an easy-to-read graph showing live communication at the facility.

Quick Access to Live Communication Activity Right from the Dashboard

# Technical Response

LIVE COMMUNICATION



The Live Communication summary on the Dashboard (pictured left) provides the user with a complete overview of all current communication taking place within your facility as well as the ability to review completed (historical) communication activity.

At a moment's glance you will be able to see all active communication, allowing you to strategically decide which type of service to live monitor or to quickly identify inconsistencies in usage.

The Live Communication summary visually displays your facility's communications on an interactive donut graph, segmented by type of communication and corresponding

activity level.

In the example to the left, there are thirty-six (36) active phone calls (467 inactive) and ten (10) active video visits in progress (24 inactive video kiosks).

When one of the segments of the chart is selected (i.e. active calls or active video visits), the Live Monitoring Utility (pictured below) for that selected service will immediately open so that the user may begin listening to those active communications.

## Live Call Monitoring

Phone Number :

Phone Number	Service	Status	Phone Number	Extension	Station	Location	City	State	Start Time	End Time
92572799	Active	1779820	559111029	142-A-10	5596965808	FRESNO	CA	172.20.30.15	15:42:52	
92573835	Active	7072075	559111054	143-C-LF	5596918847	TULARE	CA	172.20.30.15	15:50:17	
92573813	Active	1156560	559111055	143-C-RT	5592615210	FRESNO	CA	172.20.30.15	15:59:28	
92573856	Active	7056356	559111056	143-D-LF	5595008494	COARSEGOLD	CA	172.20.30.15	15:59:38	
92573871	Active	0	559111014	141-PBFR	5590932120		CA	172.20.30.15	15:59:31	
92573857	Active	0	559111015	141-PBFC	5594778567		CA	172.20.30.15	15:59:33	
92573857	Active	0	559111015	141-PBFC	5594778567		CA	172.20.30.15	15:59:33	
92572724	Active	7035969	559111084	144-A-13	5596528811	COARSEGOLD	CA	172.20.30.15	15:41:13	
92573820	Active	7074235	559111080	144-A-8	9403953210	LAGUNA ECH	CA	172.20.30.15	15:59:26	
92573732	Active	1169357	559111095	144-E-RT	4084659871	SUNNIVALE	CA	172.20.30.15	15:57:26	
92573820	Active	0240322	559111093	144-D-RT	9096801170	CHINO	CA	172.20.30.15	15:59:18	
123	Active	7074504	559111120	145-A-12	7141234567		CA	172.20.30.15	21:09:20	
123	Active	7035619	559111136	145-FF5	7141234567		CA	172.20.30.15	19:42:46	
92573197	Active	1844522	559111131	145-E-RT	5597242673	COARSEGOLD	CA	172.20.30.15	15:48:20	
92572625	Active	1174049	559111161	146-BLF	5594265758	PARLER	CA	172.20.30.15	15:39:52	
92573636	Active	1588142	559111166	146-E-LF	6502092752	LOS ALTOS	CA	172.20.30.15	15:56:08	
92573804	Active	0072337	559111167	146-E-RT	5591533306	FRESNO	CA	172.20.30.15	15:59:04	

The system provides the user with different options for live monitoring: listen to the call on your computer, or have it forward the call to your cell phone.

## Quick Access to Completed (Historical) Communication Activity Right from the Dashboard



At the bottom of each Live Communications Summary is a button labeled **VIEW COMPLETED COMMUNICATION ACTIVITY**.

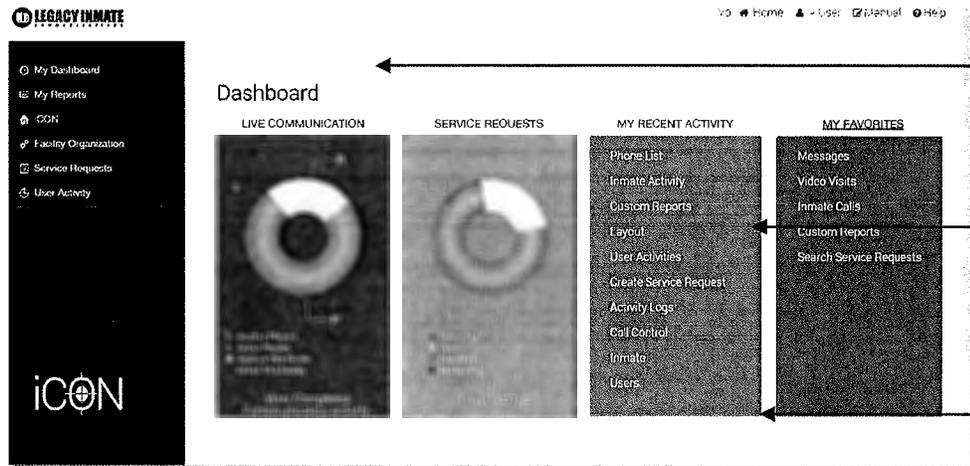
This button brings up a visual summary of the facility's recently completed communications.

# Technical Response

This utility is perfect for forecasting future usage, adjusting communication schedules, and uncovering suspicious activity such as abnormal call volume levels. The communication charts are easy to read and deliver an intuitive graphical representation of historical trends.

## Historical Communication Charts

(Available Charts: Today, Last 7 Days, or Last 30 Days)



The screenshot shows the iCON dashboard interface. On the left is a navigation sidebar with options: My Dashboard, My Reports, iCON, Facility Organization, Service Requests, and User Activity. The main dashboard area is titled 'Dashboard' and contains four panels: 'LIVE COMMUNICATION' (a circular gauge chart), 'SERVICE REQUESTS' (another circular gauge chart), 'MY RECENT ACTIVITY' (a list of activities like Phone List, Inmate Activity, etc.), and 'MY FAVORITES' (a list of favorite items like Messages, Video Visits, etc.). A top navigation bar includes Home, User, Manual, and Help. Annotations with arrows point from text on the right to the 'LIVE COMMUNICATION' and 'MY RECENT ACTIVITY' panels.

Click the appropriate button to display the communication totals for today, the last 7 days, or the last 30 days.

This chart details the historical Phone Call and Video Visit data.

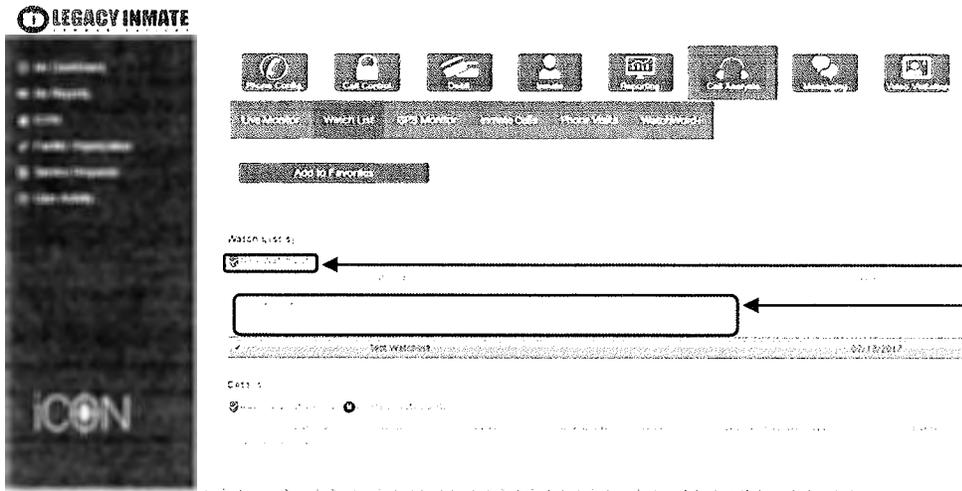
This chart details the historical Voicemail, Email, and Video Messaging data.

To review (listen to) any particular recording displayed as a point on these visual charts, simply click on the point of interest. You will be immediately redirected to a call detail report showing a list of all communication taking place on that specific date and time. For example, if a user clicks on the twenty-six (26) calls that took place at 11:00 am on the chart above, the system will automatically run a report and display those 26 call recordings for the user to listen to. The user can further filter the call recordings using the Reports and Detail Parameters at the top of the page.

## WatchList (Investigative Alerts)

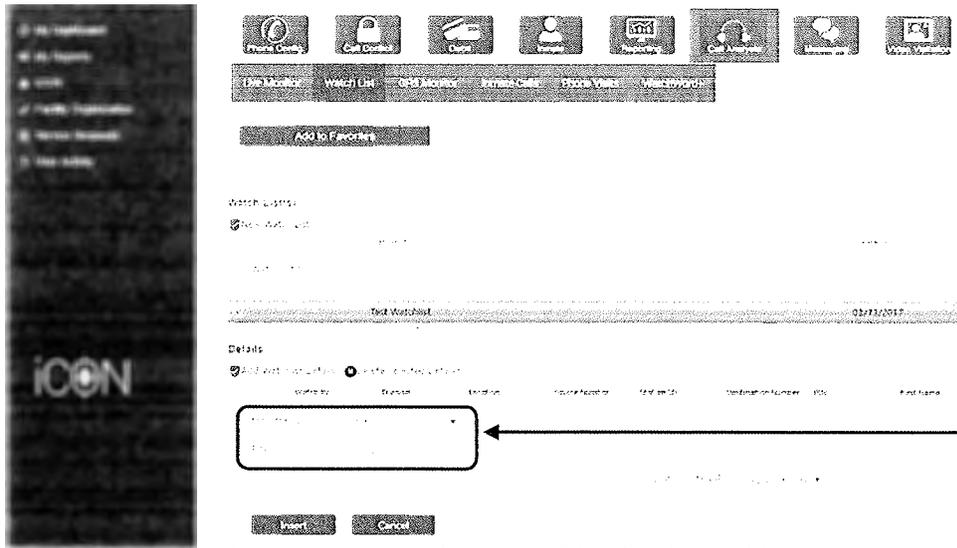
Investigators can also monitor calls using iCON's Watch List feature. Watch List is an investigative feature that allows users to create lists of interest based on any desired criteria and to have the system alert them when any communication occurs that meets these specified criteria. For example, a user may choose to be alerted any time a specific detainee places a call. Or they may choose to be alerted each time a specific destination number is called by any detainee at the facility.

# Technical Response



To create a new Watch List, click the yellow icon next to NEW WATCH LIST. Then enter in the name of your Watch List in the box that appears and click INSERT.

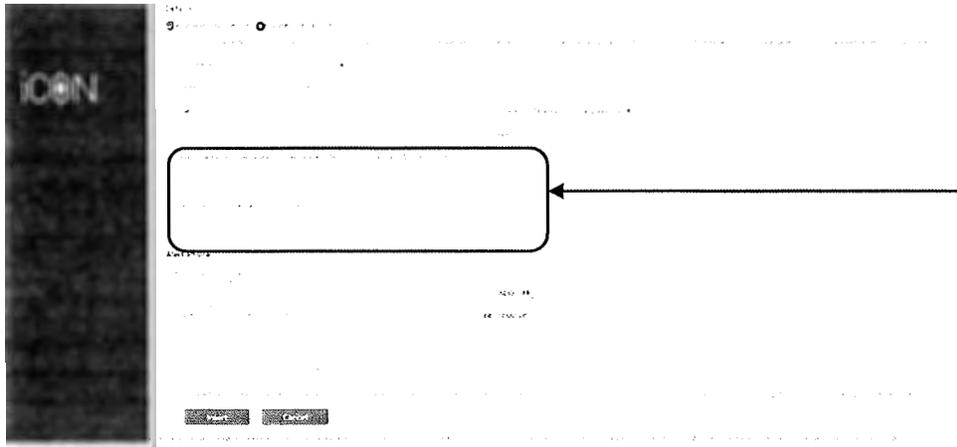
Next, click the icon to the left of ADD WATCHLIST DETAILS and fill out the form that appears.



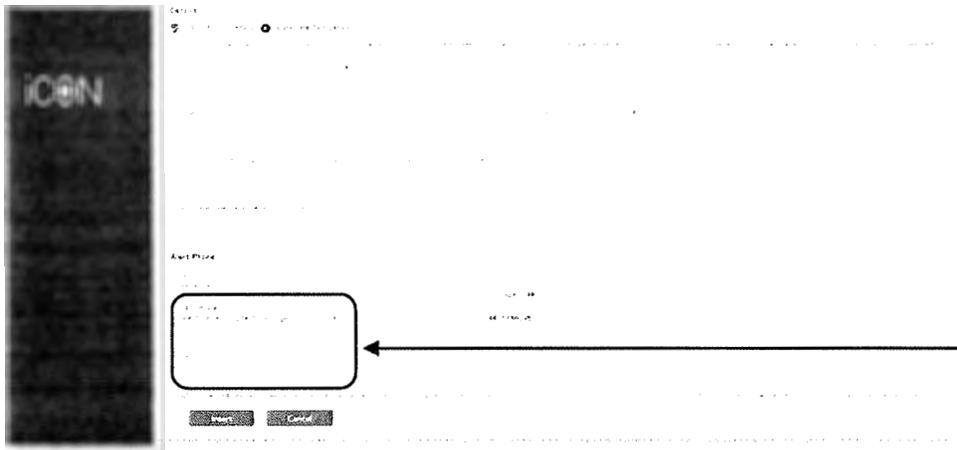
Choose the type of activity that you would like to be alerted about. In this case, the user will be alerted any time a specific detainee with the PIN 12345 places a call.

After checking the **ALERT ME** box, the user is presented with alert options.

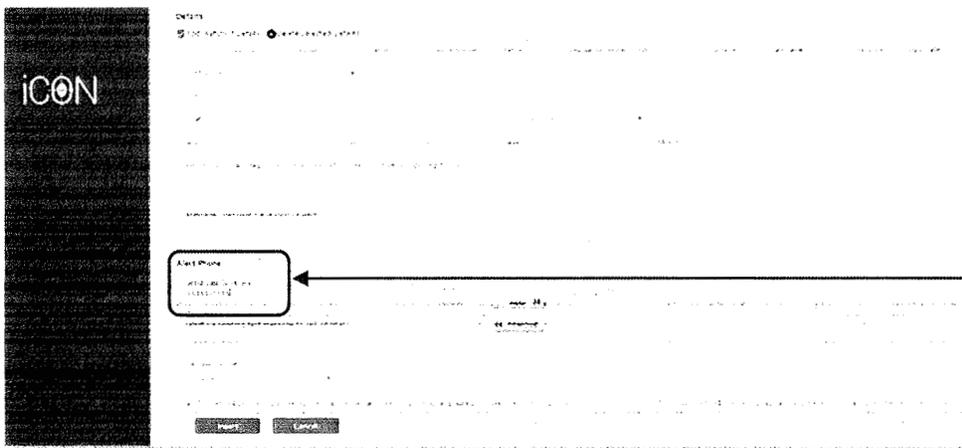
# Technical Response



If you would like to receive alerts via email, enter the email address of the person who will be receiving the alerts. Enter the message that you would like displayed on the alert.



If you would like to receive alerts via text message, enter your cell phone number and choose your carrier from the dropdown list. Then click ADD. You can add multiple phone numbers if desired.



If you would like the call to be automatically forwarded to your cell phone so you can jump right into live monitoring as soon as you are alerted, enter your cell phone number into the **SEND CALL TO PHONE** field. Then click ADD. You can add multiple phone numbers if desired.

If a user has set up a Watch List to receive an alert and has selected the “Send Call to Phone” option, they will be presented with the option to jump right into live monitor the call as soon as they are alerted. At this point they can listen silently, disconnect the call, or “barge into” the call if desired.

## Technical Response

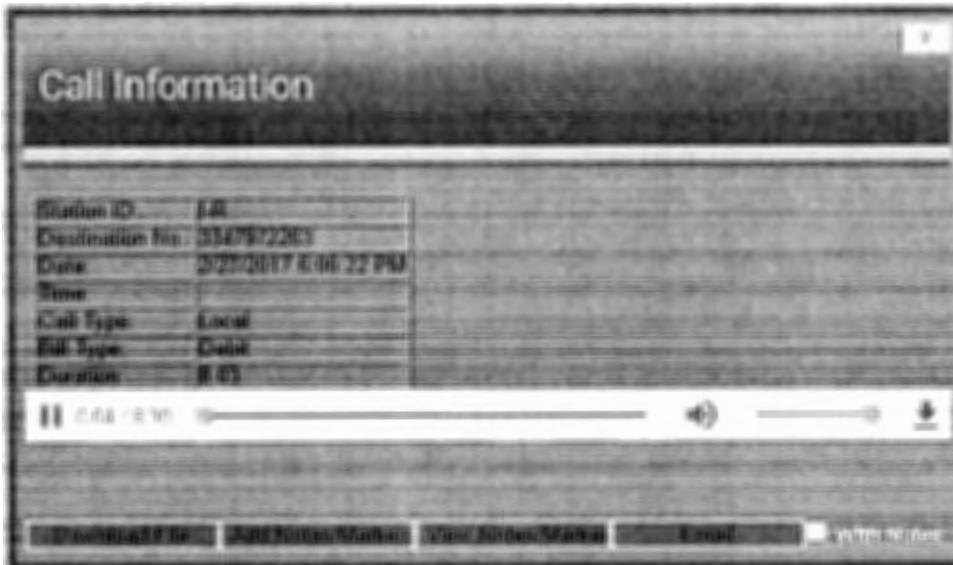
3.3.16 Recording Requirement: The recording system used in the Detainee Telephone System shall have the ability to fast forward and rewind recordings as necessary during the playback process. In addition, the recording system shall also have the ability to burn recordings to CD ROM, DVD, or other media.

☼ CenturyLink Response: Read, understood and will comply.

### Communication Recording Playback

Windows Media Player, a free standard software that comes equipped on most PCs, will play back any recording from iCON (from any location on or off-site). There will be no need for County staff to modify any of its existing on or off-site PCs to listen to system recordings. Once a recording has been selected it will begin to play almost instantaneously.

#### Call Recording Playback Utility

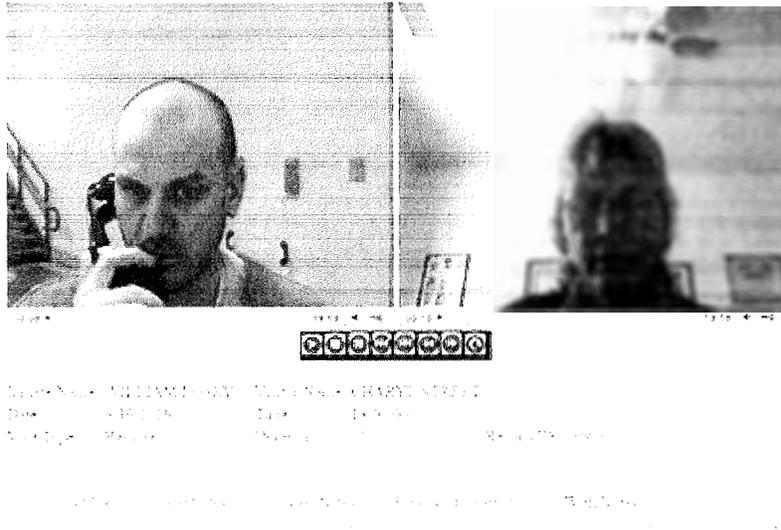


The recording playback utility allows users to:

- Fast forward, rewind, and pause
- Export the recording to hard drive or other storage media
- Add notes / place markers at specific points in the recording
- Email the recording to others

## Technical Response

### Video Visit Recording Playback Utility



Investigators will have the ability fast forward and rewind any recording from the Communication Playback Utility. This advanced feature will also provide the facility with the ability to place notes and markers in any recording. Users may also E-Mail the recording to interested parties directly from the system. Recordings can be downloaded/exported to the user's hard drive or external media storage such as USB flash drive, CD, or DVD by a simple click of a button.

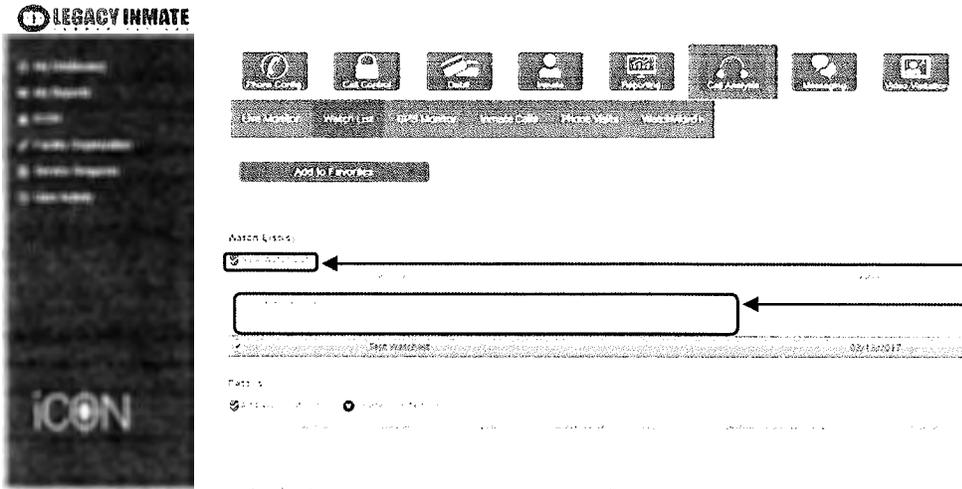
3.3.17 Watch Status Notification: The live monitoring system used in the Detainee Telephone System shall have the ability to notify designated parties via email, pager and/or cell phone of calls made to specific telephone numbers that are under a watch status. The notified party must be able to monitor the specific call from a remote location via the internet.

☼ CenturyLink Response: Read, understood and will comply.

### WatchList (Investigative Alerts)

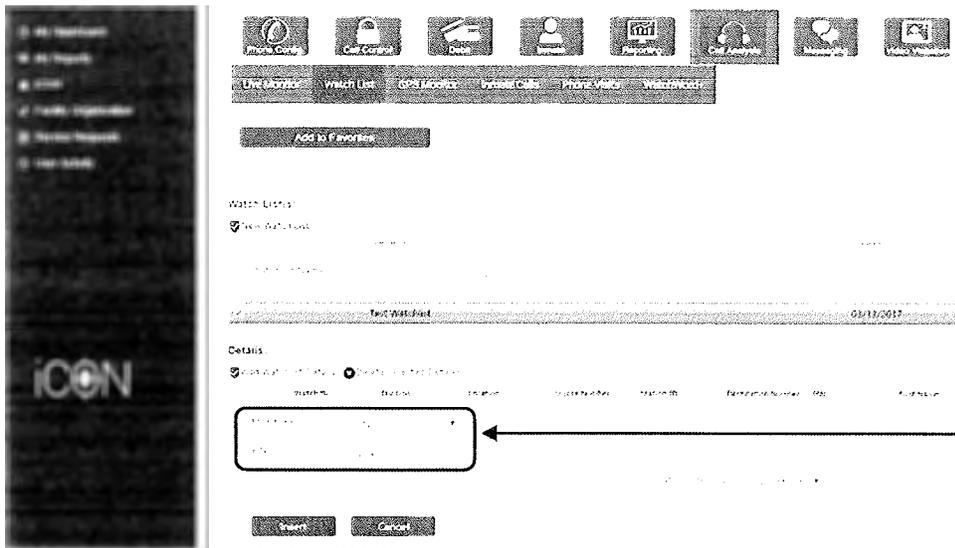
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# Technical Response



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Next, click the icon to the left of ADD WATCHLIST DETAILS and fill out the form that appears.



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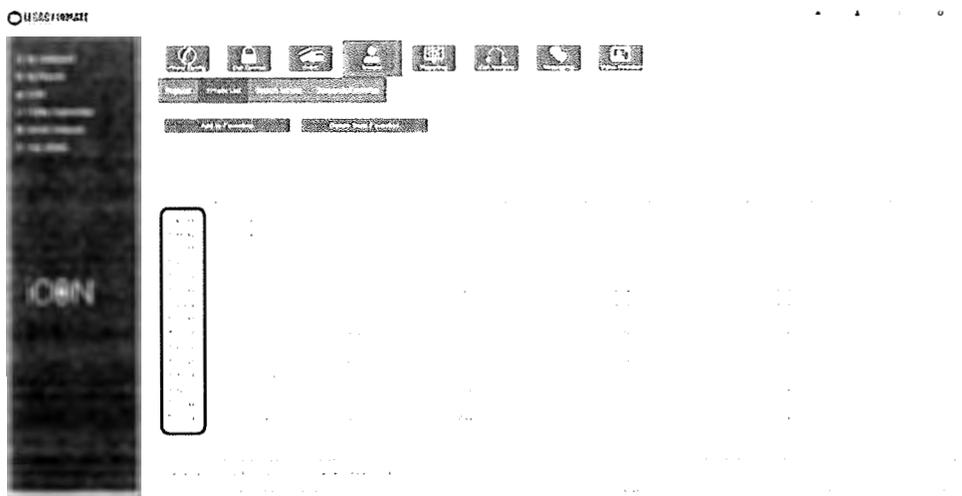
# Technical Response

3.3.18 Personal Identification Number (PIN) Requirements: The contractor shall understand and agree that PIN's will only be used if requested by the County. The following requirements shall apply regarding the Detainee Telephone System's use of PIN's:

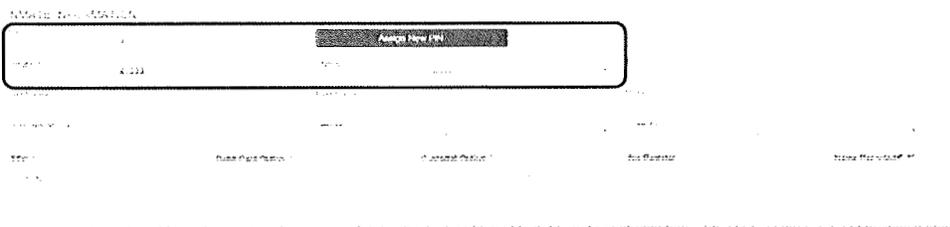
## PERSONAL IDENTIFICATION NUMBERS (PINS)

The iCON system proposed for the Boone County Detention Facility will allow detainee communications at the facility (or designated areas of the facility) to operate with detainee PINs. The same detainee PIN would be used for all of our communication services implemented at the facility (phone calling, video visitation, and messaging services).

List of Detainees at a Facility with PINs



Detainee Detail Screen with PIN



iCON is able to interface with any installed JMS system including the one currently utilized by the Boone County Detention Facility in order to automatically generate PINs based on Booking Information, including alphanumeric sequences. CenturyLink will contact Boone County's Information Technology department and duplicate the file output currently utilized at the facility ensuring a **quick and smooth transition** from the current vendor to CenturyLink. An FTP Server will be supplied by CenturyLink specifically to allow for the **automatic generation of detainee PINs**.

## Technical Response

We have interfaced with numerous correctional facility JMS's throughout the country. The County's JMS will deliver file formats with the Detainee Name, PIN or Booking Number, and any other authentication information the County currently utilizes. The file will be delivered to a CenturyLink-supplied FTP server. The file will be uploaded to the server automatically utilizing IP addressing in any time interval. CenturyLink suggests an automatic upload every fifteen (15) minutes or upon JMS modification. iCON will be automatically updated with the detainee information within two (2) minutes of file delivery. The iCON system comes with Personal Identification Number (PIN) technology as part of the system. This is a standard feature and it is highly reliable and effective in identifying detainees making calls, assisting investigators in their criminal investigations, and providing security controls on detainee calling. iCON features an extensive PIN and PAN application that allows for quick and efficient processing of detainee PIN accounts.

### The PIN Feature

**A Personal Identification Number (PIN) is a unique number assigned to each detainee that links that detainee to a telephone account and allows him/her to make telephone calls.** PINs may be unlimited digits in length and can be assigned at random by the system, created as a combination of the County-assigned ID plus a random PIN for ease of tracking, or allow detainees to set up their own PIN. iCON will record the detainee's name the first time he or she attempts to place a call. The recorded name will be saved as a .WAV file and played on all subsequent calling by the detainee utilizing his/her PIN.

The assigned PIN number will manage detainee calls by:

- Called to numbers (including free calls)
- Number of calls per day/month
- Number of attempts per day/month
- Call durations

When the PIN feature is utilized the PIN must be keyed in by the detainee at the beginning of each telephone call. The PIN identifies the detainee making the call, allowing investigators to track calls made by an individual detainee. The PIN should be created at the time of booking and eliminated at the time of discharge.

CenturyLink can also offer the County via its centralized call solution the ability to retain specific detainee PINs where the detainee is booked or incarcerated in absentia due to, for example, trial or hospitalization at a separate location. All PINs are recorded for the purpose of tracking, regardless of whether a call was also monitored or recorded.

In addition, detainee calling privileges can be revoked at any time with the facility's authorization, by temporarily disabling the PIN. These restrictions can be permanent or time-sensitive. Thus, if a detainee is to lose his phone privileges for a given time interval, a renewal date would be entered into the system. The system will track this time period and only "un-restrict" the privileges upon completion of the given time interval. The PIN also allows the facility



## Technical Response

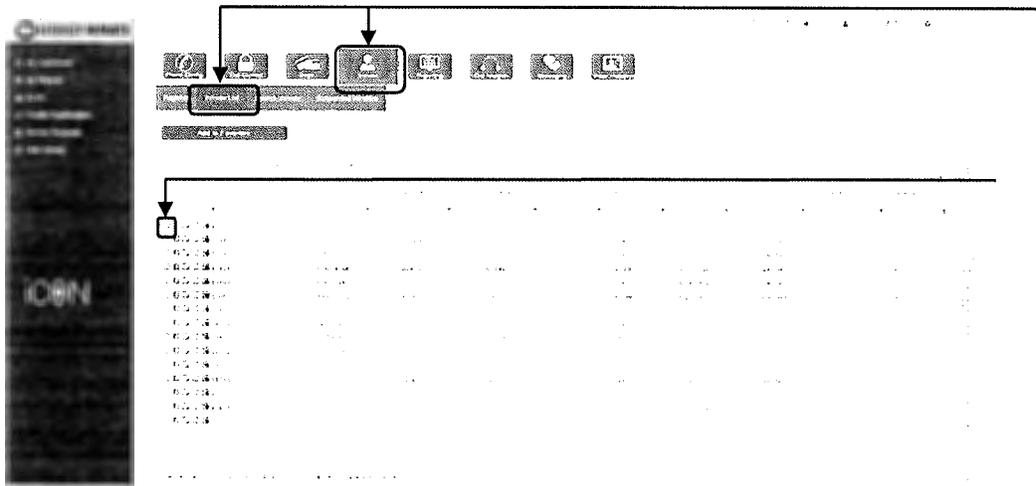
- 3.3.18.3 The County must be able to restrict calls based on the detainee's PIN. Restrictions shall include call duration, time of day, and destination numbers.

The assigned PIN number can manage detainee calls by:

- Called to numbers (including free calls)
- Number of calls per day/month
- Number of attempts per day/month
- Call durations

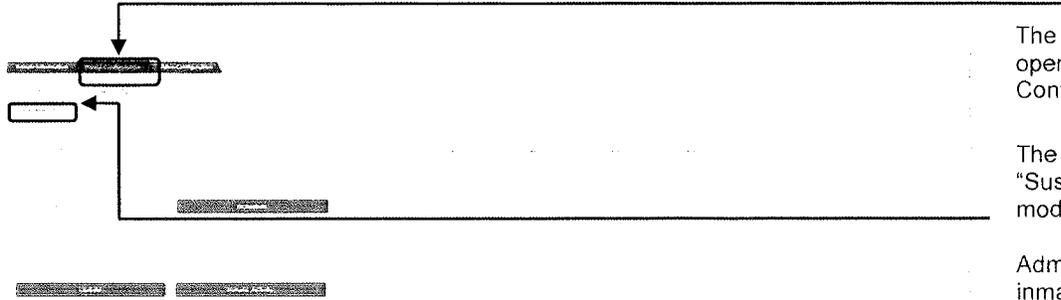
Detainee calling privileges can be revoked at any time by temporarily disabling the detainee's PIN. These restrictions can either be permanent or time-sensitive, in which case the system will automatically un-restrict the privileges upon completion of the designated time interval. Restrictions on an individual detainee will not affect the privileges of other detainees.

### Restricting Detainee Privileges



To restrict detainee PINs, administrators should click the "Inmate" module then click "Inmate List" and then select the blue icon on the left side of the inmate's name.

# Technical Response



The Inmate Detail Module will open, next, click on "Phone Configuration".

The user should check the "Suspension" box and then modify the suspension details.

Administrators can restrict inmate privileges based on:

- Maximum Call Duration
- Maximum PANs & PRNs
- Day/Time Restrictions
- Calls Allowed (per hour, day, week, or month)
- Phone station, location, or division assignments

3.3.18.4 The Detainee Telephone System should provide a method of verifying the detainee's PIN to guard against fraudulent PIN use.

☼ CenturyLink Response: Read, understood and will comply.

## Concurrent PIN Usage Report

A PIN can only be used once at a time. When two or more detainees attempt to use the same PIN at the same time, iCON only allows the first PIN that was entered to complete a call. All other attempts will be blocked by the system. iCON will also track all simultaneous PIN attempts and give Boone County detailed reports so Boone County staff can investigate the fraudulent behavior.

## Concurrent PIN Usage Report

Inmate ID	Phone Number	Call Date	Call Time	Duration	Status	Location	Division
10001	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Success	Boone County Jail	Boone County Jail
10002	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Blocked	Boone County Jail	Boone County Jail
10003	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Success	Boone County Jail	Boone County Jail
10004	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Blocked	Boone County Jail	Boone County Jail
10005	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Success	Boone County Jail	Boone County Jail
10006	314-432-1234	10/24/2017	10:00:00 AM	00:01:30	Blocked	Boone County Jail	Boone County Jail

# Technical Response

## Voice Biometrics

iCON's state-of-the-art Voice Biometrics feature is available at **no cost** to the County. Unlike many of our competitors, this functionality **does not add additional fees or charges to the detainee call. Our Voice Biometrics solution is also highly customizable, can be expended to authenticate detainees in 34 different languages, and can be configured to continuously monitor the detainee's voiceprint throughout the call.**

[Begin Confidential, Trade Secret Information]

Powered by Microsoft's voice biometric decision engine, iCON's state-of-the-art Continuous Voice Biometrics feature provides the facility with the option of utilizing advanced voiceprint technology to authenticate the identity of the speaker(s) on detainee calls.

iCON continuously monitors the detainee's voice throughout the call by means of Natural Speech Verification. This is the most effective method of voiceprint analysis because it focuses on the unique characteristics of an individual's speech patterns. It analyzes the way people speak casually and naturally.

The system works in real time to continuously examine snippets of the call for any voiceprint variation indicating that there is a new speaker. If a new speaker is detected midway through the call, iCON flags the call for review and can be configured to alert investigators in real time. The system even **offers investigators the identity of the new speaker** by comparing the new identified voiceprint with all registered voiceprints on file. The system can be configured to disconnect the call upon detection of a new voiceprint or, if desired for investigative purposes, to allow the call to continue recording.

At the request of the County, this technology can also be utilized to verify the identity of the speaker on any detainee call recording.

For situations where the facility wants to further restrict who an detainee communicates with, it is possible to combine the power of the detainee Personal Allowed Number (PAN) list with Continuous Voice Verification to also determine **the identity of the called party.**

## Technology

The Microsoft voice biometric decision engine is the result of years of research and practical, field-based experience. The engine uses statistical pattern matching techniques, advanced classification methods, and inputs from multiple mathematical algorithms to properly verify or identify speech. The basic processes performed by the Microsoft engine are:

- **Analysis and Filtering:** All Detainee audio samples are thoroughly evaluated before they are sent to the voice biometric decision engine. This ensures that the verification process will be successful.

## Technical Response

- **Feature Extraction:** The unique audio characteristics of speech are extracted vocal features modeled and synthesized into voice prints. The engine uses a combination of MFCC, LPC, and other proprietary features set within the Microsoft engine.
- **Algorithms:** To improve accuracy and reliability throughout the correctional setting, the Microsoft engine uses a number of different decision algorithms including DTW, LBG, GMM, and SVM. **CenturyLink works with each department setting and sets these algorithms based on the environment's needs.**

Microsoft was selected in concert with our iCON system because of its standing as a leading provider of voice biometric identification and verification software and delivery systems. CenturyLink understands that identity theft for detainee calling is a problem faced by facilities like the facility on a daily basis. While iCON's state-of-the-art PIN application can help reduce identity theft by large margin, some institutions are looking to increase identity protection further for use in a court of law.

[End Confidential, Trade Secret Information]

### AccuPIN Detainee Identity Authentication

AccuPIN is an enhanced method of authenticating an detainee's identification and attaching it to their respective call records. AccuPIN is our patent-pending, fully enhanced service that prevents and protects detainees from sharing (or stealing) one another's Personal Identification Number (PIN). This is a value added service that the facility may utilize **at no cost**. As long as a JMS provider is currently in place, required file information can be delivered to our network. This simple and reliable enhanced identification service **outperforms Voice Biometrics technology**. The AccuPIN authentication method offers superior operational efficiencies, exceptional cost benefits, and **a security level exceeding Federal guidelines for Level-4 security**.

[Begin Confidential, Trade Secret Information]

### Background

Law enforcement investigators have long struggled to identify with certainty a target detainee's calling activities. Detainees under surveillance in jail or prison confinement will do anything to pose as an imposter by falsifying identification during call setup, hoping to get lost amongst the thousands of call records investigators have to sort through. To solve this issue, manufacturers have sought various ways to positively verify an detainee making a call. Early technology attached a Personal Identification Number (PIN), but this can be circumvented among the detainees by transferring, bartering, or stealing the PIN number, leaving doubt as to who was actually making the phone call when presented in court.

# Technical Response

## The Solution

AccuPIN requires an detainee to verify his/her PIN number along with a set of challenge/response questions entered into the Jail Management System at the time of booking. The combination of unique and personal data offers a Protection Profile equal to the National Institute of Standards and technology Level-4 Security. AccuPIN incorporates personal information only the detainee will have knowledge of—not visible from an ID bracelet and not easily transferable or guessed by an imposter—requiring the detainee to enter a rotating set of data requests via the keypad DTMF tones during the call setup.

**By presenting the detainee with a rotating set of challenge questions, data sharing by detainees and the compromising of credentials is virtually eliminated.** The key to the method's success is that it constantly varies the data requested. If desired, the system can also be configured to present a challenge/response at variable intervals throughout the call to re-test the caller. The method is effortless, reliable, and easy to use for facility administrators and detainees alike. **While it requires only basic and simple information from the detainee, AccuPIN is able to yield a limitless set of questions and provide a powerful level of protection.**

Commercial biometric applications work well in a controlled laboratory setting, but when utilized in a correctional environment inherent inefficiency makes reliable operations difficult. In turn, this leads to a very high level of administrative maintenance and detainee grievances. Recognizing the challenges faced by correctional facilities in positively identifying an detainee but also the limitations attached to technologies like voice print biometrics, we have developed a superior authentication application which has revolutionized the detainee telephone industry.

## AccuPIN User Interface

The screenshot displays a software interface for managing detainee information. At the top, there are menu options: 'Home', 'Admin', 'Property', 'Medical', 'Invoicing', 'Reports', 'Settings', 'Reports', and 'Call Monitor'. Below the menu is a navigation bar with buttons for 'Add', 'Edit', 'Print', and 'Delete'. The main content area is divided into several sections:

- Booking Information:** Booking No. 1144111111, Inmate No. 1041101000, Booking Agency 1010, Adult Arrest, Booking Date 07/02/1999, Booking Time 10:04, Booking Officer 0001 RICHARDSON, LARRY P., Booking Date 06/23/2006, Booking Time 11:52, Booking Description: BREAKING AND ENTERING.
- Personal Information:** Name: RICHMOND, JEFFREY, DOB: 01/11/1968, Gender: M, Height: 5'6", Weight: 150, Hair Color: BLK, Eye Color: BRN, Skin Tone: FFA, Special Features: TATTOO OF A FROG ON LEFT ARM, Fingerprints: 1045874929, 147297647, 1123456789, 1123456789, 1123456789, 1123456789.
- Address Information:** Home Address: 102 PERSIMMON WAY, CO: MOBILE, AL, State: TN, Zip: 37504, Phone: 615-555-4200. Work/Business Address: 1234 JEFFERSON ST, CO: MOBILE, AL, State: TN, Zip: 37504.
- Identification:** ID No. 1010101010, State: TN, Expiration: 10/01/1997, SSN: 143-22-1234, Age: 39, Sex: Male, Race: White, Height: 5'6", Weight: 150, Hair Color: BLK, Eye Color: BRN, Special Features: TATTOO OF A FROG ON LEFT ARM, Fingerprints: 1045874929, 147297647, 1123456789, 1123456789, 1123456789, 1123456789.

At the bottom, there is a navigation bar with buttons: 'Previous', 'Next', 'Add', 'Edit', 'Search', 'Delete', 'Reports', 'Home', 'Release', 'Photos', 'Exit', 'Order', 'View', 'Assign', 'Print Arrests', 'Viewers', 'Events', 'Accounts', 'Browse', and 'Current Adult'.

## Design Features

- Challenge questions are rotated and varied per caller.

## Technical Response

- (225) challenge/response questions are presented before repeating the same request.
- Modeled after Federal Security Guidelines
- Authentication can be adjusted from basic to severe.
- Detainee is required to correctly answer multiple layers of security.
- Any failed attempts will trigger a notification to investigators.
- Custom layers of complexity can be set per individual detainee, pod, cell block, or dorm area.

Please see the following chart that gives an example of how JMS data may be used in combination with the data from the challenge questions:

**Challenge Data Chart**

Subject	Criteria	Information Delivered via:
Social Security Number (SSN):	SSN (last 4 digits) SSN (first 3 digits) SSN (middle 2 digits)	Jail Management System/Booking
Date of Birth (DOB):	Month Day Year State of Birth	Jail Management System/Booking
Address:	Street Number Street Name Zip Code	Jail Management System/Booking
Phone Number:	Area Code First 3 digits Last 4 digits	Jail Management System/Booking
Name:	Last Name Middle Name First Name	Jail Management System/Booking
Challenge Question Combinations:	15 x 15 = 225	Examples: Middle Name + Birth Month + Day Last Name + Birth Month + Year Birth Date + Year + Address Last Four of Phone# + Zip Code Zip Code + Last Address
Assurance Levels:	National Institute of Standards and Technology - Level 4	Probability of success in attempting random digits: 1 in 368,640

[End Confidential, Trade Secret Information]

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Number (PIN). This is a value added service that the facility may utilize **at no cost**. As long as a JMS provider is currently in place, required file information can be delivered to CenturyLink's network. This simple and reliable enhanced identification service **outperforms Voice Biometrics technology**. The AccuPIN authentication method offers superior operational efficiencies, exceptional cost benefits, and **a security level exceeding Federal guidelines for Level-4 security**.

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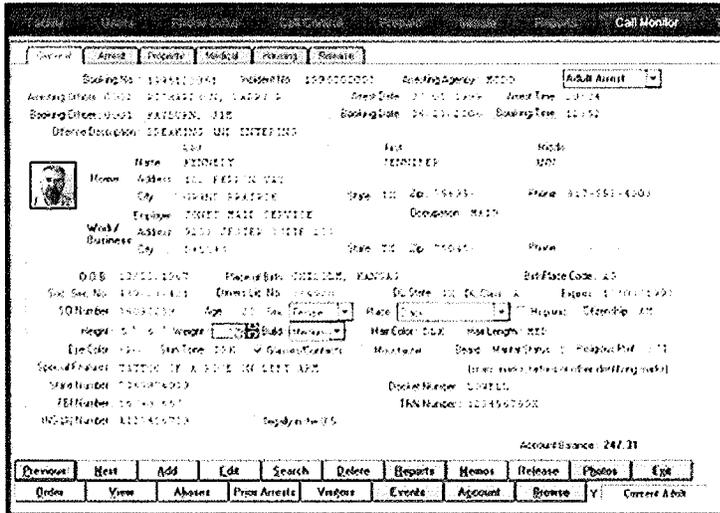
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Address:	Street Number Street Name Zip Code	Jail Management System/Booking
Phone Number:	Area Code First 3 digits Last 4 digits	Jail Management System/Booking
Name:	Last Name	Jail Management System/Booking

## Technical Response

	Middle Name First Name	
Challenge Question Combinations:	15 x 15 = 225	Examples: Middle Name + Birth Month + Day Last Name + Birth Month + Year Birth Date + Year + Address Last Four of Phone# + Zip Code Zip Code + Last Address
Assurance Levels:	National Institute of Standards and Technology – Level 4	Probability of success in attempting random digits: 1 in 368,640

[End Confidential, Trade Secret Information]

### 3.4 Fraud Management Requirements:

3.4.1 The Detainee Telephone System shall be able to detect, notify and prevent three-way or conference calls, except for calls to attorneys or other approved numbers.

☼ CenturyLink Response: Read, understood and will comply.

3.4.2 The Detainee Telephone System shall prevent the detainee from receiving a second dial tone, or “chain-dialing.”

☼ CenturyLink Response: Read, understood and will comply.

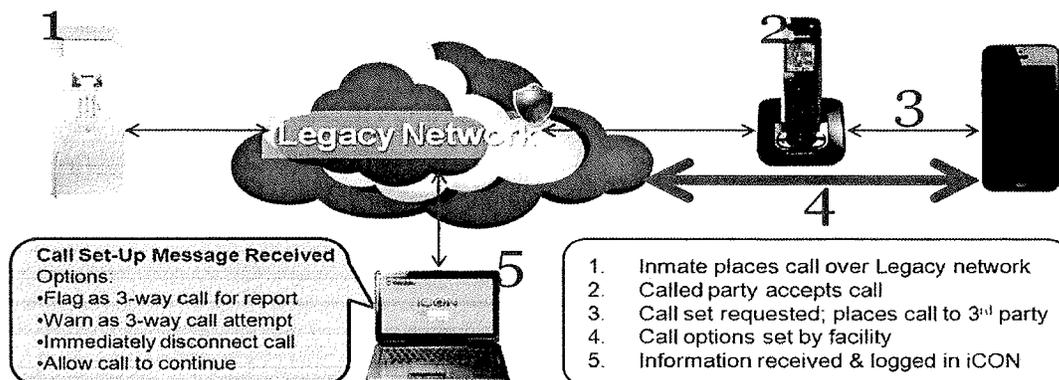
3.4.3 The system shall detect any extra digits dialed by the detainee after the party has accepted the call.

☼ CenturyLink Response: Read, agreed and will comply to requirements 3.4.1, 3.4.2, and 3.4.3.

### Fraud Detection & Prevention

We have a **distinct advantage** over most other vendors in the detainee telephone market when it comes to three-way calling prevention: we are an interexchange carrier, local service provider, and operator service provider. Our proposal to Boone County is to provide local and long distance service by originating and terminating all calls on **our own** behalf within **our own** network and call switches. **We have total control over all aspects of the call.** Other ITS vendors may contract for phone service and may only “monitor” the call, looking for a detection signal, but the control of the call is actually in the hands of the LEC (for example, Verizon or AT&T).

# Network Level 3<sup>rd</sup> Party Detection



Since traditional vendors do not have network control, they may rely on a combination of silence, dial tone, DTMF detection, and other energy algorithms that do **not** accurately detect fraudulent activities or three-way calling. Many providers propose patented three-way detection technologies which the CenturyLink team has tested in the past and which have not always proven 100% worthy in the field. **These technologies may not catch 100% of three-way calls, and they also have a very high percentage of detecting and disconnecting valid calls that are not three-way (false positives).**

Our solution is to process all calls **within our own network**, not just try to detect from outside the network. Any setup signal initiated by the called party that prompts a three-way or remote call forwarding alert falls within our network and is received by the iCON call control.

Should the system detect DTMF from the detainee phone or the called party, the Interactive Voice Response (IVR) system can be set to either:

- Notify both parties of the suspected fraud and “warn” the parties that the call will be disconnected should further dialing continue,
- Disconnect the call immediately upon DTMF or hook switch signal, or
- Allow the call to continue for investigation purposes.

In all cases, these calls will be flagged on the call detail record.

CenturyLink will implement whichever option the facility chooses. Should the County choose to allow suspected fraudulent calls, the ability to review these calls will provide **valuable investigative data**.

iCON features a real-time delivery system of call alerts to CenturyLink and designated County personnel of all fraudulent calling activity including hook switch dialing, three-way calling, frequently called destinations, and call threshold maximums (attempts, revenue). iCON's threshold setting utility allows the facility to set a maximum number of attempts to any destination number. An alert is posted when this threshold has been reached and the detainee is notified of the reason the call was not allowed.

## Technical Response

Once a destination number is dialed by a detainee from the detainee telephone keypad and iCON accepts the dialed number, the system will not respond to any further DTMF pulses from the detainee phone. Off-hook signaling cannot be simulated by the detainee and messages cannot be passed. All telephones in the facility will be limited to one call per connection. iCON does not provide detainees with a second opportunity to dial a number without the detainee hanging up the telephone receiver after the first call is completed. As soon as the switch hook is depressed, the current call is immediately disconnected and the automated operator call prompts begin.

### **24/7/365 Fraud Department**

Additionally, we employ a full-time Correctional Facilities Fraud Department that is open for business twenty-four (24) hours a day, 365 days a year. These professionals focus on dialing patterns not just from a single jail but from countless correctional facilities throughout the nation. They analyze not only real-time call data and alerts from our customer base but also fraud alerts that are issued by local telephone companies, long distance carriers, and billing clearinghouses. We work around the clock to provide the ability to identify and terminate fraud *before* it happens. We utilize every available method to sense fraud: silence detection, DTMF signaling, and hook switch signaling, all powered by an Intel Dialogic backbone.

### **Station-to-Station Calling**

The iCON system eliminates any chance for inmate-to-inmate calling. By design, the system does not allow incoming calls with all inmate phones assigned a fictitious ANI (a categorization number, not a real phone number). Due to the system's strict security constraints, it is impossible for the iCON System to receive an incoming call or an internal call from another inmate.

### **Inmate-to-Inmate Calling (iCON & ICER Protection)**

Although iCON restricts direct inmate-to-inmate calling, there are still indirect ways for inmates to communicate with each other. This indirect communication uses a third party to either connect the inmates via a called party manual bridge, automatic bridges, or two phones on speaker.

iCON's Fraud Detection and Prevention Utility automatically detects three-way calls and stops them. But the difficulty is when a called party uses other devices to connect inmates outside of our system. To detect and stop the "invisible threat" of undetectable inmate-to-inmate communication, Legacy offers ICER – an Inmate Communication Evaluation and Reporting system.

ICER enables the detection and reporting of inmate-to-inmate phone communication whether it is occurring between two inmates within your agency's facilities, or between inmates at your facilities and inmates in other participating jurisdictional locations or states. This is accomplished

## Technical Response

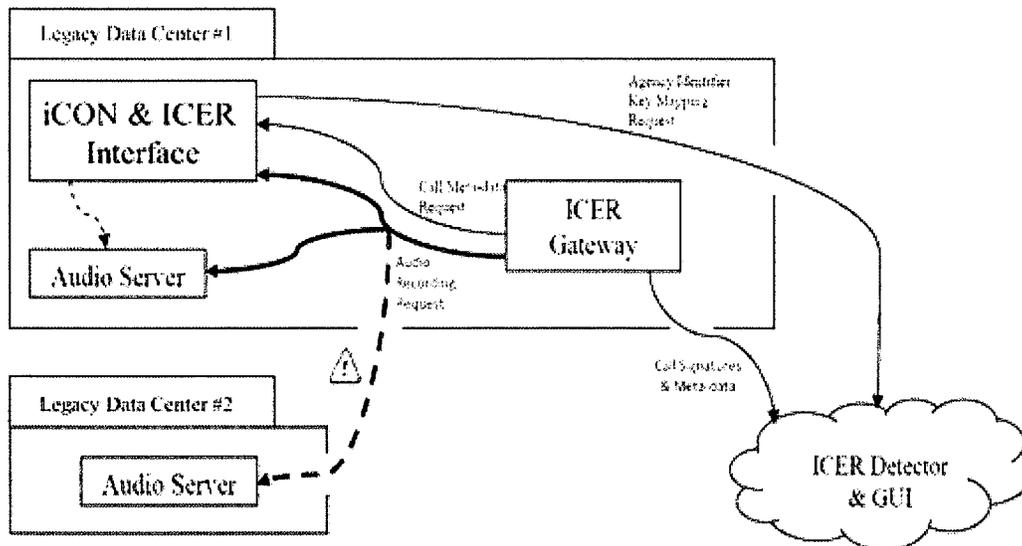
through ICER's network of participating nation-wide correctional agencies that provide the ICER Detector with call meta-data to store, compare, and analyze.

### How ICER Works

The ICER (Inmate Communication Evaluating & Reporting) system provides notifications of ITIC (Inmate-to-Inmate Communication) events. Such events occur outside the iCON system when two inmates place a call to parties outside of the correctional facility who then aid the inmates in connecting with each other so they can circumvent the restrictions placed on them by the agency. This can occur in a variety of ways, including multiple phones or cell phones using the speaker function, using external bridging devices, or even newer technology like a Skype call or Google Hangout. ITIC events don't even have to occur in real time, as in the case of an inmate leaving a voice message on an outside service that later is listened to by another inmate through the assistance of the called party.

ICER is a remotely hosted Software-as-a Service application. The ICER Gateway scans the audio on calls processed through iCON's data centers and creates a voice biometric signature for each call. These signatures contain no human interpretable audio information and are sent to the remotely hosted ICER Detector which uses them to detect ITIC events.

### iCON and ICER System Interface Overview



### iCON and ICER Interface and Process

iCON records the audio and meta-data for every inmate call placed within the facility. After a call is completed, iCON automatically queues the call for ICER processing and assignment to the ICER Gateways. The ICER Gateways utilize the interface to poll for call meta-data and audio, generate the unique call signatures (a representation of the call that does not involve any of the original audio), and submits them to the ICER Detector. During the Gateway process, the call signatures are automatically encrypted and transmitted to the central data center for analysis.

## Technical Response

None of the original audio is used in a call signature, so the ICER system is in full compliance with state and federal laws regarding the transmission of call recordings.

The call signature creation, transmission, and ICER Detector data center retrieval happens within seconds of call completion. Upon retrieval in ICER Detector, the system immediately analyzes the voice biometric call signature and checks it against other call signatures in the database. If an ITIC event is detected, it is noted in the ICER database and in iCON, and **an alert is sent via email to investigators at the participating agencies.**

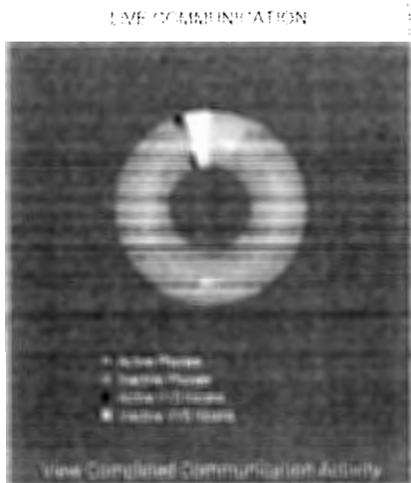
The system also creates a detailed report of the event. To guard against sensitive inmate information being shared/displayed to participating agencies, investigators from both agencies must provide online consent prior to details of the report being released and reviewed. The ICER system does not require that agencies transmit their audio files to another participating agency, and always provides the agency with complete control over the level of sensitivity with which their data is transferred.

- 3.4.4 The system shall have capability to allow the County to remotely survey detainee calls and be able to transfer specific calls in progress to County investigators.

☼ CenturyLink Response: Read, understood and will comply.

### Live Monitoring

Boone County investigators can monitor any in-progress call from any Internet-ready device (including a smart phone) and from any location on or off-site. Neither the detainee nor the called party will be aware when an investigator is listening to a call. iCON's Live Call Monitoring feature allows the investigator to disconnect any call in progress. It also allows the user to "barge in" or conference into the call if desired.



The Live Monitoring utility allows investigators to view all live calls in progress at the facility. In fact, when a user logs into their system, right on their Dashboard (i.e., homepage) they are presented with an easy-to-read graph showing live communication at the facility.

Quick Access to Live Communication Activity Right from the Dashboard

The Live Communication summary on the Dashboard (pictured left) provides the user with a complete overview of all current communication taking place within your facility as well as the ability to review completed (historical)

communication activity.

# Technical Response

At a moment's glance you will be able to see all active communication, allowing you to strategically decide which type of service to live monitor or to quickly identify inconsistencies in usage.

The Live Communication summary visually displays your facility's communications on an interactive donut graph, segmented by type of communication and corresponding activity level.

In the example to the left, there are thirty-six (36) active phone calls (467 inactive) and ten (10) active video visits in progress (24 inactive video kiosks).

When one of the segments of the chart is selected (i.e. active calls or active video visits), the Live Monitoring Utility (pictured below) for that selected service will immediately open so that the user may begin listening to those active communications.

## Live Call Monitoring Utility

Live Call Monitoring

Phone Number :

Phone Number	Status	Extension	Room	Room	Room	Room	Room	Room	Room
92572799	Active	1775620	559111029	M3-A10	559696528	FRESNO	CA	172.20.30.15	15:42:52
92573335	Active	7072075	559111054	M3-C-LF	5599913847	TULARE	CA	172.20.30.15	15:59:17
92573315	Active	1156520	559111055	M3-C-RT	5592615210	FRESNO	CA	172.20.30.15	15:59:28
92573356	Active	7058356	559111056	M3-D-LF	5595603494	COARSEGOLD	CA	172.20.30.15	15:59:38
92573271	Active	0	559111014	M1-PBFB	5596032120			172.20.30.15	15:59:31
92573357	Active	0	559111015	M1-PBFC	5594776367			172.20.30.15	15:59:23
92573357	Active	0	559111015	M1-PBFC	5594776367			172.20.30.15	15:59:23
92572724	Active	7039569	559111024	M4-A1B	5596529811	COARSEGOLD	CA	172.20.30.15	15:41:13
92573339	Active	7074235	559111030	M4-A9	9492692210	LASUNABCH	CA	172.20.30.15	15:59:25
92573332	Active	1166357	559111035	M4-E-RT	4084895971	SUNNYVALE	CA	172.20.30.15	15:57:25
92573330	Active	0240322	559111093	M4-D-RT	9056601170	CHINO	CA	172.20.30.15	15:59:18
123	Active	7074504	559111120	M5-A13	7141234567			172.20.30.15	21:09:20
123	Active	7055615	559111136	M5-FF5	7141234567			172.20.30.15	19:42:46
92573197	Active	1844523	559111131	M5-E-RT	5597242973	COARSEGOLD	CA	172.20.30.15	15:48:20
92572525	Active	1174049	559111161	M6-BLF	5594205758	PARLER	CA	172.20.30.15	15:39:32
92573686	Active	1586142	559111166	M6-E-LF	6502092752	LOS ALTOS	CA	172.20.30.15	15:59:08
92573804	Active	0072337	559111167	M6-E-RT	5595153306	FRESNO	CA	172.20.30.15	15:59:04

The system provides the user with different options for live monitoring: listen to the call on your computer, or have it forward the call to your cell phone.

## Quick Access to Completed (Historical) Communication Activity Right from the Dashboard



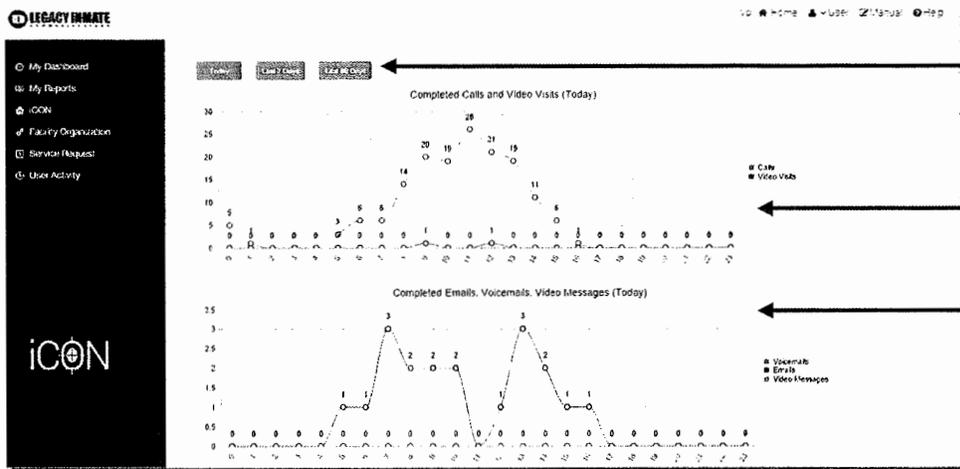
At the bottom of each Live Communications Summary is a button labeled **VIEW COMPLETED COMMUNICATION ACTIVITY**. This button brings up a visual summary of the

facility's recently completed communications.

This utility is perfect for forecasting future usage, adjusting communication schedules, and uncovering suspicious activity such as abnormal call volume levels. The communication charts are easy to read and deliver an intuitive graphical representation of historical trends.

# Technical Response

Historical Communication Charts (Available Charts: Today, Last 7 Days, or Last 30 Days.)



Click the appropriate button to display the communication totals for today, the last 7 days, or the last 30 days.

This chart details the historical Call and Video Visit data.

This chart details the historical Voicemail, Email, and Video Messaging data.

To review (listen to) any particular recording displayed as a point on these visual charts, simply click on the point of interest. You will be immediately redirected to a call detail report showing a list of all communication taking place on that specific date and time. For example, if a user clicks on the twenty-six (26) calls that took place at 11:00 am on the chart above, the system will automatically run a report and display those 26 call recordings for the user to listen to. The user can further filter the call recordings using the Reports and Detail Parameters at the top of the page.

3.4.5 The system shall brand each call with the name of the facility and the detainee placing the call.

☼ CenturyLink Response: Read, understood and will comply.

3.4.6 The system shall continue to play the recording about the calls being subject to recording and monitoring at random intervals throughout the call.

☼ CenturyLink Response: Read, agreed and will comply with requirements 3.4.5 and 3.4.6.

The system provides detainees and called parties with simple voice prompt instructions to follow while making or receiving a call. Every detainee call placed at the facilities will be processed by CenturyLink's automated operator and branded with a pre-recorded message announcing the call, name of the facility, and the name of the detainee initiating the call, and will notify both parties that "All calls are recorded and may be monitored." This message can be configured to play throughout the call at random intervals if desired.

3.4.7 The system shall guard against "Switch-hook" dialing and other fraudulent activities.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

iCON features a real-time delivery system of call alerts to CenturyLink and designated County personnel of all fraudulent calling activity including hook switch dialing, three-way calling, frequently called destinations, and call threshold maximums (attempts, revenue). iCON's threshold setting utility allows the facility to set a maximum number of attempts to any destination number. An alert is posted when this threshold has been reached and the detainee is notified of the reason the call was not allowed.

Once a destination number is dialed by a detainee from the detainee telephone keypad and iCON accepts the dialed number, the system will not respond to any further DTMF pulses from the detainee phone. Off-hook signaling cannot be simulated by the detainee and messages cannot be passed. All telephones in the facility will be limited to one call per connection. iCON does not provide detainees with a second opportunity to dial a number without the detainee hanging up the telephone receiver after the first call is completed. As soon as the switch hook is depressed, the current call is immediately disconnected and the automated operator call prompts begin.

For more details on CenturyLink's Fraud Detection and Prevention, please see our response to requirements 3.4.1 through 3.4.3.

- 3.4.8 The Detainee Telephone System shall be configured where the detainee shall not be able to communicate with the called party until the call has been accepted by the called party, see also paragraph 3.6.3.

☼ CenturyLink Response: Read, understood and will comply.

iCON's automated operator provides notification to a detainee of the call status (e.g., busy, no answer, etc.) eliminating the need for detainees to hear the call progress. iCON places the detainee "on hold" and does not allow the detainee to hear the called party prior to the actual positive acceptance (via touch tone entry) of the call. The automated operator will provide called parties with a rate quote prior to accepting the detainee's call.

- 3.4.9 The system shall detect the difference between an accepted call, and an answering machine, busy signal, or other telephone activity.

☼ CenturyLink Response: Read, understood and will comply.

iCON can detect the difference between an accepted call, an answering machine, busy signal, or other telephone activity. iCON's automated operator provides notification to a detainee of the call status (e.g., busy, no answer, etc.) eliminating the need for detainees to hear the call progress. Incomplete calls such as network intercept recordings, busy signals, no answers, refusals of calls, answering machine pick-ups, etc. will not be billed.

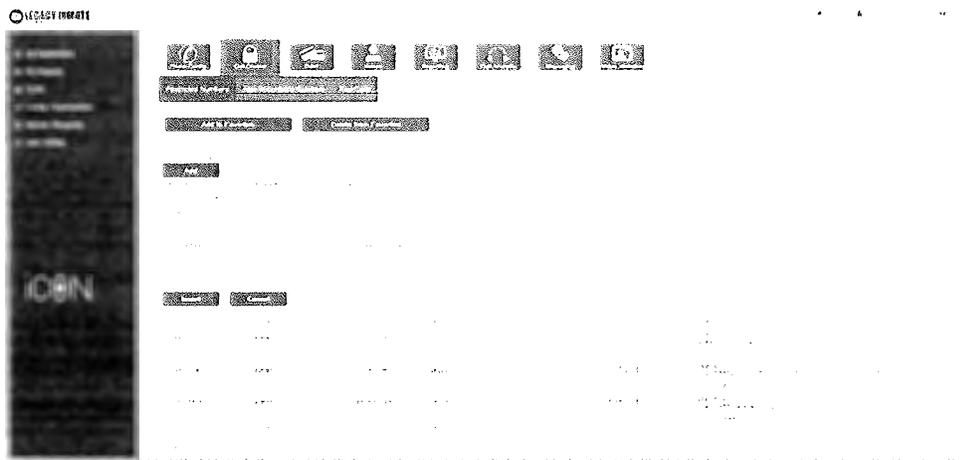
## Technical Response

3.4.10 The system shall allow call blocking of specific numbers by detainee PIN telephones, or group of telephones. The system shall be able to block access to an unlimited number of specific telephone numbers upon request.

☼ CenturyLink Response: Read, understood and will comply.

The iCON system Call Control feature provides the County with the ability to block an **unlimited amount of numbers** in real time, having an immediate effect in the system. Upon installation of our services at the facilities, CenturyLink will pre-load all current facility blocked numbers in to our system allowing for a smooth transition. Number Restrictions can also be set for a large range of NPA-NXX (prefix) sequences utilizing this utility – a simple drop down option is provided for this use. Numbers may be blocked from any PC or laptop with access to the iCON system from on or off-site. Calls can be blocked by individual telephone or group of detainee telephones.

### Adding a Number Restriction



The iCON system does not allow for calling to 0, 00, 911, 411, 555 Directory Assistance, any toll-free sequence (800,888,866,877), or 900/950 numbers. All calls are processed directly through CenturyLink's network with no involvement with the local telephone company ensuring access to pre-approved destination numbers at all times. Each attempted call is first validated through the national Line Information Database to ensure no call is routed to any number where "collect" call blocks have been requested through the applicable local exchange company or to numbers that may have been subject to third party fraud in the past.

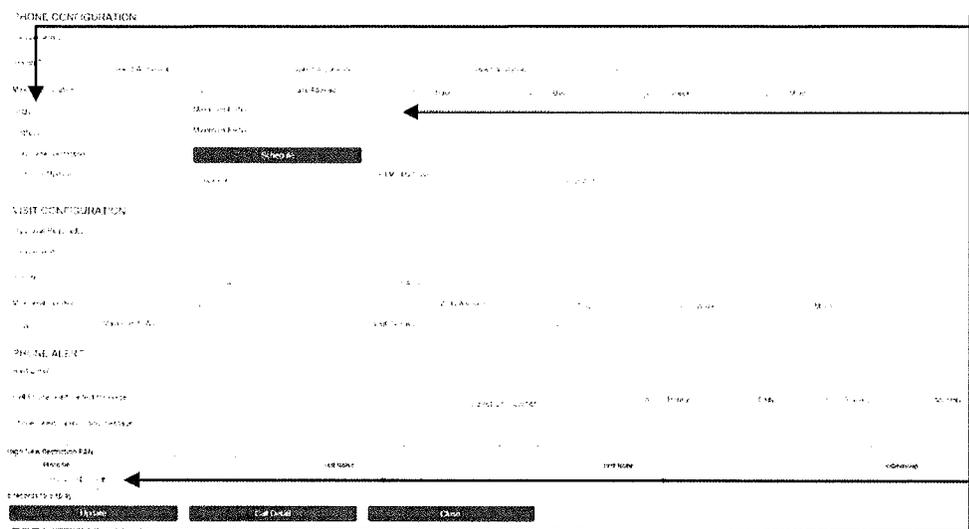
Called parties also have the option to block any further calling from the Detention Facility to their telephone number by pressing "3" when prompted by the automated operator. Call blocks are instantaneous upon request.

3.4.11 The system shall also assign approved calling numbers according to detainee PIN.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

When PINs are in use, Personal Allowed Number (PAN) lists may also be employed. The PAN application takes security one step further by providing tight control on all numbers called from the facility by detainees. The PAN application allows administrators to associate a “Personal Allowed Number” list with each PIN, so that the detainee is unable to make calls except to those pre-specified numbers on the detainee’s list. The iCON system can also assign a speed dial number to each PAN. The sample screen below shows the PAN detail.



Check the PAN box to apply a restriction.

Specify how many phone numbers you would like to be on this inmate's PAN list.

Enter the telephone numbers this inmate is allowed to call.

The PAN Detail Screen shows the called party's entire name is listed in the database. Furthermore, the PAN can be marked as “Active”, “Private”, “Hot”, “Blocked”, “Free”, and “Called Party Block”.

- **Active**- The number is currently available for the detainee to call.
- **Private**- The number will not be recorded or monitored.
- **Hot**- Any time the number is called, alerts will be sent to the appropriate investigators.
- **Blocked**- The number can be blocked so the detainee cannot call.
- **Free**- A number listed as free will not incur any charges.
- **Called Party Block**- The called party may block the detainee from placing any calls to their number.

The iCON system documents updates and history of PAN entries in real time. All updates will be immediately effective in the system and viewable by all other users within the system. Facility personnel have the ability to add, subtract or edit a detainee's PAN list directly via iCON throughout the detainee's stay.

3.4.12 The system shall permit the called party to block all future calls from a correctional facility such as the Boone County Detention Facility

☼ CenturyLink Response: Read, understood and will comply.

# Technical Response

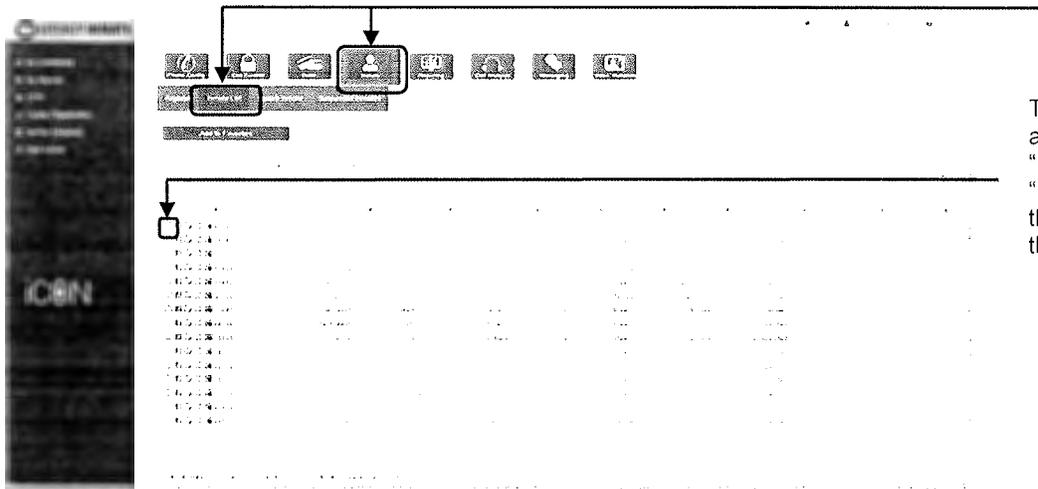
Called parties have the option to block any further calling from the Detention Facility to their telephone number by pressing “3” when prompted by the automated operator. Call blocks are instantaneous upon request.

3.4.13 The system must have the capability to temporarily suspend a detainee’s privilege for placing a call and set a beginning and end date without the need to manually re-enable privileges.

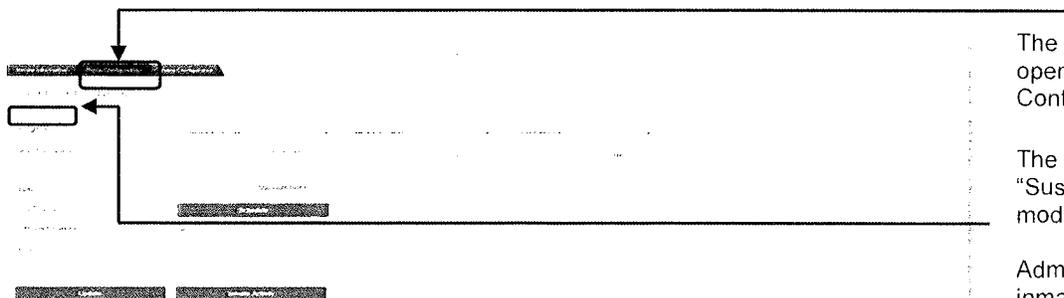
☼ CenturyLink Response: Read, understood and will comply.

Detainee calling privileges can be revoked at any time by temporarily disabling the detainee’s PIN. These restrictions can either be permanent or time-sensitive, in which case the system will automatically un-restrict the privileges upon completion of the designated time interval. Restrictions on an individual detainee will not affect the privileges of other detainees.

## Restricting Detainee Privileges



To restrict inmate PINs, administrators should click the “Inmate” module then click “Inmate List” and then select the blue icon on the left side of the inmate’s name.



The Inmate Detail Module will open, next, click on “Phone Configuration”.

The user should check the “Suspension” box and then modify the suspension details.

Administrators can restrict inmate privileges based on:

- Maximum Call Duration
- Maximum PANs & PRNs
- Day/Time Restrictions
- Calls Allowed (per hour, day, week, or month)
- Phone station, location, or division assignments

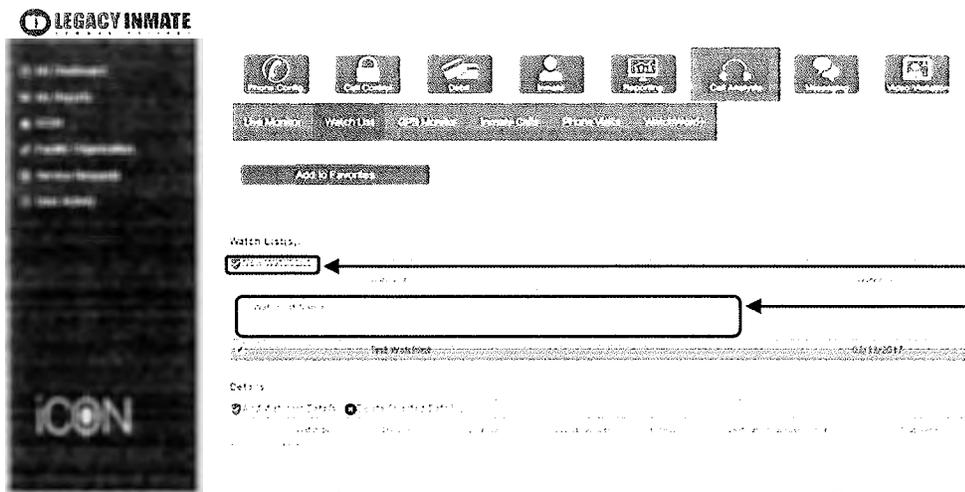
# Technical Response

## 3.5 Other Investigative Tools Requirements:

3.5.1 The Detainee Telephone System shall be equipped with a remote call-forwarding feature to those numbers that are under surveillance by the investigative unit. The feature shall allow authorized personnel to monitor a call, from any designated remote location, while the call is in progress. The call shall be automatically re-routed once the call is accepted by the called party and in progress. There cannot be any distance barriers to the retrieval process so the remote telephone number can be located within the facility, across the United States, or internationally.

☼ CenturyLink Response: Read, understood and will comply.

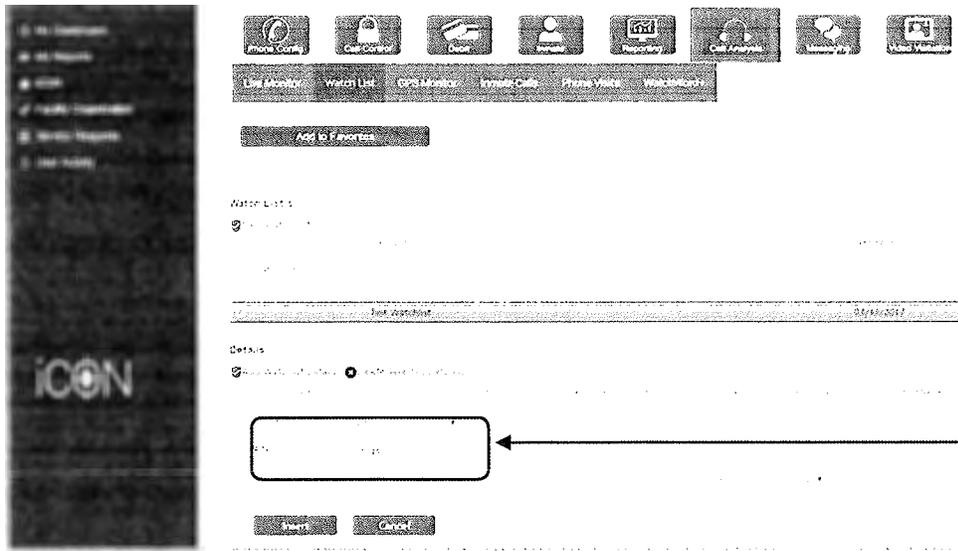
Investigators can also monitor calls using iCON's Watch List feature. Watch List is an investigative feature that allows users to create lists of interest based on any desired criteria and to have the system alert them when any communication occurs that meets these specified criteria. For example, a user may choose to be alerted any time a specific detainee places a call. Or they may choose to be alerted each time a specific destination number is called by any detainee at the facility.



To create a new Watch List, click the yellow icon next to **NEW WATCH LIST**. Then enter in the name of your Watch List in the box that appears and click **INSERT**.

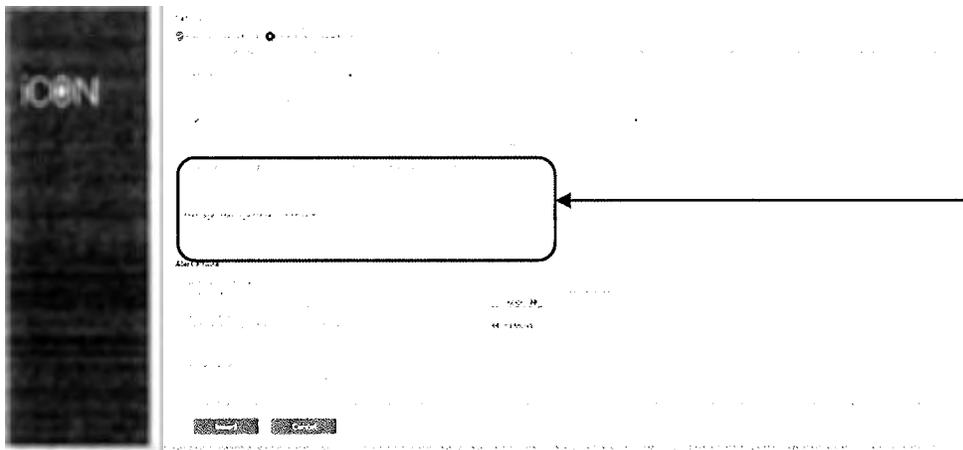
Next, click the icon to the left of **ADD WATCHLIST DETAILS** and fill out the form that appears.

# Technical Response

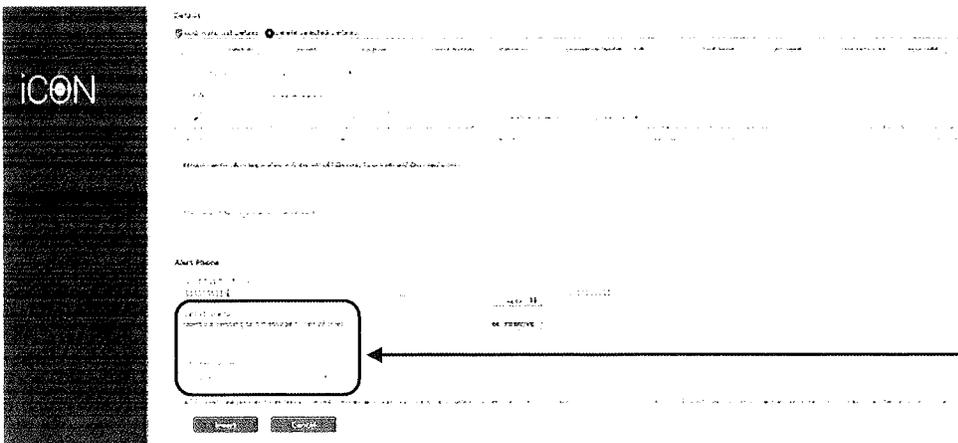


Choose the type of activity that you would like to be alerted about. In this case, the user will be alerted any time a specific inmate with the PIN 12345 places a call.

After checking the **ALERT ME** box, the user is presented with alert options.

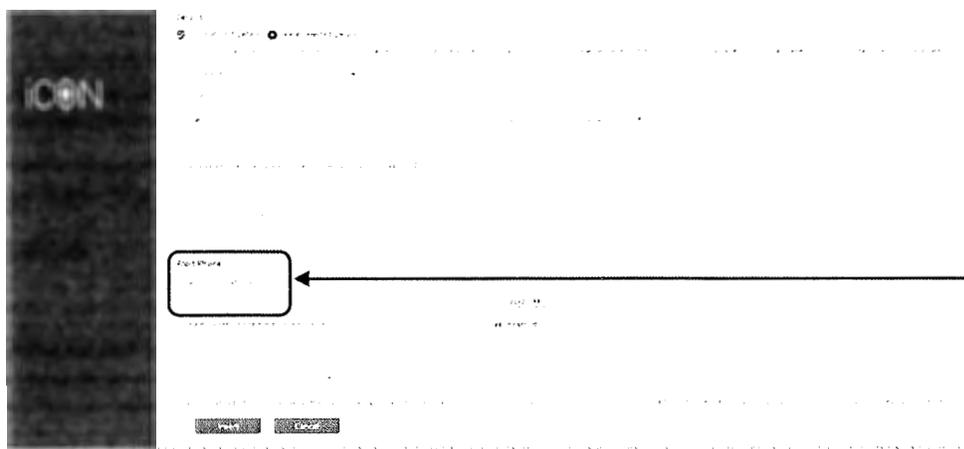


If you would like to receive alerts via email, enter the email address of the person who will be receiving the alerts. Enter the message that you would like displayed on the alert.



If you would like to receive alerts via text message, enter your cell phone number and choose your carrier from the dropdown list. Then click ADD. You can add multiple phone numbers if desired.

## Technical Response



If you would like the call to be automatically forwarded to your cell phone so you can jump right into live monitoring as soon as you are alerted, enter your cell phone number into the SEND CALL TO PHONE field. Then click ADD. You can add multiple phone numbers if desired.

If a user has set up a Watch List to receive an alert and has selected the “Send Call to Phone” option, they will be presented with the option to jump right into live monitor the call as soon as they are alerted. At this point they can listen silently, disconnect the call, or “barge into” the call if desired.

3.5.2 The system must have the capability to move a detainee or group of detainees from one housing unit to another without the need to re-enter the information.

✦ CenturyLink Response: Read, understood and will comply.

This functionality is accomplished through integration with the County's JMS. When a detainee or group of detainees is moved from one housing unit to another, or when a detainee is released, and the information is updated in the JMS, iCON will receive the update through our integration with the JMS and the correct up-to-date information will be shown in the iCON system.

iCON is able to interface with any installed JMS system including the one currently utilized by Boone County in order to automatically generate PINs based on Booking Information, including alphanumeric sequences. CenturyLink will contact Boone County's Information Technology department and duplicate the file output currently utilized at the facility ensuring a **quick and smooth transition** from the current vendor to CenturyLink. An FTP Server will be supplied by CenturyLink specifically to allow for the **automatic generation of detainee PINs**.

The County's JMS will deliver file formats with the Detainee Name, PIN or Booking Number, and any other authentication information the County currently utilizes. The file will be delivered to a CenturyLink-supplied FTP server. The file will be uploaded to the server automatically utilizing IP addressing in any time interval. We suggest an automatic upload every fifteen (15) minutes or upon JMS modification. iCON will be automatically updated with the detainee information within two (2) minutes of file delivery. The iCON system comes with Personal Identification Number (PIN) technology as part of the system. This is a standard feature and it is highly reliable and effective in identifying detainees making calls, assisting investigators in their criminal investigations, and providing security controls on detainee calling. iCON features an

## Technical Response

extensive PIN and PAN application that allows for quick and efficient processing of detainee PIN accounts.

CenturyLink can also offer the County via its centralized call solution the ability to retain specific detainee PINs where the detainee is booked or incarcerated in absentia due to, for example, trial or hospitalization at a separate location. All PINs are recorded for the purpose of tracking, regardless of whether a call was also monitored or recorded.

### 3.6 Call Acceptance Requirements:

3.6.1 The Detainee Telephone System shall alert the called party of the per-minute cost of the call prior to acceptance.

☼ CenturyLink Response: Read, understood and will comply.

3.6.2 The system shall be configured so that the called party must actively accept the call.

☼ CenturyLink Response: Read, understood and will comply.

### Call Processing & Positive Call Acceptance

CenturyLink will not connect a call from any detention facility without positive acceptance from the called party. The Company utilizes Intel Dialogic telephony cards to power its IVR responses and answer supervision. **A call cannot be connected without call positive acceptance under any circumstance.** DTMF, pulse-dial and Rotary responses are 100% accurate utilizing this technology – without exception. Calls cannot be billed to answering machines, fax machines, or computer modems. A DTMF, pulse-dial or Rotary signal of “1” must be received for a call to bridge and connect. Billing time does not begin until the called party has pressed “1” to accept the call.

3.6.3 The system shall be configured so that the detainee cannot communicate with the called party until the call has been accepted, see also paragraph 3.4.8.

☼ CenturyLink Response: Read, understood and will comply.

iCON's automated operator provides notification to a detainee of the call status (e.g., busy, no answer, etc.) eliminating the need for detainees to hear the call progress. iCON places the detainee “on hold” and does not allow the detainee to hear the called party prior to the actual positive acceptance (via touch tone entry) of the call. The automated operator will provide called parties with a rate quote prior to accepting the detainee’s call.

3.6.4 System billing must not begin until the call is accepted.

☼ CenturyLink Response: Read, understood and will comply.

# Technical Response

Billing time does not begin until the called party has pressed "1" to accept the call.

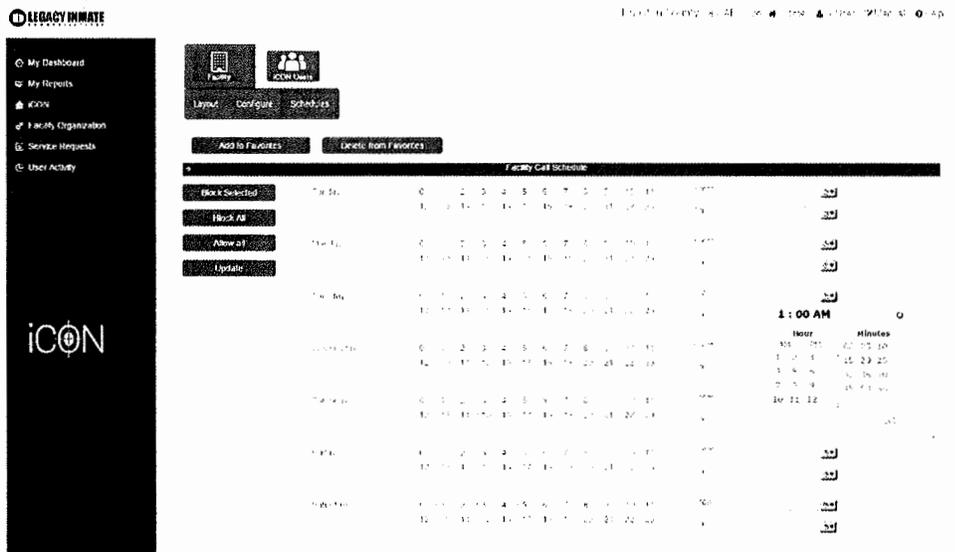
## 3.7 System Security Requirements:

3.7.1 The Detainee Telephone System must have the ability to be programmed for auto shut-off at times designated by the County on a per telephone basis.

☼ CenturyLink Response: Read, understood and will comply.

iCON will automatically shut off detainee telephones at designated times set in the Detainee Phone Schedule. CenturyLink's implementation team will set the initial schedule as designated by the facility. Detainee phone schedules can be changed at any time and can be customized to meet the exact parameters of the facility. Authorized facility personnel will have access to change phone schedules from any PC or mobile device, from on or off-site. **Call scheduling can be controlled at the level of individual phone, facility locations, facility divisions, each facility of a multi-facility agency, or globally.**

### Facility Schedule Module



The facility can set phone schedules by:

- Time of Day
- Hour
- Day of Week
- Holiday Schedules
- Full System or Individual Shutdown

iCON's phone scheduling module is extremely customizable. Any combination of call scheduling times can be completed within minutes and can be updated by approved facility staff at any time throughout the contract. The iCON system will also provide the facility with the ability to shut down any individual or group of detainee telephones by a simple click of a button. Detainee telephones will be shut off and not usable during any timeframe selected by the County.

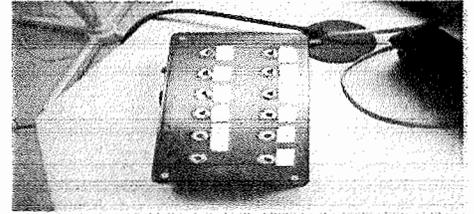
3.7.2 The system shall allow for County personnel to manually shut down the system in case of emergency.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

### Manual Shutdown

Manual shutdown can be performed on any individual phone, set of phones, or on all phones (i.e., a full shut down) directly through the Facility Phone Schedule Utility within iCON. In addition, our installation team will install manual cutoff switches (as pictured to the right) to be located in any area requested by the County including at the demarcation location, central security control center, and select housing units.



3.7.3 The system shall be password protected to permit only appropriate facility personnel access to the system.

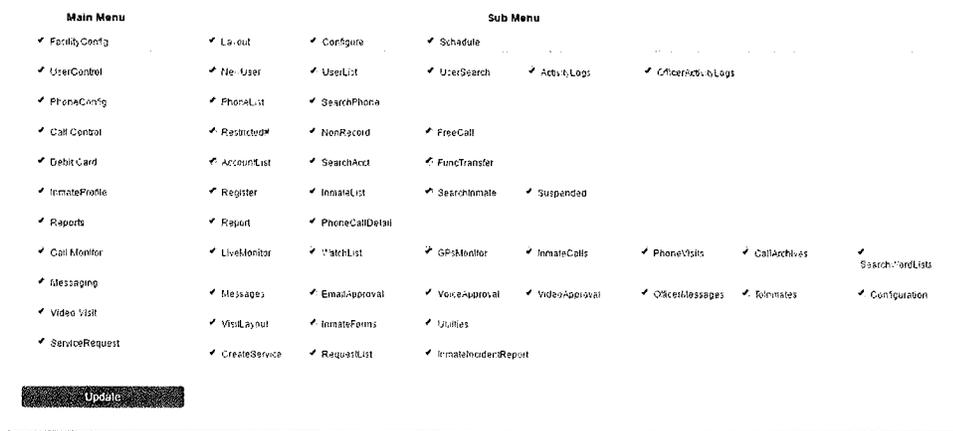
☼ CenturyLink Response: Read, understood and will comply.

iCON only allows users with an appropriate user access level to monitor detainee communications, listen to communication recordings, modify detainee data, generate reports, etc. The system features a User List interface that allows for administrators to designate multi-level passwords ensuring that only designated personnel can view certain (targeted) information contained within the system. User lists can only be defined by Administration level passwords. Standard settings designate the following user levels:

- **Administrative:** Full access to all iCON utilities including Facility Configuration and User Levels.
- **Power User:** Full access to all iCON utilities except for the Facility Configuration and User Level utilities.
- **Investigative:** Access to communication monitoring, recording, reporting, audio mining, watch list alerts, communication details, and downloading.
- **Finance:** Access to all billing and commission reporting.
- **Data Entry:** Allows access only to manually enter PINs or other data.
- **User Defined:** Allows an administrator to create a custom user level for a user. This is perfect for a staff member that performs multiple roles that don't fit perfectly into iCON's preset user groups. For example: a staff member that does financial and data entry tasks.

These user access levels may be changed and customized in any way the County chooses. The iCON infrastructure was constructed to be infinitely scalable, allowing for continual system expansion and limitless data storage capacity.

# Technical Response



iCON offers an extensive range of access configuration customizability. As an administrator, the user provided in this example has been granted access to every part of the system.

3.7.4 The system must have the capability to enable and disable any phone at the facility from any secured internet enable computer.

☼ CenturyLink Response: Read, understood and will comply.

Please refer to our response to requirement 3.7.1 which explains how any phone at the facility can be enabled or disabled directly from the iCON system. iCON is accessible from any computer or mobile device with an internet connection and authorized login credentials.

3.7.5 For security purposes, the system must be a centralized non-premise system that shall keep all records secure and not require the County facility to maintain the records.

☼ CenturyLink Response: Read, understood and will comply.

## CENTRALIZED SOLUTION

The iCON® platform is a detainee communication processing system designed with the flexibility to take advantage of our ultra-modern carrier-grade network. The system intelligence is located in our primary and two (2) secondary/backup network data centers. Our redundant data centers are:

- Completely secured and environmentally controlled location
- Monitored and maintained by skilled on-site technicians 24 hours a day
- Allow for the delivery of real-time, immediately available system updates/upgrades
- Ensure maximum system uptime and reliability
- Offer multi-layered redundancy to achieve high security protocols

Our Data Centers are automatically replicated on an ongoing basis, so that each center holds a complete and up-to-date database of data and content from the facility. When a detainee lifts a phone's receiver, an immediate connection is made to our carrier-grade network utilizing a

## Technical Response

direct connection from the facility to our network. The detail record for the call or visit is created and stored at the primary data center and immediately replicated to the secondary data centers.

Begin Confidential and Proprietary Information

We have secure, redundant data centers in multiple geographical locations. Our primary system is located in **Cypress, California**, the secondary system is in **Las Vegas, Nevada**, and the third (a back-up of both primary and secondary systems) is located on **alternative storage servers**.

End of Confidential and Proprietary Information

### 3.8 Reports Requirements:

3.8.1 The Detainee Telephone System shall generate reports that state, at a minimum the following:

- 3.8.1.1 the date and time each call is placed;
- 3.8.1.2 the source of the call;
- 3.8.1.3 the telephone number called;
- 3.8.1.4 the date and time the call ends;
- 3.8.1.5 the duration of the call;
- 3.8.1.6 and a voice recording of all parties involved in the conversation.

☼ CenturyLink Response: Read, understood and will comply.

The County will have access to detailed call reports from the Reports Utility in iCON. Reports are viewable from iCON within seconds of report request. Reports can be viewed and printed directly from iCON or the County can choose to export the report into another file, E-Mail the report, or download it onto their computer, a CD/DVD, a USB flash drive, or other media storage device. iCON reports can be exported in almost any format, including MS Word, Excel, PDF, WordPad, Word Perfect, .csv and HTML.

The iCON system may be accessed from on or off site, so all report information is available to facility personnel at all times, from anywhere. The iCON system provides a multi-level password configuration that allows the County to designate personnel to access information pertinent to their function. For example, should a user not have "finance" access they would not be able to view commission reporting.

iCON offers a myriad of standard reports which are divided into the following categories: Billed Calls, Unbilled/Attempted Calls, Commission, Call Attempts (reflects reports for every single call attempted from the facilities), Frequency Reports (e.g., frequently called numbers), Prepaid (Friends & Family) Reports, Prepaid (Detainee Debit Card/Cardless Debit) Call Detail Reports, Call Analysis Reports (call trends), Fraud Reports (Three-Way Call Detection/Voiceprint Authentication Failure) and Service Ticket/Service Reports. As with all our reports, each report supplies the originating number (detainee telephone), called number (destination number), time,

# Technical Response

date, PIN Utilized (identifying the detainee), call duration, call cost, call type, and the result of the call.

The screenshot displays the iCON system interface. On the left is a dark sidebar with navigation options: My Dashboard, My Reports, iCON, Facility Organization, Service Requests, and User Activity. The main content area features a top navigation bar with icons for Phone Calls, Call Control, Debt, Inmate, Reporting, Call Analysis, Messaging, and Video Visitation. Below this is a 'Reports' section with 'Inmate Calls' selected, and buttons for 'Add to Favorites' and 'Delete from Favorites'. A 'Report Types' list is shown, including: Un-Used Calls, Completed, Call Attempts, Frequently Called, Call Detail Report, Call Analysis (with a red arrow pointing to it), Account Chart, E-Filed Chart, Un-Filed Chart, Court-Filed Chart, Visual Analysis, Debt Account Balance, Prepaid Account Balance, Third Party Calls, Security Verification Report, Inmate List Report, Act. Log Report, Debt Debits, and Service Requests. The iCON logo is visible in the bottom left of the main area.

Each report category can be expanded to show the various reports contained in that category.

## Custom Call Detail Report Generator

The iCON system also features a Call Detail Report template that allows users to create any tailored report with any specific call criteria they may need. This function serves as a template that allows users to select call detail fields to generate a specific report with specific criteria. This allows limitless customizability and flexibility. The iCON system allows reporting of data from every single call *attempted* through our service, not just completed calls. All call detail contains the result of the call attempt (completed, denied, blocked, etc.).

# Technical Response

## Call Detail Report Criteria Selection Screen

The screenshot shows a web interface for selecting report criteria. At the top, there are navigation icons for Phone Config, Call Control, Debit, Inmate, Reporting, Call Analysis, Messaging, and Video Visitation. Below these are buttons for 'Reports' and 'Call Detail Report', along with 'Add to Favorites' and 'Delete from Favorites'.

The main section is divided into 'Report Parameters' and 'Detail Parameters'. 'Report Parameters' includes fields for 'From Date' (2/3/2016) and 'To Date' (2/4/2016), 'Bill Type' (Select a Bill Type), 'Call Type' (Select a Call Type), 'Watch List' (Select a WatchList), and 'Playlist' (Select a Playlist). 'Detail Parameters' includes 'Division' (Select a Division), 'Location' (Select a Location), 'Station #' (Select a Station), 'Inmate ID #', 'Destination #', 'Calling Card #', 'First Name', and 'Last Name'. A 'Completed' checkbox is checked, and other options include 'Private', 'InCompleted', and '3-Way Call Detection'.

At the bottom, there are buttons for 'Search', 'Export', 'Email Report', 'Show: 25 Calls Per Page', and 'Add to Custom Reports'.

Callouts provide detailed lists for the filter options:

- Select Reports by Any Range of Dates:**
  - Specific date
  - by week
  - by month
  - by quarter
  - by year
  - or over entire contract.
- Select by Bill Type:**
  - Calling Card
  - Collect Call
  - Prepaid w/CC
  - Collect w/ CC
  - Debit
  - Free Call
  - Prepaid – Collect
  - Direct Bill
  - Probono Call
  - Admin Call
  - TTY/TDD Call
  - Hot Line
  - WatchList
  - Record ID
  - Play List
- Select by Call Type:**
  - Local
  - IntraLata
  - InterLata
  - InterState
  - International
  - Caribbean
  - Canada
  - Mexico
- Select by Connection:**
  - Completed Call
  - Private Call
  - Uncompleted Call

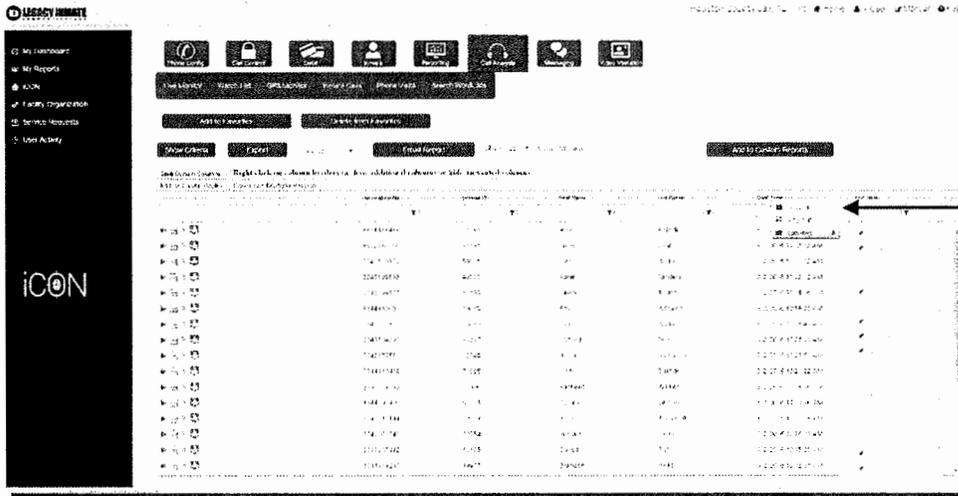
**Further Narrow CDRs by:**

- Facility Division/Building
- Location within the Facility
- Select by Station #
- Destination Number (Called Party Number)
- Inmate ID Number (PIN)
- Debit Card Number
- Called Party First and/or Last Name
- Inmate First and/or Last

When viewing a report, the user may select which columns are viewable and which are hidden so that the report only displays data that is relevant and important.

# Technical Response

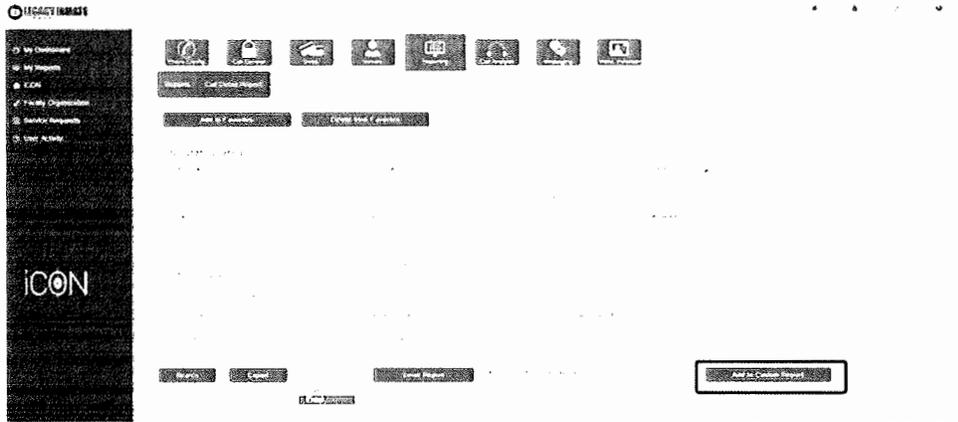
## Selecting Viewable Columns



When viewing a report, the user may select which columns are viewable and which are hidden so that the report only displays data that is relevant and important.

## User-Defined Custom Reports

Users can save any specified search criteria as a custom report so that they can easily run the same report again in the future without having to reselect the search criteria. To do so, simply click **ADD TO CUSTOM REPORT**.

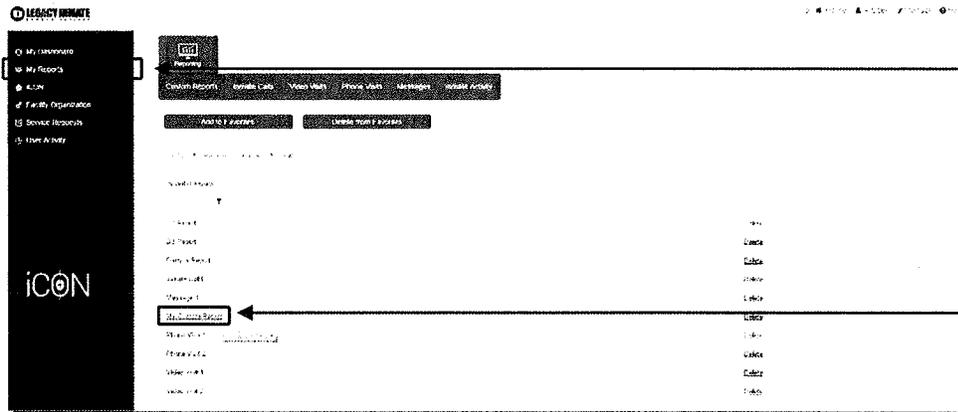


A popup window will appear asking you to provide a title for your custom report.

# Technical Response



To locate the report that you have just created, click **MY REPORTS** on the side menu of iCON. Locate your report on the list and click on the link. The system will run the report and open it in a new tab.



Click **MY REPORTS** to locate the custom report you have saved.

Locate your desired report on the list. Click the link to run the report. It will open in a new tab.

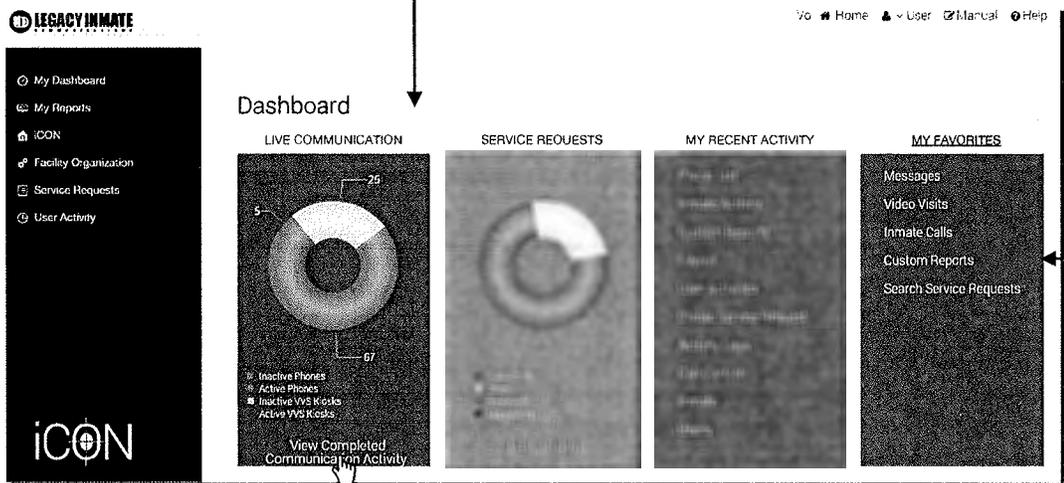
# Technical Response

## Reports Accessible Right From Your Dashboard

Your Dashboard (home screen) also provides direct access to communication activity reports.

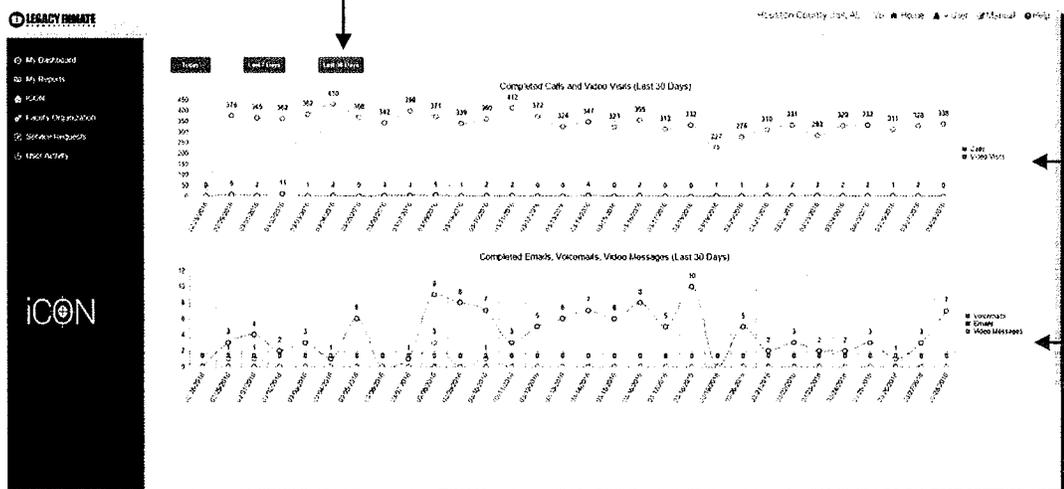
See a visual birds-eye view of every live communication going on at the facility.

If desired, you can add the Custom Reports utility to your Favorites so that it is accessible from your Dashboard.



You can choose to view activity from today, the last 7 days, or the last 30 days.

Click on VIEW COMPLETED COMMUNICATION ACTIVITY to open up another visual report showing recent communication activity at your facility.



## Detainee Activity Report

iCON's Reporting Utility is focused on providing users with **access to all of a detainee's information and data in one place**—from their communication activity to general information to powerful investigative data that extends outside of iCON even to popular social media



# Technical Response

A screenshot of a data table with multiple columns. A red rectangular box highlights a specific row. The table contains various data points, including what appears to be a date and time in the highlighted row.

## Contact Link

iCON's enhanced reporting utility also allow users to investigate the members of the public with whom detainees are communicating. Clicking on a contact's phone number allows users to see all of that individual's communications (phone calls, video visits, and messages). This report will show all communications the individual has had with any detainee at any facility that we service.

Investigators will be able to determine who this contact is communicating with, the frequency of their communication, their name and home address, and any potential links between multiple detainees (both within your facilities and across CenturyLink's nationwide network of correctional facilities).

## Contact Communication Report

A screenshot of a table titled 'Contact Communication Report'. The table has several columns. A red rectangular box highlights one of the columns, which appears to contain phone numbers or contact identifiers.

[Begin confidential, trade secret information]

## Social Network Investigator

iCON also boasts a powerful **Social Network Investigator**. Next to both the detainee's and the called party's name, you will notice icons for several popular social media platforms: **Facebook**, **Google+**, **Twitter**, and **LinkedIn**.

# Technical Response

When clicked, these buttons will perform an automatic search on the website for the individual's name. Provided your users have Internet access to social networking websites, they will be able to quickly search and investigate the public profiles of detainees and those they are communicating with outside of your facilities.

## iCON's Social Network Investigator

Save Custom Columns | \*Right click on column headers to show additional columns or hide unwanted columns.

RecordID	InmateID	Inmate Name	Activity Date	Activity Type	StationID	Contact Phone	Contact Name	Duration
6890011	0		8/3/2016 12:16:00 AM	Phone Call	6890011			0:00:00
20160802_221612_6890011	70468	William Bramlett	8/3/2016 12:16:28 AM	Phone Visit	Visit Booth1			0:00:12
		Vince Cunningham	8/3/2016 12:27:08 AM	Email		3345397693	Brandesha Potter	NA
		Aikzay Riggins	8/3/2016 12:44:54 AM	Email		4787190574	Jeremy Thomas	NA
		Vince Cunningham	8/3/2016 12:47:35 AM	Email		3345397693	Brandesha Potter	NA
		Marcus Parks	8/3/2016 3:03:00 AM	Phone Call	3347121027	3344792597	Mary Beth	0:00:00
		Brandon Blocker	8/3/2016 3:03:34 AM	Email		2054429709	Carolyn Gaff	NA
		Marcus Parks	8/3/2016 3:05:00 AM	Phone Call	3347121027			0:00:00
		Brandon Blocker	8/3/2016 3:11:00 AM	Phone Call	3347121027	3344792597	Mary Beth	0:00:00
		Brandon Blocker	8/3/2016 3:48:38 AM	Email				
		Robin Cabrera	8/3/2016 5:47:00 AM	Phone Call				
		Robin Cabrera	8/3/2016 5:50:00 AM	Phone Call				
		Amanda Stembridge	8/3/2016 5:54:00 AM	Phone Call				

The image also shows three overlapping windows: a Facebook profile for Brandon Blocker, a Google+ profile for Carolyn Gaff, and a contact list for Amanda Stembridge. Arrows indicate the flow of information from the table to these external profiles.

[End confidential, trade secret information]

3.8.2 The system shall have the capability to store calls in memory for a period of time sufficient to comply with any requirements of the Missouri Sunshine Law (Chapter 610 RSMo). At a minimum, the contractor shall retain records developed under the contract for the County for five (5) years.

☼ CenturyLink Response: Read, understood and will comply.

Call recordings (and voicemails if voicemail service is offered at the facility) will be stored and accessible from iCON for the life of the contractual agreement or for any length of time required under the Missouri Sunshine Law (Chapter 610 RSMo), whichever is longer. Call detail records (CDRs) will be stored for a minimum of ten (10) years.

3.8.3 Upon request, the contractor shall supply call detail reports to the County at no additional charge. The contractor may satisfy this requirement by providing a self-service web portal to the County for review of reporting data. The call detail report shall contain a variety of call information and be customizable to suit the County's needs.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

All reports are directly accessible from the iCON system at all times and reflect real time data. County staff can access reports easily through iCON at any time. Reports can also be downloaded, printed, emailed, or saved to external storage media directly from iCON. At the County's request, iCON technical support staff can also export/email/print and mail these reports on behalf of the County if desired.

Please refer to our response to requirement 3.8 for detailed information about reports.

3.8.4 Standard reports shall include at minimum:

- 3.8.4.1 Frequently Dialed Numbers;
- 3.8.4.2 3-Way Call Attempts;
- 3.8.4.3 and Call Volume by Telephone.

☼ CenturyLink Response: Read, understood and will comply.

Please refer to our response to requirement 3.8 for detailed information about reports. All three of these reports are standard reports available in iCON. To view samples, please refer to our attached Sample Reports.

3.8.5 The system should either have the capability for the County to generate standard accounting/revenue reports. If the system does not have this capability, then the contractor shall provide system accounting reports upon request of the County in a format desired by the County. Reporting capabilities of the system shall satisfy County, state and federal reporting requirements applicable to detainee phone systems.

☼ CenturyLink Response: Read, understood and will comply.

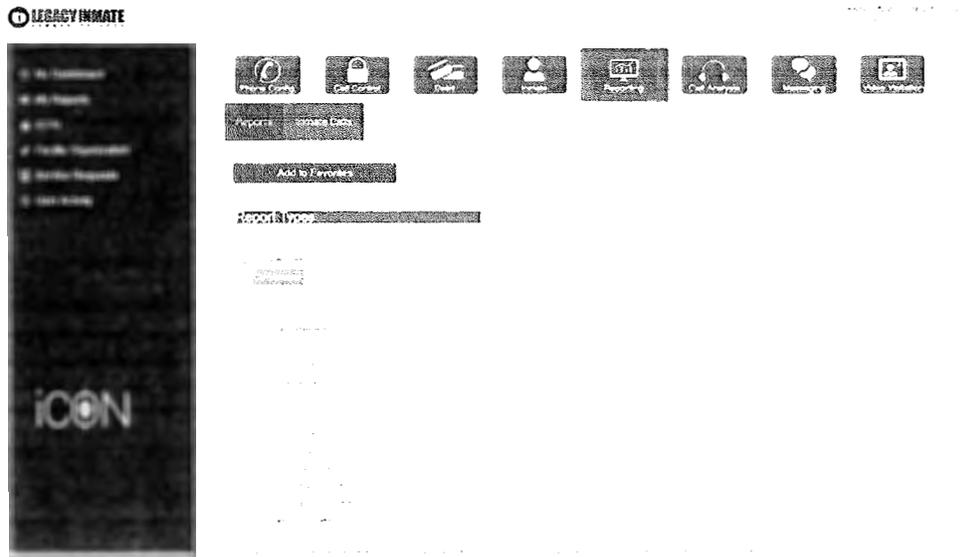
### Commission Reporting

The iCON system allows authorized facility users to run, view, print, and download commission reports reflecting real-time information at any time, from any device, and from any location on or off-site. Also, each commission payment made to the facility will be accompanied by a detailed call report itemized by facility, date of report, time period covered, total number of calls, total number of minutes, total gross revenue, and revenue for each telephone and total commission. As mentioned previously, these reports can be accessed in real time directly from iCON at any time.

The screenshot below shows the standard commission report categories. Users can also build custom commission reports showing exactly the data they would like included on the report.

# Technical Response

## Standard Commission Reporting Categories



- 3.8.6 The contractor shall provide a secure hosted site that allows the County to access all calling activity within the facility via the internet/web at no cost. The hosted site must provide an interface that allows a facility to view call detail reports, ***check and track a facility's commission data***, and it should allow facilities to open and/or view the status of system service tickets.

☼ CenturyLink Response: Read, understood and will comply.

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).

Users can easily open and/or view the status of system service tickets directly from iCON. Please refer to our response to requirement 3.8.8 for more details on iCON's Service Ticket Utility.

- 3.8.7 The system shall allow for real-time revenue reports that shall be made available through the internet and that outline all calls made from the facility. Real-time revenue reports shall, at a minimum, break-out calls by specific call type for collect, prepaid and calling card calls.

☼ CenturyLink Response: Read, understood and will comply.

iCON allows direct access to call volume and revenue reports that reflect real-time data. Please refer to our response to requirement 3.8.5 for more details on commission/revenue reporting.

# Technical Response

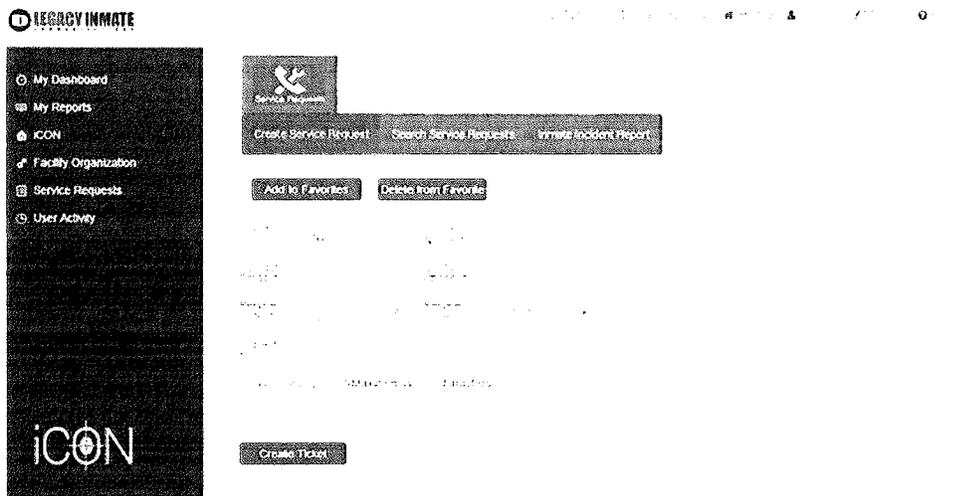
3.8.8 The system must incorporate an on-line service reporting system whereby the County can submit service requests as well as monitor service ticket status and history.

☼ CenturyLink Response: Read, understood and will comply.

## Service Ticket Utility

The iCON system features a state-of-the-art Service Report feature that allows County personnel and our staff to report as well as track service and repair requests in real time. These reports can be made from on or off-site. Once a report of service or system trouble has been made iCON simultaneously contacts CenturyLink's personnel via E-Mail and Cellular Telephone.

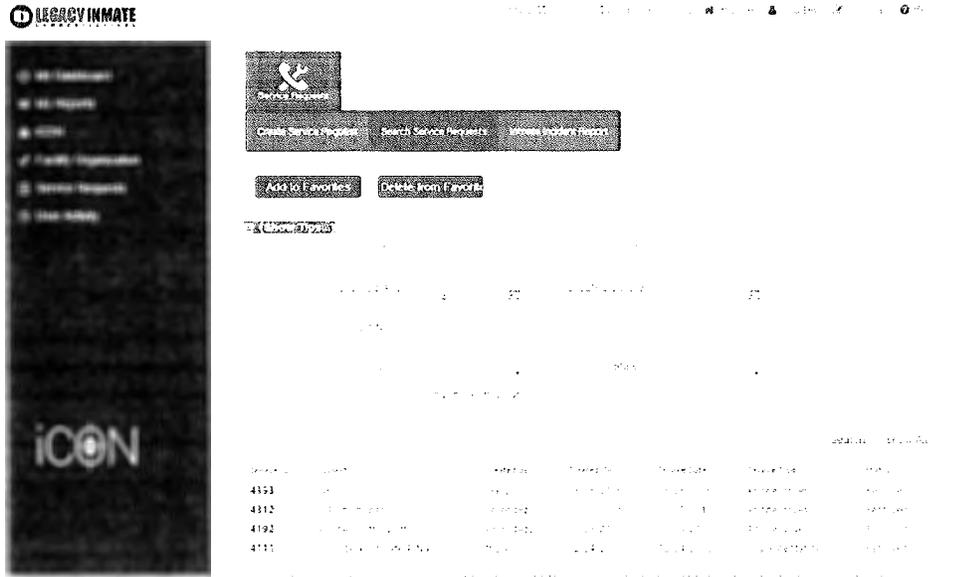
Detention Facility staff will have the ability to track work that is being performed on the service ticket and our technician notes on problem resolution. Additionally, the system will file all service and repair requests for the County tracking throughout the life of the Agreement.



Personnel can create and submit new service tickets directly through iCON. Service tickets are automatically distributed to the appropriate engineer in CenturyLink's in-house IT department.

After a service ticket is submitted, County personnel may track the progress within iCON's Service Request Utility. Service tickets are searchable based on ticket submission date, status, service type, contact name (submitter), and contact email/phone.

# Technical Response

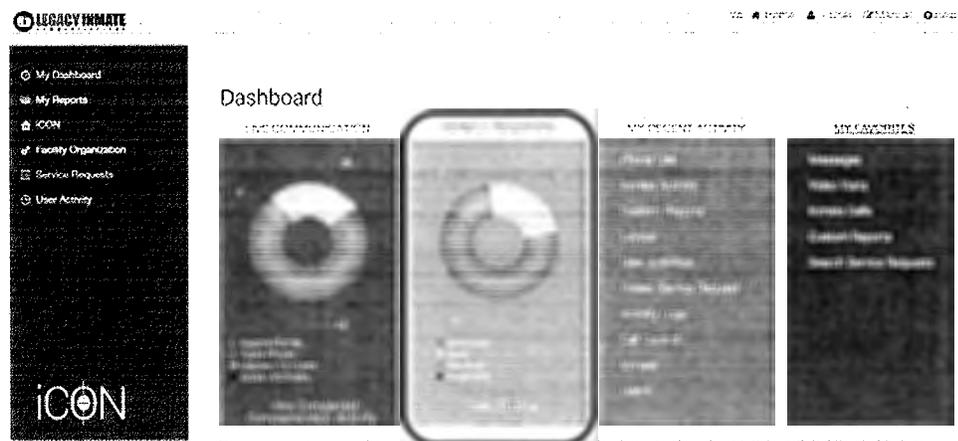


The status of the service ticket is always displayed in the right corner of the screen. When the ticket has been resolved, an email is sent to the County's contact (the person who created the ticket) notifying them that the issue is now solved.

## Service Requests are Viewable Right from your Dashboard

A visual birds-eye look at service requests is also accessible right from your Dashboard (home screen). Users will be able to quickly review the current status of all current and recent service requests made by the facility, and assess the quality of service the facility is receiving from our support team.

The doughnut chart in the Service Requests summary displays the number of Submitted, Open, Monitoring, and Resolved requests from the last 30 days. This information is updated automatically as our service team works on your requests.

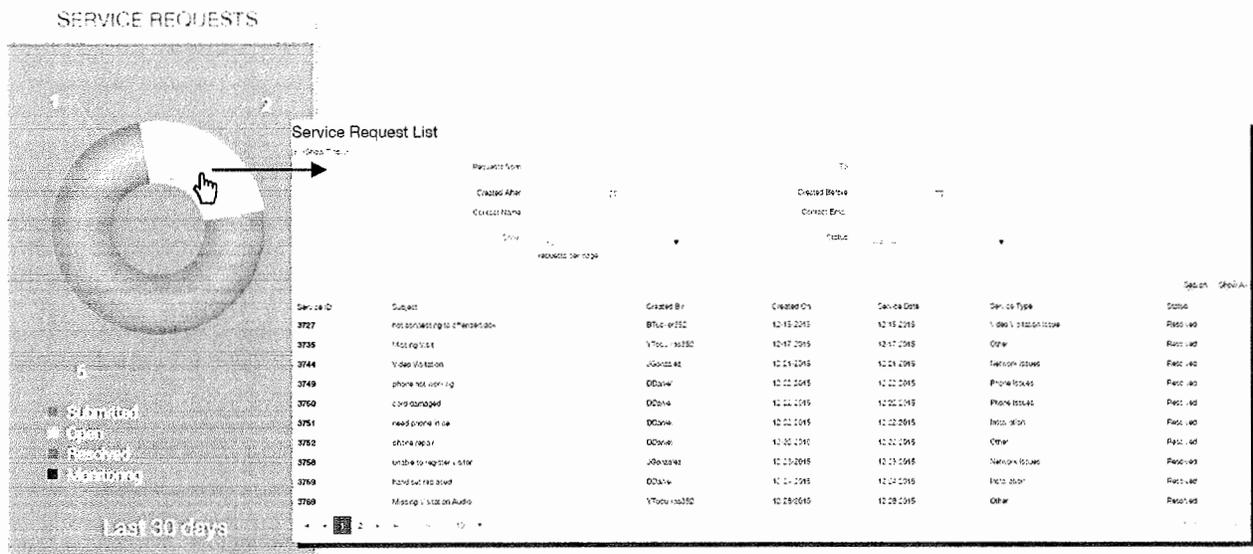


# Technical Response

The Service doughnut chart is divided into 4 categories:

- **Submitted** – Means your request has been successfully submitted and is in the queue waiting to be opened.
- **Open** – Means your request has been opened, reviewed, distributed to the appropriate department, and is being worked on.
- **Resolved** – Means your request has been successfully resolved and is now closed.
- **Monitoring** – Means the request has been addressed, but is being monitored by CenturyLink staff to ensure the issue has been fixed prior to moving it to the Resolved category.

Users can click on any section of the doughnut chart to review the requests.



To view a service ticket's details, simply click on the **SERVICE ID NUMBER**. This will also allow you to review or make notes or print the service request detail.

# Technical Response

hand set replaced	DDaniel	12/24/2015	12/24/2015	Installation	Resolved
<b>Service Request Number: 3759</b>					
Created By: DDaniel	Created Date: 12/24/2015				
Contact Info:	Service Date: 12/24/2015				
Requester: DDaniel	Resolved Date: 12/24/2015				
Request Description:	Service Type: Installation				
	Service Level: Unspecified				
	Service Department: Unspecified				
Subject: 12/24/2015					
Notes:					
Update Cancel					
12/24/2015 10:00 AM					
Tech has been dispatched, once ETA is available ticket will be noted.					
12/24/2015 10:00 AM					
Tech check in at facility.					
12/24/2015 10:00 AM					
Tech is due on site approx 9am today.					
12/24/2015 10:00 AM					
Tech has been dispatched, once ETA is available ticket will be noted.					

### 3.9 Service & Maintenance Requirements:

3.9.1 The contractor shall provide on-going complete Detainee Telephone System hardware and software maintenance on-site directly or through an approved subcontractor. The contractor is allowed to also use remote monitoring, diagnostics and repair.

☼ CenturyLink Response: Read, understood and will comply.

### INDUSTRY LEADING SERVICE & SUPPORT

CenturyLink's service approach is **proactive**. We don't wait until you have to notify us of a problem with your facility's detainee communication system. In addition to constant 24/7 remote monitoring, diagnostic testing, and system updates, we will also conduct **regular on-site technician visits** to ensure that every aspect of your detainee communication system is running smoothly at all times. Our aim is to catch anything that might cause an issue long before it happens. If something ever does go wrong, though, we're just a phone call away.

### 99.999% System Uptime

Our nationwide carrier-grade network is the backbone of the iCON™ system, providing a **99.999% system uptime** for the facility's detainee communication system. Our network is managed and maintained by our own expert network and IT personnel 24 hours a day, 365 days a year. All system features are monitored by live personnel as well as a state-of-the-art self-diagnostic system.

## Technical Response

### Local Technical Support

Ray Suddarth will serve as the primary local field technician and is located in New Century, KS. Ray has over 25 years of telecommunications experience and will work directly with Boone County personnel to schedule preventative maintenance visits and other access requests with minimal impact to County staff.

### Dedicated Program Manager

CenturyLink has assigned Josie Boos to serve as the ongoing Program Manager for the facilities. Ms. Boos will work with our entire operations and support team, site administrators, and local technicians to coordinate all ongoing projects throughout the life of the contract. Josie Boos is a skilled Program Manager with over 30 years of experience in large-scale corrections and telecommunications projects and is well versed in all iCON applications and services. Ms. Boos will be the first point of contact for the County for all service, data, and implementation requests. She will also provide proactive support by monitoring call detail, rate information, branding, billing, and trouble/service tickets on a daily basis

#### Josie Boos

#### Program Manager

100 CenturyLink Dr, Monroe, LA 71203

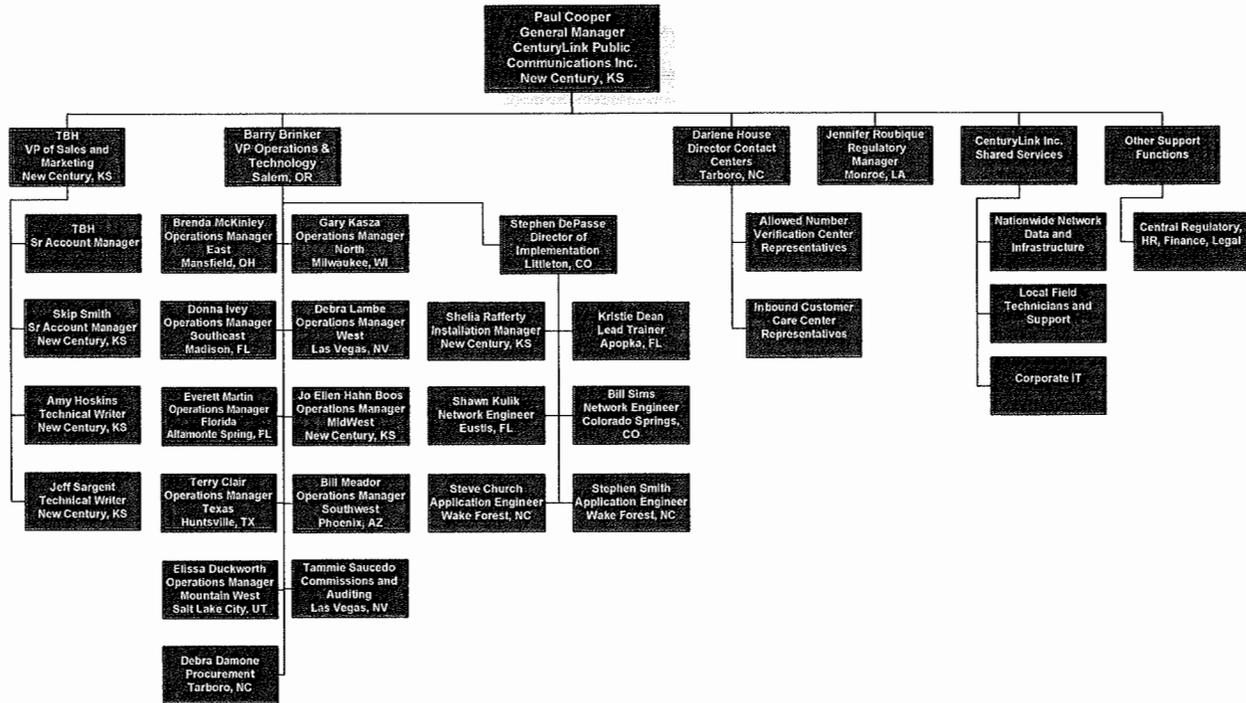
Office: 318-330-6040

[Josie.Boos@CenturyLink.com](mailto:Josie.Boos@CenturyLink.com)

CenturyLink will also provide the following additional back office personnel to support the Boone County account throughout the life of the contract.

# Technical Response

## CenturyLink Back Office Support Team



### 24/7/365 Live Facility Support Center

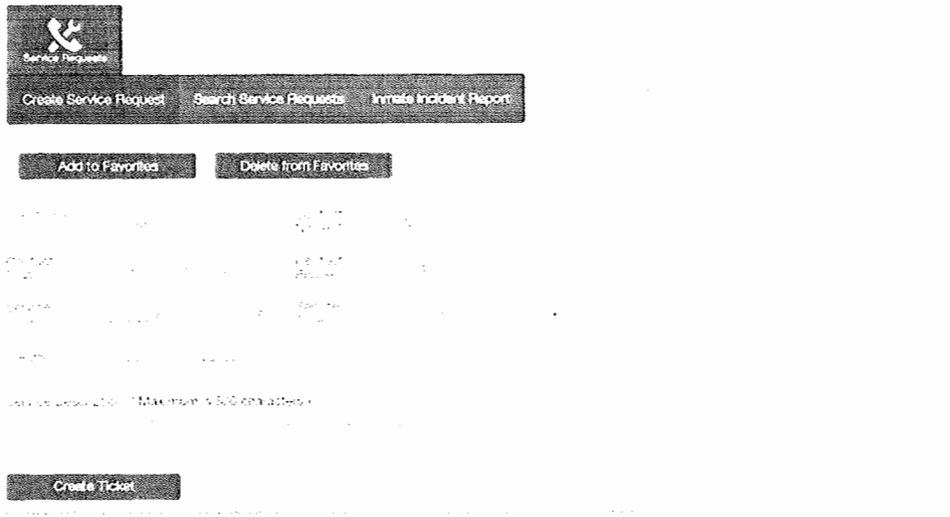
We are proud to offer the County our **domestic** 24-hour facility support 365 days a year, including holidays. We own and operate our own 24/7 facility care center staffed with live personnel that are available at all times. The 24-hour toll free number to access our correctional facility support center is **877-700-5534**.

### Service Request Utility

The iCON system features a state-of-the-art Service Report feature that allows County staff and our staff to report as well as track service and repair requests in real time. These reports can be made from on or off-site. **Once a report of service or system trouble has been made iCON simultaneously contacts our personnel via E-Mail and Cellular Telephone. County staff** will have the ability to track work that is being performed on the service ticket and our technician notes on problem resolution. Additionally, the system will file all service and repair requests so the County may track the requests throughout the life of the agreement.

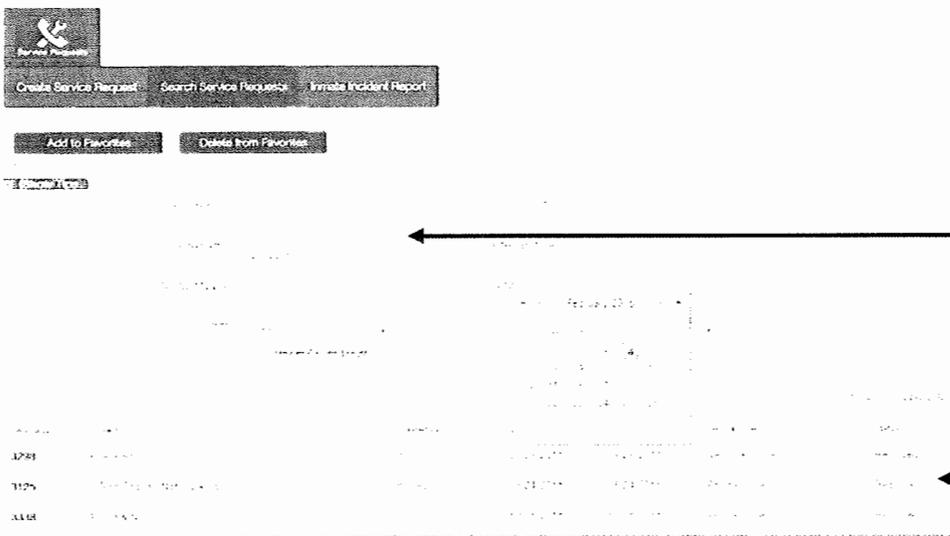
# Technical Response

## Creating A New Service Request



Users can create and submit new service tickets directly through iCON. Service tickets are automatically distributed to the appropriate engineer in our in-house IT department.

## Creating A New Service Request



After the service ticket is submitted, users may track the progress within iCON's Service Request Utility. Service tickets are searchable based on ticket submission date, status, contact name (submitter) and contact email.

The status of the service ticket is always displayed in the right corner of the screen. When the ticket has been resolved, an email is sent to the facility's contact (the person who created the ticket) notifying them that the issue is now "solved".

## Guaranteed Equipment and Service Response Times

Our network is managed and maintained by its own expert network and IT personnel, 24-hours a day. All system features are monitored by live personnel as well as a state-of-the-art self-diagnostic system. The iCON system is completely redundant with architecture that encompasses call processing in our nationwide, carrier-grade telecommunications network. We will utilize dedicated circuits that will serve as an entry-way in to our network, further decreasing and chance of any major outages.

CenturyLink utilizes three (3) service level categories; Minor (Priority Level 3), Major (Priority Level 2), and Emergency (Priority Level 1). The assigned priority level will be at the sole discretion of the facilities. Generally, the categories are defined by the following:

# Technical Response

## **Minor Service Category (Priority Service Level 3) 24 Hour Resolution**

A "minor" service category is assigned to any trouble report or service request that effects:

- one (1) individual detainee phone, BCD or kiosk is non-operational
- static or other noise heard on the line
- block or free call number entry or other iCON system administrative action needed
- new or customized report needed
- additional service requested
- additional training requested

All minor categories will be addressed **immediately** by our Implementation Manager with resolution provided within twenty four (24) hours of the report or request. In most instances these trouble reports and/or service requests will be handled directly by our support administrators or assigned Implementation Manager.

## **Major Service Category (Priority Service Level 2) 12 Hour Resolution**

A "major" service category is assigned to any trouble report or service request that effects:

- two (2) or more detainee phones, BCDs or kiosks not operational
- report information not listing on iCON
- recording or live monitoring utilities non-operational or malfunctioning

All major categories will be addressed immediately by our support administrators with resolution provided within twelve (12) hours of the report. Our administrators or local technicians will coordinate any equipment replacement needed. Our Information Technology (IT) Department will address and iCON related issues that may be the cause of a Major Service Category.

## **Emergency Service Category (Priority Service Level 1) Technician on-site within 4 hours**

An "emergency" service category consists of any report of 25% of detainee phones, BCDs or kiosks being disabled in *any* location or any occasion where iCON cannot be accessed by Boone County staff. An "emergency" trouble report is immediately responded to and a service technician is guaranteed on-site within four (4) hours of a report.

# Technical Response

## Escalation Plan

While our technical support team will work diligently to resolve issues in accordance with the Service Level Agreement requirements, we offer the following escalation points of contact as well as their responsibilities and suggested timelines to resolve issues before moving on to the next level.

Level	Escalation Point	Escalation Responsibilities
1	<p>Program Manager (Josie Boos) Office: 318-330-6040 <a href="mailto:Josie.Boos@CenturyLink.com">Josie.Boos@CenturyLink.com</a></p>	<ul style="list-style-type: none"> <li>• Notifies personnel and supervisors of strategy for problem resolution.</li> <li>• Keeps County and management involved in progress of problem resolution. Escalates as necessary.</li> <li>• Responsible for seeing problem through to resolution.</li> <li>• Contacts Manager –Operations within eight hours of missed performance standard.</li> </ul>
2	<p>Vice President – Operations and Technology (Barry Brinker) Phone: (503) 990-6466 <a href="mailto:Barry.E.Brinker@centurylink.com">Barry.E.Brinker@centurylink.com</a></p>	<ul style="list-style-type: none"> <li>• Operations VP resolves trouble/issue or escalates further if necessary.</li> <li>• Contacts additional resources (CenturyLink, Vendors, LECs, IXC, etc.) as necessary.</li> <li>• Keeps County informed of ongoing activities involving problem resolution.</li> <li>• Contacts General Manager within 24 hours if issue is not resolved.</li> </ul>
3	<p>General Manager – CenturyLink Public Communications (Paul Cooper) Phone: (913) 353-7388 <a href="mailto:Paul.N.Cooper@centurylink.com">Paul.N.Cooper@centurylink.com</a></p>	<ul style="list-style-type: none"> <li>• Escalates further if necessary.</li> </ul>
4	<p>President – Wholesale Markets Division (Bill Cheek) Phone: (318) 388-9582 <a href="mailto:Bill.Cheek@centurylink.com">Bill.Cheek@centurylink.com</a></p>	<ul style="list-style-type: none"> <li>• Final escalation point</li> </ul>

## Technical Response

### System Updates

iCON system and hardware upgrades will be provided at absolutely no cost to the County throughout the life of the service agreement. The County will be aware of all future and pending upgrades thirty (30) days prior to implementation as well as all product development projects through our Implementation Manager, Shelia Rafferty. As part of our unparalleled proactive customer support program newsletters will be released to the facility updating the staff on not only what is in-work with CenturyLink but also the industry itself. Our centralized system solution allows us to provide system updates and upgrades **in real time** without any service interruption. CenturyLink will schedule each upgrade with the facilities and train all associated County staff prior to installation.

Perhaps the most important aspect of our service approach that distinguishes us from other vendors is our commitment to delivering new technology and system improvements to our clients **as they become available**. If we develop a new feature or service that will improve the operational efficiency or investigative capabilities of our clients, we make sure they benefit from it right away. **Even if it is mid-contract, Boone County can rest assured that CenturyLink will provide system updates for your facilities as they become available—all at no cost and with no service interruption.**

### Seamless Transition from Current Provider

During system implementation, our IT developers will work with the County's current provider to convert all existing data to iCON's required format and loading into the system. iCON's open architecture allows us to accept data from the current provider in any format provided. Upon installation completion, we will perform operational testing to ensure optimal performance.

### Remote Diagnostics

The iCON system is not an on-site call processing system. The system is part of our nationwide interexchange network. **The system data centers are manned twenty-four (24) hours a day.** The network is also remotely accessible by all designated CenturyLink personnel. Our Account Coordinators and administrators are specifically charged with viewing daily call activity and testing all iCON features to ensure maximum productivity. **Remote diagnostics are used to test the entire system as well as circuits and on-site telephones.** With the network's diagnostic tools, technicians are able to make test calls from each circuit, to simulate an actual detainee using the system. This allows for all diagnostics to be completed from the Boone County Detention Facility.

Remote diagnostics is a **24/7 ongoing process** that ensures optimal performance of the system. The system can be operated remotely and is capable of reporting on diagnostic operations or other programs initiated from either local or remote control. We utilize a dedicated, point-to-point circuit that is open and communicating between the facility and our data center 24/7. We have developed as part of its preventive maintenance and diagnostic program, a real-time 24-hour / 7-day alarm and diagnostic interface. Real-time reporting is recorded into the

## Technical Response

CenturyLink project record keeping system. We have developed a statistical database and will review the Detention Facility's calling patterns to determine a set of parameters that provide thresholds to determine any irregular calling activity. When a parameter threshold is triggered, escalation and alarm will be disseminated to the administrator and additionally to the appropriate iCON staff. **CenturyLink believes that customer service begins long before any problems occur or are brought to our attention by our customers. CenturyLink is totally accountable for the detainee telephone system and has dedicated a large amount of resources and time to ensure that our system is constantly in check.**

[Begin Proprietary and Confidential Information]

For all installed equipment on and off-site we utilize Qualtech System TEAMS Remote Diagnostic Server (RDS). TEAMS-RDS collects diagnostics information gathered from the equipment, performs diagnostics, serves intelligent procedure, and manages the health of the system. Delivering of system Diagnostic Reports is done in real-time to iCON staff. **Any trouble report identified by TEAMS is automatically added to iCON's advanced Service Ticket Utility and immediately viewable by County personnel.** As discussed previously, service reports are delivered to iCON personnel via E-Mail, cellular text message, and via our self-developed AVAS alert system.

[End Proprietary and Confidential Information]

- 3.9.2 The contractor shall directly provide or arrange through the system manufacturer engineering and technical support to the County to help resolve any operational or service problems that may occur. The contractor shall provide a twenty-four-hour telephone number for emergency technical support. It is desired that the support number be toll-free.

☼ CenturyLink Response: Read, understood and will comply.

24/7/365 Live Facility Support Center

We are proud to offer the County our **domestic** 24-hour facility support 365 days a year, including holidays. We own and operate our own 24/7 facility care center staffed with live personnel that are available at all times. The 24-hour toll free number to access our correctional facility support center is **877-700-5534**.

- 3.9.3 Response Time: The contractor shall acknowledge receipt of a repair request from the County within two (2) hours of the request. The contractor shall send repair technicians on-site within twenty-four (24) hours of the request for minor system outages if the outage cannot be repaired remotely. The contractor shall send repair technicians on-site within four (4) hours of the request for major outages if the repair cannot be made remotely.

## Technical Response

3.9.3.1 A minor outage shall be defined as the inability to originate calls from less than 20% of the stations served.

3.9.3.2 A major outage shall be defined as the inability to originate calls from 20% or more of the stations served.

☼ CenturyLink Response: Read, understood and will comply.

### Guaranteed Service Request Response Times

CenturyLink **contractually guarantees** exceptional service response times.

Service Level	Resolution Time
Emergency Service Category (Priority Level 1)*	Technician on-site within <b>4hours</b>
Major Service Category (Priority Level 2)*	Immediate response, Resolved in <b>12 hours</b>
Minor Service Category (Priority Level 3)*	Immediate response, Resolved in <b>24 hours</b>

\*Each priority level is defined in detail below.

Our network is managed and maintained by its own expert network and IT personnel, 24-hours a day. All system features are monitored by live personnel as well as a state-of-the-art self-diagnostic system. Our service level response times are detailed in our standard service agreement and illustrate our dedication to providing a superior service and support for our clients. We encourage the County to call our references so our clients can confirm on our behalf our ability to respond to service and repair requests in a quick and efficient manner. The iCON system is completely redundant with architecture that encompasses call processing in our nationwide, carrier-grade telecommunications network. We will utilize dedicated circuits that will serve as an entry-way in to our network, further decreasing and chance of any major outages.

CenturyLink utilizes three (3) service level categories; Minor (Priority Level 3), Major (Priority Level 2), and Emergency (Priority Level 1). The assigned priority level will be at the sole discretion of the facilities. Generally, the categories are defined by the following:

Minor Service Category (Priority Service Level 3)  
24 Hour Resolution

A “minor” service category is assigned to any trouble report or service request that effects:

- one (1) individual detainee phone, BCD or kiosk is non-operational
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- block or free call number entry or other iCON system administrative action needed
- new or customized report needed
- additional service requested
- additional training requested

## Technical Response

All minor categories will be addressed **immediately** by our Implementation Manager with resolution provided within twenty four (24) hours of the report or request. In most instances these trouble reports and/or service requests will be handled directly by our support administrators or assigned Implementation Manager.

Major Service Category (Priority Service Level 2)  
12 Hour Resolution

A "major" service category is assigned to any trouble report or service request that effects:

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- report information not listing on iCON
- recording or live monitoring utilities non-operational or malfunctioning

All major categories will be addressed immediately by our support administrators with resolution provided within twelve (12) hours of the report. Our administrators or local technicians will coordinate any equipment replacement needed. Our Information Technology (IT) Department will address and iCON related issues that may be the cause of a Major Service Category.

Emergency Service Category (Priority Service Level 1)  
Technician on-site within 4 hours

An "emergency" service category consists of any report of 25% of detainee phones, BCDs or kiosks being disabled in *any* location or any occasion where iCON cannot be accessed by Boone County staff. An "emergency" trouble report is immediately responded to and a service technician is guaranteed on-site within four (4) hours of a report.

### Escalation Plan

While our technical support team will work diligently to resolve issues in accordance with the Service Level Agreement requirements, we offer the following escalation points of contact as well as their responsibilities and suggested timelines to resolve issues before moving on to the next level.

Level	Escalation Point	Escalation Responsibilities
1	Program Manager (Josie Boos) Office: 318-330-6040 <a href="mailto:Josie.Boos@CenturyLink.com">Josie.Boos@CenturyLink.com</a>	<ul style="list-style-type: none"><li>• Notifies personnel and supervisors of strategy for problem resolution.</li><li>• Keeps County and management involved in progress of problem resolution. Escalates as necessary.</li><li>• Responsible for seeing problem through to resolution.</li></ul>

## Technical Response

		<ul style="list-style-type: none"> <li>• Contacts Manager –Operations within eight hours of missed performance standard.</li> </ul>
2	Vice President – Operations and Technology (Barry Brinker) Phone: (503) 990-6466 <a href="mailto:Barry.E.Brinker@centurylink.com">Barry.E.Brinker@centurylink.com</a>	<ul style="list-style-type: none"> <li>• Operations VP resolves trouble/issue or escalates further if necessary.</li> <li>• Contacts additional resources (CenturyLink, Vendors, LECs, IXCs, etc.) as necessary.</li> <li>• Keeps County informed of ongoing activities involving problem resolution.</li> <li>• Contacts General Manager within 24 hours if issue is not resolved.</li> </ul>
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4	President – Wholesale Markets Division (Bill Cheek) Phone: (318) 388-9582 <a href="mailto:Bill.Cheek@centurylink.com">Bill.Cheek@centurylink.com</a>	<ul style="list-style-type: none"> <li>• Final escalation point</li> </ul>

3.9.4 Wiring Required: The contractor shall be solely responsible for providing wiring as necessary and for providing wiring maintenance at the facilities for the duration of the contract. The County must approve the wiring plans and installation.

☼ CenturyLink Response: Read, understood and will comply.

3.9.5 Assigned Account Representative: The contractor must assign an account representative main contact person who shall be responsible for ongoing account management and support to the County.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink has assigned Josie Boos to serve as the ongoing Program Manager for the facilities. Ms. Boos will work with our entire operations and support team, site administrators, and local technicians to coordinate all ongoing projects throughout the life of the contract. Josie Boos is a skilled Program Manager with over 30 years of experience in large-scale corrections and telecommunications projects and is well versed in all iCON applications and services. Ms.

## Technical Response

Boos will be the first point of contact for the County for all service, data, and implementation requests. She will also provide proactive support by monitoring call detail, rate information, branding, billing, and trouble/service tickets on a daily basis

### **Josie Boos**

#### **Program Manager**

100 CenturyLink Dr, Monroe, LA 71203

Office: 318-330-6040

[Josie.Boos@CenturyLink.com](mailto:Josie.Boos@CenturyLink.com)

3.9.6 Parts Requirements: The contractor shall maintain, directly or through the manufacturer, a complete stock of component parts for the system, both for repair and future system expansion, as may be required. Such parts shall include all electronic, electrical, and mechanical components, circuit boards, control modules and standard cabinet modules used as part of the Detainee Telephone System.

☼ CenturyLink Response: Read, understood and will comply.

3.9.7 System Expansion and Upgrade: The contractor shall provide parts, materials, labor, and support necessary for repair, expansion, and upgrade of the Detainee Telephone System when new technology becomes available for the duration of the contract.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink will provide parts, materials, labor, and support necessary for repair, expansion, and upgrade of the Detainee Telephone System when new technology becomes available for the duration of the contract.

### **System Updates**

iCON system and hardware upgrades will be provided at absolutely no cost to the County throughout the life of the service agreement. The County will be aware of all future and pending upgrades thirty (30) days prior to implementation as well as all product development projects. As part of our unparalleled proactive customer support program newsletters will be released to the facility updating the staff on not only what is in-work with CenturyLink but also the industry itself. Our centralized system solution allows us to provide system updates and upgrades **in real time** without any service interruption. CenturyLink will schedule each upgrade with the facilities and train all associated County staff prior to installation.

Perhaps the most important aspect of our service approach that distinguishes us from other vendors is our commitment to delivering new technology and system improvements to our clients **as they become available**. If we develop a new feature or service that will improve the operational efficiency or investigative capabilities of our clients, we make sure they benefit from it right away. **Even if it is mid-contract, Boone County can rest assured that CenturyLink**

## Technical Response

**will provide system updates for your facilities as they become available—all at no cost and with no service interruption.**

3.9.7.1 Repair parts shall be available for shipment on an expedited handling basis within 24 hours, 365 days per year, including weekends and holidays. The contractor shall provide a 24-hour telephone number for the handling of such orders.

☼ CenturyLink Response: Read, understood and will comply.

### **24/7/365 Live Facility Support Center**

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3.9.7.2 System upgrades, including software upgrades should be provided free of charge to the County for the life of the contract.

☼ CenturyLink Response: Read, understood and will comply.

iCON system and hardware upgrades will be provided at absolutely no cost to the County throughout the life of the service agreement.

### **3.10 Installation and Cut-Over Requirements:**

3.10.1 Complete installation of the Detainee Telephone System including installation of all hardware and software shall be performed by the contractor, at no cost to the County. The contractor shall be responsible for interfacing the Detainee Telephone System with all necessary telephone service carriers (i.e., local, long-distance, and wireless service carriers) to make the system completely operational and functional.

☼ CenturyLink Response: Read, understood and will comply.

3.10.2 The contractor shall provide and install detainee phone sets and the automated detainee call control system, and install the visitation recording sets and equipment for remote system access via the LAN and ensure that they are working properly. This installation shall be completed within ninety (90) calendar days after award of the contract.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

3.10.3 If complete system installation cannot be completed within the ninety (90) calendar days as described above, then the contractor must propose an alternate installation schedule of events. Failure to state an alternate installation time in the proposal response shall obligate the contractor to complete installation within ninety (90) calendar days. The contractor and the County may mutually agree to extend system installation time when in the best interests of the County; such amendment to the installation time shall be accomplished by a written amendment to the contract prepared by the Purchasing Office on behalf of the Sheriff's Office.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink will complete installation within ninety (90) days as requested. CenturyLink agrees that any potential extensions to the system installation timeline will be mutually agreed upon by both parties and accomplished by a written amendment to the contract prepared by the County Purchasing Office.

3.10.3.1 Any delay in the implementation of the contractor's schedule that is directly caused by the County will result in a commensurate increase in the contractor's time allowance to complete installation, however, the contractor must submit a complete and detailed written schedule of necessary additional time required to complete installation given the delay to the Detention Director and the Services Captain.

☼ CenturyLink Response: Read, understood and will comply.

3.10.3.2 The risk of loss and or damage to any equipment, hardware or materials used in the Detainee Telephone System shall be assumed by the contractor during shipment, unloading and installation of all equipment, hardware and materials.

☼ CenturyLink Response: Read, understood and will comply.

### **3.11 Call Monitoring & Recording Requirements:**

3.11.1 The Detainee Telephone System shall maintain a minimum of one (1) year of call recording online for authorized County personnel to access as needed. In addition, the system shall allow for retention and access of call recordings for a minimum of five (5) years in order to ensure the Boone County Sheriff's Department's compliance with records retention requirements.

☼ CenturyLink Response: Read, understood and will comply.

Call recordings (and voicemails if voicemail service is offered at the facility) will be stored and accessible from iCON for the life of the contractual agreement. CenturyLink will also ensure that

## Technical Response

retention and access of call recordings for a minimum of five (5) years is available in order to ensure the Boone County Sheriff's Department's compliance with records retention requirements. Call detail records (CDRs) will be stored for a minimum of ten (10) years.

3.11.2 Facility personnel must be able to search call recordings by dialed number, date, time, detainee account, or site ID.

☼ CenturyLink Response: Read, understood and will comply.

iCON users can easily search call recordings by dialed number, date, time, detainee account, or site ID. The iCON system features comprehensive Communication Detail Records (CDRs), Recording, and Live Monitoring utilities. These utilities do not require specialized equipment and can be accessed directly from the iCON System.

iCON's Call Archive Parameters Screen



Search Call Recordings by:

- Originating Phone
- Number Dialed
- Date and Time of Day
- Detainee PIN
- Site ID / Facility / Housing Unit / Pod
- Call Type
- Specific Site Location
- Inmate Watch List
- Call Length

iCON's Communication Recording Archives feature recordings from every single type of communication (calling, video visitation, video messaging, e-mail, and voicemail) attempted through our service, unless otherwise designated as non-recordable in the system. Recordings can be searched by investigator Watch List, phone unit, detainee contact (called number, visitor, messenger), date, time, call type (local, intrastate, interstate, etc.), recording ID, bill type, debit calling card, detainee PIN, or by previously designated playlist.

3.11.3 Facility personnel must be able to simultaneously listen to and record conversations.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

Every single call attempted through the iCON system is recorded unless it is designated as non-recordable (e.g. privileged attorney calls). Live monitoring is available on all live communications (again, with the exception of privileged communications). There is no affect to recording if a call is live monitored and no limit to how many calls can be simultaneously recorded and live monitored.

3.11.4 Recordings must be backed-up for archival.

☼ CenturyLink Response: Read, understood and will comply.

The iCON® platform is an detainee communication processing system designed with the flexibility to take advantage of our ultra-modern carrier-grade network. The system intelligence is located in our primary and two (2) secondary/backup network data centers. Our redundant data centers are:

- Completely secured and environmentally controlled location
- Monitored and maintained by skilled on-site technicians 24 hours a day
- Allow for the delivery of real-time, immediately available system updates/upgrades
- Ensure maximum system uptime and reliability
- Offer multi-layered redundancy to achieve high security protocols

Our Data Centers are automatically replicated on an ongoing basis, so that each center holds a complete and up-to-date database of data and content from the facility. When a detainee lifts a phone's receiver, an immediate connection is made to our carrier-grade network utilizing a direct connection from the facility to our network. The detail record for the call or visit is created and stored at the primary data center and immediately replicated to the secondary data centers.

Begin Confidential and Proprietary Information

We have secure, redundant data centers in multiple geographical locations. The primary system is located in **Cypress, California**, the secondary system is **in Las Vegas, Nevada**, and the third (a back-up of both primary and secondary systems) is located on **alternative storage servers**.

End of Confidential and Proprietary Information

### 3.12 Training and Manuals Requirements:

3.12.1 The contractor shall provide on-site training to the County staff (20-25 individuals) for system administration, operation and reporting at no additional charge to the County.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

Following system installation and at no cost to Boone County Sheriff's Department, on-site training is to be provided for all personnel who will be required to use or manage the system.

3.12.2 The training shall be scheduled at a time mutually agreeable to the contractor and the County, but the contractor must understand and agree that the decision of the County is final given the County's goal to minimize the impact of training time on shift personnel and scheduling.

☼ CenturyLink Response: Read, understood and will comply.

### Staff Training

Formal onsite training will be provided at no cost to the County shortly after system installation has been completed at locations to be determined by the County. CenturyLink will provide a customized training curriculum for the County. Training classes will be scheduled to fit the County's preference and the schedules of the personnel involved in the training. This includes the County's investigative staff and their unique training needs.

Additional and ongoing training will be provided at no cost to the County after all platform cutovers have been completed and users have had a chance to start using the systems. This training can be conducted onsite or via webinar and is offered throughout the term of the contract. The training method and the locations will be scheduled by the County by contacting our designated training coordinator. Scheduled sessions will be based on the number of new users that will require initial training. These sessions typically last approximately one hour depending on the user level of the attendees.

Our goal is to familiarize the County personnel with 100% proficiency of the systems and as such, classes will be customized to fit the participants and their assigned user roles and systems that will need training. The user-friendly nature of CenturyLink's systems makes it easy to understand and minimizes staff training time.

### Inmate Population Training

Inmate training is a simple but critical component of implementation. The CenturyLink Team's inmate training checklist includes the following:

- Placement of posters in day rooms and common areas
- New calling procedures and scheduling
- Account information for family members (need to close out previous accounts)
- Debit funding processes (no change)
- Placement of leaflets at visitation areas
- Production of pamphlet for intake packet (if desired)
- How to use the VVS

### Family & Friends Training

## Technical Response

Training for family and friends is equally as important. This is one area where the CenturyLink Team's customer service program is most valuable. Upon an inmate's first call to a number following cutover, prepaid account holders are *automatically* routed to a live representative to initiate an account – not left to call us separately on their own. Further, representatives are specially scripted to explain policies during account setup, including providing information on how to close out accounts and receive refunds from the previous provider. Of course, website updates, "how to" leaflets at visitation, and other communications further educate family members.

3.12.3 Training must at minimum cover the efficient operation of the Detainee Telephone System. All applicable training manuals and materials shall be provided by the contractor at no additional charge to the County.

☼ CenturyLink Response: Read, understood and will comply.

Part of the curriculums will include Inmate Telephone System daily system functions, reverse number look up, global numbers, monitoring, reporting, the retrieval of call recordings, scheduling and call establishment as well as emergency system shut down of all of the Inmate Communication Services. Our systems have evolved with the input and recommendations by corrections industry experts, investigators, security personnel and officers, who use the systems on a daily basis, and provide the best feedback and concepts for further improvement to the systems.

All personnel who have been identified as a user of the ITS by the County will receive the required system documentation and/or training manuals. These documents can be provided in hard or soft copy. In addition, each user will receive notification of their user names and temporary passwords with instructions on how to access each system.

Upon the release of any upgrades and/or enhancements of the Inmate Communications Systems, the County will be notified and provided documentation of the new features and functionalities contained in that release, and if the County deems training is warranted, that training will be provided at no cost. This applies to staff or investigative personnel.

3.12.3.1 The training manual shall be clearly written and illustrated to instruct employees in the proper use of all installed features, including access to reporting capabilities of the system to include financial reporting. Drawings, photographs and/or screen captures should show the location of all operator controls. This training manual shall be provided in addition to all other system manuals furnished, e.g., owner's manual, etc.

☼ CenturyLink Response: Read, understood and will comply.

3.12.4 The contractor shall provide a minimum of two (2) complete sets of the system operator's and owner's manuals to the Boone County Sheriff's Department at no

## Technical Response

additional charge in advance of system installation, in order to provide personnel with the opportunity to become familiar with the system.

☼ CenturyLink Response: Read, understood and will comply.

### 3.13 Payment Requirements

3.13.1 The proposed system shall not allow calls that will result in charges to the County.

☼ CenturyLink Response: Read, understood and will comply.

There will be no calls resulting in charges to the County.

3.13.2 The proposed system shall provide an account for detainees' families and other approved parties *to pay for phone calls*.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink's wide variety of calling options will ensure a thriving revenue stream that the County can rely on. We are uniquely set apart by our ability to allow traditional collect calling to many international destinations, as well as to all cellular telephones. And for numbers that are restricted from receiving traditional collect calls, we provide a broad spectrum of calling methods and payment options, delivering the most flexible, easy-to-use suite of calling services available in the detainee communications marketplace today. CenturyLink makes it easy for detainees and their friends and family to establish calling accounts and to keep them funded.

### Prepaid Services

Prepaid services generally represent over 80% of detainee telephone calling, so the quality of these services is of utmost importance to ensure that Boone County is receiving its optimal revenue from detainee calling. We have developed a prepaid program that we believe is the best in the industry, offering four dynamic methods of connecting detainees to their loved ones:

- Friends & Family Prepaid Collect
- Detainee Debit Card Calling
- Detainee Cardless Debit
- Direct Billing

### Friends & Family Prepaid Accounts

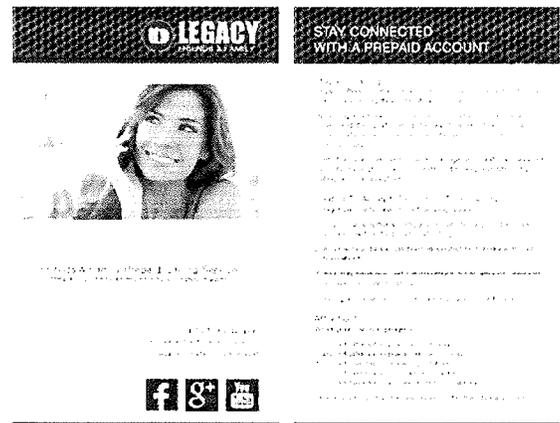
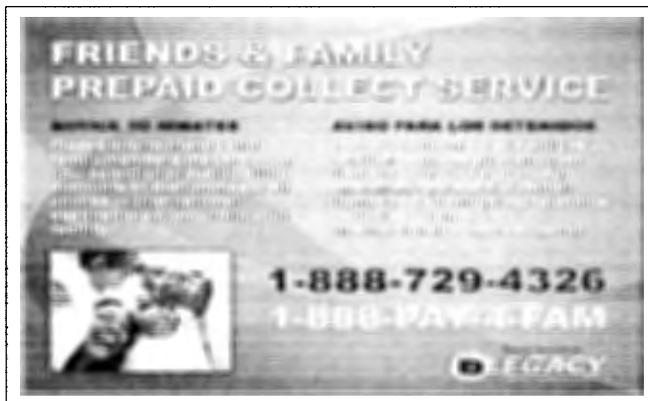
Called parties can pay in advance for collect calling time by opening a prepaid account. This offers a more cost-effective calling option for staying in touch with an incarcerated loved one, as well as an alternative option if their telephone is unable to receive traditional collect calls.

## Technical Response

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

Friends and Family can easily replenish existing accounts or check their account balance by visiting our website or by calling our toll-free customer service number, both available 24 hours a day, 365 days a year. Additionally, upon acceptance of a call from your facility an automated prompt will inform the called party of the amount of funds they have available in their account.

CenturyLink will also provide the facility with pamphlets in both Spanish and English that provide information about how to set up and replenish a Friends & Family Prepaid Account. This information will also be posted on bulletin boards and in other public areas as requested. These materials will help to generate interest in the program.



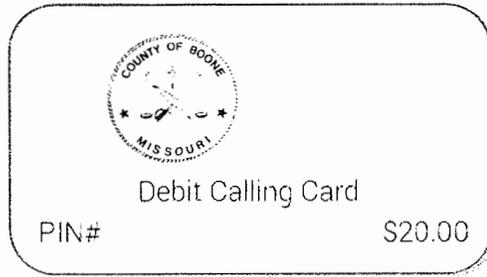
Payment options for prepaid accounts include Cashier's Check, Money Order, and:



### Detainee Debit Cards

CenturyLink will provide the Boone County Detention Facility with the ability to offer Debit Card or Cardless Debit services to its detainees for their phone calls. The cards are construction paper-based, ensuring that they cannot be utilized as a weapon.

## Technical Response



### Instructions for Use:

1. Pick up telephone handset
2. Listen for dial tone
3. Follow the voice prompts for your call processing options

Standard denominations for Debit Cards are \$5, \$10, \$20, \$30, \$40, and \$50. The facility will sell the Debit Cards via the Commissary or Cash Office and retain the funds. The facility will be invoiced for all Debit Cards purchased, and will **receive the offered commission percentage as a discount on each purchased card.**

### Detainee Cardless Debit Accounts

Cardless Debit calling can also be sold at the facility, allowing detainees to deposit any dollar denomination they may require. Detainees can pre-pay for their calling at the Commissary and have those funds applied to their assigned PIN number without the need for a card. The cost of each call will be automatically deducted from their account, which can either be created upon booking or through the Commissary. Friends and Family can also deposit money into a detainee's debit account through our website, from the Cash Office, or by Payment Kiosk. Using Debit Cards or Cardless Debit services, a detainee can call any County-approved telephone number in virtually any destination point in the world.

3.13.2 All prepaid calls should be subject to the same restrictions and features as standard detainee calls.

☼ CenturyLink Response: Read, understood and will comply.

3.13.3 The called party shall be informed of the per-minute cost of the call prior to accepting the charges, see also paragraph 3.16.1.

☼ CenturyLink Response: Read, understood and will comply.

All prepaid calls are subject to the same restrictions and features as standard detainee calls.

3.13.4 The contractor shall have a system in place that will allow detainee families and friends to set-up alternate billing methods directly with the contractor. Two of the methods the County would like to see offered follow:

3.13.5.1 The contractor should have a system in place that will allow detainee families and friends to set-up an account directly with the Contractor;

☼ CenturyLink Response: Read, understood and will comply.

## 24/7/365 Friends & Family Call Center

We own and operate our own 24/7 live customer support call center for friends and family to call with questions about any aspect of service. The center is **located in the U.S., in Cypress, California** and is staffed with personnel capable of communicating with friends and family in English, Spanish, French, German, Japanese, and Cantonese. The center is staffed with customer service personnel that are empowered to immediately resolve customer issues and complaints, set up new accounts, and update current prepaid accounts. The center is staffed with one customer service representative per ten (10) hourly inquiries ensuring that there is no hold time for callers. There is also one supervisor per twelve (12) customer service representatives guaranteeing that all issues are resolved in a timely manner. Customer service inquiries may be made by friends and family 24-hours a day, 365 days a year by calling our toll-free customer service number, (888-PAY-4-FAM), or by visiting our website ([www.legacyinmate.com](http://www.legacyinmate.com)).

## User-Friendly Friends & Family Website

Our Friends & Family website ([www.legacyinmate.com/prepaid](http://www.legacyinmate.com/prepaid)) allows for effortless account management and funding for members of the public. Friends and family can set up and fund prepaid accounts, schedule video visits (if video visitation is available at the facility), conduct video visits, and send and read emails, voicemails, and video messages.

The screenshot shows the Legacy Inmate website interface. At the top, there is a navigation bar with links for 'REGISTER', 'HELP', 'FAQ', 'CONTACT US', 'SIGN UP', and 'LOGIN'. Below the navigation bar is a large image of a woman and a child. To the right of the image is the heading 'Friends and Family Services' followed by a paragraph describing the services and a 'Sign Up Now' button. Below this is a section titled 'Core Services' which is divided into four columns, each with an icon and a brief description of a service: Prepaid Calling, Remote Video Visitation, Facility Video Visitation, and Affordable Messaging.

Friends and family can access our prepaid website to send e-mails, video messages, share photos, and conduct video visits.

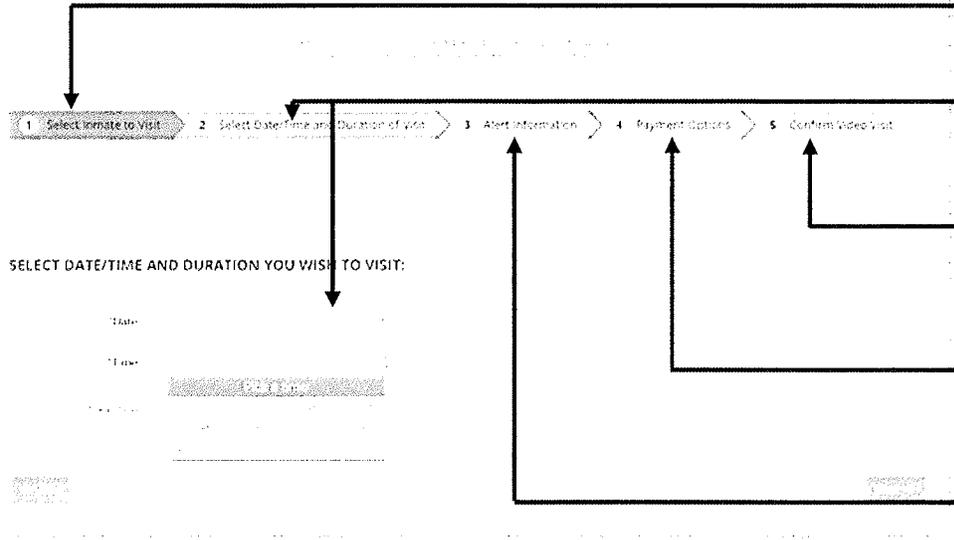
# Technical Response

## Friends and Family Video Visitation Scheduling Screen



Add funds to prepaid account

### Schedule a Remote Video Visit



Visitor selects the inmate they wish to visit with.

Visitor selects the day, time and visit duration of the visit from a list of available days and times.

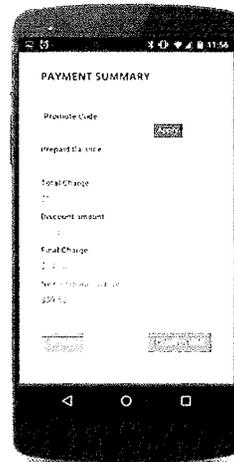
Visitor can review their scheduled visits and confirm the visit information before the visit is finalized.

Visitor pays for remote visit (if applicable). No cost for on-site scheduled visits.

Visitor can select to receive email and/or cell phone text alerts.

# Technical Response

## Accessing Our Friends & Family Website by Mobile Device



3.13.5.2 The contractor should allow customers to prepay for calls from the facility.

☀ CenturyLink Response: Read, understood and will comply.

Called parties can pay in advance for collect calling time by opening a prepaid account. This offers a more cost-effective calling option for staying in touch with an incarcerated loved one, as well as an alternative option if their telephone is unable to receive traditional collect calls.

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by iCON's automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to

## Technical Response

one of our live operators or inviting them to sign up online. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

Friends and Family can easily replenish existing accounts or check their account balance by visiting our website ([www.legacyinmate.com](http://www.legacyinmate.com)) or by calling our toll free customer service number (888-PAY-4-FAM), both available 24 hours a day, 365 days a year. Additionally, upon acceptance of a call from your facility an automated prompt will inform the called party of the amount of funds they have available in their account.

CenturyLink will also provide the facility with pamphlets in both Spanish and English that provide information about how to set up and replenish a Friends & Family Prepaid Account. This information will also be posted on bulletin boards and in other public areas as requested. These materials will help to generate interest in the program.

**FRIENDS & FAMILY  
PREPAID COLLECT SERVICE**

**NOTICE TO INMATES**  
Please inform friend and family members that they can now establish prepaid calling accounts to their home, cell phone or international destinations from within our facility.

**AVISO PARA LOS DETENIDOS**  
Informa a familiares y amigos que ahora puedes establecer cuentas de llamadas prepagadas a tu hogar, teléfono celular o destinos internacionales desde dentro de nuestra instalación.

**1-888-729-4326**  
**1-888-PAY-4-FAM**

**LEGACY**

**LEGACY**  
INMATE & FAMILY

**STAY CONNECTED  
WITH A PREPAID ACCOUNT**

How to set up a prepaid account  
How to replenish a prepaid account  
How to check your account balance  
How to use your prepaid account  
How to transfer funds to your prepaid account  
How to use your prepaid account to make international calls  
How to use your prepaid account to make cell phone calls  
How to use your prepaid account to make home phone calls  
How to use your prepaid account to make payphone calls  
How to use your prepaid account to make pay-per-minute calls  
How to use your prepaid account to make pay-per-minute international calls  
How to use your prepaid account to make pay-per-minute cell phone calls  
How to use your prepaid account to make pay-per-minute home phone calls  
How to use your prepaid account to make pay-per-minute payphone calls  
How to use your prepaid account to make pay-per-minute pay-per-minute international calls  
How to use your prepaid account to make pay-per-minute pay-per-minute cell phone calls  
How to use your prepaid account to make pay-per-minute pay-per-minute home phone calls  
How to use your prepaid account to make pay-per-minute pay-per-minute payphone calls  
How to use your prepaid account to make pay-per-minute pay-per-minute international calls

**f g+ YouTube**

Payment options for prepaid accounts include Cashier's Check, Money Order, and:



### 3.14 Equipment Requirements:

3.14.1 The contractor must provide all equipment necessary for the Detainee Telephone System that makes it a complete turnkey telephone system with complete phone service, and a web-based portal for County personnel to access system functions.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink will provide all equipment necessary for the completely turnkey iCON Detainee Communications System.

## Technical Response

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).

3.14.2 All equipment provided by the contractor for the Detainee Telephone System shall be of the highest professional quality and reliability, and comply with all applicable industry standards. All System equipment provided shall be new, in current production, and free of any defect (e.g. corrosion, scratches). Prototype or subset designs shall not be allowed. It is preferred that the System have been in production and continuous service in similar customer settings for a period of not less than one year. Any systems or system components with less than a one-year proven track record of satisfactory commercial performance shall be not acceptable under this specification.

☼ CenturyLink Response: Read, understood and will comply.

3.14.3 All System equipment shall comply with all current Federal Communication Commission (FCC) regulations.

☼ CenturyLink Response: Read, understood and will comply.

All proposed equipment is in compliance with all state and federal regulation. The registered FCC number is 1U8USA-74411-CC-T.

3.14.4 System design and construction shall be consistent with good engineering practices, industry standards and manufacturer recommendations. All installation work shall be performed in a neat, professional, and craftsman-like manner.

☼ CenturyLink Response: Read, understood and will comply.

3.14.5 The System shall have the ability, as authorized by the Sheriff's office, to monitor live or listen to previously recorded conversations from any web connection.

☼ CenturyLink Response: Read, understood and will comply.

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).

## Technical Response

3.14.6 System software shall incorporate security level features and be password protected.

☼ CenturyLink Response: Read, understood and will comply.

### iCON Data Center Firewall

The iCON system is a state-of-the-art Unified Threat Management System. This means our network hardware not only allows and rejects network traffic according to strict policy design, but also scans all traffic for viruses/malware, network intrusion attempts, denial of service attempts, and more. **The antivirus capabilities of our system outshine a vast majority of the competition because it implements a technique called “sandboxing,”** where suspect unknown malware is temporarily intercepted and reconstructed in a virtual environment and allowed to “do its thing” under security observation before the original is allowed to be forwarded to the intended recipient on the network. This is only for suspect unknown viruses; there is a threat database that is updated in our network hardware every hour for newly discovered malware and network intrusion methods so that unwanted traffic is discarded without being processed further, enhancing security and network throughput.

The majority of our network technology comes from a world-wide leader of network security technology and **was chosen because it is considered to be one of the most secure solutions in the world** while being a leader in performance in the same category. The security features of our system enable us to provide fast, reliable service with solid network protection and security measures as the foundation of our network architecture.

### User Access Levels

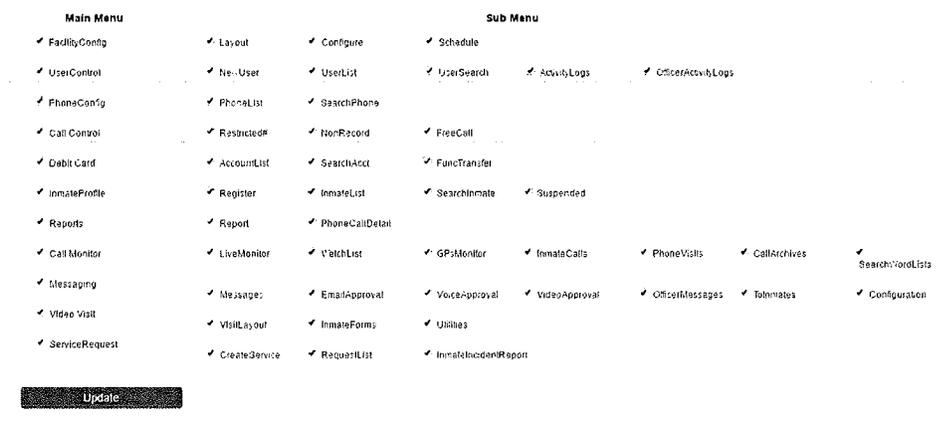
iCON only allows users with an appropriate user access level to monitor detainee communications, listen to communication recordings, modify detainee data, generate reports, etc. The system features a User List interface that allows for administrators to designate multi-level passwords ensuring that only designated personnel can view certain (targeted) information contained within the system. User lists can only be defined by Administration level passwords. Standard settings designate the following user levels:

- **Administrative:** Full access to all iCON utilities including Facility Configuration and User Levels.
- **Power User:** Full access to all iCON utilities except for the Facility Configuration and User Level utilities.
- **Investigative:** Access to communication monitoring, recording, reporting, audio mining, watch list alerts, communication details, and downloading.
- **Finance:** Access to all billing and commission reporting.
- **Data Entry:** Allows access only to manually enter PINs or other data.
- **User Defined:** Allows an administrator to create a custom user level for a user. This is perfect for a staff member that performs multiple roles that don't fit perfectly into iCON's

# Technical Response

preset user groups. For example: a staff member that does financial and data entry tasks.

These user access levels may be changed and customized in any way the County chooses. iCON's infrastructure was constructed to be infinitely scalable, allowing for continual system expansion and limitless data storage capacity.



iCON offers an extensive range of access configuration customizability. As an administrator, the user provided in this example has been granted access to every part of the system.

## User Activity Log

Within the iCON Users interface, Administrators can access the User Activity Logs which provide detailed insight into user actions, times and dates of access, files viewed and modified, workstations used, etc.

CenturyLink has given paramount consideration to maximizing system security from both inside and outside of the facility. Firewalls are diligently utilized in order to prevent any intrusion into the system. Only those IP addresses with proper authorization rights will be permitted to access the system. Network security levels can be set within the system's Facility Setup interface. Administrators can add, subtract, and define only those IP addresses they feel need to access the system.

# Technical Response

## User Activity Logs

User Name	Age/Time	Type/Activity	Utilization	Reference
Reynolds, J	4/18/2016 1:22:41 PM	Requested to Listen to Recording	Requested to Listen to Recording RecordID:18561992	89612127
Reynolds, J	4/18/2016 1:43:36 PM	Requested to Listen to Recording	Requested to Listen to Recording RecordID:18561992	89612127

Track each user and his/her system activity with the User Activity Log feature.

Each User Activity Log displays the following information to positively identify the tasks being performed by each individual User:

- User Name
- Description of User Session
- Date/Time
- IP Address of Authorized User

3.14.7 The System shall be scalable to meet the County's needs.

 CenturyLink Response: Read, understood and will comply.

The proposed iCON system features an open architecture that allows it to be fully scalable.

CenturyLink is aware that in today's world of constantly developing technology and safety challenges, many correctional facilities' needs are changing with each coming year. By choosing CenturyLink, you will be partnering with a vendor that can meet your needs both now and well into the future.

We offer a comprehensive, fully integrated package of communication services, hardware, and technology to aid in the administration and investigation of detainee communication as well as the operational efficiency of a correctional facility. Even though the County may not wish to implement these services today, CenturyLink provides them and can work with the County to implement them if and when desired, at any point through the contract term or subsequent contract terms.

CenturyLink has available six different communication services, some of which are accessed through our wall-mounted Bridge Communication Device (BCD) kiosk: calling, voicemail, video visitation, video messaging, secure messaging (e-mail), and photo sharing. Should the County wish to explore the option of implementing detainee BCD kiosks and some or all of these other communication services, CenturyLink will work with the County to grow its technology infrastructure at the pace that works best for your agency.

Our philosophy is to constantly work to improve our system and technology to meet our clients' growing needs. We genuinely take our clients' feedback into consideration when working on product development or iCON system improvement projects.

## Technical Response

**iCON is also fully scalable for integration purposes.** Utilizing iCON's adaptable and open platform, our skilled program developers and system engineers can take **any file format** supplied by a JMS or Commissary vendor and incorporate the supplied data into iCON®.

Our staff is experienced with all the standard forms of integration including vertical system integration, star system integration, and horizontal system integration, but we most commonly use Enterprise Application Integration (a.k.a. common data format). Our established integration process links applications within multiple organizations together in order to simplify and automate the processes to the greatest extent possible, while at the same time avoiding having to make comprehensive changes to the existing applications or data structures.

This flawless integration further expands the features available within iCON, allowing for enhanced commissary sales and boosted detainee call volume. The integration will enable detainees to:

- Place Commissary Orders
- Check Account/Commissary Balances
- Directly Access Trust Funds for Debit Calling
- Access Sentencing and Release Date information
- Report Grievances and make Requests (such as Medical Kites)

Also, our seamless integration of our detainee communication system with the JMS and Commissary systems allow the following integrated features to increase staff and system efficiency while reducing the facility's operating costs:

- Automatic PIN Generation during Booking
- Automatic Detainee Location and Restriction Updates (i.e. if a detainee is moved to a different cell, iCON updates once facility staff have entered the new location in the JMS)
- Expanded Calling Options
- Increased Call Completion
- Reduction in Paper Use and Data Entry

### How It Works

Upon contract award, CenturyLink will request that the JMS and Commissary vendor send us a sample data file in their system's native file format (we have no limitation of file type so this can be any file format). Our in-house program developers and system engineers then use this file to designate where the appropriate data fields populate within iCON. After this is complete, every time the JMS or Commissary system is updated, their system will automatically forward the updated information to our server and iCON will immediately update itself.

When a detainee places a commissary order over the telephone iCON sends the appropriate data to the commissary vendor via the same integration, letting them know what item and quantity has been ordered. As soon as the file is delivered, their system will be updated and

## Technical Response

send a response to iCON updating the detainee's account balance to reflect the deduction in funds for the purchased item.

3.14.8 The contractor shall provide a backup power supply for the System at no cost to the County.

☼ CenturyLink Response: Read, understood and will comply.



The detainee telephones are entirely line-powered and require no external power source. Our nationwide interexchange network is the backbone of the iCON detainee telephone system. **Emergency generators are in place at each point ensuring over 72 hours of alternate power in case of emergency.**

CenturyLink will also provide and maintain an adequate number of appropriately sized APC Smart Uninterruptible Power Source (UPS) systems with surge protection and line conditioning at no cost to the County for the life of the contract. These systems will be capable of supporting all on-site components including administrating PCs, Channel Banks, and Routers for a minimum of four (4) hours.

The APC models utilized by CenturyLink can be monitored remotely. The iCON system is largely housed off-site, so any power failure at the facilities would not affect call data – and as soon as power is restored the system would be on-line without any technical visit needed. The installed equipment will automatically reset programming upon power restoration.

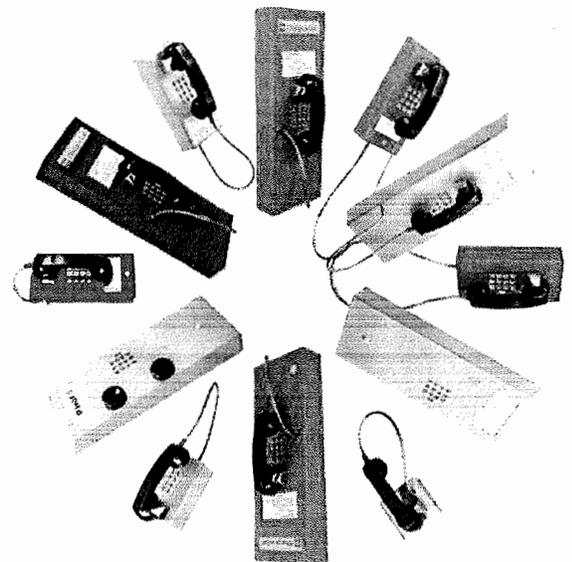
3.14.9 The contractor shall provide detainee telephones composed of durable, tamper-free equipment suitable for detention environments.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink proposes the Wintel inmate telephone and visitation telephone sets, which is the overwhelming choice for inmate facilities throughout the industry.

### Inmate Telephones Sets

The Wintel ITC7090SS Coinless Inmate Phone with volume control has been constructed to be tamperproof and is constructed of 14-gauge stainless steel and designed for indoor or outdoor inmate use. Features and benefits of the Wintel ITC7090SS are listed below:



## Technical Response

- Magnetic hook switch
- Built-in user controlled volume "LOUD" button on all inmate telephones
- Meets all ADA requirements for user controlled amplification
- Rugged vandal resistant housing especially designed for inmate use
- Sealed handset suitable for heavy use and abuse areas
- Security screws to minimize tampering
- Confidencer technology filters out background noise at the user's location
- Armored handset cord equipped with a steel lanyard (1000 lb. pull strength) and secured with vandal resistant retainers
- Hearing aid compatible and FCC registered (DF4USA-75652-CC-E)

If the County prefers a different color, size, design, etc., other Wintel models are available. Wintel manufactures the highest quality inmate telephones, handsets, visitation kits, visitation phones, private speakerphones, cord free phones, and associated replacement parts for all.

Studies done in actual inmate facilities have shown that Wintel phones and handsets have a significantly lower replacement rate (by a factor of at least 4-times) than any competing brand. This is important because it means fewer out of service conditions and less disruption to operations from technician repairs.

### 3.15 Warranty Requirements:

3.15.1 The contractor shall warrant that the Detainee Phone System shall operate in accordance with manufacturer recommendations and provide the County with reliable performance.

☼ CenturyLink Response: Read, understood and will comply.

### 3.16 FEES, RATES, COMMISSION AND BILLING REQUIREMENTS

3.16.1 The Detainee Telephone System shall have the capability to inform the called party of the call cost prior to acceptance, see also paragraph 3.13.4.

☼ CenturyLink Response: Read, understood and will comply.

3.16.2 All tariffs applicable to charged prices shall not exceed the actual tariffs as mandated by the Missouri Public Service Commission and the Federal Communications Commission (FCC) for all services.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

3.16.3 The contractor shall be responsible for the collection of charges for fraudulent or otherwise uncollectible calls.

☼ CenturyLink Response: Read, understood and will comply.

3.16.4 The contractor shall be responsible for any and all billing disputes, claims, or liabilities that may arise in regard to its provisions of services under the contract.

☼ CenturyLink Response: Read, understood and will comply.

3.16.5 The contractor's billing to called parties must include the contractor's information and a toll-free telephone number to resolve billing disputes.

☼ CenturyLink Response: Read, understood and will comply.

3.16.6 Billing Time Requirements: Billing charges shall begin at the time of the call completion when the calling party is connected to the called party and shall be terminated when either party hangs-up. Incomplete call such as network intercept recordings, busy signals, no answers, refusals of calls, answering machine pick-ups, etc. shall not be billed.

☼ CenturyLink Response: Read, understood and will comply.

3.16.7 The contractor shall understand and agree that the County reserves the right to audit performance of the contract, ***including all rates, fees and administrative costs charged or assessed under the contract. The contractor shall allow the County access to all records that the contractor maintains to support the contract.***

☼ CenturyLink Response: Read, understood and will comply.

- a. The County reserves the right to independently investigate and/or audit the prices charged by the contractor to the users of the telephone system, as well as the calculation of commissions paid to the County, at the County's expense.

☼ CenturyLink Response: Read, understood and will comply.

- b. The contractor shall maintain books, records, and documents of all costs, data, product information, allowances/credits or discounts that support pricing charged to users of the telephone system, and commissions paid to the County. The County or its authorized representative shall have the right to audit the books, records, and documents of the contractor.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

- c. The contractor shall agree to cooperate and comply with any audit required by the County as may be compelled by any office of the County including the Boone County Commission, and any other local, state, or federal government office. The County must be afforded unrestricted and unlimited access to the contractor's records related to the contract during normal working hours. The date and time of the audit investigation shall be coordinated with the contractor, and shall be scheduled to the mutual agreement of the County and the contractor, although the contractor must guarantee and provide timely access as requested.

☼ CenturyLink Response: Read, understood and will comply.

- d. Unless otherwise provided by applicable statute, the contractor from the effective date of final payment or termination hereunder, shall preserve and make available to the County for a period of three (3) years thereafter, at all reasonable times at the office of the contractor but without direct charge to the County, all its books, records, documents, and other evidence bearing on the costs and expenses of the services and supplies relating to contract work.

☼ CenturyLink Response: Read, understood and will comply.

- e. The County's right to audit and access records as referenced above shall terminate at the end of five (5) years after the contract period and/or renewals have ended.

☼ CenturyLink Response: Read, understood and will comply.

- f. The contractor shall include a "Right of Audit and Preservation of Records" clause in all subcontracts including all lower tier subcontractors for any portion of the work performed under the contract for the County. Should the contractor fail to include this clause in any such contract or lower tier contract, or otherwise fail to ensure the County's rights hereunder, the contractor shall be liable to Boone County for all reasonable costs, expenses and attorney fees which the County may have to incur in order to obtain an audit or inspection of the restoration of records which would have otherwise been available to the County from said persons under this clause. Such audit may be conducted by the County or its authorized representative.

☼ CenturyLink Response: Read, understood and will comply.

3.16.8 The contractor shall understand and agree that the phone system will be provided consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system

## Technical Response

services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.

13.6.8 (a) Note: The County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.

☼ CenturyLink Response: Read, understood and will comply.

3.16.9 The following requirements shall apply regarding the commission:

- a. Real-time commission reports must be made available through the internet detailing total commissions earned for all types of calls completed through the system.
- b. Commission: The contractor shall understand and agree that under no circumstances will the commission rate be adjusted lower than the rate agreed to at contract award, nor will the County be obligated to renegotiate any portion of the contract as a result of an increase to the commission rate.
- c. Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System.
- d. The contractor shall understand and agree that the County reserves the right to audit collection procedures and commission computations, and to terminate the contract if repeated inaccuracies in either procedures or computations are revealed.

☼ CenturyLink Response: Read, understood and will comply.

### **GENERAL OTHER TERMS OF CONTRACT:**

#### **3.17 Contract Term:**

3.17.1 The initial contract term shall be for a period of five (5) years after date of award.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

3.17.2 At the expiration of the initial contract period, the County will have the option of continuing the phone services at the same prices *and commission* for a period of two (2) additional years in one-year increments.

☼ CenturyLink Response: Read, understood and will comply.

3.17.3 Each optional year will require the County's approval for renewal.

☼ CenturyLink Response: Read, understood and will comply.

3.17.4 The contractor shall understand and agree that any contract renewal is subject to appropriations being made available and budgeted for any County Fiscal Year, i.e., calendar year.

☼ CenturyLink Response: Read, understood and will comply.

3.17.5 Following the 7<sup>th</sup> year of the contract, the contract will continue to renew at the same pricing on a month to month basis until 90 days written notice is given by either party.

☼ CenturyLink Response: Read, understood and will comply.

### **3.18 Termination of Contract:**

3.18.1 The obligation to provide further service under the terms of the resulting agreement may be terminated by the County upon ninety (90) calendar days written notice in the event of material breach by the Contractor to perform in accordance with the terms hereof, or any contract resulting from this RFP.

☼ CenturyLink Response: Read, understood and will comply.

3.18.2 In the event that the County chooses to discontinue the contract either by termination or by not extending the contract, the contractor shall remove all its equipment from County facilities without charge to the County in a prompt and reasonable manner.

☼ CenturyLink Response: Read, understood and will comply.

3.18.3 Service shall not be discontinued and equipment shall not be removed until another contractor has been acquired by the County.

☼ CenturyLink Response: Read, understood and will comply.

3.18.4 The removal of equipment and disconnecting of service process will occur during the implementation of the new system with minimal interruption of service to the

## Technical Response

County facility. The incumbent contractor must cooperate with the new contractor during the implementation of the new system.

☼ CenturyLink Response: Read, understood and will comply.

### 3.19 Transition:

3.19.1 Upon award of the contract, the contractor shall work with the County and any other organizations designated by the County to ensure an orderly transition of services and responsibilities under the contract and to ensure the continuity of those services required by the County at no additional charge to the County.

☼ CenturyLink Response: Read, understood and will comply.

3.19.2 Upon expiration, termination, or cancellation of the contract, the contractor shall assist the County to ensure an orderly and smooth transfer of responsibility and continuity of those services required under the terms of the contract to an organization designated by the County.

☼ CenturyLink Response: Read, understood and will comply.

### 3.20 Assignment, Transfer, Etc. Of Contract:

3.20.1 The contractor shall be prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its rights, title or interest therein, or its power to execute such agreement to any other person, company or corporation without the prior consent and approval in writing by the County.

☼ CenturyLink Response: Read, understood and will comply.

### 3.21 Damage and Repair Liability:

3.21.1 The County shall have no liability to the contractor for fraud, theft, vandalism/damage or loss of the Contractor's equipment inflicted by the detainees or the public. All costs associated with repair shall be the responsibility of the contractor.

☼ CenturyLink Response: Read, understood and will comply.

3.21.2 The contractor shall make all System repairs at its expense. The contractor shall make all reasonable efforts to ensure that the phone system is operational and repaired as quickly as possible, subject to requirements for repair response stated herein regarding minor and major system outages.

☼ CenturyLink Response: Read, understood and will comply.

## 3.22 Installation/Disconnection:

3.22.1 The contractor shall be responsible for all costs of installation and/or disconnection throughout the term of the contract. The contractor shall furnish and install equipment, dedicated lines and any other item necessary to make service functional.

☼ CenturyLink Response: Read, understood and will comply.

3.22.2 The contractor shall understand and agree that the incumbent contractor will remove all existing equipment, dialers and/or dedicated phone lines from the County facilities without charge to the new contractor.

☼ CenturyLink Response: Read, understood and will comply.

3.22.3 In performing all services under the resulting contract agreement, the contractor shall comply with all applicable local, state and federal laws.

☼ CenturyLink Response: Read, understood and will comply.

## 3.23 Patents and Copyrights:

3.23.1 The contractor shall hold harmless the County, its officers, and employees against all claims that machines or software supplied infringe a U.S. patent or copyright. The contractor further asserts that the equipment and software proposed do not infringe on any U.S. patent or copyright.

☼ CenturyLink Response: Read, understood and will comply.

## 3.24 Insurance Requirements:

3.24.1 The contractor shall not commence work under the contract until the contractor has obtained all insurance required herein, and such insurance has been approved by the County; nor shall the contractor allow any subcontractor to commence work until all similar insurance required of the subcontractor has been so obtained and approved. All policies shall be in amounts, form and companies satisfactory to the County which must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the County.

☼ CenturyLink Response: Read, understood and will comply.

3.24.2 **Compensation Insurance** - The contractor shall take out and maintain during the life of the contract, **Employee's Liability and Worker's Compensation**

## Technical Response

**Insurance** for all of their employees employed at the site of work, and in case any work is sublet, the contractor shall require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the Contractor. Worker's Compensation coverage shall meet Missouri statutory limits. Employers' Liability limits shall be \$1,000,000.00 each employee, \$1,000,000.00 each accident, and \$1,000,000.00 policy limit. In case any class of employees engaged in hazardous work under this Contract at the site of the work is not protected under the Worker's Compensation Statute, the Contractor shall provide and shall cause each subcontractor to provide Employers' Liability Insurance for the protection of their employees not otherwise protected.

☼ CenturyLink Response: Read, understood and will comply.

3.24.3 **Comprehensive General Liability Insurance** - The contractor shall take out and maintain during the life of the contract, such comprehensive general liability insurance as shall protect them and any subcontractor performing work covered by the contract, from claims for damages for personal injury including accidental death, as well as from claims for property damages, which may arise from operations under the contract, whether such operations be by themselves or for any subcontractor or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$2,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death.

☼ CenturyLink Response: Read, understood and will comply.

3.24.4 **Commercial Automobile Liability** – The contractor shall maintain during the life of the contract, automobile liability insurance in the amount of not less than \$2,000,000.00 combined single limit for any one occurrence, covering both bodily injury, including accidental death, and property damage, to protect themselves from any and all claims arising from the use of the contractor's own automobiles, teams and trucks; hired automobiles, teams and trucks; and both on and off the site of work.

☼ CenturyLink Response: Read, understood and will comply.

3.24.5 **Proof of Carriage of Insurance** - The contractor shall furnish the County with Certificate(s) of Insurance which name the County as additional insured in an amount as required in this contract, contain a description of the project or work to be performed, and requiring a thirty (30) day mandatory cancellation notice. In addition, such insurance shall be on occurrence basis and shall remain in effect until such time as the County has made final acceptance of the facility contracted.

☼ CenturyLink Response: Read, understood and will comply.

### 3.25 INDEMNITY AGREEMENT:

3.25.1 To the fullest extent permitted by law, the contractor shall indemnify, hold harmless and defend the County, its directors, officers, agents, and employees from and against all claims, damages, losses and expenses (including but not limited to attorney's fees) arising by reason of any act or failure to act, negligent or otherwise, of the contractor, of any subcontractor (meaning anyone, including but not limited to consultants having a contract with contractor or a subcontract for part of the services), of anyone directly or indirectly employed by contractor or by any subcontractor, or of anyone for whose acts the contractor or its subcontractor may be liable, in connection with providing these services. This provision does not, however, require the contractor to indemnify, hold harmless, or defend the County of Boone from its own negligence.

☼ CenturyLink Response: Read, understood and will comply.

### 3.26 Contractor Employee Screening and Security

3.26.1 The contractor shall comply with the following screening and security requirements

3.26.1.1. Boone County requires all employees of the contractor be subjected to a fingerprint based Criminal Background Check. The Background Check for all contractor's employees will be administered by the Boone County Sheriff Department. This portion is to be coordinated with the Boone County Sheriff Department. The contractor MUST provide pedigree information for all employees. Also, ID badges may be issued as needed by the Boone County Sheriff Department.

☼ CenturyLink Response: Read, understood and will comply.

3.26.1.2. Any subcontractors, if authorized by the Boone County Sheriff Department administrator or designee, must also pass a background check as described herein.

☼ CenturyLink Response: Read, understood and will comply.

3.26.1.3 The Boone County Sheriff Department administrator or designee shall have the sole right, at any time, to reject any such employee who it determines, in its sole discretion, poses a risk or potential risk to the security or operations of the Boone County Detention Facility or Sheriff Department.

☼ CenturyLink Response: Read, understood and will comply.

### 3.27 Records Requirement:

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3.27.1 The contractor shall keep, and require subcontractors to keep, such books and records as shall be necessary to perform the services required by the contract, and enable the County to evaluate the performance of such services. The County shall have full and free access to such books and records at all times during normal business hours of the County, including the right to inspect, copy, audit and make records and transcripts from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the County shall have access to such records in the event any audit is required.

☼ CenturyLink Response: Read, understood and will comply.

### 4. PROPOSAL SUBMISSION INFORMATION

#### 4.1. RESPONSE TO PROPOSAL

##### 4.1.1. Submission of Proposals:

4.1.1.1. Offerors must submit one (1) original, and two (2) copies of the proposal (for a total of three copies), plus an electronic copy of the complete proposal response on a removable storage drive such as a thumb-drive.

a. The offeror shall submit the proposal to:

Boone County Purchasing Department  
Attn: Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, MO 65201

b. The proposals must be delivered no later than **2:00 P.M. on Monday, October 16, 2017**. Proposals will not be accepted after this date and time. Late proposals will not be opened, and will be returned only upon request at the offeror's expense if the request is received within ten (10) business days after the opening date.

c. The package at a minimum should include a system overview and description, a detailed drawing of each user-accessed component with all controls identified, an itemized listing of the exact equipment being offered, a complete description of each applicable feature of the system, a manufacturer's data sheet for each major system component, and a complete list of options available for the system. Failure to submit a complete, detailed package shall be just cause for the proposal to be rejected as non-responsive. The offeror, by submitting a proposal response, certifies that the equipment list included with the proposal is complete and suitable for the equipment being offered, and that it is compliant with the intent of the specifications.

## Technical Response

4.1.1.2. To facilitate the evaluation process, the offeror MUST organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein. The ordering of information should follow this sequence: Letter of Transmittal, Revised Response/Pricing Page (enclosed with Addendum #1) completed with offeror contact information (page 28), followed by subsequent pages in the Response/Pricing Page section of the RFP: Experience/Expertise/Reliability information, References, Personnel Expertise, Pricing, Methodology, etc. The offeror is strongly encouraged to also respond overtly to each paragraph in the Scope of Work (section 3) with a statement indicating “Complies” or “Understood and Agreed.” Failure to comply with this requirement may compromise the subjective evaluation of the proposal and depending on the offeror’s response, may render the proposal unacceptable. When evaluating a proposal, the County reserves the right to consider relevant information and fact, whether gained from a proposal, from the offeror’s references, or from any other source. Any information submitted with the proposal, regardless of the format or placement of such information, may be considered in making decisions related to the responsiveness and merit of a proposal and the award of a contract.

- a. Each distinctive section should be titled with each individual evaluation category and all material related to that category should be included therein.
- b. The signed response page from the original RFP and all signed addenda should be placed at the beginning of the proposal.
- c. The proposal must, at a minimum, address all mandatory and desired services, equipment, materials, etc. Responses shall fully describe how the service shall be performed and what hardware/software (if any) is required at the County to access the service.

4.1.1.3. The offeror is cautioned that it is the offeror’s sole responsibility to submit information related to the evaluation categories, and that the County is under no obligation to solicit such information if it is not included with the proposal. The offeror’s failure to submit such information may cause an adverse impact on the evaluation of the proposal. Any offeror whose responses deviate from the outlined specifications may automatically be disqualified.

4.1.1.4. Offeror’s Contacts: Offerors and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, the evaluation, etc. to the buyer of record indicated on the first page of this RFP. Offerors and their agents may not contact any County employee other than the buyer of record regarding any of these matters during the solicitation and evaluation process. Inappropriate contacts are grounds for suspension and/or exclusion from specific procurements.

## Technical Response

Offerors and their agents who have questions regarding this matter should contact the buyer of record.

☼ CenturyLink Response: Read, understood and will comply.

**4.1.2. Competitive Negotiation of Proposals:** The offeror is advised that under the provisions of this Request for Proposal, the County reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:

4.1.2.1. Negotiations may be conducted in person, in writing, or by telephone.

4.1.2.2. Negotiations will only be conducted with potentially acceptable proposals. The County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial evaluation phase.

4.1.2.3. Terms, conditions, prices, methodology, or other features of the offeror's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the offeror may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.

4.1.2.4. The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the County determines that a change in such requirements is in the best interest of the entities.

☼ CenturyLink Response: Read, understood and will comply.

**4.1.3. Evaluation and Award Process:**

4.1.3.1. Boone County has selected an evaluation team to review responses and to make a formal recommendation for award to the County Commission. After determining a responsible offeror and a responsive proposal through the determination that the proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluation team will use both objective analysis and subjective judgment in conducting a comparative assessment of the proposal in accordance with the evaluation criteria stated below:

- a. **Method of Performance** - Technology offering, system features, account support team, maintenance offered, proposed project plan, scheduling, and implementation with minimal interruption of service
- b. **Experience/Expertise of Offeror**
- c. **Financial Offering:** The ability to offer a system that provides revenues sufficient to operate and maintain the system while keeping the costs to

## Technical Response

the users of the system as low as possible, *and satisfactorily compensate the County for administrative costs associated with supporting the detainee telephone system.*

4.1.3.2. After an initial evaluation process, a question and answer interview may be conducted with the offeror, if deemed necessary by the County. In addition, the offeror may be asked to make an oral presentation and demonstration of their proposed system at a designated Boone County location or other site. Attendance cost shall be at the offeror's expense. All arrangements and scheduling will be coordinated by the County.

☼ CenturyLink Response: Read, understood and will comply.

### 4.1.4. Evaluation:

4.1.4.1. Experience and reliability of the offeror's organization are considered subjectively in the evaluation process. Therefore, the offeror is advised to submit any information, which documents successful and reliable experience in past performances, especially those performances related to the requirements of this RFP.

4.1.4.2. **Qualifications Statement/References:** The offeror shall provide the following information related to previous and current services/contracts performed by the offeror's organization and any proposed subcontractors which are similar to the requirements of this RFP.

a. **Company Experience:** It is highly desirable that the offeror have a minimum of five (5) years experience providing detainee phone services. Please provide an overview of the offeror's firm, including years and nature of experience in telephone business, ownership of the offeror's company, number of years in business, total number of employees, etc.

b. **References:** Please provide a list of five government agencies/municipalities (preferably County and preferably in Missouri) for whom the offeror's company has provided the telephone system (hardware and software) proposed in the offeror's proposal response. The list should provide a contact name, e-mail address, telephone number, address, length of time using the offeror's system and a brief description of the users' equipment and software configuration.

c. **Litigation History:** The offeror should identify on-going litigation or any litigation that the offeror has been involved with over the past three (3) years regarding detainee phone system services the offeror has performed for any customer. The offeror should provide sufficient detail about the litigation to help the County appreciate the nature and status without compromising confidentiality.

## Technical Response

4.1.4.3. The offeror should submit a copy of all licenses, certifications, accreditation, and/or permits, which may be required by state, federal, and/or local law, statute, or regulation in the course of conduct of the offeror's business. If not submitted with the proposal, the County reserves the right to request and obtain a copy of any license or certification required to perform the defined services prior to contract award.

4.1.4.4. Proposals will be subjectively evaluated based on the offeror's distinctive plan for performing the requirements of the RFP. Therefore, the offeror should present a written narrative, which demonstrates the method or manner in which the offeror proposes to satisfy these requirements. The language of the narrative should be straightforward and limited to facts, solutions to problems, and plans of action.

4.1.4.5. Where the words "shall" or "must" are used, they signify a required minimum function of system capacity that will heavily impact the offeror's final response rating.

4.1.4.6. Where the words "should", "may" or "desired" are used, they signify that the feature or capacity is desirable but not mandatory; therefore, the specifications in question will possess minimal impact on the offeror's final response rating.

4.1.4.7. Each offeror must prepare a written response. The offeror is strongly encouraged to format and organize the offeror's proposal consistent with the specific RFP sections and numbered paragraphs, and respond clearly to each on an individual basis. Failure to comply may result negatively in the assessment of the offeror's proposal and failure to address any item may be interpreted as non-compliance. The offeror should address each specific paragraph and subparagraph of the Specifications by paragraph and page number as an item for discussion. Immediately below these numbers, write descriptions of how, when, by whom, with what, to what degree, why, where, etc, the requirements will be satisfied.

☼ CenturyLink Response: Read, understood and will comply.

### 4.1.5 Rejection / Withdrawal of Proposals Response:

4.1.5.1. Rejection of Proposals The right is reserved by the County at its discretion to reject any or all proposals or parts thereof. The County reserves the right to waive defects or informalities, to negotiate with Offeror's and to accept the proposal deemed to be in the best interest of the County. The County will take into account evaluation factors set forth in the RFP.

## Technical Response

4.1.5.2. Withdrawal of Proposals Proposals may be withdrawn on written request from the Offeror at the address shown in the solicitation prior to the time of acceptance.

4.1.5.3. Negligence on the part of the offeror in preparing the proposal confers no right of withdrawal after the time fixed for the acceptance of the proposals.

☼ CenturyLink Response: Read, understood and will comply.

### 4.1.6. Validity of Proposal Response:

4.1.6.1. The offeror agrees that proposal response shall remain firm for a period of ninety (90) calendar days after the date specified for the return of proposals.

☼ CenturyLink Response: Read, understood and will comply.

### 4.1.7. Terms and Conditions:

4.1.7.1. The offeror agrees that by submitting an offer, Boone County's Terms and Conditions as incorporated herein shall become part of the contract, and in the event of conflict between any terms the offeror submits, the terms and conditions of the County shall govern.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response

### 5. Response/Pricing Page

In compliance with this Request for Proposal (RFP) and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFP and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: CenturyLink

Address: 600 New Century Parkway, New Century, Kansas 66031

Telephone: Phone 913-353-7388 Fax: 720-264-8121

Federal Tax ID (or Social Security #): 59-3268090

Print Name: Paul Cooper Title: Vice President/ General Manger

Signature:  Date: 10-23-17  
FOR PAUL COOPER - VP/GEN M

E-Mail Address: paul.n.cooper@centurylink.com

**5.1 The offeror must submit pricing for services in the Pricing section of the Offeror Response Pages that follow.** As a turnkey operation, all quoted pricing for the detainee telephone services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the detainee telephone system fully operational as described herein including recording and monitoring capabilities, as well as maintenance.

☼ CenturyLink Response: Read, understood and will comply.

**5.2 Attach a Letter of Transmittal** to this page and place at the beginning of the proposal response. Included in the letter shall be a statement that identifies all materials and enclosures being identified in the proposal response. The letter of transmittal must be signed by the person who is authorized to contractually commit the offeror's organization.

☼ CenturyLink Response: Read, understood and will comply.



**DELEGATION OF AUTHORITY**

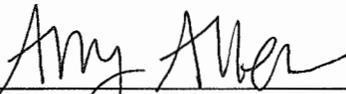
October 22, 2017

By means of this letter, I, PAUL COOPER, delegate the authority herein described to AMY ALLEN, for the period of October 22, 2017 through October 26, 2017:

1. Approval and execution of any contractual matter on behalf of CenturyLink Public Communications, Inc.

I certify that I am authorized to delegate such authority.

By:   
\_\_\_\_\_  
Paul Cooper  
VP/GM  
CenturyLink Public Communications, Inc.

To:   
\_\_\_\_\_  
Amy Allen  
Senior Technical Writer  
CenturyLink Public Communications, Inc.

## Technical Response

5.3 **Provide a contact person** who will be responsible for coordinating the efforts and personnel of all parties involved in the response, to include, but not be limited to, oral presentations, demonstrations, site visits and responses to request for clarification, if any. Provide the following:

Name: Paul Cooper

Organization: CenturyLink

Address: 600 New Century Parkway New Century, Kansas 66031

E-mail: paul.n.cooper@centurylink.com

Phone Number: 913-353-7388

Fax: 720-264-8121

## Technical Response

### 5.4 OFFEROR'S EXPERIENCE, EXPERTISE AND RELIABILITY

The evaluation of the offeror's proposed experience and reliability shall be subjective based on the ability of the offeror to perform the requirements stated herein. Therefore, the offeror should present detailed information regarding their experience and reliability. The following information should be provided by the offeror in order to assist Boone County in the evaluation of the offeror's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Describe the offeror's history in providing detainee phone service and address the number of years(s) the offeror has been providing professional detainee phone services in the Missouri and national markets:

#### **Inmate Telephone Systems and Service Qualifications**

As a division of the third largest telecommunications company in the United States, CenturyLink Public Communications (formally Embarq Payphone Services Inc) has the financial resources to support our accounts and has over **25 years** of Inmate Telephone Systems (ITS) implementation and service experience.

- We currently provide inmate telephone services for approximately 300,000 inmates nationwide.
- Our Project Team has almost 300 years of combined telecommunications experience with inmate services, and has demonstrated the ability to understand our customer's issues and have creatively adapted our approach to address their issues and meet their needs.
- CenturyLink's support staff is experienced, fully trained, and **certified** on the proposed ITS.
- A commitment to service that means more revenue, lower rates, and fewer complaints.
- Partner with "Best-In-Class" corrections markets companies who specialize in advanced state-of-the-art innovative solutions and technologies.

#### **Corporate Qualifications**

CenturyLink, Inc. is the third largest telecommunications company in the United States (45,000 employees, \$18B in annual revenues), is an S&P 500 company and ranked at number 150 on the Fortune 500 list of America's largest corporations. It is recognized as a leading network and IT provider by technology industry analyst firms. Some of the capabilities and resources that set us apart are:

- Nationwide 300,000 mile fiber optic network
- 56 class 3 and 4 data centers

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- One of two commercial service providers authorized by Department of Homeland Security to provide Enhanced Cybersecurity Services
- The company is a global leader in cloud infrastructure and hosted IT solutions for enterprise customers
  - 2015 Company of the Year Award for the North American Cloud Industry – *Frost & Sullivan*
  - 2015 Data Center Excellence Award for Operational Excellence, Innovation, and Certification Achievements – *TMC InfoTECH Spotlight*
- CenturyLink provides data, voice and managed services in local, national and select international markets through its high-quality advanced fiber optic network and multiple data centers for businesses and consumers.

Address any litigation the offeror is currently involved in or has been involved in over the past three (3) years regarding delivery of detainee phone services:

CenturyLink Public Communications, Inc. ("CPCI") provides the following list of litigation matters it is currently involved in or has been involved in during the past three (3) years where there was an issue that included the delivery of detainee phone services.

Travers Arthur Julius Greene v. Nevada DOC and CenturyLink, et al, (U.S. District Court for the District of Nevada, Las Vegas Division, No. 3:17-CV-00366). A pro se inmate on death row in the state prison in Ely, NV claims the defendants violated the federal wire fraud statute (18 USC Sect. 1343) by terminating inmate-originated calls early and then charging for a longer connection time. Case was filed in June, 2017 so little activity has occurred to date. CenturyLink denies all claims and any wrongdoing.

Cynthia Sue Lane et al. v. State of Texas – Department of Criminal Justice, et al. (Texoma/Kodiak Construction Case No. 25756 Walker County, Texas). Todd Hughes, an inmate housed by the Texas Department of Criminal Justice, was electrocuted in October 2009 as he stood in water from a ruptured water pipe that came in contact with an electrical cabinet and associated wiring and circuit panel. CenturyLink was not the owner of the electrical cabinet or associated wiring and circuit panel, and it had hired companies to perform electrical installation work for the telephone system. The case was settled and the matter was closed in July, 2015.

Nathaniel Jones III v. Century Link Inc. et al., (58<sup>th</sup> Judicial District Court, State of Texas, No. A-0196640). A pro se inmate of a Texas state prison filed suit against CenturyLink, Shawn Tech Communication, Inc., and Facility Solutions Group, Inc., alleging that when CenturyLink's contractor installed a prison phone system, it hit a gas line and he was injured by the natural gas. CenturyLink tendered to its contractor who accepted. Settlement attempts have been made, with no response by the inmate. The defense prevailed on motion for summary judgment and the matter was closed in March, 2016.

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Evans and Witherow v. Inmate Calling Solutions, et al., (U.S. Dist. Ct. NV, Case No. 3:08-CV-0353). Plaintiffs allege that attorney-client privileged phone calls between inmate Witherow and his counsel were improperly intercepted. In November 2009, the court dismissed the claims against Embarq Payphone Services, Inc. (now known as CPCI). Plaintiff filed several motions for leave to file an amended complaint, for reconsideration of the dismissal, and to have the magistrate judge removed from the case. These motions were denied. Plaintiffs' claims against remaining defendants were tried, and judgment was entered against plaintiffs on those claims. Plaintiffs filed an appeal in 2013 as to all claims and all defendants. In December, 2015, the 9<sup>th</sup> Circuit affirmed the district court's dismissal of claims against Embarq and CenturyLink. In April, 2016, Witherow filed a petition for certiorari to the United States Supreme Court and in May, 2016, the Court dismissed his petition, citing its rule regarding frivolous and malicious filings. The matter was closed in August, 2016.

Randolph v. State of Nevada, (U.S. Dist. Ct. D. NV, Case No. 3:13-cv-00148-RCJ-WGC). An inmate of a Nevada state prison filed suit against the Nevada Department of Corrections and several affiliates of Embarq Payphone Services, Inc. (now known as CPCI) alleging that six telephone calls between him and his attorney were improperly recorded after his attorney failed to respond to an audit of inmate-designated attorney phone numbers. The matter was removed to federal district court, and a motion to dismiss Embarq Payphone Services, Inc. was granted. Subsequently, and before any appeal was perfected, the matter was settled and was closed in March, 2015.

Jean Hitchcock v. Qwest Corporation, et al., (Taos County New Mexico District Court, No. D820-CV-2014-00125). The property owner filed suit in March, 2014, seeking to have Qwest Corporation's facilities ejected from her property, and also included a count seeking Quiet Title to the property. We believe CPCI was named as a defendant in this matter because it is authorized to do business in New Mexico and the plaintiff sued every CenturyLink company that she could. We do not believe CPCI is a proper party defendant in this case, but CenturyLink's counsel has not yet moved to have CPCI removed from the list of defendants.

In addition to the cases listed above, CenturyLink Public Communications, Inc. was recently named as one of several defendants in a series of putative class action cases seeking damages for activities related to CenturyLink's consumer sales practices. The plaintiffs in these various cases, which are listed below, have sued every CenturyLink entity they can find, including CPCI, and CenturyLink will be seeking to have CPCI dismissed as a party defendant on the grounds that it is not engaged in the sale of communications services to consumers, and thus is not a proper party defendant. Because these cases were only recently filed, there has been little activity on them to date.

### PUTATIVE CLASS ACTION CASES ALLEGING DAMAGES FROM DEFENDANTS' CONSUMER SALES PRACTICES:

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- Anna M. Williams, et al v. CenturyLink, Inc., et al., (U.S. District Court for the Southern District of Alabama, No. 1:17-cv-00384-KD-MU). Case filed August 25, 2017.
- Luke Roger Allison, et al v. CenturyLink, Inc., et al., (U.S. District Court for the District of Arizona, Phoenix Division, No. 2:17-cv-02162-GMS). Case filed July 7, 2017.
- Andy Chavez, et al v. CenturyLink, Inc., et al., (U.S. District Court for the District of Colorado, Denver Division, No. 1:17-cv-01561-MSK). Case filed June 28, 2017.
- Francisco Carrillo, et al v. CenturyLink, Inc., et al., (U.S. District Court for the Middle District of Florida, No. 6:17-cv-1309-CEM-KRS). Case filed July 17, 2017.
- Peter Denniston, et al v. CenturyLink, Inc., et al., (U.S. District Court for the Southern District of Iowa, No. 3:17-cv-00052-RP-SBJ). Case filed August 17, 2017.
- Craig McLeod, et al v. CenturyLink, Inc., et al., (U.S. District Court for the Central District of California, No. 2:17-cv-04504 SJO (PLAx)). Case filed June 19, 2017.
- Victor Romero, et al v. CenturyLink, Inc., et al., (U.S. District Court for the District of Minnesota, Minneapolis Division, No. 0:17-cv-2832-MJD-KKM). Case filed June 21, 2017.
- Susan Miller, et al v. CenturyLink, Inc., et al., (U.S. District Court for the Western District of Wisconsin, No. 3:17-cv-00648-WMC). Case filed August 18, 2017.

### OFFEROR'S REFERENCES

Organization Name: Cole County Missouri

Contact Name: Tim Harlin

Contact's Title: Lt. Jail Superintendent

City: Jefferson City State: MO

Telephone Number and Area Code: 573-635-7070

E-mail Address: tharlin@colecourt.com

Description of Equipment/Services Furnished:

Provided service since July 13, 2012

- Enforcer ITS installed July 2012

## Technical Response

- PIN-self enrolling
- Implemented Video Visitation February, 2016
- Video Visitation KIOSK interface with Keefe Commissary March, 2016
- Video Visitation KIOSK interface with Keefe for Offender Communication September, 2016
- Extraction Keefe Commissary file for Jail Management System.

Availability of Reference: M-F 8am to 5pm

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Organization Name: Jackson County Detention Center

Contact Name: Laura Scott

Contact's Title: Manager of Services

City: Kansas City

State: MO

Telephone Number and Area Code: 816-881-4232

E-mail Address: ljscott@jackson.gov.org

Description of Equipment/Services Furnished:

Provided service since February 1, 2012

- Enforcer ITS installed March 2012
- PIN-self enrolling
- March 2012 Extraction-Keefe Commissary File for jail management information
- Interface with Keefe Commissary
- Interface with Keefe automated debit per call through trust account
- N/A Voice print biometrics
- Secure and approved system User Remote Access
- On-line call recording storage for the life of contract

Availability of Reference: M-F 8am to 5pm

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Organization Name: Platte County Missouri Sheriff's Office

Contact Name: Captain, Joseph King

Contact's Title: Division Commander

City: Platte City

State: MO

Telephone Number and Area Code: 816-858-3463

E-mail Address: Joseph.king@plattesherriff.org

Description of Equipment Furnished:

## Technical Response

Provided service since May 15, 2014.

Special features:

- Enforcer ITS installed
- Extraction File for County's Jail Management System
- Interface with Trinity Commissary
- PIN automation
- Call Center Debit implemented.
- Pre-Call Voice print biometrics
- Secure and approved system User Remote Access
- On-line call recording storage for the life of contract
- Provide phone visitation

Availability of Reference: M-F 8am to 5pm

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Organization Name: Salt Lake County Utah

Contact Name: David Sperry

Contact's Title: Captain

City: Salt Lake City

State: Utah

Telephone Number and Area Code: 385-468-8766

E-mail Address: dsperry@slco.org

Description of Equipment/Services Furnished:

- Enforcer ITS installed Sept 2010
- PIN automated
- Oct 2010 Interface with CTS jail management system
- Oct 2010 Interface with Keefe Commissary
- Oct 2010 Automated debit calling
- Jan 2011 Voice print biometrics
- Secure and approved system User Remote Access
- On-line call recording storage for the life of contract.

Availability of Reference: M-F 8am to 5pm

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Organization Name: Pasco County Sheriff's Office

Contact Name: Rachel Williamson

Contact's Title: Captain

# Technical Response

City: Land O'Lakes

State: Florida

Telephone Number and Area Code: 813 235-6005

E-mail Address: rachael.williamson@pascosheriff.org

## Description of Equipment/Services Furnished:

- Enforcer ITS installed Jun 2009, upgraded from CAM
- PIN automated
- Jun 2009 Interface with Tiburon jail management system
- Jun 2009 Call Center Debit Calling
- No Commissary Interface for Debit Calling (Keefe)
- Sep 2009 Voice print biometrics
- Secure and approved system User Remote Access
- On-line call recording storage for the life of contract

Availability of Reference: M-F 8am to 5pm

## 5.5 PERSONNEL EXPERTISE SUMMARY

The offeror should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform under the detainee telephone service contract for the County. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

**(Also attach resumes for key personnel)**

Personnel	Background and Expertise of Personnel
1. <u>Josie Boos</u> (Name)	<u>Program Manager</u> (Title)
2. <u>Shelia Rafferty</u> (Name)	<u>Implementation/ Project Manager</u> (Title)
3. <u>Barry Brinker</u> (Name)	<u>Vice President – Operations and Technology</u>

## Technical Response

(Title)

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4. Steve Depasse

(Name)

Director - Implementation

(Title)

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5. Paul Cooper

(Name)

Vice President/ General Manager

(Title)

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## Technical Response

### Josie Boos – Program Manager CenturyLink

<b>Education and Qualifications:</b>	BA, Science in Business/Management - University of Phoenix  Correctional markets program account management.  Management of Public Communications portfolio of communications products with strong emphasis on national and strategic accounts.
<b>Total Years of Related Work Experience:</b>	39 years experience in Telecommunications 16 years experience in CenturyLink's Public Communications business

**Recent Relevant Experience:**

**(Begin Date to Current Date, Company Name, Position Held and Summation of Duties):**

[September 2005 – Present] Project/Program Manager II - Manage all inmate telephone service business for one State correctional account, three Juvenile correctional complexes, one State Hospital site, and four County correctional facilities that consist of 11,759 inmates, 1,290 inmate phones.

[August 2005 – August 2006] - In parallel of project/program manager duties, managed the Inmate Bad Debt Call Center in parallel with project management duties.

[March 2001 – August 2005] Supervisor Sales Support / Service - Managed a multi-state sales and service operation team for Sprint Payphone Services, Inc.

[December 1999- March 2001] Branch Manager – Public Access - Responsible for implementing sales and marketing programs that resulted in the profitable market development and expansion of public access and service for 18 states within the Western Branch region.

## Technical Response

### Shelia Rafferty - Implementation Project Manager © CenturyLink

<b>Education and Qualifications</b>	<p>Tyler Junior College – Tyler, Texas                  John Tyler High School – Tyler, Texas                  40+ on the job training classes through Company</p> <p>Forty-one years of telecommunications experience. Trained on five (5) different Inmate Monitoring and Recording Platforms. Project Implementation Manager for 9 State Installations and on 15 County Installations. On-site Technician and Administrator for Jackson County Jail for approx 2 years. Completed 300+ facility surveys.</p> <p>Master Certificate in Project Management                  PREA                  Train the Trainer</p>
<b>Total Years of Related Work Experience:</b>	<p>41 years experience in telecommunications                  17 years – Managing the Implementation and installation of Inmate Phone Systems and other related products.</p>
<p><b>Recent Relevant Experience:</b>                  (Begin Date to Current Date, Company Name, Position Held and Summation of Duties):</p> <p>[2001-present] – CenturyLink Public Communications/Embarq/Sprint - Implementation Project Manager</p> <p>Manage on-site installation and implementation of inmate systems and other related products. Order and track equipment, Track Projects, Test system, voice verification enrollment, site surveys, pricing,</p> <p>On-Site Technician and Administrator Jackson County Jail 2 years</p> <p>[1999 to 2001] – Sprint Corp - Corrections Market Product Analyst</p> <p>Inmate Commissions, Bad Debt, Ordering Network and Special Projects</p> <p>[1989 to 1999] – Sprint Corp - Business Service Representative</p> <p><i>Service Order Entry; Manage Refunds, Special Projects, etc.</i></p>	

## Technical Response

*[1986 to 1989] – Sprint Corp - Office Assistant II - Administrative Services*

*Designed Automated Inventory System, Process Customer Payments, etc*

*[1980 to 1986] - Office Assistance II - Operations Systems*

*OSP Studies, Collect Housing /Energy/Oil/Unemployment data, Analyze Industrial News, Research housing starts, real estate development, Develop 5 year forecast for PUC reports*

*[1975 to 1980] – United Telephone of Texas - Office Assistant II*

*Traffic Studies, Construction & Plant, Special Projects*

# Technical Response

**Barry Brinker**  
**Vice President – Operations and Technology**  
**CenturyLink**

<b>Education and Qualifications</b>	<p>BS, Information Technology – University of Phoenix</p> <p>Extensive training on project management, implementation techniques, contract negotiation, customer service, managing vendor relationships and network design (SONET, LAN/WAN, DWDM)</p> <p>Broad range of experience to include overall management of CenturyLink's Operations team with the following responsibilities:</p> <ul style="list-style-type: none"> <li>• Management of the following teams:             <ul style="list-style-type: none"> <li>• Program Managers</li> <li>• Call Center - Help Desk</li> <li>• Field Service Technicians</li> <li>• Technical Support Technicians</li> <li>• Customer Service and Billing                 <ul style="list-style-type: none"> <li>◦ Contract negotiation and compliance with both customers and subcontractors</li> <li>◦ Vendor Management</li> <li>◦ Implementation of all products agreed to during contract negotiations</li> </ul> </li> </ul> </li> </ul> <p>SLA reporting and overall contract compliance</p>
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<b>Total Years of Related Work Experience:</b>	<p>17 Years experience in Telecommunications providing leadership, vision and direction for technology based corporations across North America. Managing all aspects of Operations and Customer Service - Implementation, Account Management, Field Operations, Engineering, Network Planning, Project Management, Procurement and Technical Support - 10 Years experience in Inmate Call Control Systems Management</p>
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**Recent Relevant Experience:**  
**(Begin Date to Current Date, Company Name, Position Held and Summation of Duties):**

***CenturyLink, Salem, Oregon***  
**[2008 – Present]**

## Technical Response

### ***Vice President of Operations and Technology***

Responsible for a National Field Service Operations organization of Program Managers, Technical Support Technicians, Field Service Technicians, Project Managers, Installers and Dispatchers with an emphasis on customer service.

Achieved through strategic domestic partnerships  
Extensive vendor management and contract negotiation  
Develop and closely manage expense, capital and headcount budgets  
P&L accountability

### ***Securus Technologies, Irving, Texas***

[2006 - 2008]

#### ***Director Field Services***

Responsible for a National Field Service Operations organization of 200+ Field Engineers, Field Service Managers, Installers, Project Managers and Dispatchers with an emphasis on customer service. Developed and closely managed expense, capital and headcount budgets with an annual operating budget of over \$18M. Negotiated and managed 3<sup>rd</sup> party contracts as required to meet business needs.

### ***Fujitsu Network Communications, Richardson, Texas***

[1999 – 2006]

#### ***Manager Professional Services***

Responsible for a Technical Support organization of Field Engineers who provided Professional Services such as Engineering, Installation, Turn Up and Maintenance of all Fujitsu and OEM equipment in the US, Canada, Mexico and Puerto Rico. Developed and managed expense, capital and manpower budgets with P&L responsibility of revenue streams in excess of \$3M annually.

## Technical Response

### Stephen DePasse – Director, Implementation CenturyLink

<b>Education:</b>	M.T. Telecommunications, University of Denver B.S. Computer Information Systems, Oklahoma Christian University
<b>Qualifications:</b>	Leads post-sales implementation and engineering teams dedicated to State and County corrections markets  2 years experience in offender communications 23 years experience in telecommunications engineering, operations and projects  2015-present, Overseeing implementations, training and engineering for corrections customers. Computing and network/telecommunications projects since 1994.  Implementation planning, management and execution.
<b>Certifications:</b>	None
<b>Total Years of Related Work Experience:</b>	2 years experience in offender communications 23 years experience in telecommunications engineering, operations and projects

**Recent Relevant Experience:  
(Begin Date to Current Date, Company Name, Position Held and Summation of Duties):**

CenturyLink, Director-Implementation:

2015-present, Overseeing implementations, training and engineering for corrections project customers

Xcel Energy, Sr. Systems Engineer (Supervising):

2011-2015, Network architecture, engineering, projects and operations

CenturyLink, Sr. Staff Engineer and Manager:

1994-2011, Network architecture, engineering, projects and operations

## Technical Response

<b>Paul Cooper - General Manager / Vice President CenturyLink</b>	
<b>Education and Qualifications</b>	BA, Economics – Bates College MA, Economics – University of Rochester MBA, Analytical Finance and Marketing – University of Chicago Broad-ranging experience including network design, program management, technical sales & support, Federal/State Regulatory advocacy and expertise.
<b>Total Years of Related Work Experience:</b>	17 years experience in telecommunications 10 years leading CenturyLink's Public Communications business
<b>Recent Relevant Experience: (Begin Date to Current Date, Company Name, Position Held and Summation of Duties):</b>	
[2006-present] General Manager – CenturyLink Public Communications	
[2003-2006] Sr. Director-level positions – Sprint Corp. Positions in staff operations, consumer product management, operational stand-up of Embarq Corp. (spin-off from Sprint)	
[1999-2003] Executive Development Program – Sprint Corp. Various Sr. Manager-level positions in technical sales & support, network design, finance	
[1995-1998] Associate Economist – Federal Reserve Bank of Kansas City.	

**5.6 In addition it is highly desirable that the offeror provide the following information related to the offeror's Experience, Expertise and Reliability:**

1. It is highly desired that the offeror describe any billing disputes the offeror's company has with any users of the system for any reason; the offeror should provide enough detail without disclosure of the user's private information. The detail the County seeks should help the County understand the nature of the dispute, and the time it took to resolve it.

☼ CenturyLink Response: Read, understood and will comply.

2. The offeror should provide a list of customers who have experienced detainee telephone system outages lasting longer than 24 hours while under a service agreement with the offeror:

## Technical Response

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink has no system outages lasting 24 hours or longer.

1. The offeror should describe all patents the offeror's company holds or has developed, and in addition, should supply patent information for proposed equipment or software, where applicable to the detainee telephone system:

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink does not hold any patents.

2. The offeror should describe all patents the offeror's company holds or has developed, and in addition, should supply patent information for proposed equipment or software, where applicable to the detainee telephone system:

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink does not hold any patents.

### 5.7 RESPONSE/ PRICING PAGE

*The offeror must respond to both Part One and Part Two Pricing.*

*Part One Pricing: Administrative Costs Recovery Commission And Associated Rates*

*Pricing submitted under Part One shall be paired with provision of an Administrative Costs Recovery Commission paid to the County. The offeror's pricing shall be based on the following information:*

*Note: For purposes of preparing proposal responses, the County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.*

*The County spends approximately \$10,000.00 per year supporting the detainee phone system's operation at the County Detention Center. This includes the costs of management of the system at the detention facility as well as responding to outside requests. It does not include costs associated with tasks/requests of the Prosecuting Attorney's Office, or other detective/investigator costs.*

*Pricing submitted shall be for provision of a phone system consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.*

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

## Technical Response

No additional fees or pricing in excess of those shown below may be charged to users/called parties/detainees in excess of the pricing identified below **except** for the addition of applicable and current local, state, and federal fees/taxes. The offeror must understand and agree that if awarded the contract, no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees.

Proposal Preparation Costs: Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e. fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

### *Line Item 1: Administrative Costs Recovery Commission:*

*The offeror shall quote a single, firm and fixed commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:*

☼ CenturyLink Response: Read, understood and will comply.

**17.0%**

We understand the County is interested in \$10,000 per year cost recovery, and that this amount should be "translated" into a commission percentage for the purposes of our financial offer.

We estimate that – after taking all factors into account such as the much lower \$0.04 rate per minute and the increased call volume that will result – a commission of 17% will provide the \$10,000.00 per year in cost offset BCSO is seeking under this contract.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
2.	<b>Pre-paid Call / Debit Call</b>	Minute	<b>\$0.04</b>

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The Price per minute for

## Technical Response

pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

The proposed rate above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
3.	<b>Collect Call</b>	Minute	<b>\$0.04</b>

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

The proposed rate above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
4.	<b>Automated Payment Fee Per Transaction</b>	Each	<b>\$3.00</b>

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 4. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

The proposed fee above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
5.	<b>Live Agent Fee Per</b>	Each	<b>\$5.95</b>

## Technical Response

	<b>Transaction</b>		
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**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate “N/A” or “\$0.00” for line item 5. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

The proposed fee above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
<b>6.</b>	International Call	Minute	<b>\$0.50</b>

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee’s per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

## Technical Response

### ***Part Two Pricing: Offeror-Defined Commission And Associated Rates***

***The offeror is encouraged to provide one other commission/rate pairing that the offeror believes may benefit the County. All costs to the County and to users of the telephone system must be specifically identified/priced or built into quoted pricing.***

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

***All additional fees/pricing in excess of those shown below and in addition to applicable and current local, state, and federal fees/taxes must be identified in the proposal. The offeror must understand and agree that if awarded the contract, and in the absence of any other fees or charges being identified below, then no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees in the resulting contract.***

Proposal Preparation Costs: Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e. fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

#### ***Line Item 7: Commission:***

***The offeror shall quote a commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:***

60.2%

As a secondary offer with somewhat higher rates, CenturyLink quotes a 60.2% commission at the \$0.10 rate presented below. Importantly, this commission is payable on ALL calling (as in

## Technical Response

Part One Pricing above), without deduction, and provides BCSO with attractive cost recovery even at these very reasonable calling rates.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
<b>8.</b>	<b>Pre-paid Call / Debit Call</b>	Minute	<b>\$0.10</b>

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

The proposed rate above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
<b>9.</b>	<b>Collect Call</b>	Minute	<b>\$0.10</b>

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

The proposed rate above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
<b>10.</b>	<b>Automated Payment Fee Per Transaction</b>	Each	<b>\$3.00</b>

## Technical Response

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 10. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

The proposed fee above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
11.	<b>Live Agent Fee Per Transaction</b>	Each	<b>\$5.95</b>

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 11. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

The proposed fee above is fully compliant with these requirements.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
12.	International Call	Minute	<b>\$0.50</b>

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

The proposed rate above is fully compliant with these requirements.

# Technical Response

## 5.8 METHODOLOGY

1. **Implementation Plan:** The offeror should sequentially list and briefly describe the tasks or events proposed for the implementation of the required services. The offeror shall submit a complete and detailed schedule of the time-frame required for installation, utility coordination, training, cut-over and testing. The system must be installed in a manner and under a time-frame designed to minimize disruption of the normal functioning of the Boone County Detention Facility.

If no tasks or events are required, the offeror should provide a statement of readiness. For each task/event identified, the offeror should identify the number of days required to complete the task/event, the personnel proposed to perform the task/event, and the number of work hours for each person.

The implementation plan should identify their proposed approach to implement all aspects of the hardware and software identified herein. Specifically, the offeror should minimally address the implementation of the phones, wiring, managed access system, and geo-fencing technology.

"Completion Day" should be specified as a certain number of days from date of contract award until completion of the specific task and should be expressed as calendar days, not specific dates. "Assigned Personnel" should be identified by name rather than project title unless such personnel are yet to be hired. "Workhours" should indicate that time each assigned person will spend on the specific task.

☼ CenturyLink Response: Read, understood and will comply.

Task or Event	Completion Day	Assigned Personnel	Work-hours
Contract Awarded (estimate)	1	N/A	N/A
Conference Call	3	Boone County / CTL	2 hrs
Site Survey	8	Shelia Rafferty	4 hrs
System Requirements Review and Finalize System Design	9	Boone County / CTL	4 hrs
Finalize Implementation Plan	10	Shelia Rafferty	2 hrs
Order Equipment and Services	11	Shelia Rafferty and Jennifer Roubique	8 hrs
Request/Process Critical Information	17	Steve Depasse	2 hrs
Delivery of Equipment To Sites	40	N/A	N/A

## Technical Response

Phase I Training - Webinar (via internet)	38	Kristi Dean and Edward Mendez	4 hrs
Install Inmate and Visitation Phones	45	Shelia Rafferty and Technician	16 hrs
Cutover and Phase II Training	45	Shelia Rafferty and Technician	4 hrs
Phase III Training	58	Kristi Dean	4 hrs

- Address the offeror's ability to provide a Detainee Telephone System that integrates with the County's computer system and allows for Sheriff's Office personnel's ability to monitor and record calls.

☼ CenturyLink Response: Read, understood and will comply.

iCON<sup>®</sup> is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox).

- Also address programming features that the proposed Detainee Telephone System has:

☼ CenturyLink Response: Read, understood and will comply.

iCON offers correctional agencies complete control over the detainee communications occurring at its facilities.

iCON Overview		
Security Functions	Administrative Functions	Investigative Functions
<p><b>Voice Biometrics:</b> Verifies the identity of detainees on communications by comparing the audio input to a database of detainee voiceprints.</p> <p><b>AccuPIN:</b> Alternate method of verifying detainees' identities on communications to guard against PIN sharing and PIN theft.</p> <p><b>Three-Way/Fraudulent</b></p>	<p><b>Easy Multi-Facility Management</b></p> <p><b>Scheduling</b></p> <p><b>Call Blocking / Number Restrictions</b></p> <p><b>Call Duration Time Limits</b></p> <p><b>Free Call Configuration</b></p> <p><b>Privileged, Non-Recorded Call Configuration</b></p>	<p><b>Recording</b></p> <p><b>Live Monitoring</b></p> <p><b>WatchList:</b> Allows investigators to setup watch lists of suspicious detainees or destination numbers and receive Hot Alerts when the detainee places a call or a destination number is called.</p> <p><b>WatchWord+:</b> iCON's advanced audio transcription,</p>

**Other Ancillary Fees Charged to Users**

**CenturyLink must identify all other charges/ancillary fees to users below. If fees other than those identified are charged to users, then CenturyLink must identify them in the clarification. Failure to identify any additional fees shall be interpreted as meaning that system users will not be billed any fees in addition to those identified. Ancillary charges include but are not limited to account set-up fees, transfer of funds fees, pass-through fees for processing third-party connections or funds transfers, charges per card for prepaid debit cards, paper statement fees, and/or refund fees. In addition address the frequency at which the account is charged with the identified fee.**

	<b>Other Fees Charged to Users</b>	<b>Fee Amount</b>	<b>Charge Frequency, e.g., per month, each transaction, one-time, etc.</b>	
1	Single Bill Fee	No fee	Not applicable	
2	Prepaid Account Set-Up Fee (Prepaid Collect)	No fee	Not applicable	
3	Prepaid Account Funding Fee Via Internet (Prepaid Collect)	\$3.00	Each transaction	
4	Prepaid Account Funding Fee Via Telephone (Prepaid Collect)	\$5.95	Each transaction	<i>*\$3.00 fee if completed by automated phone system</i>
5	Refund Fee (prepaid Collect)	No fee	Not applicable	
6	Prepaid Account Close-Out Fee (Prepaid Collect)	No fee	Not applicable	
7	Account Maintenance Fee (Prepaid Collect)	No fee	Not applicable	
8	Inactive Account Fee (Prepaid Collect)	No fee	Not applicable	
9	Regulatory Cost Recovery Fee	No fee	Not applicable	
10	Transfer of funds from Western Union, MoneyGram or similar	\$5.00/\$5.99	Each transaction	<i>*\$5.00 WU, \$5.99 MoneyGram with no add-on charges</i>
11	Paper Statement	No fee	Not applicable	
12	Transfer from Commissary Fund	No fee	Not applicable	
13	Price per Debit Card	No fee	Not applicable	

# Boone County Purchasing



Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

613 E. Ash Street, Room 109  
Columbia, MO 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)

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November 21, 2017

CenturyLink  
600 New Century Parkway  
New Century, Kansas 66031

E-mail: [paul.n.cooper@centurylink.com](mailto:paul.n.cooper@centurylink.com)

RE: Clarification to *40-16OCT17 Detainee Telephone System*

Dear Mr. Cooper:

Following the County's initial evaluation meetings, the evaluation committee identified some questions that need clarification. The attached Clarification Form contains the questions the Evaluation Committee has identified at this time. The Form must be completed, signed by an authorized representative of your organization, and returned with your detailed Clarification response. You are requested to provide written response by **2:00 p.m. December 1, 2017** by e-mail to [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org).

Please let me remind you that pursuant to Section 610.021 RSMo, proposal documents are considered closed records and shall not be divulged in any manner until after a contract is executed or all proposals are rejected. Furthermore, you and your agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all questions or comments regarding the RFP, the evaluation, etc., to me, the Buyer of Record. Neither you nor your agents may contact any other County employee or evaluation committee member regarding any of these matters during the negotiation and evaluation process. Inappropriate contacts or release of information about your proposal response(s) are grounds for suspension and/or exclusion from specific procurements.

If you have any questions regarding this Clarification request, please call (573) 886-4392 or e-mail [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org). I sincerely appreciate your efforts in working with Boone County - Missouri to ensure a thorough evaluation of your proposal.

Sincerely,

A handwritten signature in black ink, appearing to read "Liz Palazzolo", written over a faint, larger version of the same signature.

Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer

cc: Evaluation Committee Members

**CLARIFICATION FORM #1**

This completed clarification will be incorporated into the offeror's proposal, and made a part all Request for Proposal documentation. The offeror must acknowledge and respond to this Clarification, and submit the completed Clarification Form #1 by e-mail to [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org).

**I. CLARIFICATION – please provide a response to the following requests.**

- 1) Provide more detail about the video relay service CenturyLink is proposing, e.g., what equipment is necessary, how would the County have to accommodate it, what would the costs be to users, are there technical/file interface issues that have to be accommodated by the County, and will it have the capability to record sessions as well as be actively monitored the same as a phone call?
- 2) Is Video Relay Service provided in addition to TTY assistive phone or instead of TTY assistive phones?
- 3) Address your company's experience interfacing with Superior (formerly SunGard), the County's JMS provider using the JMS One Solution product.
  - a. Address how interfacing has worked with Superior and your system if previously conducted.
  - b. Address the costs for interfacing between the two systems and specifically what if any costs the County will be expected to pay for the interface.
  - c. How often do files sync between the two systems?
- 4) Address your company's experience interfacing with CBM Managed Services, the County's new contractor for commissary services that includes kiosks.
  - a. Address how interfacing has worked with CBM and your system if previously conducted.
  - b. Address the costs for interfacing between the two systems and specifically what if any costs the County will be expected to pay for the interface.
  - c. How often do files sync between the two systems?
- 5) The Clarification 1 Cost Attachment (attached hereto) shows the pricing/commissions the County has identified from your proposal. CenturyLink must confirm the County's understanding of the prices to the users, and the Commissions offered to the County. In addition, CenturyLink must quote **all** ancillary fees CenturyLink will invoice users of the detainee telephone system by quoting a specific price or clearly indicating "No Fee." If the listing provided does not identify one of CenturyLink's ancillary fees, then that fee must be added, priced and the frequency of assessment identified.
- 6) Provide a sample system user invoice showing all potential charges, i.e., all ancillary fees as well as call-time, and allowed taxes, fees and surcharges.



## BOONE COUNTY, MISSOURI

### Request for Proposal #: 40-16OCT17 DETAINEE TELEPHONE SYSTEM

#### ADDENDUM #1 - Issued October 10, 2017

This addendum is issued in accordance with paragraph 2.2.2 of RFP# 40-16OCT17, Detainee Telephone System, and is hereby incorporated into and made a part of the Request for Proposal Documents. Offerors are reminded that receipt of this addendum should be acknowledged and submitted with Offeror's *Response Form*.

Specifications for the above noted Request for Proposal and the work covered thereby are herein modified as follows, and except as set forth herein, otherwise remain unchanged and in full force and effect.

**NOTE:** *Revisions* to previously released RFP text are shown in ***bolded and italicized*** font in the Addendum. Added text is not italicized/bolded.

1. The **proposal submittal deadline** is extended:

FROM: 2:00 P.M. October 16, 2017

**CHANGED TO: 2:00 P.M. Central Time October 24, 2017**

Sealed proposals will be accepted until **2:00 P.M. Central Time on Tuesday, October 24, 2017** in the Boone County Purchasing Office, 613 E. Ash, Room 109, Columbia, MO 65201.

2. Paragraph 1.1.1 is **REVISED** as follows:

- 1.1.1 **Proposal Closing:** All proposals shall be **delivered before 2:00 P.M.**, Central Time, on **Tuesday, October 24, 2017** to:

Boone County Purchasing Department  
Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201-4460

3. Paragraph 1.1.4 is **REVISED** as follows:

- 1.1.4 Proposals will be opened publicly at 2:00 P.M. on **October 24, 2017** but only the names of offerors will be read aloud at the proposal opening. Following

contract execution or rejection of all proposal responses, all responses will become a part of the public record and will be released to any person or firm who requests access. **Missouri Sunshine Laws:** Due to applicable sunshine laws and regulations concerning public documents (e.g., Section 610.021 RSMo), the County's proposal file becomes part of the public record at time of contract execution or when all proposals have been rejected.

4. Sub-paragraph 2.1.2.6 is **ADDED** as follows:

2.1.2.6 Attachments One, Two and Three

5. Paragraph 3.2.3 is **REVISED** as follows:

3.2.3 Historical Call Information: Call volume for the Boone County Detention Facility for the period January 01, 2017 through June 30, 2017 follows:

**22,413** Completed Calls  
**213,565** minutes  
Average call length **9 mins 15 seconds**

6. Paragraph 3.8.6 is **REVISED** as follows:

3.8.6 The contractor shall provide a secure hosted site that allows the County to access all calling activity within the facility via the internet/web at no cost. The hosted site must provide an interface that allows a facility to view call detail reports, ***check and track a facility's commission data***, and it should allow facilities to open and/or view the status of system service tickets.

7. Paragraph 3.13.2 is **REVISED** as follows:

3.13.2 The proposed system shall provide an account for detainees' families and other approved parties ***to pay for phone calls***.

8. Paragraph title 3.16 is **REVISED** as follows:

**3.16 FEES, RATES, COMMISSION, AND BILLING REQUIREMENTS**

9. Paragraph title 3.16.7 is **REVISED** as follows:

3.16.7 The contractor shall understand and agree that the County reserves the right to audit performance of the contract, ***including all rates, fees and administrative costs charged or assessed under the contract. The contractor shall allow the County access to all records that the contractor maintains to support the contract.***

10. Sub-paragraphs 3.16.7 (a) through (f) are **ADDED** as follows:

- a. The County reserves the right to independently investigate and/or audit the prices charged by the contractor to the users of the telephone system, as well as the calculation of commissions paid to the County, at the County's expense.
- b. The contractor shall maintain books, records, and documents of all costs, data, product information, allowances/credits or discounts that support pricing charged to users of the telephone system, and commissions paid to the County. The County or its authorized representative shall have the right to audit the books, records, and documents of the contractor.
- c. The contractor shall agree to cooperate and comply with any audit required by the County as may be compelled by any office of the County including the Boone County Commission, and any other local, state, or federal government office. The County must be afforded unrestricted and unlimited access to the contractor's records related to the contract during normal working hours. The date and time of the audit investigation shall be coordinated with the contractor, and shall be scheduled to the mutual agreement of the County and the contractor, although the contractor must guarantee and provide timely access as requested.
- d. Unless otherwise provided by applicable statute, the contractor from the effective date of final payment or termination hereunder, shall preserve and make available to the County for a period of three (3) years thereafter, at all reasonable times at the office of the contractor but without direct charge to the County, all its books, records, documents, and other evidence bearing on the costs and expenses of the services and supplies relating to contract work.
- e. The County's right to audit and access records as referenced above shall terminate at the end of five (5) years after the contract period and/or renewals have ended.
- f. The contractor shall include a "Right of Audit and Preservation of Records" clause in all subcontracts including all lower tier subcontractors for any portion of the work performed under the contract for the County. Should the contractor fail to include this clause in any such contract or lower tier contract, or otherwise fail to ensure the County's rights hereunder, the contractor shall be liable to Boone County for all reasonable costs, expenses and attorney fees which the County may have to incur in order to obtain an audit or inspection of the restoration of records which would have otherwise been available to the County from said persons under this clause. Such audit may be conducted by the County or its authorized representative.

11. Paragraph 3.16.8 is **REVISED** as follows:

3.16.8 *The contractor shall understand and agree that the phone system will be provided consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.*

12. Paragraph 3.16.8(a) is **ADDED** as follows:

13.6.8 (a) **Note: The County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.**

13. Paragraph 3.16.9, and sub-paragraph (a) through (d) are **ADDED** as follows:

3.16.9 The following requirements shall apply regarding the commission:

- a. Real-time commission reports must be made available through the internet detailing total commissions earned for all types of calls completed through the system.
- b. Commission: The contractor shall understand and agree that under no circumstances will the commission rate be adjusted lower than the rate agreed to at contract award, nor will the County be obligated to renegotiate any portion of the contract as a result of an increase to the commission rate.
- c. Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System.
- d. The contractor shall understand and agree that the County reserves the right to audit collection procedures and commission computations, and to terminate the contract if repeated inaccuracies in either procedures or computations are revealed.

14. Paragraph 3.17.2 is **REVISED** as follows:

3.17.2 At the expiration of the initial contract period, the County will have the option of continuing the phone services at the same prices *and commission* for a period of two (2) additional years in one-year increments.

15. Paragraph title 3.27 and paragraph 3.27.1 are **ADDED** as follows:

**3.27 Records Requirement:**

3.27.1 The contractor shall keep, and require subcontractors to keep, such books and records as shall be necessary to perform the services required by the contract, and enable the County to evaluate the performance of such services. The County shall have full and free access to such books and records at all times during normal business hours of the County, including the right to inspect, copy, audit and make records and transcripts from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the County shall have access to such records in the event any audit is required.

16. Paragraph 4.1.1.2 is **REVISED** as follows:

4.1.1.2 To facilitate the evaluation process, the offeror **MUST** organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein. *The ordering of information should follow this sequence: Letter of Transmittal, Revised Response/Pricing Page (enclosed with Addendum #1) completed with offeror contact information (page 28), followed by subsequent pages in the Response/Pricing Page section of the RFP: Experience/Expertise/Reliability information, References, Personnel Expertise, Pricing, Methodology, etc. The offeror is strongly encouraged to also respond overtly to each paragraph in the Scope of Work (section 3) with a statement indicating "Complies" or "Understood and Agreed." Failure to comply with this requirement may compromise the subjective evaluation of the proposal and depending on the offeror's response, may render the proposal unacceptable. When evaluating a proposal, the County reserves the right to consider relevant information and fact, whether gained from a proposal, from the offeror's references, or from any other source. Any information submitted with the proposal, regardless of the format or placement of such information, may be considered in making decisions related to the responsiveness and merit of a proposal and the award of a contract.*

17. Section 5. Response/Pricing Page is **REPLACED** in its entirety with **"Revised Section 5. Response/Pricing Page"** which is included with Addendum #1. Offerors **must use "Revised Section 5. Response/Pricing Page"** for submitting their response.

18. Sub-paragraph 4.1.3.1(c) is **REVISED** as follows:

c. **Financial Offering:** The ability to offer a system that provides revenues sufficient to operate and maintain the system while keeping the costs to the users of the system as low as possible, *and satisfactorily compensate the County for administrative costs associated with supporting the detainee telephone system.*

19. The County received the following questions and is providing the following responses:

- a. Can the RFP be provided in Word format?

**Response:** Yes. Please request a Word format version of the RFP, and any addenda thereto, from the Buyer of Record.

- b. Can the County supply a recent revenue report?

**Response:** Yes – see the answer to letter “c” below. See also revised paragraph 3.2.3 for call data (transaction volume) for the 6-month period spanning January 1, 2017 through June 30, 2017.

- c. What is the gross revenue for the past 12-months?

**Response:** An annual average for gross revenue is approximately \$82,000.00.

What follows is gross revenue data for the January-June 2017 period:

Jan-\$7,412.98; Feb-\$7,154.96; March-\$7,082.12; April-\$6,792.13; May-\$6,320.80; June-\$5,957.92

- d. Does gross revenue include “pay now” and “text to connect” calls?

**Response:** Yes.

- e. What are the current rates per minute charged to detainees and called parties by the current vendor?

**Response:** Please see link to current contract, and see also Attachment One to this Addendum.

The current contract and amendments may be viewed here:

**Step 1:**

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

**Step 2:**

Go to Bid Folder 40-16OCT17

**Step 3:**

Look at 15-07APR09

- f. Please provide the monthly ITS revenue and commissions reports for the last 12 months. Please provide a list of current fees charged. Please provide the last 12 months of call traffic data broken out by call type.

**Response:** Please see answer to above question.

- g. Who is the County's current Jail Management System (JMS) provider?

**Response:** The current provider is Superior, which recently acquired Sun Gard (the original JMS contractor providing the HTE JALAN product). The County is using the Superior JMS One Solution product. The County is now involved in an upgrade to the new platform that should be completed the first quarter of 2018.

- h. For the purposes of developing an interface for the PIN feature and for debit calling, please provide the name of the Jail Management System provider and contact information. If different, please provide the name/contact info of the vendor that provides your trust account software for inmate bank accounts.

**Response:** See the answer to the previous question for the answer to this question in part. Regarding contact information for the JMS and the inmate depository account, please see the following:

**Superion Contact:** David Montville  
Account Executive  
Public Safety & Justice Sales  
T: 407-304-3191  
C: 386-748-8822  
E: David.Montville@SunGardPS.com

**CBM Contact:** Matt Deroche  
605-321-7117  
Matt.Deroche@cbmmanagementservices.com

- i. Who is the County's commissary provider?

**Response:** The current provider is Keefe Commissary Network LLC, and the County will be switching to CBM Managed Services shortly before the upgraded JMS system is put into service (first quarter of 2018).

- j. Is the County currently using PIN debit through the commissary provider, and is this something that the County wants to do going forward?

**Response:** The County is not currently using PIN debit through the current commissary contractor, but the County intends to use PINS in the future as the detainees will need them to order from the commissary via the kiosk or phone system.

- k. Who owns the pay phones in the lobby? Will the successful provider be required to provide these?

**Response:** The lobby phones belong to the current telephone system contractor, Securus. The new contractor will have to supply the lobby phones. The County's preference is that the lobby phones accept debit/credit cards.

- l. Is the commission paid on lobby phones usage?

**Response:** No.

- m. Page 10, section 3.3.18 talks about how PINS will be used only if requested by the County. Does this mean that the County is not using PINS today?

**Response:** Currently the County is not using PINS, but plans to in the future.

- n. Who is the current depository for detainee funds?

**Response:** Currently Keefe Commissary Network, LLC maintains detainee funds. In the future, CBM will perform this service.

- o. When does the County plan to transition to CBM?

**Response:** The plan to transition to CBM is scheduled for the end of 2017 – beginning of 2018.

- p. What current technologies are used by the Boone County Detention Center?

**Response:** Mostly paper, but the County will begin using kiosks and tablets for commissary services provided by CBM.

- q. What brand of tablet will be used?

**Response:** CMB plans to use an ASUS tablet that uses Windows-based software.

- r. It appears that the RFP does not request a commission. Is the County not interested in a Commission?

**Response:** See Revised Response/Pricing Page included with Addendum #1, and see revised paragraph 3.16.8 (point #11 herein).

- s. Please confirm that the County is not seeking any compensation or commission, and that the pricing evaluation will be focused on the lowest rate per minute for detainees and consumers?

**Response:** See Revised Response/Pricing Page included with Addendum #1, and see revised paragraph 3.16.8 (point #11 herein).

- t. Does the County currently use video visits? If not, will the County want video visits in the future?

**Response:** The County does not currently use video visits. In the future, the County is interested in seeing what can be offered for provision of video visits.

- u. Is the County open to other value-added services not defined in the RFP?

**Response:** The County's goal is to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support the phone system services. If the offeror is aware of other services/products that allow the County to realize the stated goal, then the offeror may present them in the proposal for consideration. The offeror should clearly label the additional services/products as "optional," and should be wary of promoting the "value-added" services/products at the expense of satisfying base service requirements defined in the RFP.

- v. Is the County using voice bio-metrics now?

**Response:** No.

- w. Is the current system wired with cut-off switches?

**Response:** Yes.

- x. Are the eight visitor booths wired for recording?

- y. **Response:** Yes

- z. Are the switches manual?

**Response:** Yes, but it's anticipated that the new technology would lead to electronic switches.

- aa. Is the current contractor's phone system equipment off-site?

**Response:** Securus, the current contractor, provides an on-premise solution that includes the following equipment: switches, power supply, phones, etc.

- bb. What is the term "debit account" as used in paragraph 3.13.2?

**Response:** Please see revised text in revised paragraph 3.13.2 herein (point #7).

- cc. Please confirm that the County wants responses organized using the structure laid-out in the forms in Section 5, pages 28-41.

**Response:** Please see revised text in revised paragraph 4.1.1.2 herein (paragraph 15).

- dd. Since all other portions of the RFP are addressed in Section 5, please confirm that it is not necessary to provide a separate "point-by-point" response to other pages in the RFP.

**Response:** It is not necessary to provide detailed responses to each paragraph in section 3, the Scope of Work, however the offeror is encouraged to indicate "Complies" or "Understood and Agreed" as a response to each paragraph. Detail is necessary in order to evaluate the offeror's proposed methodology, but the offeror can accomplish this by answering the questions in the "Response/Pricing Page" portion of the RFP, section 5. Failure by the offeror to provide sufficient detail in their response to allow the County the ability to understand and assess the offeror's proposal is solely the offeror's responsibility.

- ee. On RFP page 23, item 4.1.1.2. states that "to facilitate the evaluation process, the offeror MUST organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein." It appears that you mean item 4.1.3.1. ("Method of Performance," "Experience/Expertise of Offeror" and "Financial Offering"), because these correspond to parts 3.1 to 5.7, but does it also include the ones item 4.1.4.2 ("Qualification Statement/References with subcategories "Company Experience," "References," and Litigation History")? If it includes the ones under item 4.1.4.2, there appears to be two places for references. Please clarify.

**Response:** Please see the response to question "cc" above, and also see Revised paragraph 4.1.1.2 (point #16 herein).

- ff. Can the County provide a list of conference/tour attendees?

**Response:** Yes, included with Addendum #1.

- gg. Is commission being paid on interstate calls?

**Response:** No, per FCC ruling.

- hh. What is the current contractor paying as the commission to the County?

**Response:** 53% on gross revenue on collect calls and 35% for prepaid calls.

- ii. Please provide a copy of all current contract and amendments pertaining to inmate phones.

The current contract and amendments may be viewed here:

**Step 1:**

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

**Step 2:**

Go to Bid Folder 40-16OCT17

**Step 3:**

Look at 15-07APR09

jj. Please provide commission statements from the last six months.

**Response: See Attachment One**

kk. Will the County please outline the fees that are being charged by the current vendor for the following (response is in blue font):

- Bill Statement Fee: **None**
- Prepaid Account Funding Fee via Web: **\$3.00**
- Prepaid Account Funding Fee via IVR: **\$3.00**
- Prepaid Account Funding Fee via Live Operator: **\$5.95**
- Fees for Instant Pay Calls: **None**

ll. On page 18 of the RFP, item 3 .14.7 states that “the System shall be scalable to meet the County's needs.” To properly gauge the scope of scalability needed, please indicate what the County’s expectations are regarding growth.

**Response: At the current time the County does not anticipate any growth.**

mm. What is the average stay for inmates?

**Response: 54% less than 4 hours  
81% less than 3 days  
94% less than 60 days**

nn. How many inmates are booked per day, on average?

**Response: In 2016, Boone County booked in a total of 5,911 detainees, which averages to 16.2 daily.**

oo. How long do inmates stay in bookings?

**Response: Less than 4 hours.**

pp. Please provide the location of the phone room(s) where our equipment will go.

**Response: See Attachment Two.**

qq. Please provide a pod layout, with the number of inmates per pod/housing unit.

**Response:** See Attachment Two.

**A-Pod**

4 Temporary holding cells - unknown # detainees

Ad Seg 4 detainees - 1 phone

**B-Pod #Detainees - Phone(s)**

B108	21	2
B110	12	1
B117	12	1
B126	12	1
B133	12	1
B139	20	2
C102	24	2
C106	8	1
C112	8	1
C120	8	1
C129	12	1
C136	8	1
C145	10	1
D105	12	1
D118	12	1
D123	10	1
D134	9	1
D140	12	1

rr. Are there any uninhabited housing units?

**Response:** No.

ss. Do you have any planned demolition or facility expansion within the period of this contract?

**Response:** No.

tt. Would the facility allow the awarded vendor to use dark fiber that has already been installed?

**Response:** The County does not own the dark fiber so it depends on the owner.

uu. On page 24 of the RFP item 4.1.2.2, states that" the County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial

evaluation phase.” Please clarify “highest rank.” For example, would it be the top two?

**Response:** The County chooses not to limit its options and say at this time that negotiation may be limited to the top two, three, etc. scoring vendors. It depends on the nature of the proposals submitted.

vv. Regarding the evaluation criteria on page 25 of the RFP, item 4.1.3.1, please clarify how these criteria are weighted. Will points be assigned to them? Will the County take an average of the evaluators scores or will the scores be added together to arrive at a lump sum total?

**Response:** The County’s evaluation will take into consideration the identified evaluation criteria, and conduct an objective and fair evaluation of proposals. The evaluators may choose to assign individual points or to average points, or to conduct the evaluation using some other scoring method. Regardless of approach, the methodology will be consistently and fairly applied to all offerors in scoring proposals.

ww. Do you currently have an inmate communications contract outside your phones and video for inmate messaging, grievances, requests, commissary ordering, and inmate kiosks?

**Response:** The County contracts with CBM Managed Services for commissary services that includes kiosks (contract #02-25MAY16).

xx. Please provide a copy of your inmate communications contract for inmate messaging, grievances, requests, commissary ordering, and inmate kiosks.

**Response:** The current commissary contract and amendments may be viewed here:

**Step 1:**

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

**Step 2:**

Go to Bid Folder 40-16OCT17

**Step 3:**

Look at 02-25MAY16

yy. Would the County consider scheduling a mandatory live product demonstration as part of your evaluation criteria?

**Response:** No.

zz. Will multiple financial offers be permitted? If so, how will the multiple offers be evaluated?

**Response:** See the Revised Vendor/Pricing Page of this Addendum. The multiple offers will be evaluated consistent with evaluation criteria stated in the RFP.

aaa. Given the current FCC stay, is the County more interested in retaining commissions or moving to lower/no commissions with a possible cost-recovery element?

**Response:** See revised paragraph 3.16.8 (point #11 herein) and the Revised Vendor/Pricing Page of this Addendum.

bbb. Can the attendance list of vendor attending the pre-proposal conference and tour be made available?

**Response:** See Attachment Three to this Addendum.

ccc. Does the incumbent inmate phone provider currently take any deductions from commission revenue? If so, what are the deductions and how much?

**Response:** \$.25 per call is deducted from commission revenue for Threads (investigative tool).

ddd. How many free calls are inmates given?

**Response:** Free calls are provided in the holding cells in A-Pod. All holding cells should provide free "local" calls.

By: \_\_\_\_\_  
**Liz Palazzolo, CPPO, C.P.M.**  
**Senior Buyer**

OFFEROR has examined Addendum #1 to Request for Proposal# 40-16OCT17 – Detainee Telephone System, receipt of which is hereby acknowledged:

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Authorized Representative Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Representative Printed Name: \_\_\_\_\_

**5. Revised Response/Pricing Page**

In compliance with this Request for Proposal (RFP) and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFP and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**5.1 The offeror must submit pricing for services in the Pricing section of the Offeror Response Pages that follow.** As a turnkey operation, all quoted pricing for the detainee telephone services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the detainee telephone system fully operational as described herein including recording and monitoring capabilities, as well as maintenance.

**5.2 Attach a Letter of Transmittal** to this page and place at the beginning of the proposal response. Included in the letter shall be a statement that identifies all materials and enclosures being identified in the proposal response. The letter of transmittal must be signed by the person who is authorized to contractually commit the offeror's organization.

5.3 **Provide a contact person** who will be responsible for coordinating the efforts and personnel of all parties involved in the response, to include, but not be limited to, oral presentations, demonstrations, site visits and responses to request for clarification, if any. Provide the following:

Name: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Fax: \_\_\_\_\_

**5.4 OFFEROR'S EXPERIENCE, EXPERTISE AND RELIABILITY**

The evaluation of the offeror's proposed experience and reliability shall be subjective based on the ability of the offeror to perform the requirements stated herein. Therefore, the offeror should present detailed information regarding their experience and reliability. The following information should be provided by the offeror in order to assist Boone County in the evaluation of the offeror's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Describe the offeror's history in providing detainee phone service and address the number of years(s) the offeror has been providing professional detainee phone services in the Missouri and national markets:

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Address any litigation the offeror is currently involved in or has been involved in over the past three (3) years regarding delivery of detainee phone services:

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**OFFEROR'S REFERENCES**

**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

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\*\*\*\*\*REVISED\*\*\*\*\*

**Organization Name:** \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

=====

**Organization Name:** \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

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**Organization Name:** \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\*\*\*\*\*REVISED\*\*\*\*\*

=====  
**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

**5.5 PERSONNEL EXPERTISE SUMMARY**

The offeror should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform under the detainee telephone service contract for the County. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

**(Also attach resumes for key personnel)**

Personnel	Background and Expertise of Personnel
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1. \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Title)

2. \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Title)

3. \_\_\_\_\_

(Name)

\*\*\*\*\*REVISED\*\*\*\*\*

(Title)

4.

(Name)

(Title)

5.

(Name)

(Title)

**5.6 In addition it is highly desirable that the offeror provide the following information related to the offeror's Experience, Expertise and Reliability:**

1. It is highly desired that the offeror describe any billing disputes the offeror's company has with any users of the system for any reason; the offeror should provide enough detail without disclosure of the user's private information. The detail the County seeks should help the County understand the nature of the dispute, and the time it took to resolve it.

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2. The offeror should provide a list of customers who have experienced detainee telephone system outages lasting longer than 24 hours while under a service agreement with the offeror:

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\*\*\*\*\*REVISED\*\*\*\*\*

2. The offeror should describe all patents the offeror's company holds or has developed, and in addition, should supply patent information for proposed equipment or software, where applicable to the detainee telephone system:

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\*\*\*\*\*REVISED\*\*\*\*\*

5. Response/Pricing Page

*The offeror must respond to both Part One and Part Two Pricing.*

*Part One Pricing: Administrative Costs Recovery Commission And Associated Rates*

*Pricing submitted under Part One shall be paired with provision of an Administrative Costs Recovery Commission paid to the County. The offeror's pricing shall be based on the following information:*

*Note: For purposes of preparing proposal responses, the County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.*

*The County spends approximately \$10,000.00 per year supporting the detainee phone system's operation at the County Detention Center. This includes the costs of management of the system at the detention facility as well as responding to outside requests. It does not include costs associated with tasks/requests of the Prosecuting Attorney's Office, or other detective/investigator costs.*

*Pricing submitted shall be for provision of a phone system consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.*

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

No additional fees or pricing in excess of those shown below may be charged to users/called parties/detainees in excess of the pricing identified below **except** for the addition of applicable and current local, state, and federal fees/taxes. The offeror must understand and agree that if awarded the contract, no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees.

**Proposal Preparation Costs:** Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e. fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

***Line Item 1: Administrative Costs Recovery Commission:***

***The offeror shall quote a single, firm and fixed commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:***

\_\_\_\_\_ %

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
2.	<b>Pre-paid Call / Debit Call</b>	Minute	\$

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The Price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

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Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
3.	<b>Collect Call</b>	Minute	\$

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
4.	<b>Automated Payment Fee Per Transaction</b>	Each	\$

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 4. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
5.	<b>Live Agent Fee Per Transaction</b>	Each	\$

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 5. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
6.	International Call	Minute	\$

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

***Part Two Pricing: Offeror-Defined Commission And Associated Rates***

***The offeror is encouraged to provide one other commission/rate pairing that the offeror believes may benefit the County. All costs to the County and to users of the telephone system must be specifically identified/priced or built into quoted pricing.***

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

***All additional fees/pricing in excess of those shown below and in addition to applicable and current local, state, and federal fees/taxes must be identified in the proposal. The offeror must understand and agree that if awarded the contract, and in the absence of any other fees or charges being identified below, then no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees in the resulting contract.***

Proposal Preparation Costs: Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e.

fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

**Line Item 7: Commission:**

**The offeror shall quote a commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:**

\_\_\_\_\_ %

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
8.	Pre-paid Call / Debit Call	Minute	\$

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
9.	Collect Call	Minute	\$

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

\*\*\*\*\*REVISED\*\*\*\*\*

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
10.	<b>Automated Payment Fee Per Transaction</b>	Each	\$

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 10. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
11.	<b>Live Agent Fee Per Transaction</b>	Each	\$

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 11. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
12.	International Call	Minute	\$

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

**5.8 METHODOLOGY**

1. **Implementation Plan:** The offeror should sequentially list and briefly describe the tasks or events proposed for the implementation of the required services. The offeror shall submit a complete and detailed schedule of the time-frame required for installation, utility coordination, training, cut-over and testing. The system must be installed in a manner and under a time-frame designed to minimize disruption of the normal functioning of the Boone County Detention Facility.

If no tasks or events are required, the offeror should provide a statement of readiness. For each task/event identified, the offeror should identify the number of days required to complete the task/event, the personnel proposed to perform the task/event, and the number of work hours for each person.

The implementation plan should identify their proposed approach to implement all aspects of the hardware and software identified herein. Specifically, the offeror should minimally address the implementation of the phones, wiring, managed access system, and geo-fencing technology.

"Completion Day" should be specified as a certain number of days from date of contract award until completion of the specific task and should be expressed as calendar days, not specific dates. "Assigned Personnel" should be identified by name rather than project title unless such personnel are yet to be hired. "Workhours" should indicate that time each assigned person will spend on the specific task.

Task or Event	Completion Day	Assigned Personnel	Work-hours
Effective Date of Contract	1	N/A	N/A

2. Address the offeror's ability to provide a Detainee Telephone System that integrates with the County's computer system and allows for Sheriff's Office personnel's ability to monitor and record calls.

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3. Address programming features that the proposed Detainee Telephone System has:

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4. Indicate the ability of the system to identify:

a. Telephone number originating call: \_\_\_\_\_

b. Time of call: \_\_\_\_\_

c. Telephone number called: \_\_\_\_\_

d. Most frequently called numbers: \_\_\_\_\_

e. Length of call: \_\_\_\_\_

f. Identify numbers called from a specific telephone number:

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g. Identify telephone numbers called by a specific detainee:

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h. Alarm number status: \_\_\_\_\_

i. Alarm a telephone number and allow automatic recording of the call:

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j. Multiple calls from different detainee phones to the same number:

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5. Describe if the detainees will have the ability to call cell phones collect.

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6. If prepaid service is offered, the offeror should explain how it works in detail.

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7. The offeror should describe how an account can be set-up for users who are not able to receive collect calls.

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8. The offeror should describe how the end user will be notified when the end user has reached 75% of its site or personal credit limit.

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9. Detail the method of determining service interruptions and service call priorities. List response time for each priority and the level of expertise devoted to each priority.

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10. Identify the location of the service office responsible for the facilities, and its hours of operation.

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11. The offeror should describe the proposed system's use of PINs, including Open PIN, Restricted PIN, and Closed PIN.

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12. The offeror should state the minimum and maximum number of digits used in a PIN.

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13. The offeror should provide a detailed description of how PIN's work, and provide a list of facilities where this feature has been implemented.

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14. The County understands that there are industry patents in this area. The offeror should provide a description of the process deployed on the offeror's platform, and include a discussion of why the technical approach used provides the best three-way detection solution.

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15. The offeror should describe how the proposed system prevents the detainee from using extra digits to dial-out of the Detainee Telephone System platform.

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16. The offeror should describe how the proposed system prevents switch-hook dialing.

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17. The offeror should describe how the proposed system detects the difference between an accepted call, an answering machine, busy signal, or other telephone activity.

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18. The offeror should provide any other additional investigative tools, features, or creative solutions that might be available to the County.

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19. Describe assistive technology applications for hearing impaired in addition to TTY's:

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20. Indicate the proposed system's ability to be monitored from any personal computer with proper access permissions.

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21. The offeror should describe the maintenance and quality assurance programs for equipment to be installed.

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22. The offeror should describe the system user training program and include applicable training documents.

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23. The offeror should identify its system's record-keeping features, and address how off-site records archive/back-up tasks will be performed.

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24. The offeror should describe the system's redundancy capacity for storing detainee phone calls.

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25. Please describe the durability of system components of the detainee telephone system including parts and labor:

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26. Identify and show the amount of work (using percentages) that will be subcontracted and the work/amount that the offeror's staff will perform directly:

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27. The offeror should attach samples of call detail and other available standard reports.

28. In addition, the offeror should provide samples of the offeror's invoices to users/called parties/detainees.

29. The offeror should also provide samples of reporting that's available from the offeror's web-accessible system.

30. The offeror should address if customized reports are available, and if so, describe the reports and what, if any, additional charges will be assessed for the customized reports.

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**31. The offeror should address the following details about the commission:**

**a. Explain in detail the method used to calculate revenue that will be paid to the County as commission:**

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**b. Describe and provide sample reports showing the calculation of the commission:**

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**c. Describe and provide sample reports that will enable the County to audit the calculation of the commission:**

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**d. Address if and how uncollectible revenue impacts calculation of the commission:**

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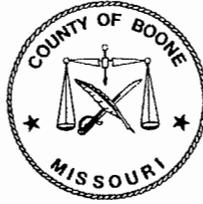
*e. Describe whether or not the offeror has had any commission disputes with any of its customers, and address the status of resolution:*

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**COUNTY OF BOONE - MISSOURI**



**REQUEST FOR PROPOSAL  
FOR  
DETAINEE TELEPHONE SYSTEM**

**RFP #40-16OCT17 – DETAINEE TELEPHONE SYSTEM  
Release Date: September 14, 2017**

**Submittal Deadline:  
October 16, 2017  
not later than 2:00 P.M. Central Time**

**Boone County Purchasing  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201**

**Liz Palazzolo, Senior Buyer  
Phone: (573) 886-4392 Fax: (573) 886-4392  
E-mail: [lpalazzolo@boonecountymmo.org](mailto:lpalazzolo@boonecountymmo.org)**



## NOTICE OF REQUEST FOR PROPOSAL

Boone County is accepting Request for Proposals for the following:

**PROPOSAL #: 40-16OCT17 – Detainee Telephone System for the Boone County  
Detention Facility**

Sealed proposals will be accepted until **2:00 P.M. on Monday, October 16, 2017** in the Boone County Purchasing Office, 613 E. Ash, Room 109, Columbia, MO 65201.

Request for Proposals are available in the Purchasing Office and requests for copies may be made by phone (573) 886-4392; fax (573) 886-4390, e-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org) or from our web page at <http://www.showmeboone.com>.

Liz Palazzolo, CPPO, C.P.M.  
Purchasing – Senior Buyer

Insertion: Thursday, September 14, 2017  
COLUMBIA MISSOURIAN



## 1. INSTRUCTIONS AND GENERAL CONDITIONS

1.1 **Delivery of Proposals:** Sealed proposals, subject to Instructions and General Conditions and any special conditions set forth herein, will be received at the Boone County Purchasing office until the proposal closing date and time indicated herein for furnishing the County with services as detailed in the following request for proposal.

1.1.1 **Proposal Closing:** All proposals shall be **delivered before 2:00 P.M.**, Central Time, on **Monday, October 16, 2017** to:

Boone County Purchasing Department  
Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201-4460

1.1.2 The County will not accept any proposals received after 2:00 P.M. Late proposals will be returned to the offeror only upon request and at the offeror's expense. Requests for return must be made no later than ten (10) business days after proposal opening.

1.1.3 Offerors must submit one (1) original, and two (2) copies of the proposal (for a total of three copies), plus an electronic copy of the complete proposal response on a removable storage drive such as a thumb-drive.

1.1.4 Proposals will be opened publicly at 2:00 P.M. on October 16, 2017 but only the names of offerors will be read aloud at the proposal opening. Following contract execution or rejection of all proposal responses, all responses will become a part of the public record and will be released to any person or firm who requests access. **Missouri Sunshine Laws:** Due to applicable sunshine laws and regulations concerning public documents (e.g., Section 610.021 RSMo), the County's proposal file becomes part of the public record at time of contract execution or when all proposals have been rejected.

1.1.5 **Sealed Proposals Required:** Proposals must be submitted in a sealed envelope identified with the proposal number and date of closing. List the proposal number on the outside of the box or envelope and note "Response to Request for Proposal enclosed." No fax or electronic transmitted proposals will be accepted.

1.1.6 If the offeror chooses not to submit a proposal, please return the *No Bid Response Page* and note the reason.

- 1.1.7 If the offeror has obtained this proposal document from the Boone County Purchasing Web Page or from a source other than the Boone County Purchasing Department, prior to submitting the proposal the offeror is advised to check with the Boone County Purchasing Department in order to ensure that the RFP solicitation package is complete, i.e., the offeror has all addenda, amendments, and attachments as applicable. *The Boone County Purchasing Department shall not be responsible for providing RFP addenda if the offeror has not been added to the official vendor list for this Request for Proposal.*
- 1.1.8 **Contact:** Any and all communication from vendors regarding specifications, requirements, competitive procurement process, etc. related to the RFP document must be referred to the Buyer of Record identified on the first page of this document. Such communication should be received at least ten (10) calendar days prior to the official proposal opening date.



## 2. INTRODUCTION AND GENERAL INFORMATION

### 2.1 Introduction:

- 2.1.1 This document constitutes a request for sealed proposals for an **Detainee Telephone System** as set forth herein.
- 2.1.2 Organization – This document, referred to as a Request for Proposal (RFP), is divided into the following parts:
  - 2.1.2.1 Instructions and General Conditions
  - 2.1.2.2 Introduction and General Information
  - 2.1.2.3 Scope of Services
  - 2.1.2.4 Proposal Submission Information
  - 2.1.2.4 Vendor Response/Pricing Page
  - 2.1.2.5 Boone County Terms and Conditions

### 2.2. Guideline for Written Questions:

- 2.2.1 All questions regarding this Request for Proposal shall be submitted in writing, **prior to the proposal opening** and no later than **5:00 P.M., Monday, October 9, 2017**. All questions must be mailed, faxed or e-mailed to the attention of Liz Palazzolo, Senior Buyer. All such questions will be answered in writing, and such answers will be provided to all parties having obtained a Request for Proposal packet by the County by posting the addendum on the County Web site at [www.showmeboone.com](http://www.showmeboone.com) (Select Purchasing, then Current Bid Opportunities). Submit questions to:

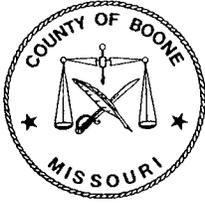
Liz Palazzolo  
Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201  
Phone: (573) 886-4392  
Fax: (573) 886-4390  
E-mail: [lpalazzolo@boonecountymo.org](mailto:lpalazzolo@boonecountymo.org)

- 2.2.2 In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any addendum to this RFP is valid only if in writing and issued by the Boone County Purchasing Department. Verbal conversations or agreements with any officer, agent, or employee of the County which modify any terms or obligations of this RFP are invalid.

2.2.3 **Timeline:** The County anticipates a contract award following evaluation of the proposal responses within **45 days calendar days** from the RFP opening date, although additional time may be necessary. The contractor shall be obligated to complete installation and training as described here in within **90 calendar days** from award of contract. These dates are provided for informational purpose and may change as requirements dictate.

### 2.3 Tour:

- 2.3.1 A tour of the Boone County Detention facility located at 2121 County Drive in Columbia, Missouri will be conducted to ensure that the offeror understands the requirements. The tour will start at 1:30 P.M. on Monday, September 25, 2017.
- 2.3.2 Offerors interested in submitting a proposal are strongly encouraged to attend the scheduled tour. While the County will make accommodation for offerors who are unable to attend the scheduled tour, offerors are advised that the County strongly encourages all offerors to attend the scheduled tour in order to minimize detention center scheduling disruptions.
- 2.3.3 Each offeror is solely responsible for a prudent and complete personal inspection, examination, and assessment of the work site condition, facilities, and/or any other existing condition, factor, or item that may affect or impact on the performance of service and equipment described and required by the requirements herein. The bidder shall not be relieved of responsibility for performance under the contract for any reason whatsoever.
- 2.3.4 To arrange a site visit at a time outside the scheduled tour, please contact the Buyer of Record, Liz Palazzolo at 573-886-4392.



### 3. SCOPE OF SERVICES

#### 3.1. Project Description:

3.1.1 The County of Boone – Missouri, hereafter referred to as the *County*, seeks a qualified firm to provide for the furnishing, delivery and installation of hardware and software, including wiring and on-going system maintenance, for a **Detainee Telephone System** at the Boone County Detention Facility in Columbia, Missouri. The Detainee Telephone System (referred to as “system” herein) shall provide for local and long distance telephone service, and shall include a recording and monitoring system to record and monitor detainee calls.

3.1.1.1 The Detainee Telephone System shall be a complete turnkey telephone system with complete service and support.

3.1.2 **Objective:** The County wishes to contract for detainee telephone services that offer the lowest cost to detainees and to the County while also including system features that allow the County to administer necessary safeguards and protections suitable for a correctional setting. Proposals will be evaluated consistent with this objective.

#### 3.2. Background Information:

3.2.1 Background: The system currently in operation at the Boone County Detention Facility (hereafter referred to as “facility”) is provided and operated by Securus Technologies using the current version of the Securus phone system.

3.2.1.1 The facility has a maximum of 246 beds and the average detainee population is 220.

3.2.1.2 There are four (4) housing buildings at the facility with a current total of twenty-six (26) detainee phones. There are two public use coin phones located in the lobbies. The facility has four (4) holding cells each equipped with a telephone that allows “free” calls to anyone local including bondspersons and family. There are eight (8) pair of visitation handsets that are not allowed to make external calls.

3.2.2 Additional information about the County of Boone – Missouri can be obtained from the following internet web site at:  
<http://www.showmeboone.com>.

3.2.3 Historical Call Information: Call volume for the Boone County Detention Facility for the period January 01, 2017 through June 30, 2017 follows:

70,429 Completed Calls

388,261 minutes

Average call length 5 mins 30 seconds

3.2.4 Although an attempt has been made to provide accurate and up-to-date information, the County of Boone – Missouri does not warrant or represent that the background information provided herein reflects all relationships or existing conditions related to this Request for Proposal.

### **3.3 General Requirements:**

3.3.1 Any item not specifically specified herein but that is otherwise necessary for the successful delivery and operation of the Detainee Telephone System shall be included by the offeror in the proposal response.

3.3.2 System Overview: The Detainee Telephone System shall be a complete turnkey system that shall consist of a minimum of twenty-six (26) detainee telephone units installed throughout the four housing buildings, and an additional (8) phones that shall be recording detainee visitation telephone units installed in the designated detainee visitation areas. Four (4) of the total number of phones shall be holding cell phones that should allow the detainee to make “free” local calls to anyone including bondspersons and family. In addition to system phones that will have recording-capability, there are two (2) public use coin phones, i.e., one (1) in each of two (2) public lobbies that must be provided and that do not have recording capability.

3.3.2.1 The contractor shall provide all wiring necessary for complete installation of all system components to make the system completely functional in accordance with all manufacturer recommendations. This shall include all wiring required to facilitate visitation recording and monitoring.

3.3.2.2 All system requirements shall apply to all calls placed through the telephone system including local calls. Calls within the Local Access Transport Area (intraLATA), calls outside the Local Access Transport Area (interLATA), interstate calls, and international calls. The contractor shall understand and agree that the County shall determine whether or not international calling will be allowed.

3.3.3 Each detainee telephone shall be connected through individual on/off switches located at each housing building control room. The contractor shall be responsible for on-going maintenance on all equipment installed for the length of the contract at no cost to the County.

- 3.3.4 The Detainee Telephone System shall provide all of the functions necessary to operate and control all features and related accessories. The contractor shall make every effort to provide a Detainee Telephone System that shall be sufficiently flexible to meet the requirements of the County.
- 3.3.5 Web-Based Interface: The Detainee Telephone System shall provide a web-based interface for administering the detainee phone system. Such interface shall include but not be limited to administrative rights control for adding, deleting and reporting on user activity, blocking numbers, PIN administration, call detail listings, and recording and playback of telephone calls. The interface shall also have the ability for the administrator of the system to monitor and report on user activities within the interface.
- 3.3.6 The Detainee Telephone System shall allow outgoing calls only.
- 3.3.7 System Features: The Detainee Telephone System shall allow detainee calls to be restricted to a maximum duration of fifteen (15) minutes. The Detainee Telephone System shall allow for County representatives to change the call duration limit by detainee PIN, specific telephone, or by group of Detainee Telephone System telephones. The duration may be increased up to thirty (30) minutes at the Detainee Telephone System's operator's discretion.
- 3.3.7.1 The Detainee Telephone System users, both detainee and called-party, shall be notified of the call time limit in advance of the system terminating the call.
- 3.3.8 As part of the Detainee Telephone System, the contractor shall supply one (1) text telephone (TTY) to the facility. The TTY must be compatible with system billing, recording, and monitoring the same as the regular detainee phone. In the event a better technological solution becomes available, the contractor shall advise the County for consideration of updated technology to assist the hearing impaired.
- 3.3.9 The Detainee Telephone System must require active acceptance by the called party.
- 3.3.10 The Detainee Telephone System shall include user prompts in English and Spanish in addition to other languages that may be requested by the County.
- 3.3.11 The Detainee Telephone System should have the ability to complete outgoing collect, prepaid debit, calling card, and called party credit card calls. For prepaid debit transactions, the end-users funds must be made available for use within fifteen (15) minutes after the funds have been received by the contractor.

- 3.3.12 Call Accounts: The contractor should have a program that will proactively attempt to set-up an account for individuals who are not able to accept collect calls, enabling families to quickly communicate with incarcerated individuals.
- 3.3.13 The contractor must notify the end user when the end user has reached 75% of its site or personal credit limit.
- 3.3.14 Toll Free Calls Required: The Detainee Telephone System shall be able to provide toll free calls to local phone numbers. This feature may be restricted to the “holding cell area only” of the detention facility.
- 3.3.15 Tracking Requirement: The Detainee Telephone System shall provide the capability to track and identify specific telephone numbers called by each individual detainee telephone, as may be required. The Detainee Telephone System shall provide the capability of monitoring and recording all calls, from both the detainee phones and visitation phones, made by each detainee, and it shall have the capability to screen calls to exclude attorney-client calls.
- 3.3.16 Recording Requirement: The recording system used in the Detainee Telephone System shall have the ability to fast forward and rewind recordings as necessary during the playback process. In addition, the recording system shall also have the ability to burn recordings to CD ROM, DVD, or other media.
- 3.3.17 Watch Status Notification: The live monitoring system used in the Detainee Telephone System shall have the ability to notify designated parties via email, pager and/or cell phone of calls made to specific telephone numbers that are under a watch status. The notified party must be able to monitor the specific call from a remote location via the internet.
- 3.3.18 Personal Identification Number (PIN) Requirements: The contractor shall understand and agree that PIN’s will only be used if requested by the County. The following requirements shall apply regarding the Detainee Telephone System’s use of PIN’s:
- 3.3.18.1 The Detainee Telephone System must have the capability to assign PIN numbers at the time a detainee is booked.
  - 3.3.18.2 The system should prevent duplicate PINs.
  - 3.3.18.3 The County must be able to restrict calls based on the detainee’s PIN. Restrictions shall include call duration, time of day, and destination numbers.

3.3.18.4 The Detainee Telephone System should provide a method of verifying the detainee's PIN to guard against fraudulent PIN use.

### **3.4 Fraud Management Requirements:**

- 3.4.1 The Detainee Telephone System shall be able to detect, notify and prevent three-way or conference calls, except for calls to attorneys or other approved numbers.
- 3.4.2 The Detainee Telephone System shall prevent the detainee from receiving a second dial tone, or "chain-dialing."
- 3.4.3 The system shall detect any extra digits dialed by the detainee after the party has accepted the call.
- 3.4.4 The system shall have capability to allow the County to remotely survey detainee calls and be able to transfer specific calls in progress to County investigators.
- 3.4.5 The system shall brand each call with the name of the facility and the detainee placing the call.
- 3.4.6 The system shall continue to play the recording about the calls being subject to recording and monitoring at random intervals throughout the call.
- 3.4.7 The system shall guard against "Switch-hook" dialing and other fraudulent activities.
- 3.4.8 The Detainee Telephone System shall be configured where the detainee shall not be able to communicate with the called party until the call has been accepted by the called party, see also paragraph 3.6.3.
- 3.4.9 The system shall detect the difference between an accepted call, and an answering machine, busy signal, or other telephone activity.
- 3.4.10 The system shall allow call blocking of specific numbers by detainee PIN telephones, or group of telephones. The system shall be able to block access to an unlimited number of specific telephone numbers upon request.
- 3.4.11 The system shall also assign approved calling numbers according to detainee PIN.
- 3.4.12 The system shall permit the called party to block all future calls from a correctional facility such as the Boone County Detention Facility

- 3.4.13 The system must have the capability to temporarily suspend a detainee's privilege for placing a call and set a beginning and end date without the need to manually re-enable privileges.

### **3.5 Other Investigative Tools Requirements:**

- 3.5.1 The Detainee Telephone System shall be equipped with a remote call-forwarding feature to those numbers that are under surveillance by the investigative unit. The feature shall allow authorized personnel to monitor a call, from any designated remote location, while the call is in progress. The call shall be automatically re-routed once the call is accepted by the called party and in progress. There cannot be any distance barriers to the retrieval process so the remote telephone number can be located within the facility, across the United States, or internationally.
- 3.5.2 The system must have the capability to move a detainee or group of detainees from one housing unit to another without the need to re-enter the information.

### **3.6 Call Acceptance Requirements:**

- 3.6.1 The Detainee Telephone System shall alert the called party of the per-minute cost of the call prior to acceptance.
- 3.6.2 The system shall be configured so that the called party must actively accept the call.
- 3.6.3 The system shall be configured so that the detainee cannot communicate with the called party until the call has been accepted, see also paragraph 3.4.8.
- 3.6.4 System billing must not begin until the call is accepted.

### **3.7 System Security Requirements:**

- 3.7.1 The Detainee Telephone System must have the ability to be programmed for auto shut-off at times designated by the County on a per telephone basis.
- 3.7.2 The system shall allow for County personnel to manually shut down the system in case of emergency.
- 3.7.3 The system shall be password protected to permit only appropriate facility personnel access to the system.
- 3.7.4 The system must have the capability to enable and disable any phone at the facility from any secured internet enable computer.

3.7.5 For security purposes, the system must be a centralized non-premise system that shall keep all records secure and not require the County facility to maintain the records.

### **3.8 Reports Requirements:**

3.8.1 The Detainee Telephone System shall generate reports that state, at a minimum the following:

- 3.8.1.1 the date and time each call is placed;
- 3.8.1.2 the source of the call;
- 3.8.1.3 the telephone number called;
- 3.8.1.4 the date and time the call ends;
- 3.8.1.5 the duration of the call;
- 3.8.1.6 and a voice recording of all parties involved in the conversation.

3.8.2 The system shall have the capability to store calls in memory for a period of time sufficient to comply with any requirements of the Missouri Sunshine Law (Chapter 610 RSMo). At a minimum, the contractor shall retain records developed under the contract for the County for five (5) years.

3.8.3 Upon request, the contractor shall supply call detail reports to the County at no additional charge. The contractor may satisfy this requirement by providing a self-service web portal to the County for review of reporting data. The call detail report shall contain a variety of call information and be customizable to suit the County's needs.

3.8.4 Standard reports shall include at minimum:

- 3.8.4.1 Frequently Dialed Numbers;
- 3.8.4.2 3-Way Call Attempts;
- 3.8.4.3 and Call Volume by Telephone.

3.8.5 The system should either have the capability for the County to generate standard accounting/revenue reports. If the system does not have this capability, then the contractor shall provide system accounting reports upon request of the County in a format desired by the County. Reporting capabilities of the system shall satisfy County, state and federal reporting requirements applicable to detainee phone systems.

3.8.6 The contractor shall provide a secure hosted site that allows the County to access all calling activity within the facility via the internet/web at no cost. The hosted site must provide an interface that allows a facility to view call detail reports and it should allow facilities to open and/or view the status of system service tickets.

3.8.7 The system shall allow for real-time revenue reports that shall be made available through the internet and that outline all calls made from the

facility. Real-time revenue reports shall, at a minimum, break-out calls by specific call type for collect, prepaid and calling card calls.

- 3.8.8 The system must incorporate an on-line service reporting system whereby the County can submit service requests as well as monitor service ticket status and history.

### **3.9 Service & Maintenance Requirements:**

- 3.9.1 The contractor shall provide on-going complete Detainee Telephone System hardware and software maintenance on-site directly or through an approved subcontractor. The contractor is allowed to also use remote monitoring, diagnostics and repair.
- 3.9.2 The contractor shall directly provide or arrange through the system manufacturer engineering and technical support to the County to help resolve any operational or service problems that may occur. The contractor shall provide a twenty-four-hour telephone number for emergency technical support. It is desired that the support number be toll-free.
- 3.9.3 Response Time: The contractor shall acknowledge receipt of a repair request from the County within two (2) hours of the request. The contractor shall send repair technicians on-site within twenty-four (24) hours of the request for minor system outages if the outage cannot be repaired remotely. The contractor shall send repair technicians on-site within four (4) hours of the request for major outages if the repair cannot be made remotely.
- 3.9.3.1 A minor outage shall be defined as the inability to originate calls from less than 20% of the stations served.
- 3.9.3.2 A major outage shall be defined as the inability to originate calls from 20% or more of the stations served.
- 3.9.4 Maintenance on Wiring Required: The contractor shall be solely responsible for providing wiring as necessary and for providing wiring maintenance at the facilities for the duration of the contract. The County must approve the wiring plans and installation.
- 3.9.5 Assigned Account Representative: The contractor must assign an account representative main contact person who shall be responsible for ongoing account management and support to the County.
- 3.9.6 Parts Requirements: The contractor shall maintain, directly or through the manufacturer, a complete stock of component parts for the system, both for repair and future system expansion, as may be required. Such parts shall include all electronic, electrical, and mechanical components, circuit boards, control modules and standard cabinet modules used as part of the Detainee Telephone System.

3.9.7 System Expansion and Upgrade: The contractor shall provide parts, materials, labor, and support necessary for repair, expansion, and upgrade of the Detainee Telephone System when new technology becomes available for the duration of the contract.

3.9.7.1 Repair parts shall be available for shipment on an expedited handling basis within 24 hours, 365 days per year, including weekends and holidays. The contractor shall provide a 24-hour telephone number for the handling of such orders.

3.9.7.2 System upgrades, including software upgrades should be provided free of charge to the County for the life of the contract.

### **3.10 Installation and Cut-Over Requirements:**

3.10.1 Complete installation of the Detainee Telephone System including installation of all hardware and software shall be performed by the contractor, at no cost to the County. The contractor shall be responsible for interfacing the Detainee Telephone System with all necessary telephone service carriers (i.e., local, long-distance, and wireless service carriers) to make the system completely operational and functional.

3.10.2 The contractor shall provide and install detainee phone sets and the automated detainee call control system, and install the visitation recording sets and equipment for remote system access via the LAN and ensure that they are working properly. This installation shall be completed within ninety (90) calendar days after award of the contract.

3.10.3 If complete system installation cannot be completed within the ninety (90) calendar days as described above, then the contractor must propose an alternate installation schedule of events. Failure to state an alternate installation time in the proposal response shall obligate the contractor to complete installation within ninety (90) calendar days. The contractor and the County may mutually agree to extend system installation time when in the best interests of the County; such amendment to the installation time shall be accomplished by a written amendment to the contract prepared by the Purchasing Office on behalf of the Sheriff's Office.

3.10.3.1 Any delay in the implementation of the contractor's schedule that is directly caused by the County will result in a commensurate increase in the contractor's time allowance to complete installation, however, the contractor must submit a complete and detailed written schedule of necessary additional time required to complete installation given the delay to the Detention Director and the Services Captain.

3.10.3.2 The risk of loss and or damage to any equipment, hardware or materials used in the Detainee Telephone System shall be

assumed by the contractor during shipment, unloading and installation of all equipment, hardware and materials.

### **3.11 Call Monitoring & Recording Requirements:**

- 3.11.1 The Detainee Telephone System shall maintain a minimum of one (1) year of call recording online for authorized County personnel to access as needed. In addition, the system shall allow for retention and access of call recordings for a minimum of five (5) years in order to ensure the Boone County Sheriff's Department's compliance with records retention requirements.
- 3.11.2 Facility personnel must be able to search call recordings by dialed number, date, time, detainee account, or site ID.
- 3.11.3 Facility personnel must be able to simultaneously listen to and record conversations.
- 3.11.4 Recordings must be backed-up for archival.

### **3.12 Training and Manuals Requirements:**

- 3.12.1 The contractor shall provide on-site training to the County staff (20-25 individuals) for system administration, operation and reporting at no additional charge to the County.
- 3.12.2 The training shall be scheduled at a time mutually agreeable to the contractor and the County, but the contractor must understand and agree that the decision of the County is final given the County's goal to minimize the impact of training time on shift personnel and scheduling.
- 3.12.3 Training must at minimum cover the efficient operation of the Detainee Telephone System. All applicable training manuals and materials shall be provided by the contractor at no additional charge to the County.
  - 3.12.3.1 The training manual shall be clearly written and illustrated to instruct employees in the proper use of all installed features, including access to reporting capabilities of the system to include financial reporting. Drawings, photographs and/or screen captures should show the location of all operator controls. This training manual shall be provided in addition to all other system manuals furnished, e.g., owner's manual, etc.
- 3.12.4 The contractor shall provide a minimum of two (2) complete sets of the system operator's and owner's manuals to the Boone County Sheriff's Department at no additional charge in advance of system installation, in order to provide personnel with the opportunity to become familiar with the system.

### **3.13 Payment Requirements**

- 3.13.1 The proposed system shall not allow calls that will result in charges to the County.
- 3.13.2 The proposed system shall provide a debit account for detainees' families and other approved parties.
- 3.13.3 All prepaid calls should be subject to the same restrictions and features as standard detainee calls.
- 3.13.4 The called party shall be informed of the per-minute cost of the call prior to accepting the charges, see also paragraph 3.16.1.
- 3.13.5 The contractor shall have a system in place that will allow detainee families and friends to set-up alternate billing methods directly with the contractor. Two of the methods the County would like to see offered follow:
  - 3.13.5.1 The contractor should have a system in place that will allow detainee families and friends to set-up an account directly with the Contractor;
  - 3.13.5.2 The contractor should allow customers to prepay for calls from the facility.

### **3.14 Equipment Requirements:**

- 3.14.1 The contractor must provide all equipment necessary for the Detainee Telephone System that makes it a complete turnkey telephone system with complete phone service, and a web-based portal for County personnel to access system functions.
- 3.14.2 All equipment provided by the contractor for the Detainee Telephone System shall be of the highest professional quality and reliability, and comply with all applicable industry standards. All System equipment provided shall be new, in current production, and free of any defect (e.g. corrosion, scratches). Prototype or subset designs shall not be allowed. It is preferred that the System have been in production and continuous service in similar customer settings for a period of not less than one year. Any systems or system components with less than a one-year proven track record of satisfactory commercial performance shall be not acceptable under this specification.
- 3.14.3 All System equipment shall comply with all current Federal Communication Commission (FCC) regulations.
- 3.14.4 System design and construction shall be consistent with good engineering practices, industry standards and manufacturer recommendations. All

installation work shall be performed in a neat, professional, and craftsman-like manner.

- 3.14.5 The System shall have the ability, as authorized by the Sheriff's office, to monitor live or listen to previously recorded conversations from any web connection.
- 3.14.6 System software shall incorporate security level features and be password protected.
- 3.14.7 The System shall be scalable to meet the County's needs.
- 3.14.8 The contractor shall provide a backup power supply for the System at no cost to the County.
- 3.14.9 The contractor shall provide detainee telephones composed of durable, tamper-free equipment suitable for detention environments.

### **3.15 Warranty Requirements:**

- 3.15.1 The contractor shall warrant that the Detainee Phone System shall operate in accordance with manufacturer recommendations and provide the County with reliable performance.

### **3.16 FEES, RATES, AND BILLING REQUIREMENTS**

- 3.16.1 The Detainee Telephone System shall have the capability to inform the called party of the call cost prior to acceptance, see also paragraph 3.13.4.
- 3.16.2 All tariffs applicable to charged prices shall not exceed the actual tariffs as mandated by the Missouri Public Service Commission and the Federal Communications Commission (FCC) for all services.
- 3.16.3 The contractor shall be responsible for the collection of charges for fraudulent or otherwise uncollectible calls.
- 3.16.4 The contractor shall be responsible for any and all billing disputes, claims, or liabilities that may arise in regard to its provisions of services under the contract.
- 3.16.5 The contractor's billing to called parties must include the contractor's information and a toll-free telephone number to resolve billing disputes.
- 3.16.6 Billing Time Requirements: Billing charges shall begin at the time of the call completion when the calling party is connected to the called party and shall be terminated when either party hangs-up. Incomplete call such as network intercept recordings, busy signals, no answers, refusals of calls, answering machine pick-ups, etc. shall not be billed.

3.16.7 The contractor shall understand and agree that the County reserves the right to audit performance of the contract.

3.16.8 The contractor shall understand and agree the County's goal is to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support the phone system services.

**GENERAL OTHER TERMS OF CONTRACT:**

**3.17 Contract Term:**

3.17.1 The initial contract term shall be for a period of five (5) years after date of award.

3.17.2 At the expiration of the initial contract period, the County will have the option of continuing the phone services at the same prices for a period of two (2) additional years in one-year increments.

3.17.3 Each optional year will require the County's approval for renewal.

3.17.4 The contractor shall understand and agree that any contract renewal is subject to appropriations being made available and budgeted for any County Fiscal Year, i.e., calendar year.

3.17.5 Following the 7<sup>th</sup> year of the contract, the contract will continue to renew at the same pricing on a month to month basis until 90 days written notice is given by either party.

**3.18 Termination of Contract:**

3.18.1 The obligation to provide further service under the terms of the resulting agreement may be terminated by the County upon ninety (90) calendar days written notice in the event of material breach by the Contractor to perform in accordance with the terms hereof, or any contract resulting from this RFP.

3.18.2 In the event that the County chooses to discontinue the contract either by termination or by not extending the contract, the contractor shall remove all its equipment from County facilities without charge to the County in a prompt and reasonable manner.

3.18.3 Service shall not be discontinued and equipment shall not be removed until another contractor has been acquired by the County.

3.18.4 The removal of equipment and disconnecting of service process will occur during the implementation of the new system with minimal interruption of service to the County facility. The incumbent contractor must cooperate with the new contractor during the implementation of the new system.

### **3.19 Transition:**

3.19.1 Upon award of the contract, the contractor shall work with the County and any other organizations designated by the County to ensure an orderly transition of services and responsibilities under the contract and to ensure the continuity of those services required by the County at no additional charge to the County.

3.19.2 Upon expiration, termination, or cancellation of the contract, the contractor shall assist the County to ensure an orderly and smooth transfer of responsibility and continuity of those services required under the terms of the contract to an organization designated by the County.

### **3.20 Assignment, Transfer, Etc. Of Contract:**

3.20.1 The contractor shall be prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its rights, title or interest therein, or its power to execute such agreement to any other person, company or corporation without the prior consent and approval in writing by the County.

### **3.21 Damage and Repair Liability:**

3.21.1 The County shall have no liability to the contractor for fraud, theft, vandalism/damage or loss of the Contractor's equipment inflicted by the detainees or the public. All costs associated with repair shall be the responsibility of the contractor.

3.21.2 The contractor shall make all System repairs at its expense. The contractor shall make all reasonable efforts to ensure that the phone system is operational and repaired as quickly as possible, subject to requirements for repair response stated herein regarding minor and major system outages.

### **3.22 Installation/Disconnection:**

3.22.1 The contractor shall be responsible for all costs of installation and/or disconnection throughout the term of the contract. The contractor shall furnish and install equipment, dedicated lines and any other item necessary to make service functional.

3.22.2 The contractor shall understand and agree that the incumbent contractor will remove all existing equipment, dialers and/or dedicated phone lines from the County facilities without charge to the new contractor.

3.22.3 In performing all services under the resulting contract agreement, the contractor shall comply with all applicable local, state and federal laws.

### **3.23 Patents and Copyrights:**

3.23.1 The contractor shall hold harmless the County, its officers, and employees against all claims that machines or software supplied infringe a U.S. patent or copyright. The contractor further asserts that the equipment and software proposed do not infringe on any U.S. patent or copyright.

### **3.24 Insurance Requirements:**

3.24.1 The contractor shall not commence work under the contract until the contractor has obtained all insurance required herein, and such insurance has been approved by the County; nor shall the contractor allow any subcontractor to commence work until all similar insurance required of the subcontractor has been so obtained and approved. All policies shall be in amounts, form and companies satisfactory to the County which must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the County.

3.24.2 **Compensation Insurance** - The contractor shall take out and maintain during the life of the contract, **Employee's Liability and Worker's Compensation Insurance** for all of their employees employed at the site of work, and in case any work is sublet, the contractor shall require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the Contractor. Worker's Compensation coverage shall meet Missouri statutory limits. Employers' Liability limits shall be \$500,000.00 each employee, \$500,000.00 each accident, and \$500,000.00 policy limit. In case any class of employees engaged in hazardous work under this Contract at the site of the work is not protected under the Worker's Compensation Statute, the Contractor shall provide and shall cause each subcontractor to provide Employers' Liability Insurance for the protection of their employees not otherwise protected.

3.24.3 **Comprehensive General Liability Insurance** - The contractor shall take out and maintain during the life of the contract, such comprehensive general liability insurance as shall protect them and any subcontractor performing work covered by the contract, from claims for damages for personal injury including accidental death, as well as from claims for property damages, which may arise from operations under the contract, whether such operations be by themselves or for any subcontractor or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$2,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death.

3.24.4 **Commercial Automobile Liability** - The contractor shall maintain during the life of the contract, automobile liability insurance in the amount of not less than \$2,000,000.00 combined single limit for any one occurrence, covering both bodily injury, including accidental death, and property

damage, to protect themselves from any and all claims arising from the use of the contractor's own automobiles, teams and trucks; hired automobiles, teams and trucks; and both on and off the site of work.

**3.24.5 Proof of Carriage of Insurance** - The contractor shall furnish the County with Certificate(s) of Insurance which name the County as additional insured in an amount as required in this contract, contain a description of the project or work to be performed, and requiring a thirty (30) day mandatory cancellation notice. In addition, such insurance shall be on occurrence basis and shall remain in effect until such time as the County has made final acceptance of the facility contracted.

### **3.25 INDEMNITY AGREEMENT:**

3.25.1 To the fullest extent permitted by law, the contractor shall indemnify, hold harmless and defend the County, its directors, officers, agents, and employees from and against all claims, damages, losses and expenses (including but not limited to attorney's fees) arising by reason of any act or failure to act, negligent or otherwise, of the contractor, of any subcontractor (meaning anyone, including but not limited to consultants having a contract with contractor or a subcontract for part of the services), of anyone directly or indirectly employed by contractor or by any subcontractor, or of anyone for whose acts the contractor or its subcontractor may be liable, in connection with providing these services. This provision does not, however, require the contractor to indemnify, hold harmless, or defend the County of Boone from its own negligence.

### **3.26 Contractor Employee Screening and Security**

3.26.1 The contractor shall comply with the following screening and security requirements

3.26.1.1. Boone County requires all employees of the contractor be subjected to a fingerprint based Criminal Background Check. The Background Check for all contractor's employees will be administered by the Boone County Sheriff Department. This portion is to be coordinated with the Boone County Sheriff Department. The contractor MUST provide pedigree information for all employees. Also, ID badges may be issued as needed by the Boone County Sheriff Department.

3.26.1.2. Any subcontractors, if authorized by the Boone County Sheriff Department administrator or designee, must also pass a background check as described herein.

3.26.1.3 The Boone County Sheriff Department administrator or designee shall have the sole right, at any time, to reject any such employee who it determines, in its sole discretion, poses a risk or potential risk to the security or operations of the Boone County Detention Facility or Sheriff Department.



#### 4. PROPOSAL SUBMISSION INFORMATION

##### 4.1. RESPONSE TO PROPOSAL

##### 4.1.1. Submission of Proposals:

4.1.1.1. Offerors must submit one (1) original, and two (2) copies of the proposal (for a total of three copies), plus an electronic copy of the complete proposal response on a removable storage drive such as a thumb-drive.

- a. The offeror shall submit the proposal to:

Boone County Purchasing Department  
Attn: Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, MO 65201

- b. The proposals must be delivered no later than **2:00 P.M. on Monday, October 16, 2017**. Proposals will not be accepted after this date and time. Late proposals will not be opened, and will be returned only upon request at the offeror's expense if the request is received within ten (10) business days after the opening date.
- c. The package at a minimum should include a system overview and description, a detailed drawing of each user-accessed component with all controls identified, an itemized listing of the exact equipment being offered, a complete description of each applicable feature of the system, a manufacturer's data sheet for each major system component, and a complete list of options available for the system. Failure to submit a complete, detailed package shall be just cause for the proposal to be rejected as non-responsive. The offeror, by submitting a proposal response, certifies that the equipment list included with the proposal is complete and suitable for the equipment being offered, and that it is compliant with the intent of the specifications.

4.1.1.2. To facilitate the evaluation process, the offeror **MUST** organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein. Failure to comply with this requirement may render the proposal unacceptable.

- a. Each distinctive section should be titled with each individual evaluation category and all material related to that category should be included therein.
- b. The signed response page from the original RFP and all signed addenda should be placed at the beginning of the proposal.
- c. The proposal must, at a minimum, address all mandatory and desired services, equipment, materials, etc. Responses shall fully describe how the service shall be performed and what hardware/software (if any) is required at the County to access the service.

4.1.1.3. The offeror is cautioned that it is the offeror's sole responsibility to submit information related to the evaluation categories, and that the County is under no obligation to solicit such information if it is not included with the proposal. The offeror's failure to submit such information may cause an adverse impact on the evaluation of the proposal. Any offeror whose responses deviate from the outlined specifications may automatically be disqualified.

4.1.1.4. Offeror's Contacts: Offerors and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, the evaluation, etc. to the buyer of record indicated on the first page of this RFP. Offerors and their agents may not contact any County employee other than the buyer of record regarding any of these matters during the solicitation and evaluation process. Inappropriate contacts are grounds for suspension and/or exclusion from specific procurements. Offerors and their agents who have questions regarding this matter should contact the buyer of record.

**4.1.2. Competitive Negotiation of Proposals:** The offeror is advised that under the provisions of this Request for Proposal, the County reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:

4.1.2.1. Negotiations may be conducted in person, in writing, or by telephone.

4.1.2.2. Negotiations will only be conducted with potentially acceptable proposals. The County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial evaluation phase.

4.1.2.3. Terms, conditions, prices, methodology, or other features of the offeror's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the offeror may be required to submit

supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.

4.1.2.4. The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the County determines that a change in such requirements is in the best interest of the entities.

**4.1.3. Evaluation and Award Process:**

4.1.3.1. Boone County has selected an evaluation team to review responses and to make a formal recommendation for award to the County Commission. After determining a responsible offeror and a responsive proposal through the determination that the proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluation team will use both objective analysis and subjective judgment in conducting a comparative assessment of the proposal in accordance with the evaluation criteria stated below:

- a. **Method of Performance** - Technology offering, system features, account support team, maintenance offered, proposed project plan, scheduling, and implementation with minimal interruption of service
- b. **Experience/Expertise of Offeror**
- c. **Financial Offering:** The ability to offer a system that provides revenues sufficient to operate and maintain the system while keeping the costs to the users of the system as low as possible.

4.1.3.2. After an initial evaluation process, a question and answer interview may be conducted with the offeror, if deemed necessary by the County. In addition, the offeror may be asked to make an oral presentation and demonstration of their proposed system at a designated Boone County location or other site. Attendance cost shall be at the offeror's expense. All arrangements and scheduling will be coordinated by the County.

**4.1.4. Evaluation:**

4.1.4.1. Experience and reliability of the offeror's organization are considered subjectively in the evaluation process. Therefore, the offeror is advised to submit any information, which documents successful and reliable experience in past performances, especially those performances related to the requirements of this RFP.

4.1.4.2. **Qualifications Statement/References:** The offeror shall provide the following information related to previous and current

services/contracts performed by the offeror's organization and any proposed subcontractors which are similar to the requirements of this RFP.

a. **Company Experience:** It is highly desirable that the offeror have a minimum of five (5) years experience providing detainee phone services. Please provide an overview of the offeror's firm, including years and nature of experience in telephone business, ownership of the offeror's company, number of years in business, total number of employees, etc.

b. **References:** Please provide a list of five government agencies/municipalities (preferably County and preferably in Missouri) for whom the offeror's company has provided the telephone system (hardware and software) proposed in the offeror's proposal response. The list should provide a contact name, e-mail address, telephone number, address, length of time using the offeror's system and a brief description of the users' equipment and software configuration.

c. **Litigation History:** The offeror should identify on-going litigation or any litigation that the offeror has been involved with over the past three (3) years regarding detainee phone system services the offeror has performed for any customer. The offeror should provide sufficient detail about the litigation to help the County appreciate the nature and status without compromising confidentiality.

4.1.4.3. The offeror should submit a copy of all licenses, certifications, accreditation, and/or permits, which may be required by state, federal, and/or local law, statute, or regulation in the course of conduct of the offeror's business. If not submitted with the proposal, the County reserves the right to request and obtain a copy of any license or certification required to perform the defined services prior to contract award.

4.1.4.4. Proposals will be subjectively evaluated based on the offeror's distinctive plan for performing the requirements of the RFP. Therefore, the offeror should present a written narrative, which demonstrates the method or manner in which the offeror proposes to satisfy these requirements. The language of the narrative should be straightforward and limited to facts, solutions to problems, and plans of action.

4.1.4.5. Where the words "shall" or "must" are used, they signify a required minimum function of system capacity that will heavily impact the offeror's final response rating.

4.1.4.6. Where the words "should", "may" or "desired" are used, they signify that the feature or capacity is desirable but not mandatory; therefore, the specifications in question will possess minimal impact on the offeror's final response rating.

4.1.4.7. Each offeror must prepare a written response. The offeror is strongly encouraged to format and organize the offeror's proposal consistent with the specific RFP sections and numbered paragraphs, and respond clearly to each on an individual basis. Failure to comply may result negatively in the assessment of the offeror's proposal and failure to address any item may be interpreted as non-compliance. The offeror should address each specific paragraph and subparagraph of the Specifications by paragraph and page number as an item for discussion. Immediately below these numbers, write descriptions of how, when, by whom, with what, to what degree, why, where, etc, the requirements will be satisfied.

#### **4.1.5 Rejection / Withdrawal of Proposals Response:**

4.1.5.1. Rejection of Proposals The right is reserved by the County at its discretion to reject any or all proposals or parts thereof. The County reserves the right to waive defects or informalities, to negotiate with Offeror's and to accept the proposal deemed to be in the best interest of the County. The County will take into account evaluation factors set forth in the RFP.

4.1.5.2. Withdrawal of Proposals Proposals may be withdrawn on written request from the Offeror at the address shown in the solicitation prior to the time of acceptance.

4.1.5.3. Negligence on the part of the offeror in preparing the proposal confers no right of withdrawal after the time fixed for the acceptance of the proposals.

#### **4.1.6. Validity of Proposal Response:**

4.1.6.1. The offeror agrees that proposal response shall remain firm for a period of ninety (90) calendar days after the date specified for the return of proposals.

#### **4.1.7. Terms and Conditions:**

4.1.7.1. The offeror agrees that by submitting an offer, Boone County's Terms and Conditions as incorporated herein shall become part of the contract, and in the event of conflict between any terms the offeror submits, the terms and conditions of the County shall govern.



5. Response/Pricing Page

In compliance with this Request for Proposal (RFP) and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFP and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**5.1 The offeror must submit pricing for services in the Pricing section of the Offeror Response Pages that follow.** As a turnkey operation, all quoted pricing for the detainee telephone services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the detainee telephone system fully operational as described herein including recording and monitoring capabilities, as well as maintenance.

**5.2 Attach a Letter of Transmittal** to this page and place at the beginning of the proposal response. Included in the letter shall be a statement that identifies all materials and enclosures being identified in the proposal response. The letter of transmittal must be signed by the person who is authorized to contractually commit the offeror's organization.

5.3 **Provide a contact person** who will be responsible for coordinating the efforts and personnel of all parties involved in the response, to include, but not be limited to, oral presentations, demonstrations, site visits and responses to request for clarification, if any. Provide the following:

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax: \_\_\_\_\_

**5.4 OFFEROR'S EXPERIENCE, EXPERTISE AND RELIABILITY**

The evaluation of the offeror's proposed experience and reliability shall be subjective based on the ability of the offeror to perform the requirements stated herein. Therefore, the offeror should present detailed information regarding their experience and reliability. The following information should be provided by the offeror in order to assist Boone County in the evaluation of the offeror's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Describe the offeror's history in providing detainee phone service and address the number of years(s) the offeror has been providing professional detainee phone services in the Missouri and national markets:

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Address any litigation the offeror is currently involved in or has been involved in over the past three (3) years regarding delivery of detainee phone services:

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**OFFEROR'S REFERENCES**

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

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Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

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Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

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Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

\_\_\_\_\_

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Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

**5.5 PERSONNEL EXPERTISE SUMMARY**

The offeror should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform under the detainee telephone service contract for the County. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

**(Also attach resumes for key personnel)**

Personnel	Background and Expertise of Personnel
1. _____ (Name)  _____ (Title)	
2. _____ (Name)  _____ (Title)	
3. _____ (Name)  _____ (Title)	
4. _____ (Name)  _____ (Title)	
5. _____ (Name)  _____ (Title)	

**5.6 In addition it is highly desirable that the offeror provide the following information related to the offeror's Experience, Expertise and Reliability:**

1. It is highly desired that the offeror describe any billing disputes the offeror's company has with any users of the system for any reason; the offeror should provide enough detail without disclosure of the user's private information. The detail the County seeks should help the County understand the nature of the dispute, and the time it took to resolve it.

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2. The offeror should provide a list of customers who have experienced detainee telephone system outages lasting longer than 24 hours while under a service agreement with the offeror:

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3. The offeror should describe all patents the offeror's company holds or has developed, and in addition, should supply patent information for proposed equipment or software, where applicable to the detainee telephone system:

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## 5.7 PRICING

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations. No additional fees or pricing in excess of those shown below may be charged to users/called parties/detainees in excess of the pricing identified below except for the addition of applicable and current local, state, and federal fees/taxes. The offeror must understand and agree that if awarded the contract, no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees.

Proposal Preparation Costs: Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e. fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
1.	<b>Pre-paid Call / Debit Call</b>	Minute	\$

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The Price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
2.	<b>Collect Call</b>	Minute	\$

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
3.	<b>Automated Payment Fee Per Transaction</b>	Each	\$

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 3. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
4.	<b>Live Agent Fee Per Transaction</b>	Each	\$

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 4. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
5.	International Call	Minute	\$

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

## 5.8 METHODOLOGY

1. **Implementation Plan:** The offeror should sequentially list and briefly describe the tasks or events proposed for the implementation of the required services. The offeror shall submit a complete and detailed schedule of the time-frame required for installation, utility coordination, training, cut-over and testing. The system must be installed in a manner and under a time-frame designed to minimize disruption of the normal functioning of the Boone County Detention Facility.

If no tasks or events are required, the offeror should provide a statement of readiness. For each task/event identified, the offeror should identify the number of days required to complete the task/event, the personnel proposed to perform the task/event, and the number of work hours for each person.

The implementation plan should identify their proposed approach to implement all aspects of the hardware and software identified herein. Specifically, the offeror should minimally address the implementation of the phones, wiring, managed access system, and geo-fencing technology.

"Completion Day" should be specified as a certain number of days from date of contract award until completion of the specific task and should be expressed as calendar days, not specific dates.

"Assigned Personnel" should be identified by name rather than project title unless such personnel are yet to be hired.

"Workhours" should indicate that time each assigned person will spend on the specific task.

Task or Event	Completion Day	Assigned Personnel	Work-hours
Effective Date of Contract	1	N/A	N/A


2. Address the offeror's ability to provide a Detainee Telephone System that integrates with the County's computer system and allows for Sheriff's Office personnel's ability to monitor and record calls.

\_\_\_\_\_

\_\_\_\_\_

3. Also address programming features that the proposed Detainee Telephone System has:

\_\_\_\_\_

\_\_\_\_\_

4. Indicate the ability of the system to identify:

a. Telephone number originating call: \_\_\_\_\_

b. Time of call: \_\_\_\_\_

c. Telephone number called: \_\_\_\_\_

d. Most frequently called numbers: \_\_\_\_\_

e. Length of call: \_\_\_\_\_

f. Identify numbers called from a specific telephone number:  
\_\_\_\_\_

g. Identify telephone numbers called by a specific detainee:  
\_\_\_\_\_

h. Alarm number status: \_\_\_\_\_

i. Alarm a telephone number and allow automatic recording of the call:  
\_\_\_\_\_

j. Multiple calls from different detainee phones to the same number:

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5. Describe if the detainees will have the ability to call cell phones collect.

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6. If prepaid service is offered, the offeror should explain how it works in detail.

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7. The offeror should describe how an account can be set-up for users who are not able to receive collect calls.

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8. The offeror should describe how the end user will be notified when the end user has reached 75% of its site or personal credit limit.

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9. Detail the method of determining service interruptions and service call priorities. List response time for each priority and the level of expertise devoted to each priority.

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10. Identify the location of the service office responsible for the facilities, and its hours of operation.

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11. The offeror should describe the proposed system's use of PINs, including Open PIN, Restricted PIN, and Closed PIN.

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12. The offeror should state the minimum and maximum number of digits used in a PIN.

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13. The offeror should provide a detailed description of how PIN's work, and provide a list of facilities where this feature has been implemented.

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14. The County understands that there are industry patents in this area. The offeror should provide a description of the process deployed on the offeror's platform, and include a discussion of why the technical approach used provides the best three-way detection solution.

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15. The offeror should describe how the proposed system prevents the detainee from using extra digits to dial-out of the Detainee Telephone System platform.

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16. The offeror should describe how the proposed system prevents switch-hook dialing.

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17. The offeror should describe how the proposed system detects the difference between an accepted call, an answering machine, busy signal, or other telephone activity.

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18. The offeror should provide any other additional investigative tools, features, or creative solutions that might be available to the County.

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19. Describe assistive technology applications for hearing impaired in addition to TTY's:

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20. Indicate the proposed system's ability to be monitored from any personal computer with proper access permissions.

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21. The offeror should describe the maintenance and quality assurance programs for equipment to be installed.

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22. The offeror should describe the system user training program and include applicable training documents.

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23. The offeror should identify its system's record-keeping features, and address how off-site records archive/back-up tasks will be performed

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24. The offeror should describe the system's redundancy capacity for storing detainee phone calls.

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25. Please describe the durability of system components of the detainee telephone system including parts and labor:

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26. Identify and show the amount of work (using percentages) that will be subcontracted and the work/amount that the offeror's staff will perform directly:

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27. The offeror should attach samples of call detail and other available standard reports.
  28. In addition the offeror should provide samples of the offeror's invoices to users/called parties/detainees.
  29. The offeror should also provide samples of reporting that's available from the offeror's web-accessible system.
  30. The offeror should address if customized reports are available, and if so, describe the reports and what, if any, additional charges will be assessed for the customized reports.
- 
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**"No Bid" Response Form**

**Boone County Purchasing**  
613 E. Ash Street, Room 109  
Columbia, MO 65201

Liz Palazzolo, Senior Buyer  
(573) 886-4392 – Fax: (573) 886-4390  
Email: lpalazzolo@boonecountymo.org

**"NO BID RESPONSE FORM"**

**NOTE: THE OFFEROR SHOULD COMPLETE AND RETURN THIS FORM ONLY IF THE OFFEROR DOES NOT WANT TO SUBMIT A BID**

If the offeror does not wish to respond to this bid request, but would like to remain on the Boone County offeror list **for this service/commodity**, please remove form and return to the Purchasing Department by mail, email or fax.

**Bid: 40-16OCT17 – Detainee Telephone System**

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Contact: \_\_\_\_\_

Date: \_\_\_\_\_

Reason(s) for Not Submitting Proposal Response :

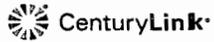
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Contractor shall comply with all applicable federal, state, and local laws and failure to do so, in County's sole discretion, shall give County the right to terminate this Contract.
2. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
3. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
4. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid. The Purchasing Director reserves the right, when only one bid has been received by the bid closing date, to delay the opening of bids to another date and time in order to revise specifications and/or establish further competition for the commodity or service required. The one (1) bid received will be retained unopened until the new Closing date, or at request of bidder, returned unopened for re-submittal at the new date and time of bid closing.
5. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
6. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
7. The delivery date shall be stated in definite terms, as it will be taken into consideration in awarding the bid.
8. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
9. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
10. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
11. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
12. No bid transmitted by fax machine or e-mail will be accepted.
13. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
14. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase from other vendors.
15. The County, from time to time, uses federal grant funds for the procurement of goods and services.

Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the *Federal Transit Administration's Best Practices Procurement Manual – Appendix A*. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.

16. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
17. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
18. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County on all transfer documents** including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
19. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.



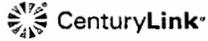
Account Name  
Collect and Prepaid

Commission Statement  
Nov-17

Commission Percentage: TBD  
Total Commission: TBD

NOTE: Numbers are illustrative only and are not intended to reflect actual volumes

Facility	Controller	Port	Location	TOTAL				LOCAL				INTRALATA				INTERLATA				INTERSTATE				INTERNATIONAL							
				Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission				
Facility ABC		1	201 Unit 3A Pod 1	6	25	\$ 28.28	\$ 11.88	120	1,071	\$ 401.37	\$ 168.58	120	1,071	\$ 401.37	\$ 168.58	2	17	\$ 4.76	\$ 3.09	1	0	\$ -	\$ -	7	230	\$ 64.26	\$ 41.72	0	0	\$ -	\$ -
Facility ABC		1	203 Unit 3A Pod 3	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	120	1,029	\$ 401.37	\$ 168.58	2	17	\$ 4.76	\$ 3.09	1	0	\$ -	\$ -	7	230	\$ 64.26	\$ 41.72	0	0	\$ -	\$ -
Facility ABC		1	204 Unit 3A Pod 4	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	120	1,029	\$ 401.37	\$ 168.58	3	26	\$ 7.14	\$ 4.64	4	34	\$ 9.52	\$ 6.19	7	60	\$ 16.66	\$ 10.83	3	26	\$ 22.70	\$ 14.75
Facility ABC		1	206 Unit 3A Control Point	203	2,025	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	146	1,241	\$ 347.48	\$ 225.86	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09	7	60	\$ 16.66	\$ 10.83	0	0	\$ -	\$ -
Facility ABC		1	208 Unit 3B South Wall	21	192	\$ 56.76	\$ 23.94	120	1,029	\$ 401.37	\$ 168.58	146	1,241	\$ 347.48	\$ 225.86	1	0	\$ -	\$ -	1	0	\$ -	\$ -	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	207 Unit 3B South Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	125	1,063	\$ 297.50	\$ 193.38	2	17	\$ 4.76	\$ 3.09	4	34	\$ 9.52	\$ 6.19	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	208 Unit 3B Control Point	21	192	\$ 56.76	\$ 23.94	120	1,029	\$ 401.37	\$ 168.58	141	1,199	\$ 335.58	\$ 218.13	2	17	\$ 4.76	\$ 3.09	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	209 Unit 3B West Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	71	624	\$ 188.88	\$ 109.84	1	0	\$ -	\$ -	1	0	\$ -	\$ -	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	210 Unit 3B West Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	125	1,063	\$ 297.50	\$ 193.38	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	211 Unit 3C/D East Wall	58	772	\$ 107.60	\$ 45.19	120	1,029	\$ 401.37	\$ 168.58	132	1,122	\$ 314.16	\$ 204.20	3	26	\$ 7.14	\$ 4.64	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	213 Unit 3C/D East Wall	58	772	\$ 107.60	\$ 45.19	120	1,029	\$ 401.37	\$ 168.58	86	561	\$ 157.08	\$ 102.10	2	17	\$ 4.76	\$ 3.09	1	0	\$ -	\$ -	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	213 Unit 3C/D East Wall	58	772	\$ 107.60	\$ 45.19	120	1,029	\$ 401.37	\$ 168.58	150	1,448	\$ 321.90	\$ 206.85	4	0	\$ -	\$ -	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -	1	0	\$ -	\$ -
Facility ABC		1	214 Unit 3C/D East Wall	93	1,042	\$ 274.69	\$ 115.37	120	1,029	\$ 401.37	\$ 168.58	62	527	\$ 147.56	\$ 95.91	3	26	\$ 7.14	\$ 4.64	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	215 Unit 3C/D Control Point	93	1,042	\$ 274.69	\$ 115.37	120	1,029	\$ 401.37	\$ 168.58	55	468	\$ 130.90	\$ 85.09	2	17	\$ 4.76	\$ 3.09	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	216 Unit 3E/F Dorm Room	1	2	\$ 1.80	\$ 0.76	120	1,029	\$ 401.37	\$ 168.58	79	546	\$ 180.88	\$ 117.57	3	26	\$ 7.14	\$ 4.64	2	17	\$ 4.76	\$ 3.09	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	217 Unit 3E/F Dorm Room	204	2,056	\$ 743.10	\$ 312.10	120	1,029	\$ 401.37	\$ 168.58	126	1,071	\$ 299.88	\$ 194.92	1	0	\$ -	\$ -	1	0	\$ -	\$ -	17	145	\$ 40.46	\$ 26.30	0	0	\$ -	\$ -
Facility ABC		1	218 Unit 3E/F Dorm Room	193	1,788	\$ 696.28	\$ 288.24	120	1,029	\$ 401.37	\$ 168.58	116	986	\$ 276.08	\$ 179.45	2	17	\$ 4.76	\$ 3.09	1	0	\$ -	\$ -	10	85	\$ 23.80	\$ 15.47	0	0	\$ -	\$ -
Facility ABC		1	219 Unit 3E/F Dorm Room	19	182	\$ 82.03	\$ 34.45	120	1,029	\$ 401.37	\$ 168.58	100	1,420	\$ 397.48	\$ 258.35	2	17	\$ 4.76	\$ 3.09	0	0	\$ -	\$ -	2	17	\$ 4.76	\$ 3.09	0	0	\$ -	\$ -
Facility ABC		1	220 Unit 3E/F Dorm Room	19	182	\$ 82.03	\$ 34.45	120	1,029	\$ 401.37	\$ 168.58	130	1,105	\$ 309.40	\$ 201.11	1	0	\$ -	\$ -	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09	0	0	\$ -	\$ -
Facility ABC		1	221 Dayroom West Wall	181	2,025	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	118	1,000	\$ 280.84	\$ 182.55	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09	2	17	\$ 4.76	\$ 3.09
Facility ABC		1	222 Dayroom West Wall	21	191	\$ 55.08	\$ 27.33	120	1,029	\$ 401.37	\$ 168.58	98	833	\$ 233.24	\$ 151.61	1	0	\$ -	\$ -	0	0	\$ -	\$ -	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	223 Dayroom West Wall	45	484	\$ 114.64	\$ 48.15	120	1,029	\$ 401.37	\$ 168.58	101	899	\$ 240.38	\$ 156.25	0	0	\$ -	\$ -	3	26	\$ 7.14	\$ 4.64	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -
Facility ABC		1	224 Dayroom West Wall	328	3,570	\$ 788.06	\$ 330.98	120	1,029	\$ 401.37	\$ 168.58	94	729	\$ 223.72	\$ 145.42	1	0	\$ -	\$ -	1	0	\$ -	\$ -	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -
Facility ABC		1	225 Dayroom North Wall	117	1,399	\$ 305.08	\$ 128.13	120	1,029	\$ 401.37	\$ 168.58	167	1,420	\$ 397.48	\$ 258.35	3	26	\$ 7.14	\$ 4.64	2	17	\$ 4.76	\$ 3.09	4	34	\$ 9.52	\$ 6.19	0	0	\$ -	\$ -
Facility ABC		1	226 Dayroom North Wall	140	1,345	\$ 357.58	\$ 225.78	120	1,029	\$ 401.37	\$ 168.58	92	782	\$ 218.96	\$ 142.32	2	17	\$ 4.76	\$ 3.09	3	26	\$ 7.14	\$ 4.64	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	227 Dayroom North Wall	82	823	\$ 207.47	\$ 87.14	120	1,029	\$ 401.37	\$ 168.58	64	544	\$ 152.32	\$ 99.01	2	17	\$ 4.76	\$ 3.09	3	26	\$ 7.14	\$ 4.64	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	228 Dayroom North Wall	36	496	\$ 95.58	\$ 40.14	120	1,029	\$ 401.37	\$ 168.58	164	1,384	\$ 386.32	\$ 253.71	0	0	\$ -	\$ -	2	17	\$ 4.76	\$ 3.09	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	201 Unit 3A Pod 1	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	77	655	\$ 183.26	\$ 118.12	0	0	\$ -	\$ -	3	26	\$ 7.14	\$ 4.64	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -
Facility ABC		1	202 Unit 3A Pod 2	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	115	978	\$ 273.70	\$ 177.81	0	0	\$ -	\$ -	2	17	\$ 4.76	\$ 3.09	7	60	\$ 16.66	\$ 10.83	0	0	\$ -	\$ -
Facility ABC		1	203 Unit 3A Pod 3	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	53	536	\$ 149.84	\$ 97.46	3	26	\$ 7.14	\$ 4.64	4	34	\$ 9.52	\$ 6.19	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -
Facility ABC		1	204 Unit 3A Pod 4	6	25	\$ 28.28	\$ 11.88	120	1,029	\$ 401.37	\$ 168.58	137	1,165	\$ 326.06	\$ 211.94	0	0	\$ -	\$ -	4	34	\$ 9.52	\$ 6.19	7	60	\$ 16.66	\$ 10.83	0	0	\$ -	\$ -
Facility ABC		1	206 Unit 3B South Wall	21	192	\$ 56.76	\$ 23.94	120	1,029	\$ 401.37	\$ 168.58	133	1,131	\$ 316.54	\$ 205.75	2	17	\$ 4.76	\$ 3.09	1	0	\$ -	\$ -	7	60	\$ 16.66	\$ 10.83	3	26	\$ 22.70	\$ 14.75
Facility ABC		1	207 Unit 3B South Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	170	1,445	\$ 404.60	\$ 262.99	1	0	\$ -	\$ -	2	17	\$ 4.76	\$ 3.09	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	208 Unit 3B Control Point	21	192	\$ 56.76	\$ 23.94	120	1,029	\$ 401.37	\$ 168.58	74	629	\$ 176.12	\$ 114.48	0	0	\$ -	\$ -	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	209 Unit 3B West Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	85	723	\$ 202.30	\$ 131.50	0	0	\$ -	\$ -	4	34	\$ 9.52	\$ 6.19	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -
Facility ABC		1	210 Unit 3B West Wall	203	2,004	\$ 794.11	\$ 333.53	120	1,029	\$ 401.37	\$ 168.58	53	451	\$ 126.14	\$ 81.99	0	0	\$ -	\$ -	11	94	\$ 26.18	\$ 17.02	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	211 Unit 3C/D East Wall	58	772	\$ 107.60	\$ 45.19	120	1,029	\$ 401.37	\$ 168.58	159	1,352	\$ 378.42	\$ 245.97	0	0	\$ -	\$ -	1	0	\$ -	\$ -	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	212 Unit 3C/D East Wall	93	1,042	\$ 274.69	\$ 115.37	120	1,029	\$ 401.37	\$ 168.58	174	1,479	\$ 414.12	\$ 269.19	3	26	\$ 7.14	\$ 4.64	3	26	\$ 7.14	\$ 4.64	0	0	\$ -	\$ -	0	0	\$ -	\$ -
Facility ABC		1	213 Unit 3C/D East Wall	58	772	\$ 107.60	\$ 45.19	120	1,029	\$ 401.37	\$ 168.58	51	434	\$ 12																	



Account Name  
Inmate Debit

Commission Statement  
Nov-17

Commission Percentage: TBD  
Total Commission: TBD

NOTE: Numbers are illustrative only and are not intended to reflect actual volumes

Facility	Controller	Port	Location	TOTAL			LOCAL			INTRALATA			INTERLATA			INTERSTATE			INTERNATIONAL				
				Messages	Minutes	Revenue	Messages	Minutes	Revenue	Messages	Minutes	Revenue	Messages	Minutes	Revenue	Messages	Minutes	Revenue	Messages	Minutes	Revenue		
Facility ABC			2011 Unit 3A Pod 1	1	31	2.12	1	31	2.12	1	31	2.12	1	31	2.12	1	31	2.12	1	31	2.12		
Facility ABC			202 Unit 3A Pod 2	9	87	28.01	43	366	102.34	0	0	0	1	9	2.38	1	9	2.38	1	9	2.38		
Facility ABC			203 Unit 3A Pod 3	2	23	14.67	59	587	164.22	2	17	4.76	1	102	28.56	1	102	28.56	1	102	28.56		
Facility ABC			204 Unit 3A Pod 4	17	168	59.40	53	451	126.14	1	9	2.38	1	17	4.76	3.09	7	60	16.66	10	83	23.83	
Facility ABC			205 Unit 3A Control Point	20	210	37.54	61	519	145.18	1	9	2.38	1	9	2.38	1.55	13	111	30.94	20	111	30.94	
Facility ABC			206 Unit 3B South Wall	3	25	5.40	55	466	130.80	2	17	4.76	3.09	11	94	26.18	17	94	26.18	17	94	26.18	
Facility ABC			207 Unit 3B South Wall	7	68	19.72	58	493	138.04	2	17	4.76	3.09	11	94	26.18	17	94	26.18	17	94	26.18	
Facility ABC			208 Unit 3B Control Point	28	301	66.24	50	425	119.00	2	17	4.76	3.09	0	0	0	5	43	11.90	7	43	11.90	
Facility ABC			209 Unit 3B West Wall	16	217	28.12	53	451	126.14	0	0	0	2	17	4.76	3.09	6	51	14.28	9	51	14.28	
Facility ABC			210 Unit 3B West Wall	17	202	51.32	66	561	157.08	1	9	2.38	1.55	0	0	0	10	86	23.80	15	86	23.80	
Facility ABC			211 Unit 3C0 East Wall	14	139	32.48	63	536	149.94	4	34	9.52	6.19	1	9	2.38	1.55	9	77	21.42	13	77	21.42
Facility ABC			212 Unit 3C0 East Wall	24	273	71.04	65	553	154.70	2	17	4.76	3.09	0	0	0	4	34	9.52	6	34	9.52	
Facility ABC			213 Unit 3C0 East Wall	0	0	0	43	366	102.34	1	9	2.38	1.55	6	51	14.28	9	0	0	0	0	0	
Facility ABC			214 Unit 3C0 East Wall	149	1,861	379.96	64	544	152.32	2	17	4.76	3.09	2	17	4.76	3.09	9	77	21.42	13	77	21.42
Facility ABC			215 Unit 3C0 Control Point	70	724	212.48	58	493	138.04	1	9	2.38	1.55	1	9	2.38	1.55	0	0	0	0	0	0
Facility ABC			216 Unit 3EF Dorm Room	0	0	0	45	383	107.10	1	9	2.38	1.55	0	0	0	0	0	0	0	0	0	
Facility ABC			217 Unit 3EF Dorm Room	8	70	17.52	44	374	104.72	1	9	2.38	1.55	0	0	0	12	102	28.56	16	102	28.56	
Facility ABC			218 Unit 3EF Dorm Room	58	637	163.48	70	595	166.80	0	0	0	0	1	9	2.38	1.55	5	43	11.90	7	43	11.90
Facility ABC			219 Unit 3EF Dorm Room	11	114	18.80	54	459	126.52	0	0	0	0	11	94	26.18	17	94	26.18	17	94	26.18	
Facility ABC			220 Unit 3EF Dorm Room	25	332	72.12	55	466	130.80	2	17	4.76	3.09	0	0	0	0	0	0	0	0	0	
Facility ABC			221 Dayroom West Wall	36	482	74.40	50	425	119.00	2	17	4.76	3.09	0	0	0	0	0	0	0	0	0	
Facility ABC			222 Dayroom West Wall	3	32	11.88	48	408	114.24	0	0	0	0	1	9	2.38	1.55	14	119	33.32	21	119	33.32
Facility ABC			223 Dayroom West Wall	0	0	0	68	578	161.84	1	9	2.38	1.55	1	9	2.38	1.55	10	85	23.80	15	85	23.80
Facility ABC			224 Dayroom West Wall	88	1,241	228.84	56	476	133.28	6	51	14.28	9.28	1	9	2.38	1.55	10	86	23.80	15	86	23.80
Facility ABC			225 Dayroom North Wall	44	369	121.25	70	595	166.80	0	0	0	0	3	26	7.14	4.64	0	0	0	0	0	0
Facility ABC			226 Dayroom North Wall	15	205	31.80	43	366	102.34	0	0	0	0	2	17	4.76	3.09	7	60	16.66	10	60	16.66
Facility ABC			227 Dayroom North Wall	123	1,620	221.64	71	604	168.98	0	0	0	0	1	9	2.38	1.55	6	51	14.28	9	51	14.28
Facility ABC			228 Dayroom North Wall	32	369	59.76	61	519	145.18	1	9	2.38	1.55	0	0	0	2	17	4.76	3.09	0	0	0
Facility ABC			2011 Unit 3A Pod 1	37	456	76.38	53	451	126.14	2	17	4.76	3.09	4	34	9.52	6.19	11	94	26.18	17	94	26.18
Facility ABC			202 Unit 3A Pod 2	56	754	108.67	61	519	145.18	2	17	4.76	3.09	2	17	4.76	3.09	9	43	11.90	7	43	11.90
Facility ABC			203 Unit 3A Pod 3	65	1,046	165.40	71	604	168.98	2	17	4.76	3.09	0	0	0	7	60	16.66	10	60	16.66	
Facility ABC			204 Unit 3A Pod 4	74	1,018	173.84	51	434	121.38	2	17	4.76	3.09	0	0	0	10	86	23.80	15	86	23.80	
Facility ABC			205 Unit 3A Control Point	77	986	183.75	46	391	109.68	1	9	2.38	1.55	2	17	4.76	3.09	9	77	21.42	13	77	21.42
Facility ABC			206 Unit 3B South Wall	136	1,917	255.35	47	400	111.86	1	9	2.38	1.55	1	9	2.38	1.55	14	119	33.32	21	119	33.32
Facility ABC			207 Unit 3B South Wall	83	1,357	167.40	50	425	119.00	1	9	2.38	1.55	1	9	2.38	1.55	6	51	14.28	9	51	14.28
Facility ABC			208 Unit 3B Control Point	0	0	0	46	391	109.68	1	9	2.38	1.55	11	94	26.18	17	94	26.18	17	94	26.18	
Facility ABC			209 Unit 3B West Wall	12	147	21.60	47	400	111.86	1	9	2.38	1.55	3	26	7.14	4.64	0	0	0	0	0	
Facility ABC			210 Unit 3B West Wall	2	16	3.44	54	459	126.52	0	0	0	0	8	68	19.04	12.38	2	17	4.76	3.09		
Facility ABC			211 Unit 3C0 East Wall	12	165	30.80	51	434	121.38	0	0	0	0	2	17	4.76	3.09	10	85	23.80	15	85	23.80
Facility ABC			212 Unit 3C0 East Wall	7	70	13.80	43	366	102.34	2	17	4.76	3.09	0	0	0	0	0	0	0	0	0	
Facility ABC			213 Unit 3C0 East Wall	34	446	67.12	56	476	133.28	2	17	4.76	3.09	2	17	4.76	3.09	1	9	2.38	1.55		
Facility ABC			214 Unit 3C0 East Wall	5	46	9.40	52	442	123.76	0	0	0	0	2	17	4.76	3.09	0	0	0	0	0	
Facility ABC			215 Unit 3C0 Control Point	0	0	0	58	498	138.64	0	0	0	0	11	94	26.18	17	94	26.18	17	94	26.18	
Facility ABC			216 Unit 3EF Dorm Room	0	0	0	48	408	114.24	0	0	0	0	9	77	21.42	13	77	21.42	13	77	21.42	
Facility ABC			217 Unit 3EF Dorm Room	4	60	10.40	45	383	107.10	2	17	4.76	3.09	0	0	0	0	0	0	0	0	0	
Facility ABC			218 Unit 3EF Dorm Room	15	176	28.52	67	570	159.46	1	9	2.38	1.55	2	17	4.76	3.09	13	111	30.94	20	111	30.94
Facility ABC			219 Unit 3EF Dorm Room	13	158	23.40	53	451	126.14	1	9	2.38	1.55	2	17	4.76	3.09	7	60	16.66	10	60	16.66



Account Name  
YTD Summary Report - 2017

NOTE: Numbers are illustrative only and are not intended to reflect actual volumes

Nov-17

Month	TOTAL				LOCAL				INTRALATA				INTERLATA				INTERSTATE				INTERNATIONAL			
	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission	Messages	Minutes	Revenue	Commission
Jan																								
Feb																								
Mar																								
Apr																								
May	10,390	68,060	\$ 24,827.91	\$ 16,138.14	9,320	79,220	\$ 22,181.60	\$ 14,418.04	160	1,360	\$ 380.80	\$ 247.52	176	1,496	\$ 418.88	\$ 272.27	671	5,704	\$ 1,595.98	\$ 1,038.04	33	281	\$ 248.65	\$ 102.27
Jun	10,671	90,702	\$ 25,372.74	\$ 16,622.28	9,600	81,597	\$ 22,847.05	\$ 14,850.58	165	1,401	\$ 392.22	\$ 254.95	181	1,541	\$ 431.45	\$ 280.44	691	5,875	\$ 1,644.89	\$ 1,063.18	34	289	\$ 257.13	\$ 107.14
July	11,085	94,224	\$ 26,565.86	\$ 17,267.81	9,972	84,765	\$ 23,734.31	\$ 15,477.90	171	1,455	\$ 407.46	\$ 264.85	188	1,601	\$ 448.90	\$ 291.33	718	6,193	\$ 1,708.77	\$ 1,110.70	35	302	\$ 267.12	\$ 173.63
Aug	11,418	97,051	\$ 27,362.83	\$ 17,785.84	10,272	87,308	\$ 24,446.34	\$ 15,890.12	176	1,499	\$ 418.58	\$ 272.79	194	1,649	\$ 461.65	\$ 300.07	740	6,286	\$ 1,760.03	\$ 1,144.02	36	309	\$ 275.13	\$ 178.84
Sept																								
Oct																								
Nov																								
Dec																								
YTD TOTAL	43,534	370,037	\$ 104,329.34	\$ 67,814.07	39,164	332,890	\$ 93,209.30	\$ 60,586.05	672	5,715	\$ 1,600.16	\$ 1,040.10	740	6,286	\$ 1,760.18	\$ 1,144.11	2,820	23,967	\$ 6,710.67	\$ 4,361.94	139	1,179	\$ 1,049.03	\$ 681.87

- 7) Paragraph 3.16.9(c) of RFP 40-16OCT17 requires that the commission be paid on all Gross Billed Revenue: "Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System."

CenturyLink's clarification shall clarify that all calls, i.e., local, intraLATA intrastate, interLATA intrastate, interLATA interstate, and international calls, shall be included as gross revenue used in calculating its commission calculation, and that its calculation complies with Paragraph 3.16.9(c) of RFP 40-16OCT17.

In compliance with this request, the offeror agrees to furnish the services requested and proposed, at the pricing quoted and commissions offered, and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of the RFP and this clarification request, and is authorized to contract on behalf of the firm.

**Note:** This form must be signed. All signatures must be original and not photocopies.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-mail: \_\_\_\_\_

RFP#: 40-16OCT17		Centurylink			
Detainee Telephone System					
Cost Clarification 1	Description	Commission Or Price	Estimated Annual Quantity	Extended Price	Commission Payment
<b>Part One</b>					
Line Item 1	Administrative Costs Recovery Commission Firm, Fixed Percentage on Gross Revenue	17% Commission	1		17%
Line Item 2	Pre-paid Call/Debit Call - Price Per Minute	\$ 0.04	213,565	\$ 8,542.60	
Line Item 3	Collect Call - Price Per Minute	\$ 0.04	213,565	\$ 8,542.60	
Line Item 4	Automated Payment Fee Per Each Transaction	\$ 3.00	220	\$ 660.00	
Line Item 5	Live Agent Fee Per Each Transaction	\$ 5.95	220	\$ 1,309.00	
Line Item 6	International Call - Price Per Minute	\$ 0.50	5	\$ 2.50	
		TOTAL PRICE FOR COMMISSION PAYMENT CALCULATION		\$ 19,056.70	\$ 3,239.64
<b>Part Two</b>					
Line Item 7	Other Commission Firm, Fixed Percentage on Gross Revenue	60.2% Commission	1		60.2%
Line Item 8	Pre-paid Call/Debit Call - Price Per Minute	\$ 0.10	213,565	\$ 21,356.50	
Line Item 9	Collect Call - Price Per Minute	\$ 0.10	213,565	\$ 21,356.50	
Line Item 10	Automated Payment Fee Per Each Transaction	\$ 3.00	220	\$ 660.00	
Line Item 11	Live Agent Fee Per Each Transaction	\$ 5.95	220	\$ 1,309.00	
Line Item 12	International Call - Price Per Minute	\$ 0.50	5	\$ 2.50	
		TOTAL PRICE FOR COMMISSION PAYMENT CALCULATION		\$ 44,684.50	\$ 26,900.07
<b>Other Ancillary Fees Charged to Users</b>					
<p><i>Centurylink must identify all other charges/ancillary fees to users below. If fees other than those identified are charged to users, then Centurylink must identify them in the clarification. Failure to identify any additional fees shall be interpreted as meaning that system users will not be billed any fees in addition to those identified. Ancillary charges include but are not limited to account set-up fees, transfer of funds fees, pass-through fees including fees for processing third-party connections or funds transfers, charges per card for prepaid debit cards, paper statement fees, and/or refund fees. In addition, address the frequency at which the account is charged with the identified fee.</i></p>					
	<b>Other Fees Charged to Users</b>	<b>Fee Amount</b>	<b>Charge Frequency, e.g., per month, each transaction, one-time, etc.</b>		
1	Single Bill Fee				
2	Prepaid Account Set-Up Fee (Prepaid Collect)				
3	Prepaid Account Funding Fee Via Internet (Prepaid Collect)				
4	Prepaid Account Funding Fee via Telephone (Prepaid Collect)				
5	Refund Fee (prepaid Collect)				
6	Prepaid Account Close-Out Fee (Prepaid Collect)				
7	Account Maintenance Fee (Prepaid Collect)				
8	Inactive Account Fee (Prepaid Collect)				
9	Regulatory Cost Recovery Fee				

<b>RFP#: 40-16OCT17</b>	<b>Centurylink</b>			
<b>Detainee Telephone System</b>				
10	Transfer of funds from Western Union, MoneyGram or similar			
11	Paper Statement			
12	Transfer from Commissary Fund			
13	Price per Debit Card			

## Technical Response

<p><b>Calling Detection and Prevention</b></p> <p><b>User Access Levels:</b> Allows for the designation of user types (finance, investigator, administrator, etc.)</p> <p><b>User Activity Log:</b> Records the actions of users in the system for review</p>	<p><b>Personal Identification Numbers (PINs)</b></p> <p><b>Personal Allowed Number (PAN) Lists</b></p> <p><b>Personal Restricted Number (PRN) Lists</b></p> <p><b>Reporting:</b> iCON features many built-in investigative and administrative reports and allows users to generate their own custom reports using any of the massive amount of data parameters we capture and store. All reports that a user consistently runs can be saved to their "My Reports" profile making the report available directly from their personalized Dashboard.</p>	<p>audio mining, and keyword search utility.</p> <p><b>iCONTracker:</b> iCON's called party GPS locator</p> <p><b>Social Network Investigator:</b> Quickly helps users investigate the social media profiles of detainees and their public contacts.</p> <p><b>Data Link:</b> Allows investigators to access and compare investigative data from surrounding correctional facilities.</p>
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4. Indicate the ability of the system to identify:
  - a. Telephone number originating call:
  - b. Time of call:
  - c. Telephone number called:
  - d. Most frequently called numbers:
  - e. Length of call:
  - f. Identify numbers called from a specific telephone number:
  - g. Identify telephone numbers called by a specific detainee:
  - h. Alarm number status:
  - i. Alarm a telephone number and allow automatic recording of the call:
  - j. Multiple calls from different detainee phones to the same number:

 CenturyLink Response: Read, understood and will comply.

## Technical Response

- a. Telephone number originating call:  
Yes, this info is included on the CDR for every call
- b. Time of call:  
Yes, this info is included on the CDR for every call
- c. Telephone number called:  
Yes, this info is included on the CDR for every call
- d. Most frequently called numbers:  
Yes, this is a standard iCON report
- e. Length of call:  
Yes, this info is included on the CDR for every call
- f. Identify numbers called from a specific telephone number:  
Yes, the detainee phone used is included on the CDR for every call. Users can run a report showing all destination numbers called from any given detainee phone.
- g. Identify telephone numbers called by a specific detainee:  
Yes, users can run a report that shows all destination numbers called by a specific detainee.
- h. Alarm number status:  
WatchList is iCON's built-in alarm/hot alert function.
- i. Alarm a telephone number and allow automatic recording of the call:  
All calls are automatically recorded by the system unless designated as non-recordable (i.e. attorney calls). WatchList can be used to set an alert/alarm for specific calling activity, for example whenever a specific destination number is called by any detainee. Users who receive the alert have the option to jump in to live monitor the call directly from the alert.
- j. Multiple calls from different detainee phones to the same number:  
Yes, this is a standard iCON report.

5. Describe if the detainees will have the ability to call cell phones collect.

☼ CenturyLink Response: Read, understood and will comply.

Yes, collect calling is available to all cellular telephones.

6. If prepaid service is offered, the offeror should explain how it works in detail.

☼ CenturyLink Response: Read, understood and will comply.

Prepaid services generally represent over 80% of detainee telephone calling, so the quality of these services is of utmost importance to ensure that Boone County is receiving its optimal revenue from detainee calling. We have developed a prepaid program that we believe is the best in the industry, offering four dynamic methods of connecting detainees to their loved ones:

- Friends & Family Prepaid Collect
- Detainee Debit Card Calling
- Detainee Cardless Debit
- Direct Billing

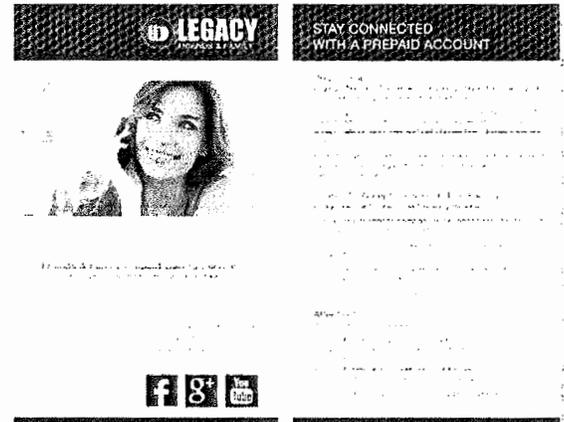
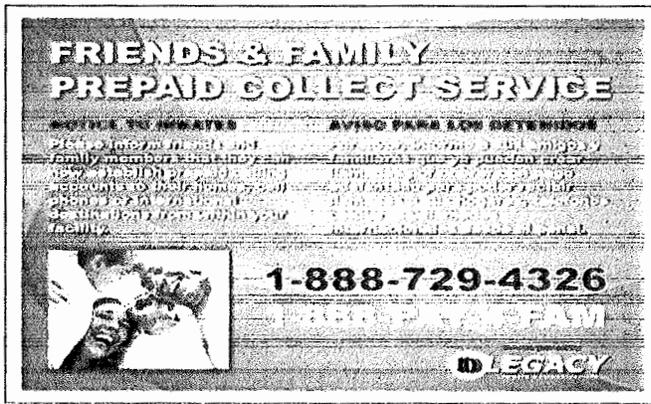
### **Friends & Family Prepaid Accounts**

Called parties can pay in advance for collect calling time by opening a prepaid account. This offers a more cost-effective calling option for staying in touch with an incarcerated loved one, as well as an alternative option if their telephone is unable to receive traditional collect calls.

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

Friends and Family can easily replenish existing accounts or check their account balance by visiting our website or by calling our toll-free customer service number, both available 24 hours a day, 365 days a year. Additionally, upon acceptance of a call from your facility an automated prompt will inform the called party of the amount of funds they have available in their account.

CenturyLink will also provide the facility with pamphlets in both Spanish and English that provide information about how to set up and replenish a Friends & Family Prepaid Account. This information will also be posted on bulletin boards and in other public areas as requested. These materials will help to generate interest in the program.

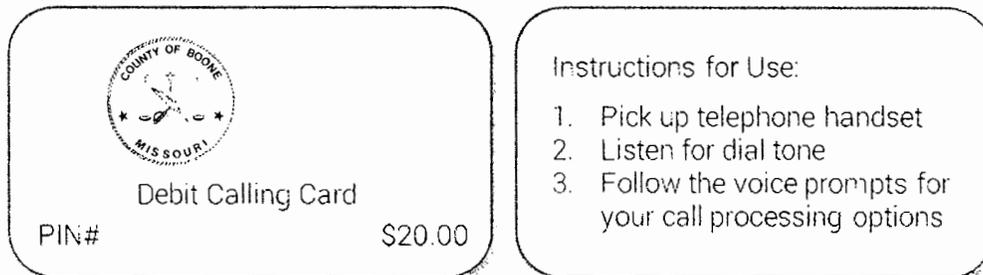


Payment options for prepaid accounts include Cashier's Check, Money Order, and:



## Detainee Debit Cards

CenturyLink will provide the Boone County Detention Facility with the ability to offer Debit Card or Cardless Debit services to its detainees for their phone calls. The cards are construction paper-based, ensuring that they cannot be utilized as a weapon.



Standard denominations for Debit Cards are \$5, \$10, \$20, \$30, \$40, and \$50. The facility will sell the Debit Cards via the Commissary or Cash Office and retain the funds. The facility will be invoiced for all Debit Cards purchased, and will **receive the offered commission percentage as a discount on each purchased card.**

## Detainee Cardless Debit Accounts

Cardless Debit calling can also be sold at the facility, allowing detainees to deposit any dollar denomination they may require. Detainees can pre-pay for their calling at the Commissary and have those funds applied to their assigned PIN number without the need for a card. The cost of each call will be automatically deducted from their account, which can either be created upon booking or through the Commissary. Friends and Family can also deposit money into a

## Technical Response

detainee's debit account through our website, from the Cash Office, or by Payment Kiosk. Using Debit Cards or Cardless Debit services, a detainee can call any County-approved telephone number in virtually any destination point in the world.

7. The offeror should describe how an account can be set-up for users who are not able to receive collect calls.

☼ CenturyLink Response: Read, understood and will comply.

Even if their chosen local exchange carrier does not accept collect calls, called parties will still be contacted by our automated operator and notified that their collect call can be accepted using a credit card. If the called party does not want to use a credit card, the automated operator will inform the party that they can set up a prepaid account, offering to connect them to one of our live operators or inviting them to sign up online on our website. With either one of these options, called parties will be able to set up a prepaid account at any time 24 hours a day, 365 days a year.

8. The offeror should describe how the end user will be notified when the end user has reached 75% of its site or personal credit limit.

☼ CenturyLink Response: Read, understood and will comply.

A recording is played to the end user notifying them of their low balance prior to connecting the call. The low balance recording is played when their credit balance is less than the cost of a 15 minute call.

9. Detail the method of determining service interruptions and service call priorities. List response time for each priority and the level of expertise devoted to each priority.

☼ CenturyLink Response: Read, understood and will comply.

Our network is managed and maintained by its own expert network and IT personnel, 24-hours a day. All system features are monitored by live personnel as well as a state-of-the-art self-diagnostic system. The iCON system is completely redundant with architecture that encompasses call processing in our nationwide, carrier-grade telecommunications network. We will utilize dedicated circuits that will serve as an entry-way in to our network, further decreasing and chance of any major outages.

CenturyLink utilizes three (3) service level categories; Minor (Priority Level 3), Major (Priority Level 2), and Emergency (Priority Level 1). The assigned priority level will be at the sole discretion of the facilities. Generally, the categories are defined by the following:

**Minor Service Category (Priority Service Level 3)  
24 Hour Resolution**

## Technical Response

A "minor" service category is assigned to any trouble report or service request that effects:

- one (1) individual detainee phone, BCD or kiosk is non-operational
- static or other noise heard on the line
- block or free call number entry or other iCON system administrative action needed
- new or customized report needed
- additional service requested
- additional training requested

All minor categories will be addressed **immediately** by our Implementation Manager with resolution provided within twenty four (24) hours of the report or request. In most instances these trouble reports and/or service requests will be handled directly by our support administrators or assigned Implementation Manager.

### **Major Service Category (Priority Service Level 2) 12 Hour Resolution**

A "major" service category is assigned to any trouble report or service request that effects:

- two (2) or more detainee phones, BCDs or kiosks not operational
- report information not listing on iCON
- recording or live monitoring utilities non-operational or malfunctioning

All major categories will be addressed immediately by our support administrators with resolution provided within twelve (12) hours of the report. Our administrators or local technicians will coordinate any equipment replacement needed. Our Information Technology (IT) Department will address and iCON related issues that may be the cause of a Major Service Category.

### **Emergency Service Category (Priority Service Level 1) Technician on-site within 4 hours**

An "emergency" service category consists of any report of 25% of detainee phones, BCDs or kiosks being disabled in *any* location or any occasion where iCON cannot be accessed by Boone County staff. An "emergency" trouble report is immediately responded to and a service technician is guaranteed on-site within four (4) hours of a report.

10. Identify the location of the service office responsible for the facilities, and its hours of operation.

 CenturyLink Response: Read, understood and will comply.

### 99.999% System Uptime

Our nationwide carrier-grade network is the backbone of the iCON™ system, providing a **99.999% system uptime** for the facility's detainee communication system. Our network is managed and maintained by our own expert network and IT personnel 24 hours a day, 365 days a year. All system features are monitored by live personnel as well as a state-of-the-art self-diagnostic system.

### Local Technical Support

CenturyLink will provide quality local technical support stationed a short distance away from your facilities. CenturyLink's dedicated technicians are a team of qualified and certified telecommunications professionals. 30% spare parts and equipment for the facilities will be stored locally to ensure quick service repairs.

### 24/7/365 Live Facility Support Center

We are proud to offer the County our **domestic** 24-hour facility support 365 days a year, including holidays. We own and operate our own 24/7 facility care center staffed with live personnel that are available at all times. The 24-hour toll free number to access our correctional facility support center is **877-700-5534**.

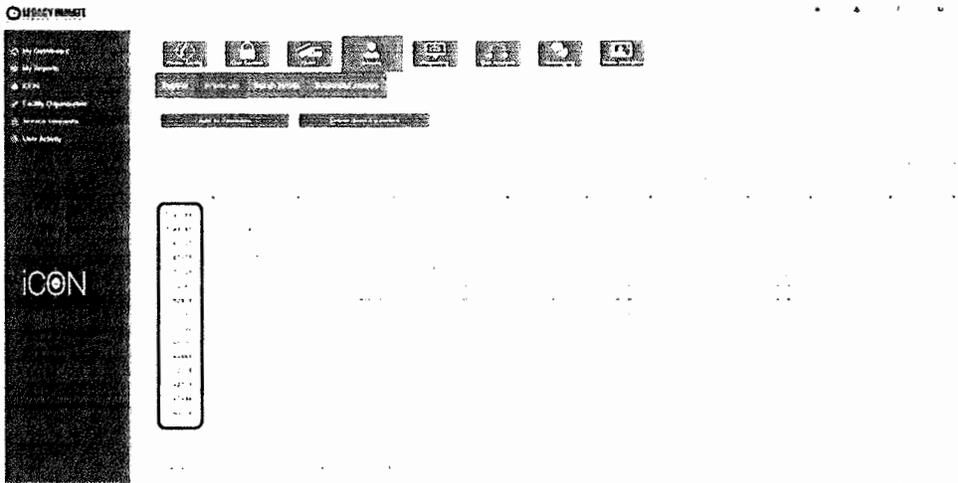
11. The offeror should describe the proposed system's use of PINs, including Open PIN, Restricted PIN, and Closed PIN.

☼ CenturyLink Response: Read, understood and will comply.

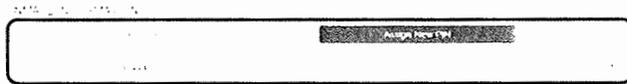
### PERSONAL IDENTIFICATION NUMBERS (PINS)

The iCON system proposed for the Boone County Detention Facility will allow detainee communications at the facility (or designated areas of the facility) to operate with detainee PINs. The same detainee PIN would be used for all of our communication services implemented at the facility (phone calling, video visitation, and messaging services).

## List of Detainees at a Facility with PINs



## Detainee Detail Screen with PIN



iCON is able to interface with any installed JMS system including the one currently utilized by the Boone County Detention Facility in order to automatically generate PINs based on Booking Information, including alphanumeric sequences. CenturyLink will contact Boone County's Information Technology department and duplicate the file output currently utilized at the facility ensuring a **quick and smooth transition** from the current vendor to CenturyLink. An FTP Server will be supplied by CenturyLink specifically to allow for the **automatic generation of detainee PINs**.

We have interfaced with numerous correctional facility JMS's throughout the country. The County's JMS will deliver file formats with the Detainee Name, PIN or Booking Number, and any other authentication information the County currently utilizes. The file will be delivered to a CenturyLink-supplied FTP server. The file will be uploaded to the server automatically utilizing IP addressing in any time interval. CenturyLink suggests an automatic upload every fifteen (15) minutes or upon JMS modification. iCON will be automatically updated with the detainee information within two (2) minutes of file delivery. The iCON system comes with Personal Identification Number (PIN) technology as part of the system. This is a standard feature and it is highly reliable and effective in identifying detainees making calls, assisting investigators in their criminal investigations, and providing security controls on detainee calling. iCON features an extensive PIN and PAN application that allows for quick and efficient processing of detainee PIN accounts.

### The PIN Feature

**A Personal Identification Number (PIN) is a unique number assigned to each detainee that links that detainee to a telephone account and allows him/her to make telephone calls.** PINs may be unlimited digits in length and can be assigned at random by the system, created as a combination of the County-assigned ID plus a random PIN for ease of tracking, or allow detainees to set up their own PIN. iCON will record the detainee's name the first time he or she attempts to place a call. The recorded name will be saved as a .WAV file and played on all subsequent calling by the detainee utilizing his/her PIN.

The assigned PIN number will manage detainee calls by:

- Called to numbers (including free calls)
- Number of calls per day/month
- Number of attempts per day/month
- Call durations

When the PIN feature is utilized the PIN must be keyed in by the detainee at the beginning of each telephone call. The PIN identifies the detainee making the call, allowing investigators to track calls made by an individual detainee. The PIN should be created at the time of booking and eliminated at the time of discharge.

CenturyLink can also offer the County via its centralized call solution the ability to retain specific detainee PINs where the detainee is booked or incarcerated in absentia due to, for example, trial or hospitalization at a separate location. All PINs are recorded for the purpose of tracking, regardless of whether a call was also monitored or recorded.

In addition, detainee calling privileges can be revoked at any time with the facility's authorization, by temporarily disabling the PIN. These restrictions can be permanent or time-sensitive. Thus, if a detainee is to lose his phone privileges for a given time interval, a renewal date would be entered into the system. The system will track this time period and only "un-restrict" the privileges upon completion of the given time interval. The PIN also allows the facility to place restrictions on an individual detainee's calling privileges without affecting the privileges of other detainees.

12. The offeror should state the minimum and maximum number of digits used in a PIN.

☼ CenturyLink Response: Read, understood and will comply.

PINs may be unlimited digits in length and can be assigned at random by the system, created as a combination of the County-assigned ID plus a random PIN for ease of tracking, or allow detainees to set up their own PIN.

13. The offeror should provide a detailed description of how PIN's work, and provide a list of facilities where this feature has been implemented.

☼ CenturyLink Response: Read, understood and will comply.

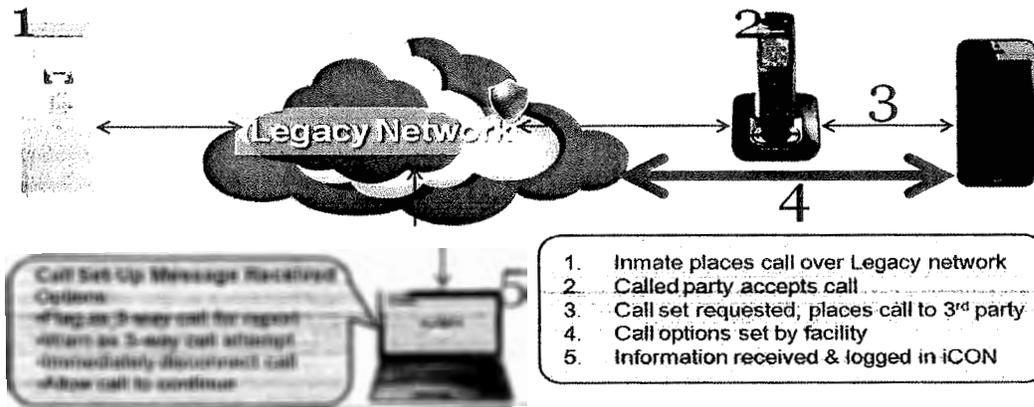
PINs are a standard part of iCON and are therefore available for use by all of our hundreds of clients across the country. There are a handful of clients that do not use PINs, mostly smaller facilities, but the majority of our clients use PINs. For a detailed description of how the PIN feature works, please refer to our response to number 11 of this section.

14. The County understands that there are industry patents in this area. The offeror should provide a description of the process deployed on the offeror's platform, and include a discussion of why the technical approach used provides the best three-way detection solution.

☼ CenturyLink Response: Read, understood and will comply.

We have a **distinct advantage** over most other vendors in the detainee telephone market when it comes to three-way calling prevention: we are an interexchange carrier, local service provider, and operator service provider. Our proposal to Boone County is to provide local and long distance service by originating and terminating all calls on **our own** behalf within **our own** network and call switches. **We have total control over all aspects of the call.** Other ITS vendors may contract for phone service and may only "monitor" the call, looking for a detection signal, but the control of the call is actually in the hands of the LEC (for example, Verizon or AT&T).

## Network Level 3<sup>rd</sup> Party Detection



Since traditional vendors do not have network control, they may rely on a combination of silence, dial tone, DTMF detection, and other energy algorithms that do **not** accurately detect fraudulent activities or three-way calling. Many providers propose patented three-way detection technologies which the CenturyLink team has tested in the past and which have not always proven 100% worthy in the field. **These technologies may not catch 100% of three-way calls, and they also have a very high percentage of detecting and disconnecting valid calls that are not three-way (false positives).**

## Technical Response

Our solution is to process all calls **within our own network**, not just try to detect from outside the network. Any setup signal initiated by the called party that prompts a three-way or remote call forwarding alert falls within our network and is received by the iCON call control.

Should the system detect DTMF from the detainee phone or the called party, the Interactive Voice Response (IVR) system can be set to either:

- Notify both parties of the suspected fraud and “warn” the parties that the call will be disconnected should further dialing continue,
- Disconnect the call immediately upon DTMF or hook switch signal, or
- Allow the call to continue for investigation purposes.

In all cases, these calls will be flagged on the call detail record.

CenturyLink will implement whichever option the facility chooses. Should the County choose to allow suspected fraudulent calls, the ability to review these calls will provide **valuable investigative data**.

iCON features a real-time delivery system of call alerts to CenturyLink and designated County personnel of all fraudulent calling activity including hook switch dialing, three-way calling, frequently called destinations, and call threshold maximums (attempts, revenue). iCON's threshold setting utility allows the facility to set a maximum number of attempts to any destination number. An alert is posted when this threshold has been reached and the detainee is notified of the reason the call was not allowed.

Once a destination number is dialed by a detainee from the detainee telephone keypad and iCON accepts the dialed number, the system will not respond to any further DTMF pulses from the detainee phone. Off-hook signaling cannot be simulated by the detainee and messages cannot be passed. All telephones in the facility will be limited to one call per connection. iCON does not provide detainees with a second opportunity to dial a number without the detainee hanging up the telephone receiver after the first call is completed. As soon as the switch hook is depressed, the current call is immediately disconnected and the automated operator call prompts begin.

### **24/7/365 Fraud Department**

Additionally, we employ a full-time Correctional Facilities Fraud Department that is open for business twenty-four (24) hours a day, 365 days a year. These professionals focus on dialing patterns not just from a single jail but from countless correctional facilities throughout the nation. They analyze not only real-time call data and alerts from our customer base but also fraud alerts that are issued by local telephone companies, long distance carriers, and billing clearinghouses. We work around the clock to provide the ability to identify and terminate fraud *before* it happens. We utilize every available method to sense fraud: silence detection, DTMF signaling, and hook switch signaling, all powered by an Intel Dialogic backbone.

## Technical Response

15. The offeror should describe how the proposed system prevents the detainee from using extra digits to dial-out of the Detainee Telephone System platform.

☼ CenturyLink Response: Read, understood and will comply.

Once a destination number is dialed by a detainee from the detainee telephone keypad and iCON accepts the dialed number, the system will not respond to any further DTMF pulses from the detainee phone. Off-hook signaling cannot be simulated by the detainee and messages cannot be passed. All telephones in the facility will be limited to one call per connection. iCON does not provide detainees with a second opportunity to dial a number without the detainee hanging up the telephone receiver after the first call is completed. As soon as the switch hook is depressed, the current call is immediately disconnected and the automated operator call prompts begin.

16. The offeror should describe how the proposed system prevents switch-hook dialing.

☼ CenturyLink Response: Read, understood and will comply.

All telephones in the facility will be limited to one call per connection. iCON does not provide detainees with a second opportunity to dial a number without the detainee hanging up the telephone receiver after the first call is completed. As soon as the switch hook is depressed, the current call is immediately disconnected and the automated operator call prompts begin.

17. The offeror should describe how the proposed system detects the difference between an accepted call, an answering machine, busy signal, or other telephone activity.

☼ CenturyLink Response: Read, understood and will comply.

iCON can detect the difference between an accepted call, an answering machine, busy signal, or other telephone activity. iCON's automated operator provides notification to a detainee of the call status (e.g., busy, no answer, etc.) eliminating the need for detainees to hear the call progress. Incomplete calls such as network intercept recordings, busy signals, no answers, refusals of calls, answering machine pick-ups, etc. will not be billed.

18. The offeror should provide any other additional investigative tools, features, or creative solutions that might be available to the County.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink is aware that in today's world of constantly developing technology and safety challenges, many correctional facilities' needs are changing with each coming year. By choosing CenturyLink, you will be partnering with a vendor that can meet your needs both now and well into the future.

## Technical Response

We offer a comprehensive, fully integrated package of communication services, hardware, and technology to aid in the administration and investigation of detainee communication as well as the operational efficiency of a correctional facility. Even though the County may not wish to implement these services today, CenturyLink provides them and can work with the County to implement them if and when desired, at any point through the contract term or subsequent contract terms.

CenturyLink has available six different communication services, some of which are accessed through our wall-mounted Bridge Communication Device (BCD) kiosk: calling, voicemail, video visitation, video messaging, secure messaging (e-mail), and photo sharing. Should the County wish to explore the option of implementing detainee BCD kiosks and some or all of these other communication services, CenturyLink will work with the County to grow its technology infrastructure at the pace that works best for your agency.

Our philosophy is to constantly work to improve our system and technology to meet our clients' growing needs. We genuinely take our clients' feedback into consideration when working on product development or iCON system improvement projects.

WatchWord+ Speech-to-Text Transcription & Keyword Search

Audio Transcription, Audio Mining, and Keyword Search Utility

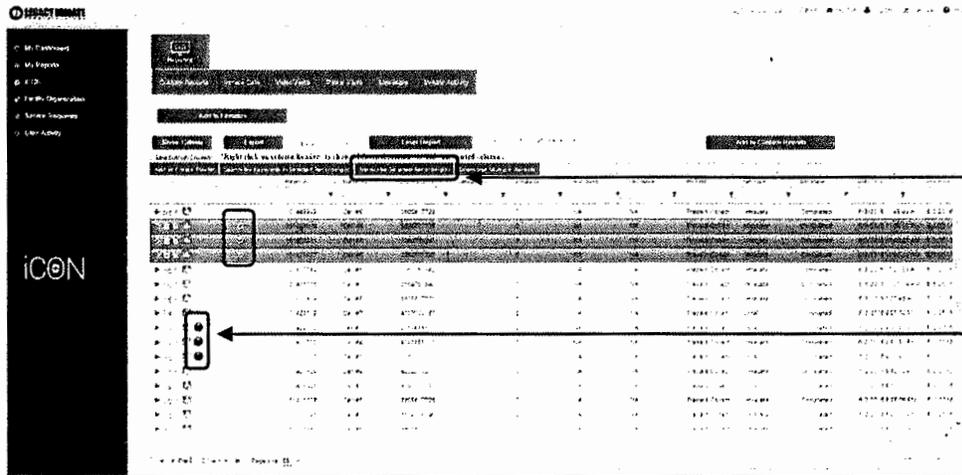
Built into the iCON system as a standard feature at **no cost** to either the facility, the detainee, or the called party is our self-developed audio transcription and keyword search feature called WatchWord+. This feature has the potential to **significantly expedite the investigative detainee communication review process** for your agency.

Speech-to-Text Transcription

**Any call recording or voicemail can be transcribed to text within iCON.** The iCON user simply selects the desired recording(s) and clicks "Transcribe Selected Recording(s)." Once the transcription has been processed, a red and black icon will appear beside the transcribed recordings.

# Technical Response

## Selecting Recordings for Transcription

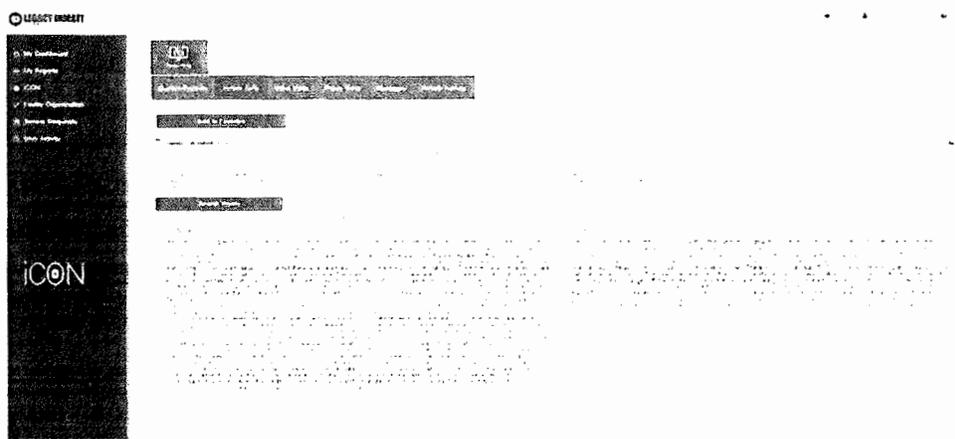


Select the recordings you wish you have the system transcribe, and click "Transcribe Selected Recording(s)"

Any recording showing the black and red icon has been transcribed already.

Clicking the transcription icon will open a text transcription of the selected audio recording. This screen also provides the option to enter a keyword to search for inside of the transcription. If the word or phrase is located, the system will highlight the occurrences.

## Viewing a Transcribed Recording



## Searching for Keywords/Phrases (Audio Mining)

Investigators can create **lists of keywords/phrases of interest that they would like to search for within call recordings and voicemails**. Any word list can be re-used multiple times and can be applied to multiple recordings. These lists are fully customizable by each investigator and can contain any number of words, phrases, or names of interest, such as words used for drugs, gang-associated terminology, known code words, or names of individual people (including facility staff names).

## Creating a New Word List

Enter the name of your word list.

Enter the keywords or phrases you want to include in the Word List.

Existing saved Word Lists

After creating a Word List, investigators can apply the list of words/phrases to any call or voicemail recording and the system will run a search for all words/phrases on that list. You can choose to apply a Word List to **all recordings associated with a specific detainee of interest**, or to **all calls occurring within a specified date range**. Multiple Word Lists can be applied at a single time, if desired.

## Applying Word List(s) to Recording(s)

Select the desired Word List(s) you would like to apply. More than one list can be applied.

Enter the Inmate ID whose recordings you would like to apply the list to.

Select the desired date range of calls you would like to list applied to.

The system will search for the keywords/phrases contained in the selected Word List(s) inside of the recordings the investigator has specified. **Any recording(s) containing one or more of the words/phrases on the list will be transcribed to text and presented to the investigator in text format, with the found words highlighted.**

## Results Displayed After Applying a Word List to a Recording

The screenshot displays the iCON Legacy Inmate system interface. On the left is a navigation menu with options: My Dashboard, My Reports, iCON, Facility Organization, Service Requests, and User Activity. The main content area shows a recording titled 'Lyn Monitor - Watch List - GPS Monitor - Inmate Calls - Phone Calls - Watchlist-1'. Below this, there are sections for 'Add to Favorites', 'Display Transcribed Texts', and 'CALL INFO'. The 'CALL INFO' section contains a table with the following data:

Source	422711135	Destination	2079375815	Record ID	99502191
Date	6/5/2017	Time	1:27:17 PM	Duration	Sec:0:07
Words	997 - 46 messages				
Searches	0 - 0 messages				

Below the call info, there is a 'Search Words' section with the instruction 'Enter words, separate by comma'. Two columns of text are shown: 'Detainee' and 'Called Party'. The 'Detainee' column contains a large block of text with several words highlighted in yellow, including 'Awesome', 'supper', 'Awesome', 'I bet it's an option', 'You're welcome', 'be safe', 'class of milk', 'app, what's up?', 'Just tried', 'I'ma guess we'll just wait to see a V', 'Tell the check', 'OK, I need to shower', 'Just', 'Awesome', 'see that I was gonna look at work and she was gonna tell me tomorrow tomorrow how to tell my dad about it doing bad?', 'Oh I want a song came on Ebony decide What's the point?', 'Hello What is the plan?', 'should I get a lot of pictures without looking', 'Niiham person, Rosephange', 'I don't think I won't be so I don't', 'Right now', 'Make it by 7, but when I'm done, I want', 'Hey that's life', 'About the way', 'Setting other things on their schedules, there'. The 'Called Party' column contains a smaller block of text with words like 'Nothing', 'Awesome', 'my bed on time', 'I got coffee you want for supper', 'Awesome', 'I bet it's an option', 'You're welcome', 'be safe', 'class of milk', 'app, what's up?', 'Just tried', 'I'ma guess we'll just wait to see a V', 'Tell the check', 'OK, I need to shower', 'Just', 'Awesome', 'see that I was gonna look at work and she was gonna tell me tomorrow tomorrow how to tell my dad about it doing bad?', 'Oh I want a song came on Ebony decide What's the point?', 'Hello What is the plan?', 'should I get a lot of pictures without looking', 'Niiham person, Rosephange', 'I don't think I won't be so I don't', 'Right now', 'Make it by 7, but when I'm done, I want', 'Hey that's life', 'About the way', 'Setting other things on their schedules, there'.

The system will search for all keywords and phrases inside the Word List. Any calls containing one or more of the words/phrases will be transcribed and presented in text format with the found words/phrases highlighted.

[Begin Confidential, Trade Secret Information]

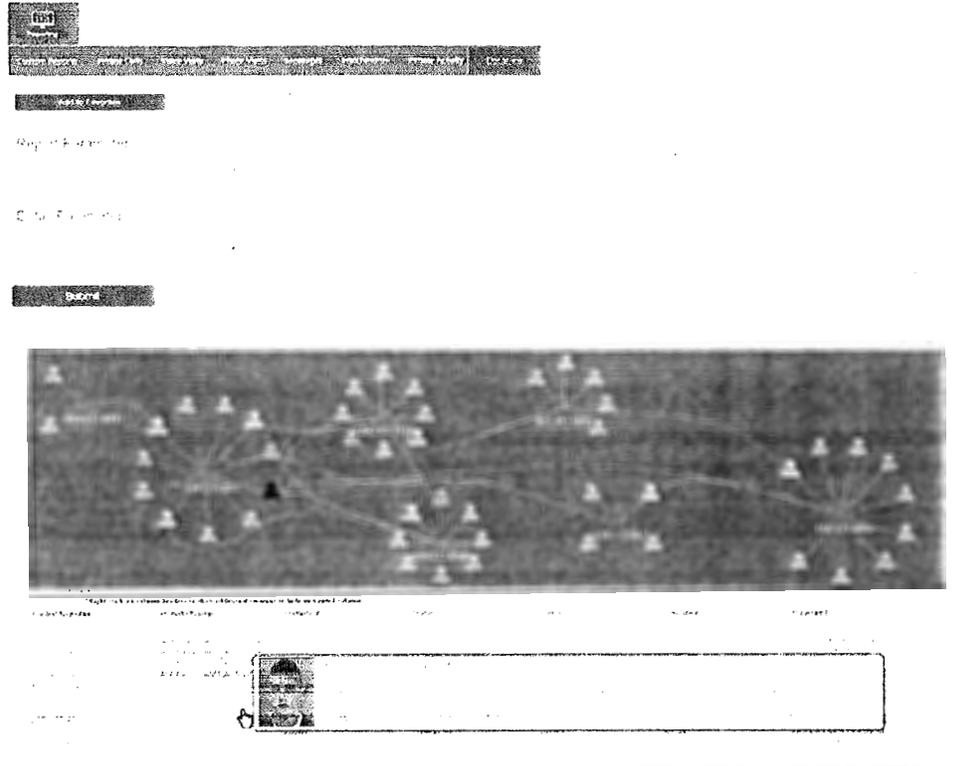
## Analytical Investigative Reports with Visual Mapping

iCON features an intelligent analytical report that investigates relevant data points to discover links between:

# Technical Response

- Communication Types
- Detainees
- Public Contact (Called Party's / Visitors)
- Communication Patterns
- Payments
- Locations
- Other Correctional Agencies
- Etc.

Analytical & Visual Mapping Report that Searches for Suspicious Numbers and Linked Detainees



This reporting utility gives investigators highly suspicious links between detainees, the people they communicate with, and the payments that are used to fund suspicious communication. The report filters out all irrelevant data / information and compares multiple data fields to give the investigator a priority list of detainees / communication they should be investigating.

[End Confidential, Trade Secret Information]

## Social Network Investigator

iCON also boasts a **powerful Social Network Investigator**. Next to both the detainee's and the called party's name, you will notice icons for several popular social media platforms: **Facebook, Google+, Twitter, and LinkedIn**.

When clicked, these buttons will perform an automatic search on the website for the individual's name. Provided your users have Internet access to social networking websites, they will be able

# Technical Response

to quickly search and investigate the public profiles of detainees and those they are communicating with outside of your facilities.

## iCON's Social Network Investigator

Save Custom Columns \*Right click on column headers to show additional columns or hide unwanted columns.

RecordID	InmateID	Inmate Name	Activity Date	Activity Type	StationID	Contact Phone	Contact Name	Duration
6890011	0		8/3/2016 12:16:00 AM	Phone Call	6890011			0:00:00
20160802_221612_6890011	70468	William Bramlett	8/3/2016 12:16:28 AM	Phone Visit	Visit Booth1			0:00:12
		Vince Cunningham	8/3/2016 12:27:08 AM	Email		3345397693	Brandesha Potter	NA
		Akzay Riggins	8/3/2016 12:44:54 AM	Email		4787190574	Jeremy Thomas	NA
		Vince Cunningham	8/3/2016 12:47:35 AM	Email		3345397693	Brandesha Potter	NA
		Marcus Parks	8/3/2016 3:03:00 AM	Phone Call	3347121027	3344792597	Mary Beth	0:00:00
		Brandon Blocker	8/3/2016 3:03:34 AM	Email	3347121027	2054429709	Carolyn Gaff	NA
		Marcus Parks	8/3/2016 3:05:00 AM	Phone Call	3347121027		Mary Beth	0:00:00
		Marcus Parks	8/3/2016 3:11:00 AM	Phone Call	3347121027	3344792597	Mary Beth	0:00:00
		Brandon Blocker	8/3/2016 3:48:38 AM	Email				
		Robin Cabrera	8/3/2016 5:44:00 AM	Phone Call				
		Robin Cabrera	8/3/2016 5:50:00 AM	Phone Call				
		Amanda Stembridge	8/3/2016 5:54:00 AM	Phone Call				

[End confidential, trade secret information]

19. Describe assistive technology applications for hearing impaired in addition to TTY's:

CenturyLink Response: Read, understood and will comply.

CenturyLink also has available Video Relay Service (VRS), which is accessible through our wall-mounted Bridge Communication Device (BCD) kiosks and mobile detainee tablets. While neither of these devices are proposed in our current offer, we are willing to discuss options with the County to install BCDs and/or tablets equipped with Video Relay Service (VRS) at any time the County deems it appropriate.

When a deaf or hard-of-hearing detainee attempts to make a phone call using a BCD, they dial the number which is already registered with the VRS and the number then rings into a phone with a Video Relay Service application (much like Video Visitation) so people who know sign language can sign to each other directly.

Additionally, in situations where a deaf or hard-of-hearing detainee dials a voice telephone user that does not know how to sign, they are connected to a Video Relay Service interpreter on the screen. This interpreter relays the call between the parties, using sign language with the detainee and verbal communication with the hearing party. These interpreters serve as the

## Technical Response

intermediary and provide 24/7 VRS service in both English and Spanish. VRS calls may also be recorded and monitored to ensure security and safety.

The VRS application is simple and easy to use. Using our multipurpose Bridge Communication Device, the detainee selects the VRS app and dials the called party. All the subsequent steps are fully automated.

20. Indicate the proposed system's ability to be monitored from any personal computer with proper access permissions.

☼ CenturyLink Response: Read, understood and will comply.

iCON® is a web-based Detainee Communication Management System. Users can access the complete system, including full investigative functionality, communication recording and monitoring, and data reporting, from any location on or off-site via any approved PC, laptop, or mobile device with an Internet connection and standard web browser (e.g., Internet Explorer 11 or greater, Google Chrome, Safari, Opera, or Firefox). The user would need to login with their authorized login credentials.

21. The offeror should describe the maintenance and quality assurance programs for equipment to be installed.

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink will repair and replace all equipment as needed throughout the life of the agreement at no cost to the County. Please refer to our response to question 9 of this section for more information about our service response times and priority levels for damaged or broken equipment.

22. The offeror should describe the system user training program and include applicable training documents.

☼ CenturyLink Response: Read, understood and will comply.

## Technical Response



Training sessions are furnished at **no cost for the life of the contract** and can be conducted from any location preferred by your facility. With proper training comes the confidence in knowing that your job will be well executed and less problematic. By personalizing our training sessions, we are able to discuss and identify exactly what matters to you most. These sessions are not only a great opportunity for each of your staff members to familiarize

themselves with the newly installed telephone system; they also ensure that you are gaining true “working knowledge” by utilizing actual call data from your facility. Administration is performed directly through the iCON system itself. Training sessions are set up as a classroom-based, open multi-media presentation with a question & answer period following each module so that those with lingering concerns can address them accordingly.

Trainers will explain all the various Administrative, Investigative, and Reporting Tools available to you through the iCON system. Training sessions will cover all the details of how to access, and effectively manage the detainee communication system and all of its services.



The following is a brief outline of some items that will be discussed during a training session:

Topic Covered

Approximate Training Time

## Technical Response

Accessing the iCON System	5 – 10 Minutes
System Overview	20 – 30 Minutes
System Shutdown Procedure	5 Minutes
Facility Information	20 – 40 Minutes
Facility Layout	5 – 10 Minutes
Facility Configuration	5 – 10 Minutes
Scheduling Phone Service	10 – 20 Minutes
System User(s)	25 – 30 Minutes
Adding a New User(s) Account	10 – 15 Minutes
Listing All System Users	5 Minutes
Locating a Specific User(s)	5 Minutes
Generating a User Activity Log	5 Minutes
Phone Configuration	10 – 20 Minutes
Listing All Detainee Phones	5 – 10 Minutes
Locating a Specific Detainee Phone(s)	5 – 10 Minutes
Call Control	25 – 40 Minutes
Number Management (Blocking & Unblocking)	10 – 15 Minutes
Assigning Non-Recordable Numbers	10 – 15 Minutes
Assigning Free Calls	5 – 10 Minutes
Debit	15 – 20 Minutes
Displaying Debit Accounts	5 Minutes
Locating Specific Debit Account(s)	5 Minutes
Transferring Debit Funds	5 – 10 Minutes
Detainee Information	15 Minutes
Registering a detainee	5 Minutes
Generating a List of Detainees	5 Minutes
Locating Specific Detainee(s)	5 Minutes
System Reporting	50 – 105 Minutes
Call Detail Reporting	15 – 30 Minutes
Administrative Reporting	15 – 30 Minutes
Accessing all Other Reports	10 – 30 Minutes
Exporting Records and Reports	10 – 15 Minutes
Service Requests	5 – 10 Minutes
Creating Service Tickets	5 – 10 Minutes
Tracking /Accessing Service Tickets	5 Minutes

## Web-Based Training

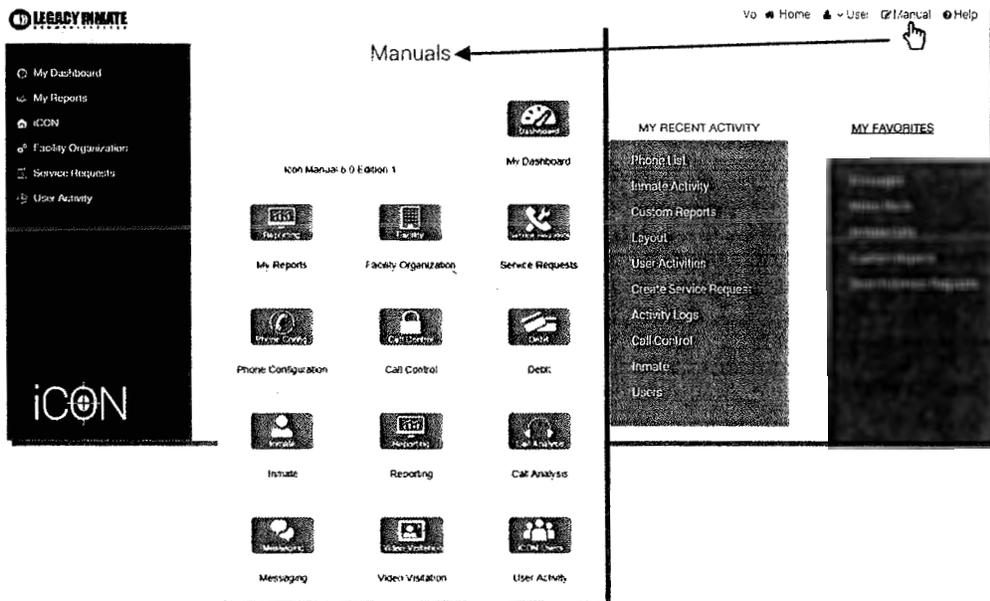
For those staff members unable to attend on-site training sessions, CenturyLink offers web-based training sessions. Training can also be provided to County prosecutors, DA Investigators, defense counsel(s), and judiciary staff upon request. All data utilized during these sessions will be live and direct from the facility in order to offer the most realistic training scenario possible. Upon completion, most users are comfortable enough to navigate the system independently, without the need for assistance. There is no cost for additional web-based training.

## Post-Training Assistance

CenturyLink will provide you with your very own Program Manager. If at any time you find yourself needing assistance, your Program Manager is there to help you answer any questions or even help you brush up on your skills with a refresher course.

## On-Screen Help Utility and User Manual

Upon project completion, we will provide access to the complete set of system reference manuals which must include information specific to the operation of the iCON system for each authorized user. System manuals are provided on CD, written publication, and also within iCON itself. If at any time you find that you need help understanding information on a screen of the iCON system or how to use a specific tool or feature, simply click on the **HELP** or **MANUAL** buttons on the top right of the screen. This will open up a new screen with access to simple PDF user manuals to walk you through each section of iCON. This on-screen help system has the capability to immediately assist staff.



23. The offeror should identify its system's record-keeping features, and address how off-site records archive/back-up tasks will be performed

☼ CenturyLink Response: Read, understood and will comply.

### Centralized Solution

The iCON® platform is a detainee communication processing system designed with the flexibility to take advantage of our ultra-modern carrier-grade network. The system intelligence is located in our primary and two (2) secondary/backup network data centers. Our redundant data centers are:

- Completely secured and environmentally controlled location
- Monitored and maintained by skilled on-site technicians 24 hours a day
- Allow for the delivery of real-time, immediately available system updates/upgrades
- Ensure maximum system uptime and reliability
- Offer multi-layered redundancy to achieve high security protocols

Our Data Centers are automatically replicated on an ongoing basis, so that each center holds a complete and up-to-date database of data and content from the facility. When a detainee lifts a phone's receiver, an immediate connection is made to our carrier-grade network utilizing a direct connection from the facility to our network. The detail record for the call or visit is created and stored at the primary data center and immediately replicated to the secondary data centers.

Begin Confidential and Proprietary Information

We have secure, redundant data centers in multiple geographical locations. Our primary system is located in **Cypress, California**, the secondary system is in **Las Vegas, Nevada**, and the third (a back-up of both primary and secondary systems) is located on **alternative storage servers**.

End of Confidential and Proprietary Information

### User Activity Log

Within the iCON Users interface, Administrators can access the User Activity Logs which provide detailed insight into user actions, times and dates of access, files viewed and modified, workstations used, etc.

CenturyLink has given paramount consideration to maximizing system security from both inside and outside of the facility. Firewalls are diligently utilized in order to prevent any intrusion into the system. Only those IP addresses with proper authorization rights will be permitted to access the system. Network security levels can be set within the system's Facility Setup interface.

# Technical Response

Administrators can add, subtract, and define only those IP addresses they feel need to access the system.

## User Activity Logs

User Name	Action	Time	Type/Details	User Action	Reference
R-Herring583	Requested to Listen to Recording	4/17/2016 8:32:47 PM	Requested to Listen to Recording	Requested to Listen to Recording RecordID:58612107	924125.7
R-Herring685	Requested to Listen to Recording	4/19/2016 1:42:29 PM	Requested to Listen to Recording	Requested to Listen to Recording RecordID:26583873	96585673
R-Herring689	Requested to Listen to Recording	4/19/2016 1:49:56 PM	Requested to Listen to Recording	Requested to Listen to Recording RecordID:55504511	98508511

Track each user and his/her system activity with the User Activity Log feature.

Each User Activity Log displays the following information to positively identify the tasks being performed by each individual User:

- User Name
- Description of User Session
- Date/Time
- IP Address of Authorized User

24. The offeror should describe the system's redundancy capacity for storing detainee phone calls.

 CenturyLink Response: Read, understood and will comply.

The iCON system is a state-of-the-art Unified Threat Management System. This means our network hardware not only allows and rejects network traffic according to strict policy design, but also scans all traffic for viruses/malware, network intrusion attempts, denial of service attempts, and more. **The antivirus capabilities of our system outshine a vast majority of the competition because it implements a technique called "sandboxing,"** where suspect unknown malware is temporarily intercepted and reconstructed in a virtual environment and allowed to "do its thing" under security observation before the original is allowed to be forwarded to the intended recipient on the network. This is only for suspect unknown viruses; there is a threat database that is updated in our network hardware every hour for newly discovered malware and network intrusion methods so that unwanted traffic is discarded without being processed further, enhancing security and network throughput.

The majority of our network technology comes from a world-wide leader of network security technology and **was chosen because it is considered to be one of the most secure solutions in the world** while being a leader in performance in the same category. The security features of our system enable us to provide fast, reliable service with solid network protection and security measures as the foundation of our network architecture.

## Recording Security

Each call and video recording is "digitally signed" so any attempt to modify the recording will remove the signature (watermark). By assigning a digital signature that is maintained by us, we can ensure that recordings with this signature have never been tampered with. Our IT personnel

## Technical Response

will testify on behalf of CenturyLink if required to do so by the County or any court with jurisdiction in regards to our recording technology and security.

See our response to question 23 of this section for more information about our secure and redundant data centers.

25. Please describe the durability of system components of the detainee telephone system including parts and labor:

☼ CenturyLink Response: Read, understood and will comply.

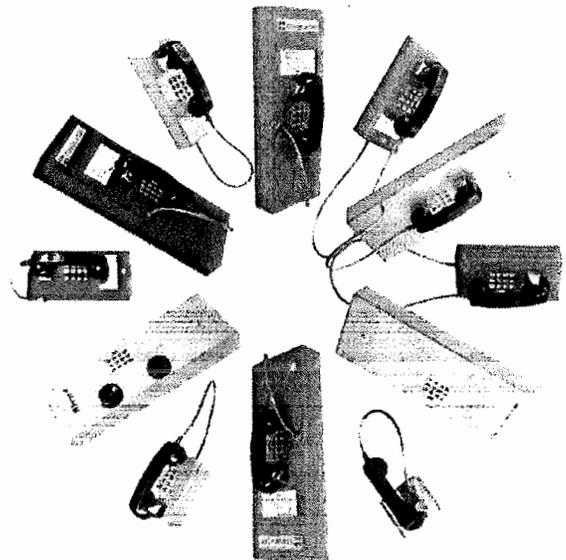
### Detainee Telephones

CenturyLink proposes the Wintel inmate telephone and visitation telephone sets, which is the overwhelming choice for inmate facilities throughout the industry.

#### Inmate Telephones and Visitation HeadSets

The Wintel ITC7090SS Coinless Inmate Phone with volume control has been constructed to be tamperproof and is constructed of 14-gauge stainless steel and designed for indoor or outdoor inmate use. Features and benefits of the Wintel ITC7090SS are listed below:

- Magnetic hook switch
- Built-in user controlled volume "LOUD" button on all inmate telephones
- Meets all ADA requirements for user controlled amplification
- Rugged vandal resistant housing especially designed for inmate use
- Sealed handset suitable for heavy use and abuse areas
- Security screws to minimize tampering
- Confidencer technology filters out background noise at the user's location
- Armored handset cord equipped with a steel lanyard (1000 lb. pull strength) and secured with vandal resistant retainers
- Hearing aid compatible and FCC registered (DF4USA-75652-CC-E)



### Visitation Telephones

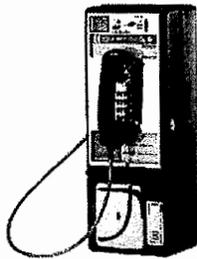
CenturyLink will also provide Visitation Telephone Service that includes call recording. Visitation phone management functions are fully accessible from the very same iCON system used to

## Technical Response

manage detainee calling. This allows Investigators to listen to recordings of detainee calling as well as on-site visits through a single system. Listening to visitation recordings can be done from any PC from on or off-site. If desired by the County, the system can be set to prompt the Detainee to enter his/her PIN prior to allowing the visitation call to proceed. The utilization of a PIN will further authenticate the visitation recording should it be needed in any criminal proceeding.

### Payphones

CenturyLink will provide the requested two (2) public use coin phones for the two public lobbies. The coin-operated payphones will be designated as a public pay phone and will be maintained by CenturyLink at no cost to the County. Our local technicians will collect coins from the coin-operated public use pay station at the facility during proactive facility visits. The calling rates for the public pay telephones will mirror the collect calling rates chosen for detainee calling.



#### Elcotel Series 5-XG

- 5 Series Advanced Housing and Circuit Board
- Tamper Resistant Locking System
- Heavy-Duty Armored Handset
- Adjustable Steel Lanyard
- Hearing Aid Compatible
- Anti-Static Receiver
- Accepts \$0.25, \$0.10, and \$0.05 Coins
- Credit and Calling Card Compatible
- On-Board Solid-State Transient Surge Protector
- Line Powered

26. Identify and show the amount of work (using percentages) that will be subcontracted and the work/amount that the offeror's staff will perform directly:

☼ CenturyLink Response: Read, understood and will comply.

<b>% of Hours By Subcontract (3 Year Base Contract)</b>						
<b>Total Labor Hours</b>						
#	Category Of Task	Task (Implementation Hours Are One Time, Operations Hours Are Monthly)	CTL Labor (Hours)	CTL Labor (%)	Legacy Labor (Hours)	Legacy Labor (%)
1	Implementation	Project Management	60	1.5%	16	1.3%
2	Implementation	Site Surveys	16	0.4%	8	0.6%
3	Implementation	Equipment Ordering	8	0.2%	8	0.6%
4	Implementation	Phone Installation	32	0.8%	16	1.3%
5	Implementation	Site Preparation	5	0.1%	0	0.0%
6	Implementation	Platform Installation	32	0.8%	16	1.3%
7	Implementation	Platform Cutover	4	0.1%	4	0.3%

## Technical Response

8	Implementation	Customer Training	16	0.4%	0	0.0%
9	Operation	Program Management	1,440	36.8%	0	0.0%
10	Operation	Network Management	360	9.2%	0	0.0%
11	Operation	Phone Repair	144	3.7%	0	0.0%
12	Operation	Platform Maintenance	144	3.7%	0	0.0%
13	Operation	Platform Repair	144	3.7%	288	22.9%
14	Operation	Helpdesk	0	0.0%	540	43.0%
15	Operation	Collect Call Management	360	9.2%	0	0.0%
16	Operation	Prepaid Call Management	360	9.2%	180	14.3%
17	Operation	Debit Call Management	360	9.2%	180	14.3%
18	Operation	Commissioning	144	3.7%	0	0.0%
19	Operation	Ongoing Training	288	7.4%	0	0.0%
20		<b>Totals</b>	<b>3,917</b>	<b>100.0%</b>	<b>1,256</b>	<b>100.0%</b>
21		<b>Grand Totals</b>	<b>4,198</b>	<b>76.1%</b>	<b>1,316</b>	<b>23.9%</b>
					<b>5,514</b>	<b>100.0%</b>

<b>% of Hours By Subcontract (3 Year Base Contract)</b>						
<b>Total Labor Hours</b>						
#	Category Of Task	Task (Implementation Hours Are One Time, Operations Hours Are Monthly)	CTL	CTL	Legacy	Legacy
			Labor (Hours)	Labor (%)	Labor (Hours)	Labor (%)
1	Implementation	Project Management	60	1.5%	16	1.3%
2	Implementation	Site Surveys	16	0.4%	8	0.6%
3	Implementation	Equipment Ordering	8	0.2%	8	0.6%
4	Implementation	Phone Installation	32	0.8%	16	1.3%
5	Implementation	Site Preparation	5	0.1%	0	0.0%
6	Implementation	Platform Installation	32	0.8%	16	1.3%
7	Implementation	Platform Cutover	4	0.1%	4	0.3%
8	Implementation	Customer Training	16	0.4%	0	0.0%
9	Operation	Program Management	1,440	36.8%	0	0.0%
10	Operation	Network Management	360	9.2%	0	0.0%
11	Operation	Phone Repair	144	3.7%	0	0.0%
12	Operation	Platform Maintenance	144	3.7%	0	0.0%
13	Operation	Platform Repair	144	3.7%	288	22.9%
14	Operation	Helpdesk	0	0.0%	540	43.0%
15	Operation	Collect Call Management	360	9.2%	0	0.0%
16	Operation	Prepaid Call Management	360	9.2%	180	14.3%
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18	Operation	Commissioning	144	3.7%	0	0.0%
19	Operation	Ongoing Training	288	7.4%	0	0.0%
20		<b>Totals</b>	<b>3,917</b>	<b>100.0%</b>	<b>1,256</b>	<b>100.0%</b>
21		<b>Grand Totals</b>	<b>4,198</b>	<b>76.1%</b>	<b>1,316</b>	<b>23.9%</b>
					<b>5,514</b>	<b>100.0%</b>

## Technical Response

27. The offeror should attach samples of call detail and other available standard reports.

☼ CenturyLink Response: Read, understood and will comply.

Please see Attachment: Sample Reports

28. In addition the offeror should provide samples of the offeror's invoices to users/called parties/detainees.

☼ CenturyLink Response: Read, understood and will comply.

Please see Attachment: Sample Called Party Bill

29. The offeror should also provide samples of reporting that's available from the offeror's web-accessible system.

☼ CenturyLink Response: Read, understood and will comply.

The sample reports attached are all system-generated. Reports are available directly from the system in your web browser and reflect real-time data. They can also be printed out/downloaded/exported to various file formats directly from the system.

Please see Attachment: Sample Reports

30. The offeror should address if customized reports are available, and if so, describe the reports and what, if any, additional charges will be assessed for the customized reports.

☼ CenturyLink Response: Read, understood and will comply.

Yes, customized reports are available. The iCON system features a Custom Call Detail Report Generator (described in more detail below). Also, iCON's developers can build additional custom reports to meet the specific needs of Boone County. There will be no charge for custom reports.

### **Custom Call Detail Report Generator**

The iCON system also features a Call Detail Report template that allows users to create any tailored report with any specific call criteria they may need. This function serves as a template that allows users to select call detail fields to generate a specific report with specific criteria. This allows limitless customizability and flexibility. The iCON system allows reporting of data from every single call *attempted* through our service, not just completed calls. All call detail contains the result of the call attempt (completed, denied, blocked, etc.).



# Technical Response

## Call Detail Report Criteria Selection Screen

### Select Reports by Any Range of Dates:

- Specific date
- by week
- by month
- by quarter
- by year
- or over entire contract.

### Select by Bill Type:

- Calling Card
- Collect Call
- Prepaid w/CC
- Collect w/ CC
- Debit
- Free Call
- Prepaid – Collect
- Direct Bill
- Probono Call
- Admin Call
- TTY/TDD Call
- Hot Line
- WatchList
- Record ID
- Play List

### Select by Call Type:

- Local
- IntraLata
- InterLata
- InterState
- International
- Caribbean
- Canada
- Mexico

### Select by Connection:

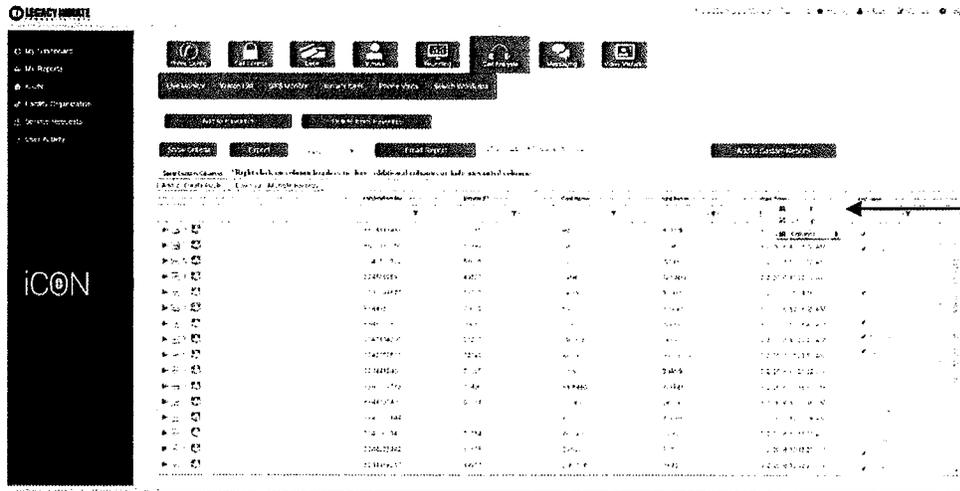
- Completed Call
- Private Call
- Uncompleted Call

### Further Narrow CDRs by:

- Facility Division/Building
- Location within the Facility
- Select by Station #
- Destination Number (Called Party Number)
- Inmate ID Number (PIN)
- Debit Card Number
- Called Party First and/or Last Name
- Inmate First and/or Last

When viewing a report, the user may select which columns are viewable and which are hidden so that the report only displays data that is relevant and important.

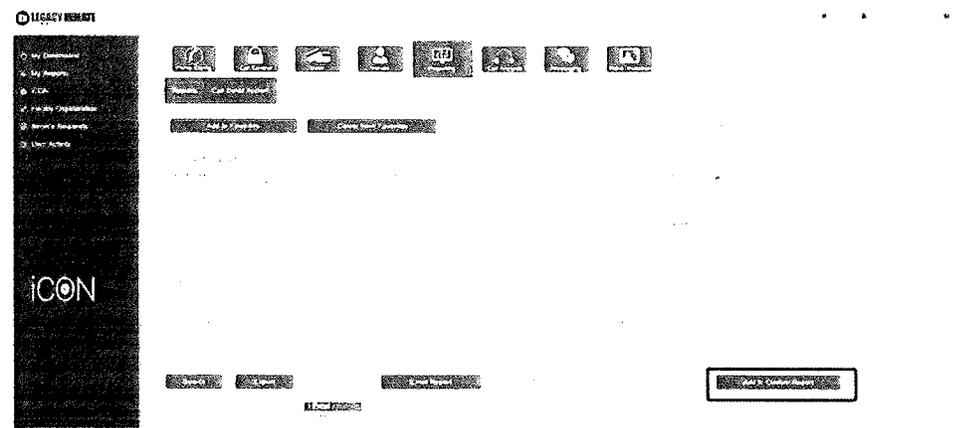
## Selecting Viewable Columns



When viewing a report, the user may select which columns are viewable and which are hidden so that the report only displays data that is relevant and important.

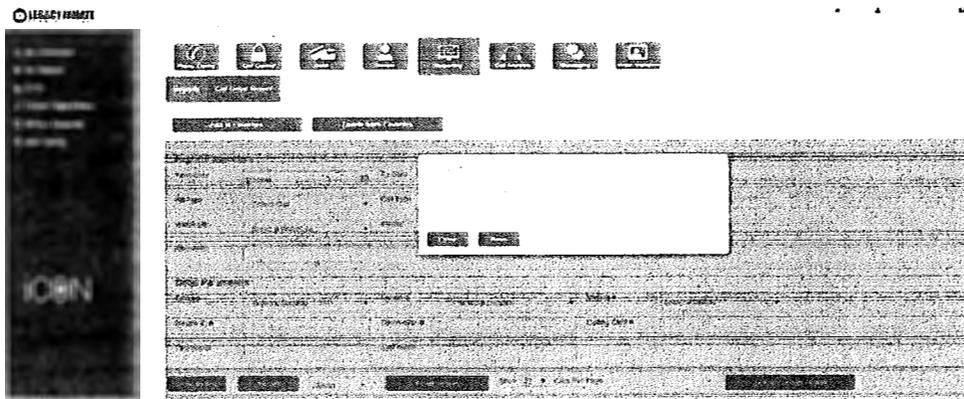
## User-Defined Custom Reports

Users can save any specified search criteria as a custom report so that they can easily run the same report again in the future without having to reselect the search criteria. To do so, simply click **ADD TO CUSTOM REPORT**.

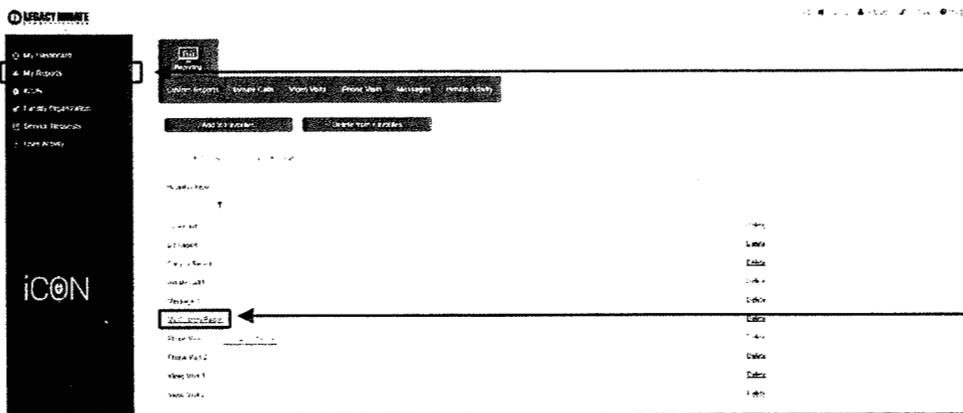


A popup window will appear asking you to provide a title for your custom report.

# Technical Response



To locate the report that you have just created, click **MY REPORTS** on the side menu of iCON. Locate your report on the list and click on the link. The system will run the report and open it in a new tab.



Click MY REPORTS to locate the custom report you have saved.

Locate your desired report on the list. Click the link to run the report. It will open in a new tab.

31. The offeror should address the following details about the commission:

- a. Explain in detail the method used to calculate revenue that will be paid to the County as commission:

☀ CenturyLink Response: Read, understood and will comply.

Gross Billed Revenue is calculated as revenue billed for each call less applicable taxes, which are calculated as a pass through charged to end-users, then remitted to the appropriate taxing authority. Gross Billed Revenue will include the surcharge and per minute amounts for the following payment types (Traditional Collect, Prepaid Collect, and Debit) and the following call types (Local, IntraLATA, InterLATA). CenturyLink does not use any other "alternative revenue" program, such as text-to-connect or pay-now, to complete calls. All calls provided through CenturyLink are stated above and Boone County will be paid commission based on their total.

- b. Describe and provide sample reports showing the calculation of the commission:

☼ CenturyLink Response: Read, understood and will comply.

- c. Describe and provide sample reports that will enable the County to audit the calculation of the commission:

☼ CenturyLink Response: Read, understood and will comply.

CenturyLink provides the data necessary to verify the accuracy of rate and revenue calculations at all times, **allowing complete transparency of collected revenue**. Revenue data can be accessed **at any time** by authorized County personnel by logging on to the system via a workstation or remotely. CenturyLink also provides monthly commission statements with each commission payment that can be verified against the data.

**In addition, CenturyLink will always cooperate with any audit requests.** CenturyLink maintains all books, records, and documents in accordance with generally accepted accounting practices that reflect all gross revenues generated. The County, or your designated representative, will have access to examine all books, documents, papers, and records as it relates to CenturyLink's contract with the County.

CenturyLink has provided a Sample Commission Report for the County's review.

- d. Address if and how uncollectible revenue impacts calculation of the commission:

☼ CenturyLink Response: Read, understood and will comply.

Commission revenue to the County is calculated based on Gross Billed Revenue as explained in section 3.29.9 above. CenturyLink does not deduct uncollectible revenue. There are NO DEDUCTIONS for fraud, line charges, and equipment charges, other collectible or uncollectible expenses, etc.

- e. Describe whether or not the offeror has had any commission disputes with any of its customers, and address the status of resolution:

☼ CenturyLink Response: Read, understood and will comply.

To our knowledge we have not had any commission disputes with our customers.

## Technical Response

14. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms. The resulting contract will be considered "Non-Exclusive". The County reserves the right to purchase from other vendors.
15. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the *Federal Transit Administration's Best Practices Procurement Manual – Appendix A*. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.
16. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
17. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
18. **For all titled vehicles and equipment the dealer must use the actual delivery date to the County on all transfer documents** including the Certificate of Origin (COO,) Manufacturer's Statement of Origin (MSO,) Bill of Sale (BOS,) and Application for Title.
19. **Equipment and serial and model numbers** - The contractor is strongly encouraged to include equipment serial and model numbers for all amounts invoiced to the County. If equipment serial and model numbers are not provided on the face of the invoice, such information may be required by the County before issuing payment.

 CenturyLink Response: Read, understood and will comply.



BOONE COUNTY, MISSOURI

Request for Proposal #: 40-16OCT17 DETAINEE TELEPHONE SYSTEM

ADDENDUM #1 - Issued October 19, 2017

This addendum is issued in accordance with paragraph 2.2.2 of RFP# 40-16OCT17, Detainee Telephone System, and is hereby incorporated into and made a part of the Request for Proposal Documents. Offerors are reminded that receipt of this addendum should be acknowledged and submitted with Offeror's *Response Form*.

Specifications for the above noted Request for Proposal and the work covered thereby are herein modified as follows, and except as set forth herein, otherwise remain unchanged and in full force and effect.

**NOTE:** *Revisions* to previously released RFP text are shown in ***bolded and italicized*** font in the Addendum. Added text is not italicized/bolded.

1. The **proposal submittal deadline** is extended:

FROM: 2:00 P.M. October 16, 2017

**CHANGED TO: 2:00 P.M. Central Time October 24, 2017**

Sealed proposals will be accepted until **2:00 P.M. Central Time on Tuesday, October 24, 2017** in the Boone County Purchasing Office, 613 E. Ash, Room 109, Columbia, MO 65201.

2. Paragraph 1.1.1 is **REVISED** as follows:

- 1.1.1 **Proposal Closing:** All proposals shall be **delivered before 2:00 P.M.**, Central Time, on **Tuesday, October 24, 2017** to:

Boone County Purchasing Department  
Liz Palazzolo, Senior Buyer  
613 E. Ash Street, Room 109  
Columbia, Missouri 65201-4460

3. Paragraph 1.1.4 is **REVISED** as follows:

- 1.1.4 Proposals will be opened publicly at 2:00 P.M. on **October 24, 2017** but only the names of offerors will be read aloud at the proposal opening. Following

contract execution or rejection of all proposal responses, all responses will become a part of the public record and will be released to any person or firm who requests access. **Missouri Sunshine Laws:** Due to applicable sunshine laws and regulations concerning public documents (e.g., Section 610.021 RSMo), the County's proposal file becomes part of the public record at time of contract execution or when all proposals have been rejected.

4. Sub-paragraph 2.1.2.6 is **ADDED** as follows:

2.1.2.6 Attachments One, Two and Three

5. Paragraph 3.2.3 is **REVISED** as follows:

3.2.3 Historical Call Information: Call volume for the Boone County Detention Facility for the period January 01, 2017 through June 30, 2017 follows:

*22,413* Completed Calls

*213,565* minutes

Average call length *9 mins 15 seconds*

6. Paragraph 3.8.6 is **REVISED** as follows:

3.8.6 The contractor shall provide a secure hosted site that allows the County to access all calling activity within the facility via the internet/web at no cost. The hosted site must provide an interface that allows a facility to view call detail reports, *check and track a facility's commission data*, and it should allow facilities to open and/or view the status of system service tickets.

7. Paragraph 3.13.2 is **REVISED** as follows:

3.13.2 The proposed system shall provide an account for detainees' families and other approved parties *to pay for phone calls*.

8. Paragraph title 3.16 is **REVISED** as follows:

**3.16 FEES, RATES, COMMISSION, AND BILLING REQUIREMENTS**

9. Paragraph title 3.16.7 is **REVISED** as follows:

3.16.7 The contractor shall understand and agree that the County reserves the right to audit performance of the contract, *including all rates, fees and administrative costs charged or assessed under the contract. The contractor shall allow the County access to all records that the contractor maintains to support the contract.*

10. Sub-paragraphs 3.16.7 (a) through (f) are **ADDED** as follows:

- a. The County reserves the right to independently investigate and/or audit the prices charged by the contractor to the users of the telephone system, as well as the calculation of commissions paid to the County, at the County's expense.
- b. The contractor shall maintain books, records, and documents of all costs, data, product information, allowances/credits or discounts that support pricing charged to users of the telephone system, and commissions paid to the County. The County or its authorized representative shall have the right to audit the books, records, and documents of the contractor.
- c. The contractor shall agree to cooperate and comply with any audit required by the County as may be compelled by any office of the County including the Boone County Commission, and any other local, state, or federal government office. The County must be afforded unrestricted and unlimited access to the contractor's records related to the contract during normal working hours. The date and time of the audit investigation shall be coordinated with the contractor, and shall be scheduled to the mutual agreement of the County and the contractor, although the contractor must guarantee and provide timely access as requested.
- d. Unless otherwise provided by applicable statute, the contractor from the effective date of final payment or termination hereunder, shall preserve and make available to the County for a period of three (3) years thereafter, at all reasonable times at the office of the contractor but without direct charge to the County, all its books, records, documents, and other evidence bearing on the costs and expenses of the services and supplies relating to contract work.
- e. The County's right to audit and access records as referenced above shall terminate at the end of five (5) years after the contract period and/or renewals have ended.
- f. The contractor shall include a "Right of Audit and Preservation of Records" clause in all subcontracts including all lower tier subcontractors for any portion of the work performed under the contract for the County. Should the contractor fail to include this clause in any such contract or lower tier contract, or otherwise fail to ensure the County's rights hereunder, the contractor shall be liable to Boone County for all reasonable costs, expenses and attorney fees which the County may have to incur in order to obtain an audit or inspection of the restoration of records which would have otherwise been available to the County from said persons under this clause. Such audit may be conducted by the County or its authorized representative.

11. Paragraph 3.16.8 is **REVISED** as follows:

3.16.8 *The contractor shall understand and agree that the phone system will be provided consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.*

12. Paragraph 3.16.8(a) is **ADDED** as follows:

13.6.8 (a) **Note: The County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.**

13. Paragraph 3.16.9, and sub-paragraph (a) through (d) are **ADDED** as follows:

3.16.9 The following requirements shall apply regarding the commission:

- a. Real-time commission reports must be made available through the internet detailing total commissions earned for all types of calls completed through the system.
- b. Commission: The contractor shall understand and agree that under no circumstances will the commission rate be adjusted lower than the rate agreed to at contract award, nor will the County be obligated to renegotiate any portion of the contract as a result of an increase to the commission rate.
- c. Commissions shall be based on Gross Billed Revenue. Gross Billed Revenue shall be defined as total billable minutes without any allowances or deductions for fraud, line charges, equipment charges, bad debt, true-up fees, billing fees, local access fees, long distance fees, service fees or any other fees associated with the operation of the Detainee Telephone System.
- d. The contractor shall understand and agree that the County reserves the right to audit collection procedures and commission computations, and to terminate the contract if repeated inaccuracies in either procedures or computations are revealed.

14. Paragraph 3.17.2 is **REVISED** as follows:

3.17.2 At the expiration of the initial contract period, the County will have the option of continuing the phone services at the same prices *and commission* for a period of two (2) additional years in one-year increments.

15. Paragraph title 3.27 and paragraph 3.27.1 are **ADDED** as follows:

**3.27 Records Requirement:**

3.27.1 The contractor shall keep, and require subcontractors to keep, such books and records as shall be necessary to perform the services required by the contract, and enable the County to evaluate the performance of such services. The County shall have full and free access to such books and records at all times during normal business hours of the County, including the right to inspect, copy, audit and make records and transcripts from such records. Such records shall be maintained for a period of three (3) years following completion of the services hereunder, and the County shall have access to such records in the event any audit is required.

16. Paragraph 4.1.1.2 is **REVISED** as follows:

4.1.1.2 To facilitate the evaluation process, the offeror **MUST** organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein. *The ordering of information should follow this sequence: Letter of Transmittal, Revised Response/Pricing Page (enclosed with Addendum #1) completed with offeror contact information (page 28), followed by subsequent pages in the Response/Pricing Page section of the RFP: Experience/Expertise/Reliability information, References, Personnel Expertise, Pricing, Methodology, etc. The offeror is strongly encouraged to also respond overtly to each paragraph in the Scope of Work (section 3) with a statement indicating "Complies" or "Understood and Agreed." Failure to comply with this requirement may compromise the subjective evaluation of the proposal and depending on the offeror's response, may render the proposal unacceptable. When evaluating a proposal, the County reserves the right to consider relevant information and fact, whether gained from a proposal, from the offeror's references, or from any other source. Any information submitted with the proposal, regardless of the format or placement of such information, may be considered in making decisions related to the responsiveness and merit of a proposal and the award of a contract.*

17. Section 5. Response/Pricing Page is **REPLACED** in its entirety with "**Revised Section 5. Response/Pricing Page**" which is included with Addendum #1. Offerors **must** use "**Revised Section 5. Response/Pricing Page**" for submitting their response.

18. Sub-paragraph 4.1.3.1(c) is **REVISED** as follows:

c. **Financial Offering:** The ability to offer a system that provides revenues sufficient to operate and maintain the system while keeping the costs to the users of the system as low as possible, *and satisfactorily compensate the County for administrative costs associated with supporting the detainee telephone system.*

19. The County received the following questions and is providing the following responses:

a. Can the RFP be provided in Word format?

**Response:** Yes. Please request a Word format version of the RFP, and any addenda thereto, from the Buyer of Record.

b. Can the County supply a recent revenue report?

**Response:** Yes – see the answer to letter “c” below. See also revised paragraph 3.2.3 for call data (transaction volume), for the 6-month period spanning January 1, 2017 through June 30, 2017.

c. What is the gross revenue for the past 12-months?

**Response:** An annual average for gross revenue is approximately \$82,000.00.

What follows is gross revenue data for the January-June 2017 period:

Jan-\$7,413.98; Feb-\$7,154.96; March-\$7,082.12; April-\$6,792.13; May-\$6,320.80; June-\$5,957.92

d. Does gross revenue include “pay now” and “text to connect” calls?

**Response:** Yes.

e. What are the current rates per minute charged to detainees and called parties by the current vendor?

**Response:** Please see link to current contract, and see also Attachment One to this Addendum.

The current contract and amendments may be viewed here:

Step 1:

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

Step 2:

Go to Bid Folder 40-16OCT17

Step 3:

Look at 15-07APR09

f. Please provide the monthly ITS revenue and commissions reports for the last 12 months. Please provide a list of current fees charged. Please provide the last 12 months of call traffic data broken out by call type.

**Response:** Please see answer to above question.

- g. Who is the County's current Jail Management System (JMS) provider?

**Response:** The current provider is Superior, which recently acquired Sun Card (the original JMS contractor providing the HTE JALAN product). The County is using the Superior JMS One Solution product. The County is now involved in an upgrade to the new platform that should be completed the first quarter of 2018.

- h. For the purposes of developing an interface for the PIN feature and for debit calling, please provide the name of the Jail Management System provider and contact information. If different, please provide the name/contact info of the vendor that provides your trust account software for inmate bank accounts.

**Response:** See his answer to the previous question for the answer to this question in part. Regarding contact information for the JMS and the inmate depository account, please see the following:

Superior Contact: David Montville  
Account Executive  
Public Safety & Justice Sales  
T: 407-304-3191  
C: 386-748-8822  
E: David.Montville@SunCardPS.com

CBM Contact: Matt Deroche  
605-321-7117  
Matt.Deroche@cbmmanagementservices.com

- i. Who is the County's commissary provider?

**Response:** The current provider is Keefe Commissary Network LLC, and the County will be switching to CBM Managed Services shortly before the upgraded JMS system is put into service (first quarter of 2018).

- j. Is the County currently using PIN debit through the commissary provider, and is this something that the County wants to do going forward?

**Response:** The County is not currently using PIN debit through the current commissary contractor, but the County intends to use PINS in the future as the detainees will need them to order from the commissary via the kiosk or phone system.

- k. Who owns the pay phones in the lobby? Will the successful provider be required to provide these?

**Response:** The lobby phones belong to the current telephone system contractor, Securus. The new contractor will have to supply the lobby phones. The County's preference is that the lobby phones accept debit/credit cards.

- l. Is the commission paid on lobby phones usage?

**Response:** No.

- m. Page 10, section 3.3.18 talks about how PINS will be used only if requested by the County. Does this mean that the County is not using PINS today?

**Response:** Currently the County is not using PINS, but plans to in the future.

- n. Who is the current depository for detainee funds?

**Response:** Currently Keefe Commissary Network, LLC maintains detainee funds. In the future, CBM will perform this service.

- o. When does the County plan to transition to CBM?

**Response:** The plan to transition to CBM is scheduled for the end of 2017 – beginning of 2018.

- p. What current technologies are used by the Boone County Detention Center?

**Response:** Mostly paper, but the County will begin using kiosks and tablets for commissary services provided by CBM.

- q. What brand of tablet will be used?

**Response:** CMB plans to use an ASUS tablet that uses Windows-based software.

- r. It appears that the RFP does not request a commission. Is the County not interested in a Commission?

**Response:** See Revised Response/Pricing Page included with Addendum #1, and see revised paragraph 3.16.8 (point #11 herein).

- s. Please confirm that the County is not seeking any compensation or commission, and that the pricing evaluation will be focused on the lowest rate per minute for detainees and consumers?

**Response:** See Revised Response/Pricing Page included with Addendum #1, and see revised paragraph 3.16.8 (point #11 herein).

- t. Does the County currently use video visits? If not, will the County want video visits in the future?

**Response:** The County does not currently use video visits. In the future, the County is interested in seeing what can be offered for provision of video visits.

- u. Is the County open to other value-added services not defined in the RFP?

**Response:** The County's goal is to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support the phone system services. If the offeror is aware of other services/products that allow the County to realize the stated goal, then the offeror may present them in the proposal for consideration. The offeror should clearly label the additional services/products as "optional," and should be wary of promoting the "value-added" services/products at the expense of satisfying base service requirements defined in the RFP.

- v. Is the County using voice bio-metrics now?

**Response:** No.

- w. Is the current system wired with cut-off switches?

**Response:** Yes.

- x. Are the eight visitor booths wired for recording?

- y. **Response:** Yes

- z. Are the switches manual?

**Response:** Yes, but it's anticipated that the new technology would lead to electronic switches.

- aa. Is the current contractor's phone system equipment off-site?

**Response:** Securus, the current contractor, provides an on-premise solution that includes the following equipment: switches, power supply, phones, etc.

- bb. What is the term "debit account" as used in paragraph 3.13.2?

**Response:** Please see revised text in revised paragraph 3.13.2 herein (point #7).

- cc. Please confirm that the County wants responses organized using the structure laid-out in the forms in Section 5, pages 28-41.

**Response:** Please see revised text in revised paragraph 4.1.1.2 herein (paragraph 13).

- dd. Since all other portions of the RFP are addressed in Section 5, please confirm that it is not necessary to provide a separate "point-by-point" response to other pages in the RFP.

**Response:** It is not necessary to provide detailed responses to each paragraph in section 3, the Scope of Work, however the offeror is encouraged to indicate "Complies" or "Understood and Agreed" as a response to each paragraph. Detail is necessary in order to evaluate the offeror's proposed methodology, but the offeror can accomplish this by answering the questions in the "Response/Pricing Page" portion of the RFP, section 5. Failure by the offeror to provide sufficient detail in their response to allow the County the ability to understand and assess the offeror's proposal is solely the offeror's responsibility.

- ee. On RFP page 23, item 4.1.1.2. states that "to facilitate the evaluation process, the offeror MUST organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein." It appears that you mean item 4.1.3.1. ("Method of Performance," "Experience/Expertise of Offeror" and "Financial Offering"), because these correspond to parts 3.1 to 5.7, but does it also include the ones item 4.1.4.2 ("Qualification Statement/References with subcategories "Company Experience," "References," and Litigation History")? If it includes the ones under item 4.1.4.2, there appears to be two places for references. Please clarify.

**Response:** Please see the response to question "cc" above, and also see Revised paragraph 4.1.1.2 (point #16 herein).

- ff. Can the County provide a list of conference/tour attendees?

**Response:** Yes, included with Addendum #1.

- gg. Is commission being paid on interstate calls?

**Response:** No, per FCC ruling.

- hh. What is the current contractor paying as the commission to the County?

**Response:** 53% on gross revenue on collect calls and 35% for prepaid calls.

- ii. Please provide a copy of all current contract and amendments pertaining to inmate phones.

The current contract and amendments may be viewed here:

Step 1:

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

Step 2:

Go to Bid Folder 40-16OCT17

Step 3:

Look at 15-07APR09

jj. Please provide commission statements from the last six months.

**Response:** See Attachment One

kk. Will the County please outline the fees that are being charged by the current vendor for the following (response is in blue font):

- Bill Statement Fee: None
- Prepaid Account Funding Fee via Web: \$3.00
- Prepaid Account Funding Fee via IVR: \$3.00
- Prepaid Account Funding Fee via Live Operator: \$5.95
- Fees for Instant Pay Calls: None

ll. On page 18 of the RFP, item 3 .14.7 states that “the System shall be scalable to meet the County's needs.” To properly gauge the scope of scalability needed, please indicate what the County’s expectations are regarding growth.

**Response:** At the current time the County does not anticipate any growth.

mm. What is the average stay for inmates?

**Response:** 54% less than 4 hours  
81% less than 3 days  
94% less than 60 days

nn. How many inmates are booked per day, on average?

**Response:** In 2016, Boone County booked in a total of 5,911 detainees, which averages to 16.2 daily.

oo. How long do inmates stay in bookings?

**Response:** Less than 4 hours.

pp. Please provide the location of the phone room(s) where our equipment will go.

**Response:** See Attachment Two.

qq. Please provide a pod layout, with the number of inmates per pod/housing unit.

**Response:** See Attachment Two.

A-Pod

4 Temporary holding cells - unknown # detainees

Ad Seg 4 detainees - 1 phone

B-Pod #Detainees - Phone(s)

B108	21	2
B110	12	1
B117	12	1
B126	12	1
B133	12	1
B139	20	3
C102	24	2
C106	8	1
C112	8	1
C120	8	1
C129	12	1
C136	8	1
C145	10	1
D105	12	1
D118	12	1
D123	10	1
D134	9	1
D140	12	1

rr. Are there any uninhabited housing units?

**Response:** No.

ss. Do you have any planned demolition or facility expansion within the period of this contract?

**Response:** No.

tt. Would the facility allow the awarded vendor to use dark fiber that has already been installed?

**Response:** The County does not own the dark fiber so it depends on the owner.

uu. On page 24 of the RFP item 4.1.2.2, states that" the County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial

evaluation phase." Please clarify "highest rank." For example, would it be the top two?

**Response:** The County chooses not to limit its options and say at this time that negotiation may be limited to the top two, three, etc. scoring vendors. It depends on the nature of the proposals submitted.

vv. Regarding the evaluation criteria on page 25 of the RFP, item 4.1.3.1, please clarify how these criteria are weighted. Will points be assigned to them? Will the County take an average of the evaluators scores or will the scores be added together to arrive at a lump sum total?

**Response:** The County's evaluation will take into consideration the identified evaluation criteria, and conduct an objective and fair evaluation of proposals. The evaluators may choose to assign individual points or to average points, or to conduct the evaluation using some other scoring method. Regardless of approach, the methodology will be consistently and fairly applied to all offerors in scoring proposals.

ww. Do you currently have an inmate communications contract outside your phones and video for inmate messaging, grievances, requests, commissary ordering, and inmate kiosks?

**Response:** The County contracts with CBM Managed Services for commissary services that includes kiosks (contract #02-25MAY16).

xx. Please provide a copy of your inmate communications contract for inmate messaging, grievances, requests, commissary ordering, and inmate kiosks.

**Response:** The current commissary contract and amendments may be viewed here:

Step 1:

<https://www.showmeboone.com/purchasing/bids/current-bids.asp>

Step 2:

Go to Bid Folder 40-16OCT17

Step 3:

Look at 02-25MAY16

yy. Would the County consider scheduling a mandatory live product demonstration as part of your evaluation criteria?

**Response:** No.

E-mail: paul.n.cooper@centurylink.com

Authorized Representative Signature: Amy Allen Date: 10-23-17  
For Paul Cooper - VP101M

Authorized Representative Printed Name: Amy Allen

zz. Will multiple financial offers be permitted? If so, how will the multiple offers be evaluated?

**Response:** See the Revised Vendor/Pricing Page of this Addendum. The multiple offers will be evaluated consistent with evaluation criteria stated in the RFP.

aaa. Given the current FCC stay, is the County more interested in retaining commissions or moving to lower/no commissions with a possible cost-recovery element?

**Response:** See revised paragraph 3.16.8 (point #11 basis) and the Revised Vendor/Pricing Page of this Addendum.

bbb. Can the attendance list of vendor attending the pre-proposal conference and tour be made available?

**Response:** See Attachment Three to this Addendum

ccc. Does the incumbent inmate phone provider currently take any deductions from commission revenue? If so, what are the deductions and how much?

**Response:** \$.25 per call is deducted from commission revenue for Threads (investigative tool)

ddd. How many free calls are inmates given?

**Response:** Free calls are provided in the holding cells in A-Pod. All holding cells should provide free "local" calls.

By: \_\_\_\_\_

**Liz Palazzolo, CPPO, C.P.M.  
Senior Buyer**

OFFEROR has examined Addendum #1 to Request for Proposal# 40-16OCT17 – Detainee Telephone System, receipt of which is hereby acknowledged:

Company Name: CenturyLink

Address: 600 New Century Parkway New Century, Kansas 66031

Phone Number: 913-353-7388

Fax Number: 720-264-8121

E-mail: paul.n.cooper@centurylink.com

Authorized Representative Signature: Amy Allen  
For Paul Cooper - VP101M

Date: 10-23-17

Authorized Representative Printed Name: Amy Allen

5. Revised Response/Pricing Page

In compliance with this Request for Proposal (RFP) and subject to all the conditions thereof, the offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this RFP and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Federal Tax ID (or Social Security #): \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

5.1 **The offeror must submit pricing for services in the Pricing section of the Offeror Response Pages that follow.** As a turnkey operation, all quoted pricing for the detainee telephone services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the detainee telephone system fully operational as described herein including recording and monitoring capabilities, as well as maintenance.

5.2 Attach a **Letter of Transmittal** to this page and place at the beginning of the proposal response. Included in the letter shall be a statement that identifies all materials and enclosures being identified in the proposal response. The letter of transmittal must be signed by the person who is authorized to contractually commit the offeror's organization.

5.3 **Provide a contact person** who will be responsible for coordinating the efforts and personnel of all parties involved in the response, to include, but not be limited to, oral presentations, demonstrations, site visits and responses to request for clarification, if any. Provide the following:

Name: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Fax: \_\_\_\_\_

**5.4 OFFEROR'S EXPERIENCE, EXPERTISE AND RELIABILITY**

The evaluation of the offeror's proposed experience and reliability shall be subjective based on the ability of the offeror to perform the requirements stated herein. Therefore, the offeror should present detailed information regarding their experience and reliability. The following information should be provided by the offeror in order to assist Boone County in the evaluation of the offeror's experience and reliability. The County reserves the right to use this information, including information gained from any other source, in the evaluation process.

Describe the offeror's history in providing detainee phone service and address the number of years(s) the offeror has been providing professional detainee phone services in the Missouri and national markets:

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Address any litigation the offeror is currently involved in or has been involved in over the past three (3) years regarding delivery of detainee phone services:

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**OFFEROR'S REFERENCES**

**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

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=====  
**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_  
\_\_\_\_\_

=====  
**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_  
\_\_\_\_\_

=====  
**Organization** Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

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=====  
*Organization* Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact's Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone Number and Area Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Equipment/Services Furnished: \_\_\_\_\_

Availability of Reference: \_\_\_\_\_

**5.5 PERSONNEL EXPERTISE SUMMARY**

The offeror should identify the names and provide a brief description of the background, including educational degrees and certifications, of key personnel who will be assigned to perform under the detainee telephone service contract for the County. Identify the title the staff person will be assigned under the prospective contract and emphasize the expertise the person brings for consideration.

**(Also attach resumes for key personnel)**

Personnel	Background and Expertise of Personnel
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1. \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Title)

2. \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Title)

3. \_\_\_\_\_

(Name)

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(Title)

4.

(Name)

(Title)

5.

(Name)

(Title)

**5.6 In addition it is highly desirable that the offeror provide the following information related to the offeror's Experience, Expertise and Reliability:**

1. It is highly desired that the offeror describe any billing disputes the offeror's company has with any users of the system for any reason; the offeror should provide enough detail without disclosure of the user's private information. The detail the County seeks should help the County understand the nature of the dispute, and the time it took to resolve it.

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2. The offeror should provide a list of customers who have experienced detainee telephone system outages lasting longer than 24 hours while under a service agreement with the offeror:

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2. The offeror should describe all patents the offeror's company holds or has developed, and in addition, should supply patent information for proposed equipment or software, where applicable to the detainee telephone system:

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5. Response/Pricing Page

*The offeror must respond to both Part One and Part Two Pricing.*

*Part One Pricing: Administrative Costs Recovery Commission And Associated Rates*

*Pricing submitted under Part One shall be paired with provision of an Administrative Costs Recovery Commission paid to the County. The offeror's pricing shall be based on the following information:*

*Note: For purposes of preparing proposal responses, the County has estimated that the portion of its administrative costs that it seeks recovery on from the detainee phone system is \$10,000.00 for FY2018, and thereafter that amount will be increased annually by the CPI index for the prior 12-month period as certified by the Missouri State Tax Commission.*

*The County spends approximately \$10,000.00 per year supporting the detainee phone system's operation at the County Detention Center. This includes the costs of management of the system at the detention facility as well as responding to outside requests. It does not include costs associated with tasks/requests of the Prosecuting Attorney's Office, or other detective/investigator costs.*

*Pricing submitted shall be for provision of a phone system consistent with the County's goal to keep the costs to the users of the system as low as practicable while generating sufficient revenue to support phone system services as well as recover administrative costs to the County for supporting the detainee telephone system. The County does not desire revenue in excess of recovering administrative costs associated with supporting the detainee telephone system.*

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

No additional fees or pricing in excess of those shown below may be charged to users/called parties/detainees in excess of the pricing identified below **except** for the addition of applicable and current local, state, and federal fees/taxes. The offeror must understand and agree that if awarded the contract, no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees.

**Proposal Preparation Costs:** Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e. fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

***Line Item 1: Administrative Costs Recovery Commission:***

***The offeror shall quote a single, firm and fixed commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:***

\_\_\_\_\_ %

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
2.	Pre-paid Call / Debit Call	Minute	\$

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The Price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

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Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
3.	<b>Collect Call</b>	Minute	\$

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
4.	<b>Automated Payment Fee Per Transaction</b>	Each	\$

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 4. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
5.	<b>Live Agent Fee Per Transaction</b>	Each	\$

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 5. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
6.	International Call	Minute	\$

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

***Part Two Pricing: Offeror-Defined Commission And Associated Rates***

***The offeror is encouraged to provide one other commission/rate pairing that the offeror believes may benefit the County. All costs to the County and to users of the telephone system must be specifically identified/priced or built into quoted pricing.***

The offeror must submit firm, fixed pricing for provision of Detainee Telephone Services as described herein. All quotations shall be considered firm and fixed. As a turnkey operation, all quoted pricing for the Detainee Telephone Services must include all costs for provision of hardware, software, materials, wiring, supplies, labor and support including travel necessary to make the Detainee Telephone System fully operational as described herein including recording and monitoring capabilities, as well as maintenance. The County shall assume that no other costs are to be charged if not identified by the offeror in its proposal.

All pricing must be firm, fixed for the duration of the contract, and in compliance with FCC and State of Missouri Public Service Commission regulations.

***All additional fees/pricing in excess of those shown below and in addition to applicable and current local, state, and federal fees/taxes must be identified in the proposal. The offeror must understand and agree that if awarded the contract, and in the absence of any other fees or charges being identified below, then no other fees or charges of any kind, including discretionary fees, shall be charged to users/called parties/detainees in the resulting contract.***

Proposal Preparation Costs: Any and all costs incurred by the offeror in preparing or submitting a proposal shall be the offeror's sole responsibility whether or not any award results from this RFP. The County shall not reimburse such costs.

The offeror shall provide firm, fixed pricing for the Detainee Telephone System pursuant to all requirements stated above in the available space provided as follows. All pricing shall comply with the identified "unit of measure." All per minute prices must be a whole number (i.e.

fractions of cents such as \$0.075 must not be proposed). All prices must be within rules established by the Federal Communication Commission and the Missouri Public Service Commission, and shall apply regardless of the call being made intraLATA intrastate, interLATA intrastate, interLATA interstate, or for international calls.

**Line Item 7: Commission:**

*The offeror shall quote a commission that covers all calls that shall be paid on a monthly basis based on all gross revenue from all calls transacted using the detainee telephone system:*

\_\_\_\_\_ %

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
8.	Pre-paid Call / Debit Call	Minute	\$

**Pre-paid and Debit Calls:** The offeror must state the firm, fixed price per minute for pre-paid, and debit calls above. The price proposed for pre-paid and debit calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the per minute prices. The price per minute for pre-paid and debit calls per minute shall include all set-up fees for all detainee calls. The firm fixed price per minute quoted shall be the same price for every minute for the entire duration of the phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
9.	Collect Call	Minute	\$

**Collect Call:** The offeror must state the firm, fixed price per minute for a collect call. The quoted price per minute proposed for a collect call shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the quoted per minute price. The collect call per minute price shall include all set-up fees for the detainee call. The firm fixed price per minute quoted shall be the same price for every minute for the duration of the entire phone call (i.e., the offeror cannot charge a higher rate for the first minute and lower rate for subsequent minutes, or vice versa). No other fees of any kind shall be charged with the exception of current and actual local, state, and federal fees/taxes.

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Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Transaction
10.	<b>Automated Payment Fee Per Transaction</b>	Each	\$

**Automated Payment Fee:** If the offeror charges a fee for a customer to make an automatic payment to an account, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make an automatic payment to an account, the offeror must indicate "N/A" or "\$0.00" for line item 10. The automated payment fee shall include payment made by means of a credit card, debit card, and shall include all bill processing fees, including fees for payments made by interactive voice response (IVR), web or kiosk.

Line Item	Description	Unit of Measure	Firm Fixed Price Each Transaction
11.	<b>Live Agent Fee Per Transaction</b>	Each	\$

**Live Agent Fee:** If the offeror charges a fee for a customer to make a payment to an account through a live agent, then the offeror must quote a firm fixed price per each transaction. If the offeror does not charge a fee for a customer to make a payment to an account through a live agent, the offeror must indicate "N/A" or "\$0.00" for line item 11. The live agent fee shall mean a fee associated with the optional use of a live human operator in order to complete a transaction.

Line Item	Description	Unit of Measure	Firm Fixed Price Per Each Minute
12.	International Call	Minute	\$

**International Calls:** The offeror must state the firm, fixed rate per minute for international calls. The rates proposed for international calls shall be exclusive of any and all local, state, and federal taxes/fees. Local, state, and federal taxes/fees may be passed on with no mark-up to the customer in addition to the detainee's per minute prices. The firm fixed price per minute offered shall be the same for the entire phone call (i.e. cannot charge a higher rate for the first minute and lower rate for subsequent minutes.) The offeror shall not charge called parties and/or detainees discretionary fees in addition to the per minute rate for international calls, and local, state, and federal fees/taxes.

**5.8 METHODOLOGY**

1. **Implementation Plan:** The offeror should sequentially list and briefly describe the tasks or events proposed for the implementation of the required services. The offeror shall submit a complete and detailed schedule of the time-frame required for installation, utility coordination, training, cut-over and testing. The system must be installed in a manner and under a time-frame designed to minimize disruption of the normal functioning of the Boone County Detention Facility.

If no tasks or events are required, the offeror should provide a statement of readiness. For each task/event identified, the offeror should identify the number of days required to complete the task/event, the personnel proposed to perform the task/event, and the number of work hours for each person.

The implementation plan should identify their proposed approach to implement all aspects of the hardware and software identified herein. Specifically, the offeror should minimally address the implementation of the phones, wiring, managed access system, and geo-fencing technology.

"Completion Day" should be specified as a certain number of days from date of contract award until completion of the specific task and should be expressed as calendar days, not specific dates. "Assigned Personnel" should be identified by name rather than project title unless such personnel are yet to be hired. "Workhours" should indicate that time each assigned person will spend on the specific task.

<b>Task or Event</b>	<b>Completion Day</b>	<b>Assigned Personnel</b>	<b>Work-hours</b>
Effective Date of Contract	1	N/A	N/A

2. Address the offeror's ability to provide a Detainee Telephone System that integrates with the County's computer system and allows for Sheriff's Office personnel's ability to monitor and record calls.

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3. Address programming features that the proposed Detainee Telephone System has:

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4. Indicate the ability of the system to identify:

a. Telephone number originating call: \_\_\_\_\_

b. Time of call: \_\_\_\_\_

c. Telephone number called: \_\_\_\_\_

d. Most frequently called numbers: \_\_\_\_\_

e. Length of call: \_\_\_\_\_

f. Identify numbers called from a specific telephone number:

---

g. Identify telephone numbers called by a specific detainee:

---

h. Alarm number status: \_\_\_\_\_

i. Alarm a telephone number and allow automatic recording of the call:

---

j. Multiple calls from different detainee phones to the same number:

---

5. Describe if the detainees will have the ability to call cell phones collect.

---

---

6. If prepaid service is offered, the offeror should explain how it works in detail.

---

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7. The offeror should describe how an account can be set-up for users who are not able to receive collect calls.

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8. The offeror should describe how the end user will be notified when the end user has reached 75% of its site or personal credit limit.

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9. Detail the method of determining service interruptions and service call priorities. List response time for each priority and the level of expertise devoted to each priority.

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10. Identify the location of the service office responsible for the facilities, and its hours of operation.

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11. The offeror should describe the proposed system's use of PINs, including Open PIN, Restricted PIN, and Closed PIN.

---

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12. The offeror should state the minimum and maximum number of digits used in a PIN.

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13. The offeror should provide a detailed description of how PIN's work, and provide a list of facilities where this feature has been implemented.

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14. The County understands that there are industry patents in this area. The offeror should provide a description of the process deployed on the offeror's platform, and include a discussion of why the technical approach used provides the best three-way detection solution.

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15. The offeror should describe how the proposed system prevents the detainee from using extra digits to dial-out of the Detainee Telephone System platform.

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16. The offeror should describe how the proposed system prevents switch-hook dialing.

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17. The offeror should describe how the proposed system detects the difference between an accepted call, an answering machine, busy signal, or other telephone activity.

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18. The offeror should provide any other additional investigative tools, features, or creative solutions that might be available to the County.

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19. Describe assistive technology applications for hearing impaired in addition to TTY's:

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20. Indicate the proposed system's ability to be monitored from any personal computer with proper access permissions.

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21. The offeror should describe the maintenance and quality assurance programs for equipment to be installed.

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22. The offeror should describe the system user training program and include applicable training documents.

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23. The offeror should identify its system's record-keeping features, and address how off-site records archive/back-up tasks will be performed.

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24. The offeror should describe the system's redundancy capacity for storing detainee phone calls.

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25. Please describe the durability of system components of the detainee telephone system including parts and labor:

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26. Identify and show the amount of work (using percentages) that will be subcontracted and the work/amount that the offeror's staff will perform directly:

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27. The offeror should attach samples of call detail and other available standard reports.

28. In addition, the offeror should provide samples of the offeror's invoices to users/called parties/detainees.

29. The offeror should also provide samples of reporting that's available from the offeror's web-accessible system.

30. The offeror should address if customized reports are available, and if so, describe the reports and what, if any, additional charges will be assessed for the customized reports.

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*31. The offeror should address the following details about the commission:*

*a. Explain in detail the method used to calculate revenue that will be paid to the County as commission:*

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*b. Describe and provide sample reports showing the calculation of the commission:*

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*c. Describe and provide sample reports that will enable the County to audit the calculation of the commission:*

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*d. Address if and how uncollectible revenue impacts calculation of the commission:*

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*e. Describe whether or not the offeror has had any commission disputes with any of its customers, and address the status of resolution:*

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STATE	ICSC Code	NECA CODE or OCN	Legacy Company Name	Legacy CO ID	Ownership Indicator	T-CO	SPECIALS-CO	SWITCHED-CO	SWITCHED-WIRELESS-CO
AZ	MS03	5101	QWEST CORPORATION-AZ	L-Q	Y	T600	3201	9201	6201
CO	MS02	5102	QWEST CORPORATION-CO	L-Q	Y	T600	3202	9202	6202
ID	MS01	5103	QWEST CORPORATION-ID	L-Q	Y	T600	3203	9203	6203
MT	MS01	5104	QWEST CORPORATION-MT	L-Q	Y	T600	3204	9204	6204
NM	MS03	5105	QWEST CORPORATION-NM	L-Q	Y	T600	3205	9205	6205
UT	MS01	5107	QWEST CORPORATION-UT	L-Q	Y	T600	3207	9207	6207
WY	MS02	5108	QWEST CORPORATION-WY	L-Q	Y	T600	3208	9208	6208
IA	NW01	5141	QWEST CORPORATION-IA	L-Q	Y	T600	3241	9241	6241
MN	NW02	5142	QWEST CORPORATION-MN	L-Q	Y	T600	3242	9242	6242
NE	NW01	5143	QWEST CORPORATION-NE	L-Q	Y	T600	3243	9243	6243
ND	NW02	5144	QWEST CORPORATION-ND	L-Q	Y	T600	3244	9244	6244
SD	NW01	5145	QWEST CORPORATION-SD	L-Q	Y	T600	3245	9245	6245
WA	PN01	5161	QWEST CORPORATION-WA	L-Q	Y	T600	3261	9261	6261
OR	PN02	5163	QWEST CORPORATION-OR	L-Q	Y	T600	3263	9263	6263



**LEGACY INMATE**  
C O M M U N I C A T I O N S

Legacy Inmate Communications  
10833 Valley View Street  
Suite 150  
Cypress, CA 90630  
1-800-577-5534

Pay your bill Online at:  
<http://www.legacyinmate.com>



David Elsmore  
4409 E Hedges Ave  
Fresno , CA 93703-4345

Invoice Number:  329579  
Invoice Date: 1/5/2007  
Due Date: 2/4/2007

<b>Total Amount Due:</b>	<b>\$12.88</b>
--------------------------	----------------

0

Bill To Phone: (330) 837-8486

Balance:	\$8.45
Call Charges:	\$2.70
Federal Taxes:	\$0.58
State Taxes:	\$1.15
<b>Total Amount Due:</b>	<b>\$12.88</b>

**Call Summary**

Date	Time	From	Number	To	Number	Authorized	Min	Amount
12/30/2006	4:49:18PM	(559) 490-0298	FRESNO CA	(559) 412-4668	FRESNO CA	elsmoore,david	6	\$ 2.70

David Elsmore  
4409 E Hedges Ave  
Fresno , CA93703-4345

Invoice #:  329579  
Invoice Date: 1/5/2007  
Total Due: **\$12.88**  
Due Date: 2/4/2007

Make Check Payable To:  
**Legacy Inmate Communications**  
10833 Valley View Street  
Suite 150  
Cypress, CA 90630

or Pay by Credit Card:  
Card Type: \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
Credit Card Number: \_\_\_\_\_  
Signature: \_\_\_\_\_

Amount Enclosed:

or Pay Online at: <http://www.legacyinmate.com>

You are receiving this invoice because someone has authorized a "collect" call from the Collin County Detention Center in McKinney, Texas. You have selected a Local Exchange Company that does not allow billing from third-party operator service providers. In order to receive further "collect" calls from this incarcerated friend or family member, we highly suggest that you consider establishing a direct billing or inmate prepaid account. At some point, one of our representatives may have already called your home to inform you of your calling options. However, if your telephone number has been listed on the FCC mandated National Do Not Call List; this attempt may not have been successful. To establish calling service and/or discuss your options, please call us toll free at 800-577-5534. Thank you.

# Prepaid Account Balance Displayed On Account Dashboard



ACCOUNT + PREPAID CALLING VIDEO VISITATION + MESSAGING + LOGOUT

Eduardo J

Balance: \$649.41

10833 Valley View St.  
Cypress California 90630  
United States  
enterpiece@legacyinmate.com



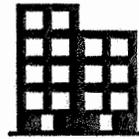
## Select a Service



Prepaid Calling



Remote Video Visitation



Onsite Video Visitation



Send Message

### Contact Us

(877) 553-4440  
info@legacyinmate.com  
Legacy Inmate Communications  
10833 Valley View Street Suite 150

### About Us

At Legacy, we are dedicated to providing unparalleled service while connecting friends and families through our industry leading worldwide, carrier-grade network. Since our inception in 1996, Legacy has been committed to providing advanced communications

# Billed Prepaid Calls Can Be Searched and Displayed On The Calling History Page



ACCOUNT + PREPAID CALLING VIDEO VISITATION + MESSAGING + LOGOUT

## Prepaid Calling

To begin receiving calls, click here to add fund to your account.  
To allow an inmate to call anyone, click here to add fund his/her account.  
To view your call records, select a from date and to date below and click search.

From date: 1/1/2015 To date: 1/12/2015 Search

From City	From State	Call Number	To City	To State	Call Date	Call Type	Call Duration	Total Charge
McCormick	SC	7146228283	CYPRESS	CA	1/6/2015 3:38:43 PM	Prepaid-Collect	0:03:00	\$0.75
Pierce	NE	7146228283	CYPRESS	CA	1/12/2015 4:26:47 PM	Prepaid-Collect	0:00:07	\$0.25

### Contact Us

(877) 553-4440  
info@legacyinmate.com  
Legacy Inmate Communications  
10833 Valley View Street Suite 150  
Cypress, California 90630

### About Us

At Legacy, we are dedicated to providing unparalleled service while connecting friends and families through our industry leading worldwide, carrier-grade network. Since our inception in 1996, Legacy has been committed to providing advanced communications solutions to the corrections industry plus operator assisted telecommunication services for public use telephones.

## **SAMPLE COMMISSION REPORTS**

Users can easily access reports from the Reports Utility of iCON. Reports are viewable from iCON within seconds of report request. iCON offers a wide array of useful Investigative Report options to substantiate every aspect of the inmate call process. The following sample reports demonstrate the capability of iCON to supply detailed commission reports. On the following pages you will find:

**Call Commission Summary**

**Commission Due Statement**

**Call Commission Detail**

**Call Commission (Inmate Phone Number)**

**LEGACY INMATE COMMUNICATIONS**

Call Commission Summary

From Date : 2/1/2013 12:00:00 AM To : 2/21/2013 12:00:00 AM

Report Date : Feb 21 2013 12:42:21

Call Date	Call Count	Total Minutes	Call Revenue	Commission Rate	Commission Paid
02/01/13	1,707	23,732	\$6,409.62	56.00%	\$3,589.39
02/02/13	1,653	22,936	\$6,126.00	56.00%	\$3,430.56
02/03/13	1,735	24,512	\$6,372.55	56.00%	\$3,568.63
02/04/13	1,689	22,674	\$6,569.64	56.00%	\$3,679.00
02/05/13	1,598	22,098	\$6,164.04	56.00%	\$3,451.86
02/06/13	1,597	21,850	\$6,075.96	56.00%	\$3,402.54
02/07/13	1,503	21,375	\$5,742.31	56.00%	\$3,215.69
02/08/13	1,800	25,885	\$7,032.30	56.00%	\$3,938.09
02/09/13	1,673	24,211	\$5,996.69	56.00%	\$3,358.15
02/10/13	1,659	24,305	\$6,340.81	56.00%	\$3,550.85
02/11/13	1,843	24,867	\$7,046.23	56.00%	\$3,945.89
02/12/13	1,813	25,075	\$6,916.02	56.00%	\$3,872.97
02/13/13	1,888	26,883	\$7,241.76	56.00%	\$4,055.39
02/14/13	2,024	29,168	\$7,805.53	56.00%	\$4,371.10
02/15/13	1,747	24,869	\$6,755.23	56.00%	\$3,782.93
02/16/13	1,702	24,676	\$6,426.77	56.00%	\$3,598.99
02/17/13	1,614	24,093	\$6,056.35	56.00%	\$3,391.56
02/18/13	1,738	25,121	\$6,654.11	56.00%	\$3,726.30
02/19/13	1,800	25,091	\$6,856.72	56.00%	\$3,839.76
02/20/13	1,637	22,151	\$6,253.37	56.00%	\$3,501.89
02/21/13	344	4,607	\$1,515.10	56.00%	\$848.46
<b>TOTAL ALL PAGES</b>	<b>34,764</b>	<b>490,179</b>	<b>\$132,357.11</b>		<b>\$74,120.00</b>

**LEGACY INMATE COMMUNICATIONS**

Commission Due Statement

From Date : 2/1/2013 12:00:00 AM To : 2/21/2013 12:00:00 AM

Report Date : 21 Feb 2013 01:03:09

Bill Type	Call Type	Call Count	Call Duration	Call Revenue	Commission Rate	Commission Paid
Collect	Canada	13	141	\$240.02	56.00%	\$134.41
Collect	InterLata	401	3,966	\$3,344.20	56.00%	\$1,872.75
Collect	InterState	80	1,102	\$1,035.22	56.00%	\$579.72
Collect	IntraLata	957	10,837	\$3,688.94	56.00%	\$2,065.81
Collect	Local	4,569	51,706	\$13,836.67	56.00%	\$7,748.54
Collect w/ CC	Canada	10	115	\$192.15	56.00%	\$107.60
Collect w/ CC	InterLata	838	11,287	\$8,638.05	56.00%	\$4,837.31
Collect w/ CC	InterState	288	3,574	\$3,447.62	56.00%	\$1,930.67
Collect w/ CC	IntraLata	2,055	29,901	\$8,714.64	56.00%	\$4,880.20
Collect w/ CC	Local	11,082	166,910	\$35,639.70	56.00%	\$19,958.23
Prepaid w/CC	InterLata	338	5,096	\$3,783.00	56.00%	\$2,118.48
Prepaid w/CC	InterState	45	504	\$500.04	56.00%	\$280.02
Prepaid w/CC	IntraLata	374	5,520	\$1,601.58	56.00%	\$896.88
Prepaid w/CC	Local	3,153	50,485	\$10,301.93	56.00%	\$5,769.08
Prepaid-Collect	InterLata	343	3,527	\$2,934.55	56.00%	\$1,643.35
Prepaid-Collect	InterState	89	1,130	\$1,083.54	56.00%	\$606.78
Prepaid-Collect	IntraLata	1,275	17,257	\$5,242.78	56.00%	\$2,935.96
Prepaid-Collect	Local	8,890	127,683	\$28,273.65	56.00%	\$15,833.24
<b>TOTAL ALL PAGES</b>		<b>34,800</b>	<b>490,741</b>	<b>\$132,498.28</b>		<b>\$74,199.03</b>

LEGACY INMATE COMMUNICATIONS

Call Commission Detail

From Date : 2/1/2013 12:00:00 AM To : 2/21/2013 12:00:00 AM

Report Date : Feb 21 2013 01:35:19

Date	Bill Type	Call Type	Inmate Phone #	Destination #	End Time	Call Count	Call Duration	Call Revenue	Comm Rate	Comm Paid
02/01/13	Collect	InterLata	(559) 111-3061	(530) 839-2191	6:16:59 PM	1	13	\$10.05	56.00%	\$5.63
02/01/13	Collect	InterLata	(559) 111-2112	(510) 899-8400	3:57:08 PM	1	6	\$6.20	56.00%	\$3.47
02/01/13	Collect	InterLata	(559) 111-2112	(510) 899-8400	3:45:31 PM	1	6	\$6.20	56.00%	\$3.47
02/01/13	Collect	InterLata	(559) 111-3073	(661) 854-2809	8:21:55 PM	1	6	\$6.20	56.00%	\$3.47
02/01/13	Collect	InterLata	(559) 111-2111	(510) 899-8400	2:33:24 PM	1	2	\$4.00	56.00%	\$2.24
02/01/13	Collect	InterLata	(559) 111-2078	(310) 320-0977	6:22:52 PM	1	11	\$8.95	56.00%	\$5.01
02/01/13	Collect	InterLata	(559) 111-3007	(562) 595-9802	9:38:23 PM	1	10	\$8.40	56.00%	\$4.70
02/01/13	Collect	InterLata	(559) 111-2104	(209) 572-2664	2:18:34 PM	1	1	\$3.45	56.00%	\$1.93
02/01/13	Collect	InterLata	(559) 111-2104	(209) 572-2664	2:14:37 PM	1	5	\$5.65	56.00%	\$3.16
02/01/13	Collect	InterLata	(559) 111-3068	(408) 360-9975	2:41:33 PM	1	7	\$6.75	56.00%	\$3.78
02/01/13	Collect	InterLata	(559) 111-1005	(209) 962-5644	4:24:36 PM	1	7	\$6.75	56.00%	\$3.78
02/01/13	Collect	InterLata	(559) 111-1054	(661) 837-4560	5:39:10 PM	1	19	\$13.35	56.00%	\$7.48
02/01/13	Collect	InterLata	(559) 111-2104	(209) 572-2664	6:25:57 PM	1	12	\$9.50	56.00%	\$5.32
02/01/13	Collect	InterLata	(559) 111-2113	(310) 604-0349	6:26:34 PM	1	2	\$4.00	56.00%	\$2.24
02/01/13	Collect	InterLata	(559) 111-3011	(415) 467-9836	9:39:40 AM	1	5	\$5.65	56.00%	\$3.16
02/01/13	Collect	InterLata	(559) 111-1030	(661) 273-2118	8:44:10 AM	1	11	\$8.95	56.00%	\$5.01
02/01/13	Collect	InterState	(559) 111-2111	(317) 787-5264	3:02:40 PM	1	18	\$15.94	56.00%	\$8.93
02/01/13	Collect	InterState	(559) 111-3063	(318) 336-9464	11:22:40 AM	1	8	\$8.84	56.00%	\$4.95
02/01/13	Collect	InterState	(559) 111-1130	(608) 251-6613	1:14:20 PM	1	4	\$6.00	56.00%	\$3.36
02/01/13	Collect	InterState	(559) 111-3076	(770) 631-2846	5:47:52 PM	1	3	\$5.29	56.00%	\$2.96
02/01/13	Collect	IntraLata	(559) 111-3035	(559) 693-1902	5:47:23 PM	1	6	\$3.36	56.00%	\$1.88
02/01/13	Collect	IntraLata	(559) 111-3073	(559) 643-0521	8:02:22 PM	1	11	\$3.61	56.00%	\$2.02
02/01/13	Collect	IntraLata	(559) 111-3073	(559) 934-0195	7:46:17 PM	1	20	\$4.60	56.00%	\$2.58
02/01/13	Collect	IntraLata	(559) 111-3035	(559) 693-1902	9:51:21 PM	1	3	\$2.73	56.00%	\$1.53
02/01/13	Collect	IntraLata	(559) 111-3042	(559) 935-6088	4:12:44 PM	1	20	\$5.60	56.00%	\$3.14
<b>TOTAL ALL PAGES</b>						<b>34,843</b>	<b>491,319</b>	<b>\$132,679.56</b>		<b>\$74,300.55</b>

**LEGACY INMATE COMMUNICATIONS**

Call Commission (Inmate Phone Number)

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

Report Date : Feb 21 2013 01:17:00

Inmate Phone #	Call Count	Total Minutes	Call Revenue	Commission Rate	Commission Paid
(559) 111-1001	1	4	\$5.10	56.00%	\$2.86
(559) 111-1004	2	12	\$12.40	56.00%	\$6.94
(559) 111-1005	1	7	\$6.75	56.00%	\$3.78
(559) 111-1023	3	25	\$8.75	56.00%	\$4.90
(559) 111-1026	5	44	\$18.96	56.00%	\$10.62
(559) 111-1027	13	220	\$43.38	56.00%	\$24.29
(559) 111-1029	2	23	\$8.33	56.00%	\$4.66
(559) 111-1030	2	24	\$19.00	56.00%	\$10.64
(559) 111-1039	3	45	\$12.30	56.00%	\$6.89
(559) 111-1040	11	166	\$36.23	56.00%	\$20.29
(559) 111-1041	3	24	\$8.79	56.00%	\$4.92
(559) 111-1042	1	8	\$3.28	56.00%	\$1.84
(559) 111-1048	2	40	\$27.80	56.00%	\$15.57
(559) 111-1049	2	29	\$6.64	56.00%	\$3.72
(559) 111-1051	3	62	\$15.07	56.00%	\$8.44
(559) 111-1052	13	195	\$47.11	56.00%	\$26.38
(559) 111-1053	13	193	\$43.03	56.00%	\$24.10
(559) 111-1054	8	141	\$37.57	56.00%	\$21.04
(559) 111-1055	12	205	\$44.01	56.00%	\$24.65
(559) 111-1056	7	120	\$31.54	56.00%	\$17.66
(559) 111-1057	6	57	\$18.22	56.00%	\$10.20
(559) 111-1058	15	221	\$48.98	56.00%	\$27.43
(559) 111-1059	18	265	\$58.89	56.00%	\$32.98
(559) 111-1065	2	42	\$7.42	56.00%	\$4.16
(559) 111-1070	7	106	\$50.97	56.00%	\$28.54
(559) 111-1071	2	3	\$5.08	56.00%	\$2.84
<b>TOTAL</b>	<b>157</b>	<b>2,281</b>	<b>\$625.60</b>		<b>\$350.34</b>

## **SAMPLE CALL DETAIL REPORTS**

Users can easily access reports from the Reports Utility of iCON. Reports are viewable from iCON within seconds of report request. iCON offers a wide array of useful Investigative Report options to substantiate every aspect of the inmate call process. The following sample reports demonstrate the capability of iCON to supply detailed commission reports. On the following pages you will find:

**Billed Call Detail Report by – Inmate Phone Number, Facility Division, Facility Location, Call Type, Bill Type, Inmate PIN, Prepaid Account**

**Billed Call Detail Report by – Inmate Phone Number, Destination Number, Facility Division, Facility Location, Call Type, Bill Type, Inmate PIN, Prepaid Account, Call Date, Hour**

**Un-Billed Call Report by – Inmate Phone Number, Inmate PIN, Reject Type, Facility Division, Facility Location**

**Un-Billed Call Summary Report**

**Monthly Billed and Un-Billed Call Report - Graph**

**LEGACY INMATE COMMUNICATIONS**

Billed Call Detail (Inmate Phone Number)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 11:28:30

Inmate Phone #	Destination #	Date	Call Type	Bill Type	Total Minutes	Call Revenue
(559) 111-1001	(951) 377-1732	2/1/2013 13:18	RL	Collect w/ CC	4	\$5.10
(559) 111-1002	(559) 528-2513	2/4/2013 14:56	AL	Collect	5	\$3.20
(559) 111-1004	(951) 287-3988	2/1/2013 12:00	RL	Collect w/ CC	6	\$6.20
(559) 111-1004	(951) 377-1732	2/1/2013 12:39	RL	Collect w/ CC	6	\$6.20
(559) 111-1005	(209) 962-5644	2/1/2013 16:24	RL	Collect	7	\$6.75
(559) 111-1007	(661) 965-0037	2/2/2013 3:03	RL	Prepaid-Collect	21	\$14.45
(559) 111-1007	(661) 965-0037	2/2/2013 3:28	RL	Prepaid w/CC	20	\$13.90
(559) 111-1007	(661) 965-0037	2/2/2013 10:14	RL	Prepaid w/CC	21	\$14.45
(559) 111-1007	(661) 345-0356	2/3/2013 15:08	RL	Collect w/ CC	3	\$4.55
(559) 111-1007	(661) 345-0356	2/3/2013 15:24	RL	Collect w/ CC	6	\$6.20
(559) 111-1007	(661) 345-0356	2/3/2013 16:02	RL	Collect w/ CC	12	\$9.50
(559) 111-1007	(559) 474-1000	2/4/2013 21:54	AL	Collect w/ CC	1	\$2.51
(559) 111-1007	(559) 474-1888	2/4/2013 21:58	AL	Prepaid-Collect	3	\$2.73
(559) 111-1009	(559) 693-2119	2/2/2013 2:25	AL	Collect	1	\$2.51
(559) 111-1010	(209) 559-2178	2/4/2013 12:14	RL	Collect w/ CC	6	\$6.20
(559) 111-1012	(559) 562-0750	2/3/2013 0:19	AL	Collect	5	\$2.95
(559) 111-1012	(559) 562-0750	2/3/2013 0:29	AL	Collect	1	\$2.51
(559) 111-1014	(559) 693-2247	2/4/2013 7:12	AL	Collect	3	\$2.88
(559) 111-1014	(209) 826-0796	2/4/2013 8:06	RL	Collect	5	\$5.65
(559) 111-1014	(209) 826-0796	2/4/2013 8:17	RL	Collect	3	\$4.55
(559) 111-1014	(209) 826-0796	2/4/2013 8:43	RL	Collect	5	\$5.65
(559) 111-1014	(209) 826-0796	2/4/2013 10:40	RL	Collect	3	\$4.55
(559) 111-1014	(209) 826-0796	2/4/2013 12:03	RL	Collect	4	\$5.10
(559) 111-1014	(209) 826-0796	2/4/2013 12:14	RL	Collect	4	\$5.10
<b>TOTAL</b>					<b>155</b>	<b>\$143.39</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Detail (Division)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 11:33:06

Division	Date	Inmate Phone #	Destination #	Bill Type	Total Minutes	Call Revenue
Main Jail	2/4/2013 14:56	(559) 111-1002	(559) 528-2513	Collect	5	\$3.20
Main Jail	2/2/2013 2:25	(559) 111-1009	(559) 693-2119	Collect	1	\$2.51
Main Jail	2/3/2013 0:19	(559) 111-1012	(559) 562-0750	Collect	5	\$2.95
Main Jail	2/4/2013 15:41	(559) 111-1073	(559) 935-8534	Collect	5	\$3.20
Main Jail	2/3/2013 0:29	(559) 111-1012	(559) 562-0750	Collect	1	\$2.51
Main Jail	2/3/2013 0:55	(559) 111-1018	(559) 528-2655	Collect	1	\$2.51
Main Jail	2/4/2013 12:52	(559) 111-1165	(559) 646-0343	Collect	15	\$4.80
Main Jail	2/4/2013 19:46	(559) 111-1094	(559) 626-2620	Collect	6	\$3.06
Main Jail	2/1/2013 22:59	(559) 111-1147	(559) 945-9087	Collect	10	\$3.50
Main Jail	2/2/2013 20:12	(559) 111-1216	(559) 646-9482	Collect	9	\$3.39
Main Jail	2/3/2013 20:31	(559) 111-1142	(559) 923-2207	Collect	19	\$3.32
Main Jail	2/3/2013 21:04	(559) 111-1153	(559) 591-3276	Collect	20	\$4.60
Main Jail	2/1/2013 9:11	(559) 111-1217	(559) 646-9481	Collect	1	\$2.56
Main Jail	2/1/2013 20:00	(559) 111-1218	(559) 661-8582	Collect	7	\$3.17
Main Jail	2/3/2013 18:22	(559) 111-1127	(559) 626-4592	Collect	9	\$3.39
Main Jail	2/2/2013 19:17	(559) 111-1155	(559) 659-2591	Collect	4	\$2.84
Main Jail	2/2/2013 19:12	(559) 111-1143	(559) 923-2207	Collect	5	\$2.62
Main Jail	2/1/2013 22:49	(559) 111-1147	(559) 945-9087	Collect	20	\$4.60
Main Jail	2/4/2013 19:47	(559) 111-1155	(559) 659-2591	Collect	12	\$3.72
Main Jail	2/2/2013 14:13	(559) 111-1142	(559) 923-2207	Collect	20	\$3.37
Main Jail	2/3/2013 14:15	(559) 111-1103	(559) 925-8502	Collect	21	\$4.71
Main Jail	2/3/2013 15:38	(559) 111-1090	(559) 674-1516	Collect	7	\$3.17
Main Jail	2/3/2013 16:13	(559) 111-1094	(559) 626-2620	Collect	10	\$3.50
Main Jail	2/1/2013 19:32	(559) 111-1212	(559) 659-1681	Collect	14	\$3.94
<b>TOTAL</b>					<b>227</b>	<b>\$81.14</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Detail (Location)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 11:34:39

Location	Destination #	Record Date	Bill Type	Total Minutes	Call Revenue
Second Floor	(559) 646-2517	2/1/2013 16:44	Collect	20	\$5.60
Second Floor	(559) 626-4727	2/4/2013 17:56	Collect	8	\$3.68
Second Floor	(559) 626-4727	2/1/2013 18:51	Collect	3	\$2.73
Second Floor	(559) 646-2517	2/3/2013 20:13	Collect	21	\$4.71
Second Floor	(559) 646-2517	2/4/2013 20:10	Collect	3	\$2.73
Second Floor	(559) 646-2517	2/4/2013 20:19	Collect	7	\$3.17
Second Floor	(559) 646-2517	2/2/2013 21:18	Collect	21	\$4.71
Second Floor	(559) 476-2000	2/1/2013 14:47	Collect	1	\$2.51
Second Floor	(559) 476-2000	2/1/2013 15:07	Collect	19	\$3.59
Second Floor	(559) 266-2073	2/2/2013 13:26	Collect	17	\$3.22
Second Floor	(559) 298-5319	2/1/2013 19:17	Collect	5	\$2.65
Second Floor	(559) 266-2073	2/3/2013 19:55	Collect	9	\$2.82
Second Floor	(559) 298-5319	2/3/2013 20:13	Collect	7	\$2.72
Second Floor	(559) 298-5319	2/4/2013 20:07	Collect	4	\$2.60
Second Floor	(559) 298-5319	2/4/2013 20:22	Collect	5	\$2.65
Second Floor	(559) 485-5205	2/4/2013 10:30	Collect	12	\$3.17
Second Floor	(559) 266-2663	2/4/2013 12:32	Collect	1	\$2.51
Second Floor	(559) 444-0980	2/4/2013 13:08	Collect	1	\$2.51
Second Floor	(559) 445-1255	2/4/2013 12:23	Collect	3	\$2.63
Second Floor	(619) 338-4821	2/4/2013 10:44	Collect	21	\$14.45
Second Floor	(661) 273-2118	2/1/2013 8:44	Collect	11	\$8.95
Second Floor	(714) 305-3996	2/4/2013 21:22	Prepaid w/CC	20	\$13.90
Second Floor	(559) 213-7741	2/3/2013 12:37	Collect w/ CC	21	\$3.42
Second Floor	(559) 213-7741	2/3/2013 14:31	Collect w/ CC	21	\$3.42
<b>TOTAL</b>				<b>261</b>	<b>\$105.05</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Detail (Call Type)

From Date : 2/1/2013 12:00:00 AM To : 2/15/2013 12:00:00 AM

Report Date : Feb 15 2013 01:24:29

Call Type	Inmate Phone #	Destination #	Date	Total Minutes	Call Revenue
Canada	(559) 111-2112	(780) 918-6243	2/1/2013 18:28	20	\$28.99
Canada	(559) 111-3021	(604) 469-1812	2/4/2013 10:55	18	\$26.69
Canada	(559) 111-3021	(604) 469-1812	2/4/2013 11:41	5	\$11.74
Canada	(559) 111-3021	(778) 355-8219	2/4/2013 13:29	20	\$28.99
Canada	(559) 111-3023	(604) 469-1812	2/5/2013 15:28	12	\$19.79
InterLata	(559) 111-1165	(209) 217-2100	2/1/2013 8:40	9	\$7.85
InterLata	(559) 111-1030	(661) 273-2118	2/1/2013 8:44	11	\$8.95
InterLata	(559) 111-1030	(805) 235-5925	2/1/2013 8:58	13	\$10.05
InterLata	(559) 111-3056	(510) 490-1974	2/1/2013 9:14	4	\$5.10
InterLata	(559) 111-3060	(415) 467-9836	2/1/2013 9:34	15	\$11.15
IntraLata	(559) 111-3005	(559) 975-3259	2/13/2013 20:03	20	\$4.60
IntraLata	(559) 111-1211	(559) 666-5014	2/13/2013 20:04	20	\$4.60
IntraLata	(559) 111-3032	(559) 638-2174	2/13/2013 20:08	11	\$3.61
IntraLata	(559) 111-3045	(559) 471-5434	2/13/2013 20:08	3	\$2.73
IntraLata	(559) 111-1120	(559) 590-8763	2/13/2013 20:09	8	\$3.28
Local	(559) 111-1205	(559) 455-3092	2/11/2013 19:14	21	\$3.45
Local	(559) 111-1215	(559) 298-0395	2/11/2013 19:15	16	\$3.20
Local	(559) 111-3106	(559) 289-3289	2/11/2013 19:17	14	\$3.10
Local	(559) 111-3028	(559) 495-0889	2/11/2013 19:17	7	\$2.75
Local	(559) 111-3009	(559) 273-2973	2/11/2013 19:17	21	\$3.45
Local	(559) 111-2078	(559) 412-1226	2/14/2013 17:33	21	\$3.71
Local	(559) 111-3014	(559) 493-1760	2/14/2013 17:33	20	\$3.65
Local	(559) 111-1194	(559) 761-2024	2/14/2013 17:33	8	\$2.93
Local	(559) 111-1088	(559) 392-8953	2/14/2013 17:33	20	\$3.65
<b>TOTAL</b>				<b>337</b>	<b>\$208.01</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Details (Bill Type)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 02:38:50

Bill Type	Inmate Phone #	Destination #	Date	Total Minutes	Call Revenue
Collect	(559) 111-3047	(559) 442-0686	2/4/2013 11:50	3	\$2.63
Collect	(559) 111-3017	(559) 487-5561	2/4/2013 12:01	4	\$2.69
Collect	(559) 111-3030	(559) 237-8336	2/4/2013 12:24	11	\$3.11
Collect	(559) 111-3104	(559) 233-3843	2/4/2013 12:43	12	\$3.17
Collect	(559) 111-2111	(317) 787-5264	2/4/2013 13:04	5	\$6.71
Collect w/ CC	(559) 111-2090	(559) 704-7390	2/2/2013 20:59	14	\$3.07
Collect w/ CC	(559) 111-3051	(559) 285-1486	2/2/2013 20:43	9	\$2.82
Collect w/ CC	(559) 111-1128	(559) 681-1233	2/2/2013 20:34	20	\$3.37
Collect w/ CC	(559) 111-1052	(559) 394-6685	2/2/2013 20:38	20	\$3.37
Collect w/ CC	(559) 111-2041	(559) 666-8774	2/2/2013 20:21	20	\$4.60
Prepaid w/CC	(559) 111-1040	(559) 470-2488	2/1/2013 11:48	20	\$3.65
Prepaid w/CC	(559) 111-1164	(559) 412-3102	2/2/2013 10:48	20	\$3.37
Prepaid w/CC	(559) 111-3051	(831) 461-1405	2/2/2013 10:52	9	\$7.85
Prepaid w/CC	(559) 111-1164	(559) 395-4345	2/1/2013 11:16	16	\$4.96
Prepaid w/CC	(559) 111-1055	(559) 803-8227	2/4/2013 15:28	21	\$3.71
Prepaid-Collect	(559) 111-1052	(559) 696-6706	2/3/2013 12:46	7	\$2.72
Prepaid-Collect	(559) 111-3090	(559) 313-4807	2/2/2013 13:54	20	\$3.37
Prepaid-Collect	(559) 111-1052	(559) 696-6706	2/3/2013 12:37	7	\$2.72
Prepaid-Collect	(559) 111-2090	(559) 349-9627	2/3/2013 12:36	21	\$3.42
Prepaid-Collect	(559) 111-3068	(209) 720-9041	2/3/2013 12:50	2	\$4.00
Prepaid-Collect	(559) 111-3020	(559) 348-3546	2/4/2013 14:51	20	\$3.65
Prepaid-Collect	(559) 111-1200	(559) 862-5680	2/4/2013 14:40	20	\$3.65
Prepaid-Collect	(559) 111-3049	(559) 360-2770	2/4/2013 14:39	20	\$3.65
Prepaid-Collect	(559) 111-3063	(559) 367-3090	2/4/2013 14:38	9	\$2.99
<b>TOTAL</b>				<b>330</b>	<b>\$89.25</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Detail (Inmate PIN)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:21:25

PIN	Inmate Phone #	Destination #	Date	Call Type	Total Minutes	Call Revenue
12520	(559) 111-1143	(559) 475-3868	2/1/2013 12:40	Local	14	\$3.29
12520	(559) 111-1208	(559) 475-3868	2/3/2013 20:17	Local	20	\$3.37
16452	(559) 111-3081	(559) 271-2139	2/1/2013 21:11	Local	11	\$2.95
17316	(559) 111-1077	(559) 284-5865	2/2/2013 20:52	Local	14	\$3.07
17316	(559) 111-1077	(626) 224-8187	2/2/2013 16:03	InterLata	20	\$13.90
17316	(559) 111-1077	(559) 549-3411	2/2/2013 15:40	Local	19	\$3.32
17316	(559) 111-1077	(559) 441-1418	2/1/2013 12:35	Local	1	\$2.51
17316	(559) 111-1077	(559) 284-5865	2/1/2013 13:06	Local	12	\$3.17
17316	(559) 111-1077	(559) 441-1418	2/4/2013 16:19	Local	14	\$3.29
17316	(559) 111-1077	(559) 284-5865	2/4/2013 17:06	Local	20	\$3.65
17316	(559) 111-1077	(559) 441-1418	2/1/2013 16:37	Local	1	\$2.51
17316	(559) 111-1077	(559) 549-3411	2/4/2013 17:24	Local	12	\$3.17
17316	(559) 111-1077	(559) 375-5535	2/4/2013 16:43	Local	20	\$3.65
17325	(559) 111-1090	(559) 776-2881	2/3/2013 17:15	Local	20	\$3.37
17325	(559) 111-1091	(559) 720-5649	2/4/2013 17:23	Local	20	\$3.65
30727	(559) 111-2066	(559) 277-3139	2/4/2013 20:16	Local	8	\$2.80
30727	(559) 111-2066	(559) 277-3139	2/4/2013 21:08	Local	11	\$2.95
30727	(559) 111-2060	(559) 349-5027	2/4/2013 13:51	Local	8	\$2.93
30727	(559) 111-2061	(559) 277-3139	2/1/2013 16:59	Local	8	\$2.93
30727	(559) 111-2060	(559) 445-1255	2/4/2013 14:54	Local	2	\$2.57
37816	(559) 111-3056	(559) 495-5362	2/2/2013 20:19	Local	20	\$3.37
37816	(559) 111-3055	(559) 495-5362	2/1/2013 20:21	Local	20	\$3.40
37816	(559) 111-3053	(559) 495-5362	2/3/2013 20:08	Local	1	\$2.42
37816	(559) 111-3053	(559) 495-5362	2/3/2013 20:39	Local	20	\$3.37
<b>TOTAL</b>					<b>316</b>	<b>\$85.61</b>

LEGACY INMATE COMMUNICATIONS

Billed Call Detail (Prepaid Account)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:26:53

Account #	Inmate Phone #	Destination #	Total Minutes	Call Revenue
209-380-1556	(559) 111-3076	(209) 380-1556	7	\$6.75
209-380-1556	(559) 111-3075	(209) 380-1556	7	\$6.75
510-289-2178	(559) 111-3075	(510) 289-2178	4	\$5.10
559-210-1998	(559) 111-1208	(559) 210-1998	9	\$3.39
559-210-1998	(559) 111-1143	(559) 210-1998	13	\$3.83
559-210-1998	(559) 111-1143	(559) 210-1998	20	\$4.60
559-210-1998	(559) 111-1143	(559) 210-1998	1	\$2.51
559-210-1998	(559) 111-1142	(559) 210-1998	21	\$4.71
559-210-1998	(559) 111-1143	(559) 210-1998	20	\$4.60
559-210-1998	(559) 111-1143	(559) 210-1998	14	\$4.64
559-210-1998	(559) 111-1208	(559) 210-1998	18	\$4.38
559-210-1998	(559) 111-1142	(559) 210-1998	20	\$4.60
559-210-1998	(559) 111-1142	(559) 210-1998	10	\$3.50
559-233-3333	(559) 111-3018	(559) 233-3333	3	\$2.63
559-233-3333	(559) 111-1070	(559) 233-3333	4	\$2.69
559-233-3333	(559) 111-1125	(559) 233-3333	4	\$2.69
559-233-3333	(559) 111-1209	(559) 233-3333	6	\$2.81
559-233-3333	(559) 111-3004	(559) 233-3333	2	\$2.57
559-233-3333	(559) 111-1125	(559) 233-3333	2	\$2.57
559-233-3333	(559) 111-3005	(559) 233-3333	2	\$2.47
559-233-3333	(559) 111-3006	(559) 233-3333	2	\$2.47
559-233-3333	(559) 111-3004	(559) 233-3333	8	\$2.93
559-233-3333	(559) 111-1203	(559) 233-3333	6	\$2.81
559-233-3333	(559) 111-3112	(559) 233-3333	3	\$2.63
<b>TOTAL</b>			<b>206</b>	<b>\$88.63</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Inmate Phone Number)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:30:23

<b>Inmate Phone #</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Total Revenue</b>
(559) 111-1001	1	4	\$5.10
(559) 111-1002	1	5	\$3.20
(559) 111-1004	2	12	\$12.40
(559) 111-1005	1	7	\$6.75
(559) 111-1007	8	87	\$68.29
(559) 111-1009	1	1	\$2.51
(559) 111-1010	1	6	\$6.20
(559) 111-1012	2	6	\$5.46
(559) 111-1014	7	27	\$33.48
(559) 111-1015	2	17	\$10.36
(559) 111-1016	3	37	\$29.05
(559) 111-1018	12	63	\$42.51
(559) 111-1019	4	12	\$10.62
(559) 111-1023	9	79	\$32.26
(559) 111-1024	3	43	\$9.26
(559) 111-1025	1	21	\$14.45
(559) 111-1026	16	148	\$53.10
(559) 111-1027	49	795	\$191.17
(559) 111-1029	8	97	\$30.62
(559) 111-1030	5	74	\$48.87
(559) 111-1036	3	44	\$11.89
(559) 111-1039	6	108	\$27.48
(559) 111-1040	51	856	\$168.47
(559) 111-1041	3	24	\$8.79
<b>TOTAL</b>	<b>199</b>	<b>2,573</b>	<b>\$832.29</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Destination Number)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:31:27

<b>Destination #</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Total Revenue</b>
(208) 342-9790	1	20	\$17.36
(208) 837-4927	2	21	\$21.23
(209) 217-2100	1	9	\$7.85
(209) 261-4130	1	20	\$13.90
(209) 380-1556	2	14	\$13.50
(209) 392-3191	2	24	\$8.44
(209) 392-3750	14	250	\$63.20
(209) 392-3795	1	8	\$3.28
(209) 408-9617	1	3	\$4.55
(209) 409-6917	2	16	\$14.60
(209) 456-1111	5	82	\$59.60
(209) 478-5212	3	41	\$31.25
(209) 509-6062	1	20	\$13.90
(209) 518-9583	1	21	\$14.45
(209) 541-7239	1	16	\$11.70
(209) 557-9586	1	16	\$11.70
(209) 559-2178	1	6	\$6.20
(209) 568-1186	4	30	\$28.10
(209) 572-2664	5	43	\$38.15
(209) 581-1404	1	9	\$7.85
(209) 585-7495	6	73	\$57.55
(209) 594-8245	1	1	\$3.45
(209) 614-2599	1	21	\$14.45
(209) 631-9655	2	21	\$17.35
<b>TOTAL</b>	<b>60</b>	<b>785</b>	<b>\$483.61</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Division)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:32:46

<b>Division</b>	<b>Call Count</b>	<b>Call Duration</b>	<b>Call Revenue</b>
Main Jail	2,590	37,559	\$9,429.72
North Annex	3,281	44,218	\$12,708.04
South Annex	913	12,077	\$3,340.05
<hr/>			
<b>TOTAL ALL PAGES:</b>	<b>6784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Location)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:34:26

Location	Call Count	Call Duration	Call Revenue
Basement	2	22	\$6.57
Fifth Floor	1,500	20,815	\$5,141.49
First Floor	66	419	\$352.39
Fourth Floor	1,688	23,672	\$6,664.14
Second Floor	1,129	14,999	\$4,198.40
Sixth Floor	451	6,453	\$1,556.90
Third Floor	1,948	27,474	\$7,557.92
<b>TOTAL ALL PAGES:</b>	<b>6,784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Call Type)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:35:39

Call Type	Call Count	Total Minutes	Total Revenue
Canada	4	63	\$96.41
InterLata	392	4,611	\$3,672.85
InterState	106	1,345	\$1,289.91
IntraLata	820	10,635	\$3,262.25
Local	5,462	77,200	\$17,156.39
<hr/>			
<b>TOTAL ALL PAGES:</b>	<b>6,784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Bill Type)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:36:59

Bill Type	Call Count	Total Minutes	Call Revenue
Collect	1,255	13,962	\$4,511.37
Collect w/ CC	2,702	39,435	\$10,811.60
Prepaid w/CC	696	10,789	\$2,838.12
Prepaid-Collect	2,131	29,668	\$7,316.72
<hr/>			
<b>TOTAL ALL PAGES:</b>	<b>6,784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Inmate PIN)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:37:49

Inmate PIN	Call Count	Total Minutes	Call Revenue
82267	2	35	\$6.78
12520	2	34	\$6.66
16452	1	11	\$2.95
17316	10	133	\$42.24
17325	2	40	\$7.02
30727	5	37	\$14.18
37816	4	61	\$12.56
50295	2	14	\$5.74
53973	1	8	\$2.93
56253	6	81	\$18.47
59368	1	20	\$3.37
62658	2	40	\$7.30
63291	6	72	\$18.62
63351	1	3	\$2.52
63406	1	9	\$3.84
65756	3	51	\$9.69
68834	8	64	\$26.24
69201	4	58	\$53.82
72710	1	17	\$3.25
72954	1	16	\$3.41
73034	4	60	\$12.48
73296	1	9	\$7.85
73668	28	145	\$75.39
78034	2	40	\$6.80
<b>TOTAL</b>	<b>98</b>	<b>1,058</b>	<b>\$354.11</b>

LEGACY INMATE COMMUNICATIONS

Billed Call Summary (Prepaid Account)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:39:16

Account #	Call Count	Total Minutes	Total Revenue
209-380-1556	2	14	\$13.50
510-289-2178	1	4	\$5.10
559-210-1998	10	146	\$40.76
559-233-3333	12	43	\$31.78
559-240-0290	7	144	\$24.42
559-251-4529	10	31	\$25.91
559-268-0770	3	42	\$9.47
559-273-5222	8	113	\$25.66
559-275-7701	6	58	\$18.18
559-277-0104	7	146	\$24.49
559-283-1699	11	153	\$33.90
559-284-5865	3	46	\$9.89
559-347-4373	2	22	\$5.87
559-347-9801	3	37	\$9.12
559-348-3546	11	201	\$37.18
559-348-8215	2	40	\$7.05
559-360-0238	1	20	\$3.65
559-412-6529	3	23	\$8.41
559-431-9335	6	113	\$20.36
559-478-4990	1	20	\$3.65
559-579-2721	4	18	\$10.63
559-639-3441	2	40	\$11.20
559-681-7190	1	18	\$3.53
559-704-6811	2	9	\$5.44
<b>TOTAL FOR ALL PAGES:</b>	<b>118</b>	<b>1,501</b>	<b>\$389.15</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Call Date)

From Date : 2/1/2013 12:00:00 AM To : 2/25/2013 12:00:00 AM

Report Date : Feb 15 2013 01:40:38

<b>Date</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Total Revenue</b>
2/1/2013	1,707	23,732	\$6,409.62
2/2/2013	1,653	22,936	\$6,126.00
2/3/2013	1,735	24,512	\$6,372.55
2/4/2013	1,689	22,674	\$6,569.64
2/5/2013	1,598	22,098	\$6,164.04
2/6/2013	1,597	21,850	\$6,075.96
2/7/2013	1,503	21,375	\$5,742.31
2/8/2013	1,800	25,885	\$7,032.30
2/9/2013	1,673	24,211	\$5,996.69
2/10/2013	1,659	24,305	\$6,340.81
2/11/2013	1,843	24,867	\$7,046.23
2/12/2013	1,813	25,075	\$6,916.02
2/13/2013	1,888	26,883	\$7,241.76
2/14/2013	2,024	29,168	\$7,805.53
2/15/2013	430	5,869	\$1,685.03
<b>TOTAL ALL PAGES:</b>	<b>24,612</b>	<b>345,440</b>	<b>\$93,524.49</b>

**LEGACY INMATE COMMUNICATIONS**

Billed Call Summary (Hour)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 15 2013 01:41:45

Hour	Call Count	Total Minutes	Total Revenue
0	9	25	\$23.42
1	4	12	\$10.62
2	4	9	\$12.41
3	3	43	\$32.35
6	2	10	\$11.30
7	1	3	\$2.88
8	107	1,226	\$391.03
9	250	3,339	\$934.67
10	348	4,995	\$1,437.30
11	401	5,454	\$1,454.03
12	423	5,512	\$1,641.57
13	421	5,528	\$1,590.69
14	438	5,817	\$1,724.95
15	460	5,575	\$1,716.80
16	462	5,987	\$1,732.91
17	489	6,614	\$1,821.81
18	522	6,972	\$1,896.68
19	733	10,235	\$2,762.48
20	907	14,278	\$3,373.17
21	657	9,930	\$2,401.46
22	122	1,890	\$434.22
23	21	400	\$71.06
<b>TOTAL ALL PAGES:</b>	<b>6,784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Un-Billed Calls (Inmate Phone Number)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 21 2013 11:00:23

Inmate Phone #	Destination #	Record Date	Call Count	Bill Type	Reason
(559) 111-1131	(559) 349-4703	2/1/2013 17:06	1	Collect	Cell Phone
(559) 111-3112	(559) 816-0896	2/2/2013 14:40	1	Prepaid w/CC	No Answer
(559) 111-3104	(559) 458-9922	2/3/2013 11:37	1	Collect w/ CC	No Answer
(559) 111-1053	(559) 495-5842	2/4/2013 18:05	1	Collect w/ CC	No Answer
(559) 111-1194	(559) 597-5431	2/3/2013 12:36	1	Collect w/ CC	No Answer
(559) 111-1161	(559) 221-1243	2/4/2013 14:50	1	Collect	Billing Block
(559) 111-1209	(559) 266-6358	2/1/2013 15:36	1	Collect	User Block
(559) 111-1071	(559) 365-5336	2/3/2013 18:44	1	Collect w/ CC	No Answer
(559) 111-3107	(559) 454-1428	2/4/2013 18:22	1	Collect	No Answer
(559) 111-3002	(559) 513-6298	2/1/2013 20:24	1	Collect	Cell Phone
(559) 111-3004	(559) 493-9233	2/2/2013 13:15	1	Collect	Cell Phone
(559) 111-1055	(559) 707-0305	2/1/2013 10:05	1	Collect	Cell Phone
(559) 111-1166	(559) 347-8394	2/1/2013 13:23	1	Collect	Cell Phone
(559) 111-2046	(559) 412-0698	2/3/2013 11:14	1	Prepaid w/CC	No Answer
(559) 111-1215	(559) 702-6533	2/4/2013 20:00	1	Collect w/ CC	No Answer
(559) 111-2050	(559) 682-2278	2/1/2013 8:45	1	Collect	Cell Phone
(559) 111-2050	(559) 800-0590	2/3/2013 11:57	1	Collect	Cell Phone
(559) 111-1024	(559) 286-7288	2/3/2013 14:59	1	Collect w/ CC	No Answer
(559) 111-2076	(559) 298-1512	2/4/2013 15:38	1	Collect	No Answer
(559) 111-3060	(559) 960-6277	2/3/2013 10:49	1	Collect	Cell Phone
(559) 111-3062	(559) 389-2279	2/4/2013 21:29	1	Collect	Cell Phone
(559) 111-1090	(559) 862-5740	2/4/2013 17:44	1	Collect w/ CC	No Answer
(559) 111-2056	(559) 435-5699	2/2/2013 21:19	1	Collect	Billing Block
(559) 111-3030	(559) 455-1400	2/1/2013 9:39	1	Collect	Threshold Block
<b>TOTAL</b>			<b>24</b>		

**LEGACY INMATE COMMUNICATIONS**

Un-Billed Call (PIN)

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

Report Date : Feb 21 2013 11:32:41

PIN	Inmate Phone #	Destination #	Date	Call Count	Bill Type	Reason
0	(559) 111-2105	(559) 458-1943	2/1/2013 8:10	1	Free	User Block
12520	(559) 111-1142	(559) 475-3630	2/1/2013 21:25	1	Collect w/ CC	Rejected
12520	(559) 111-1142	(559) 519-0779	2/1/2013 14:56	1	Collect	Cell Phone
12520	(559) 111-1142	(559) 519-0779	2/1/2013 21:09	1	Collect	Cell Phone
12520	(559) 111-1142	(559) 519-0779	2/1/2013 21:10	1	Collect w/ CC	Rejected
12520	(559) 111-1143	(559) 475-3630	2/1/2013 11:07	1	Collect	Cell Phone
12520	(559) 111-1143	(559) 475-3630	2/1/2013 11:10	1	Collect	Cell Phone
12520	(559) 111-1143	(559) 475-3630	2/1/2013 12:08	1	Collect	Cell Phone
12520	(559) 111-1143	(559) 475-3630	2/1/2013 12:13	1	Collect w/ CC	No Answer
12520	(559) 111-1143	(559) 475-3630	2/1/2013 12:52	1	Collect w/ CC	Rejected
12520	(559) 111-1143	(559) 475-3630	2/1/2013 18:17	1	Collect w/ CC	Rejected
12520	(559) 111-1143	(559) 475-3630	2/1/2013 20:36	1	Collect	Cell Phone
12520	(559) 111-1143	(559) 519-0779	2/1/2013 12:15	1	Collect w/ CC	No Answer
12520	(559) 111-1143	(559) 519-0779	2/1/2013 20:15	1	Collect	Cell Phone
12520	(559) 111-1143	(559) 519-0779	2/1/2013 20:38	1	Collect	Cell Phone
16452	(559) 111-3081	(559) 271-2139	2/1/2013 20:59	1	Collect	Billing Block
16452	(559) 111-3084	(559) 271-2139	2/1/2013 16:16	1	Collect	Billing Block
17316	(559) 111-1077	(559) 375-5535	2/1/2013 19:24	1	Collect	Cell Phone
17316	(559) 111-1077	(559) 441-1418	2/1/2013 15:58	1	Collect	No Answer
17316	(559) 111-1077	(559) 549-3411	2/1/2013 22:03	1	Prepaid-Collect	No Answer
17325	(559) 111-1091	(559) 720-5649	2/1/2013 16:20	1	Prepaid w/CC	No Answer
17325	(559) 111-1091	(559) 720-5649	2/1/2013 18:19	1	Prepaid w/CC	No Answer
17325	(559) 111-1091	(559) 721-0005	2/1/2013 18:43	1	Collect w/ CC	No Answer
30727	(559) 111-2058		2/1/2013 20:08	1	Collect	AccuPIN Verified Fail
<b>TOTAL</b>				<b>24</b>		

**LEGACY INMATE COMMUNICATIONS**

Un-Billed Calls (Reject Type)

From Date : 2/1/2013 12:00:00 AM To : 2/3/2013 12:00:00 AM

Report Date : Feb 21 2013 11:43:33

Reason	Call Count	Date
No Answer	7,447	2/2/2013
User Block	567	2/1/2013
User Block	568	2/2/2013
AccuPIN Verified Fail	501	2/1/2013
No Answer	7,058	2/1/2013
Billing Block	1,269	2/1/2013
Threshold Block	367	2/2/2013
Cell Phone	7,284	2/3/2013
Billing Block	1,384	2/2/2013
AccuPIN Verified Fail	495	2/2/2013
Busy	78	2/3/2013
User Block	432	2/3/2013
Cell Phone	6,844	2/1/2013
Busy	142	2/2/2013
No Answer	7,551	2/3/2013
Billing Block	1,296	2/3/2013
AccuPIN Verified Fail	487	2/3/2013
Cell Phone	7,206	2/2/2013
Busy	159	2/1/2013
Admin Block	4	2/1/2013
Rejected	2,037	2/2/2013
Threshold Block	299	2/3/2013
Rejected	2,121	2/3/2013
Rejected	2,123	2/1/2013
Admin Block	6	2/2/2013
Admin Block	4	2/3/2013
Threshold Block	514	2/1/2013
<b>Total All Pages</b>	<b>58,243</b>	

**LEGACY INMATE COMMUNICATIONS**

Un-Billed Calls (Division)

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

Report Date : Feb 21 2013 11:52:35

Division	Inmate Phone #	Destination #	Date	Call Count	Bill Type	Reason
Main Jail	(559) 111-1001		2/1/2013 12:16	1	Free	Billing Block
Main Jail	(559) 111-1001		2/1/2013 18:32	1	Free	Billing Block
Main Jail	(559) 111-1001	(559) 227-4737	2/1/2013 9:07	1	Free	No Answer
Main Jail	(559) 111-1001	(559) 365-2278	2/1/2013 7:36	1	Collect	Cell Phone
Main Jail	(559) 111-1001	(559) 365-2278	2/1/2013 7:36	1	Collect w/ CC	No Answer
Main Jail	(559) 111-1001	(559) 394-6455	2/1/2013 9:15	1	Free	No Answer
Main Jail	(559) 111-1001	(559) 422-4200	2/1/2013 12:16	1	Collect	Billing Block
Main Jail	(559) 111-1001	(559) 442-4200	2/1/2013 12:05	1	Free	User Block
North Annex	(559) 111-3025	(559) 417-6074	2/1/2013 17:07	1	Collect	Cell Phone
North Annex	(559) 111-3025	(559) 417-6074	2/1/2013 19:35	1	Collect	Cell Phone
North Annex	(559) 111-3025	(559) 449-3394	2/1/2013 19:49	1	Collect	Threshold Block
North Annex	(559) 111-3025	(559) 513-7662	2/1/2013 17:13	1	Collect	Cell Phone
North Annex	(559) 111-3025	(559) 519-8819	2/1/2013 14:11	1	Collect w/ CC	No Answer
North Annex	(559) 111-3025	(559) 519-8819	2/1/2013 17:01	1	Collect	Cell Phone
North Annex	(559) 111-3025	(559) 579-2090	2/1/2013 16:21	1	Prepaid w/CC	No Answer
North Annex	(559) 111-3025	(559) 681-3523	2/1/2013 17:16	1	Collect	Cell Phone
South Annex	(559) 111-2050	(559) 800-0590	2/1/2013 18:26	1	Collect w/ CC	No Answer
South Annex	(559) 111-2050	(707) 474-1122	2/1/2013 16:00	1	Collect w/ CC	No Answer
South Annex	(559) 111-2051	(559) 375-0092	2/1/2013 20:23	1	Collect	Cell Phone
South Annex	(559) 111-2051	(559) 375-0092	2/1/2013 20:26	1	Collect	Cell Phone
South Annex	(559) 111-2051	(559) 682-2278	2/1/2013 10:56	1	Collect	Cell Phone
South Annex	(559) 111-2051	(559) 682-2278	2/1/2013 10:59	1	Collect	Cell Phone
South Annex	(559) 111-2052	(559) 246-9808	2/1/2013 20:31	1	Collect	Cell Phone
South Annex	(559) 111-2052	(559) 860-3722	2/1/2013 14:48	1	Collect	Cell Phone
Main Jail	(559) 111-1003	(559) 704-7288	2/1/2013 10:21	1	Free	No Answer
<b>TOTAL</b>				<b>25</b>		

**LEGACY INMATE COMMUNICATIONS**

Un-billed Calls (Location)

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

Report Date : Feb 21 2013 12:08:24

Location	Inmate #	Destination #	Date	Call Count	Bill Type	Reason
Fifth Floor	(559) 111-1108	(559) 978-1045	2/1/2013 21:09	1	Collect w/ CC	No Answer
Fifth Floor	(559) 111-1109		2/1/2013 21:18	1	Collect	Billing Block
Fifth Floor	(559) 111-1109	(559) 225-7732	2/1/2013 18:28	1	Collect	Billing Block
Fifth Floor	(559) 111-1109	(559) 259-5720	2/1/2013 22:21	1	Collect	Cell Phone
Fifth Floor	(559) 111-1109	(559) 259-5720	2/1/2013 22:23	1	Collect w/ CC	No Answer
Fourth Floor	(559) 111-1088	(559) 389-1144	2/1/2013 10:30	1	Prepaid w/CC	No Answer
Fourth Floor	(559) 111-1088	(559) 412-0730	2/1/2013 21:17	1	Collect	Cell Phone
Fourth Floor	(559) 111-1088	(559) 445-2691	2/1/2013 14:19	1	Collect	Threshold Block
Fourth Floor	(559) 111-1088	(559) 477-0737	2/1/2013 11:20	1	Collect w/ CC	No Answer
Fourth Floor	(559) 111-1088	(559) 704-4388	2/1/2013 8:59	1	Collect	Cell Phone
Third Floor	(559) 111-3034	(559) 720-1433	2/1/2013 20:52	1	Collect w/ CC	Rejected
Third Floor	(559) 111-3034	(559) 803-2120	2/1/2013 19:59	1	Prepaid w/CC	No Answer
Third Floor	(559) 111-3034	(650) 922-9674	2/1/2013 13:37	1	Collect	Cell Phone
Third Floor	(559) 111-3035	(559) 210-1350	2/1/2013 21:45	1	Collect	Cell Phone
Third Floor	(559) 111-3035	(559) 243-9414	2/1/2013 21:07	1	Collect w/ CC	No Answer
Second Floor	(559) 111-2043	(559) 478-3410	2/1/2013 22:41	1	Collect	Cell Phone
Second Floor	(559) 111-2043	(559) 478-3410	2/1/2013 22:48	1	Collect w/ CC	No Answer
Second Floor	(559) 111-2043	(559) 495-5339	2/1/2013 17:04	1	Collect	Cell Phone
Second Floor	(559) 111-2043	(559) 517-6446	2/1/2013 12:14	1	Collect	Cell Phone
Second Floor	(559) 111-2043	(559) 517-6446	2/1/2013 13:21	1	Collect w/ CC	No Answer
First Floor	(559) 111-1014	(559) 381-2949	2/1/2013 22:36	1	Collect	Cell Phone
First Floor	(559) 111-1014	(559) 381-2949	2/1/2013 22:38	1	Collect w/ CC	No Answer
First Floor	(559) 111-1014	(559) 392-1819	2/1/2013 13:31	1	Free	Busy
First Floor	(559) 111-1014	(559) 416-0334	2/1/2013 9:57	1	Collect	Cell Phone
First Floor	(559) 111-1014	(559) 582-4220	2/1/2013 1:39	1	Collect	No Answer

**TOTAL**

**25**

LEGACY INMATE COMMUNICATIONS

Un-Billed Calls (Summary)

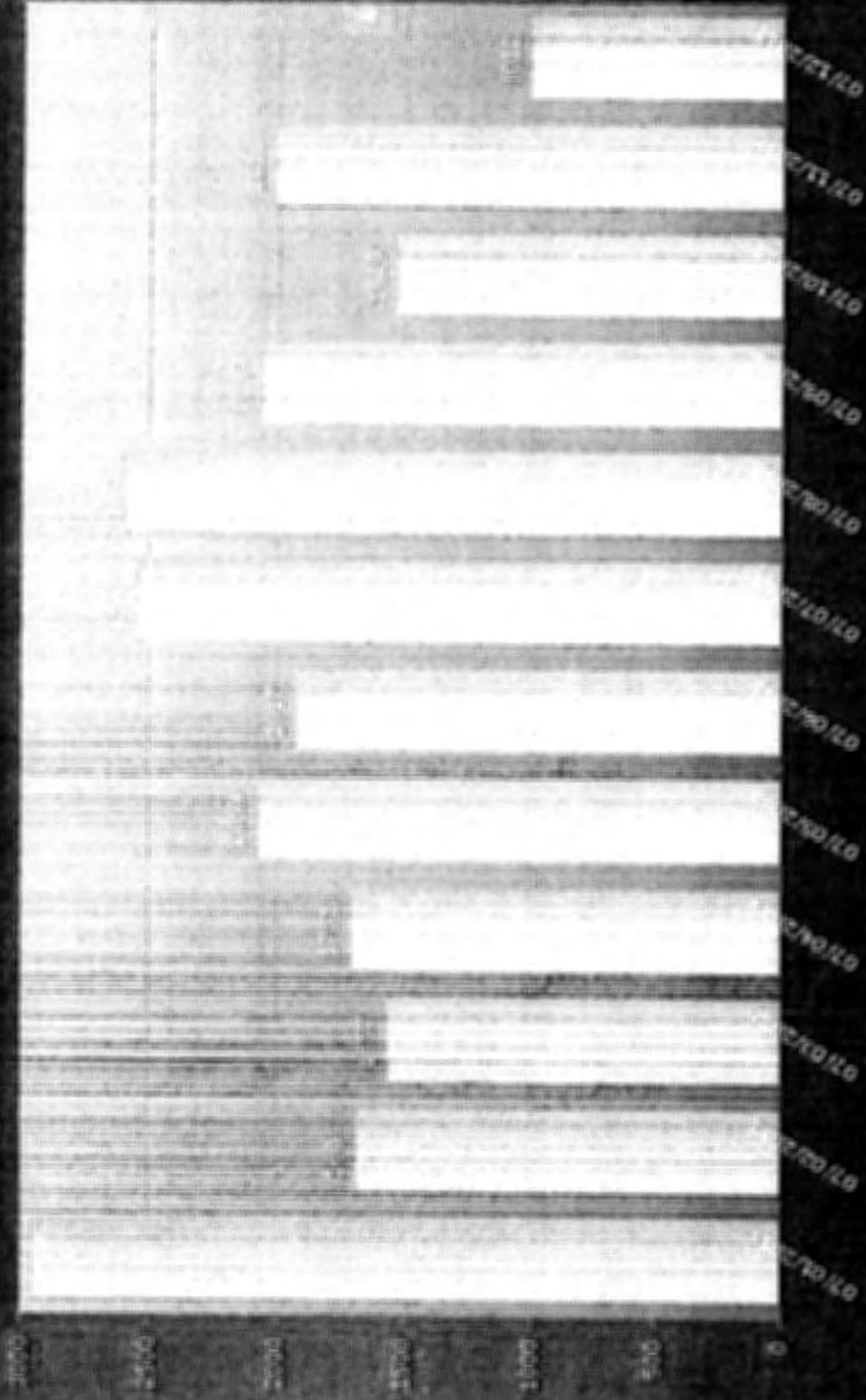
From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

Report Date : Feb 21 2013 12:23:08

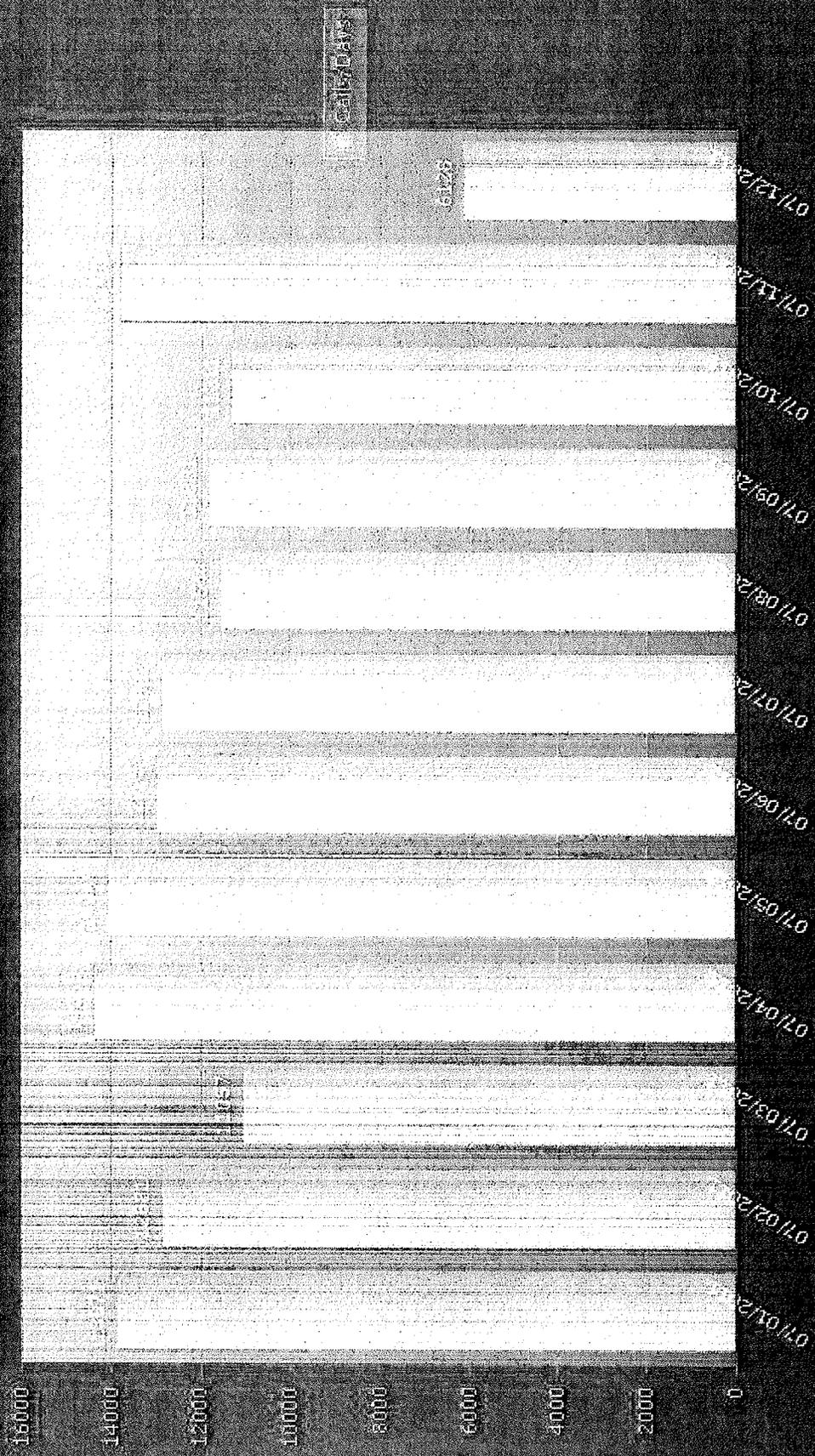
Inmate Phone #	Destination #	PIN	Date	Call Count	Bill Type	Reason
(559) 111-1018	(559) 367-6609	7054819	2/1/2013 0:09	1	Collect w/ CC	No Answer
(559) 111-1018	(559) 864-9466	1282183	2/1/2013 0:12	1	Collect	No Answer
(559) 111-1018		7043421	2/1/2013 0:15	1	Collect	AccuPIN Verified Fail
(559) 111-1018	(559) 903-8390	7033750	2/1/2013 0:20	1	Collect	Cell Phone
(559) 111-1018	(559) 908-8390	7033750	2/1/2013 0:21	1	Collect	Cell Phone
(559) 111-1018		1739444	2/1/2013 14:36	1	Collect	AccuPIN Verified Fail
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:30	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:32	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 896-0656	1526277	2/1/2013 17:34	1	Collect	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:36	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:41	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:45	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 776-7726	1526277	2/1/2013 17:47	1	Collect	Cell Phone
(559) 111-1019	(559) 776-7726	1526277	2/1/2013 17:47	1	Collect w/ CC	Rejected
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 17:59	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 18:06	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 356-8904	1526277	2/1/2013 18:23	1	Prepaid w/CC	No Answer
(559) 111-1019	(559) 646-0670	7035380	2/2/2013 0:00	1	Collect	User Block
(559) 111-1019	(559) 646-0670	7035380	2/2/2013 0:00	1	Collect	User Block
(559) 111-1021	(559) 355-9096	1587863	2/1/2013 9:00	1	Collect	Cell Phone
(559) 111-1021	(559) 355-9096	1587863	2/1/2013 9:02	1	Collect w/ CC	No Answer
(559) 111-1021	(559) 666-9044	1587863	2/1/2013 9:03	1	Collect	Cell Phone
(559) 111-1021	(559) 666-9044	1587863	2/1/2013 9:06	1	Collect w/ CC	No Answer
(559) 111-1023		1140604	2/1/2013 8:43	1	Collect	AccuPIN Verified Fail
(559) 111-1023	(559) 266-2073	1140604	2/1/2013 8:45	1	Collect	No Answer

TOTAL

# Billed Calls for July, 2011



# Un-Billed Calls for July, 2011



## **SAMPLE CALL FREQUENCY AND HIGH CALL VOLUME REPORTS**

Users can easily access reports from the Reports Utility of iCON. Reports are viewable from iCON within seconds of report request. iCON offers a wide array of useful Investigative Report options to substantiate every aspect of the inmate call process. The following sample reports demonstrate the capability of iCON to supply detailed commission reports. On the following pages you will find:

**Call Frequency Report by – Inmate Phone Number, Destination Number, Facility  
Division, Facility Location, Inmate PIN, and Prepaid Account**

**High Call Volume Report by – Destination Number, Inmate PIN**

**LEGACY INMATE COMMUNICATIONS**

Call Frequency (Inmate Phone Number)

From Date : 2/1/2013 12:00:00 AM To : 2/4/2013 12:00:00 AM

Report Date : Feb 21 2013 03:06:53

<b>Inmate Phone #</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Call Revenue</b>
(559) 111-2041	79	1,154	\$255.66
(559) 111-1200	72	1,032	\$273.83
(559) 111-1163	68	1,035	\$226.82
(559) 111-3058	65	1,018	\$220.73
(559) 111-1052	64	930	\$210.98
(559) 111-2089	62	727	\$224.60
(559) 111-1059	62	1,008	\$236.68
(559) 111-3076	59	676	\$197.01
(559) 111-3005	59	649	\$194.17
(559) 111-2112	58	682	\$278.01
(559) 111-1129	58	859	\$192.89
(559) 111-3018	58	942	\$239.60
(559) 111-2077	57	789	\$180.73
(559) 111-1055	55	897	\$208.74
(559) 111-3008	54	644	\$208.20
(559) 111-1131	54	928	\$176.63
(559) 111-1124	53	737	\$169.19
(559) 111-1053	53	817	\$171.35
(559) 111-1130	52	846	\$182.83
(559) 111-1212	52	865	\$169.74
(559) 111-1058	52	772	\$176.49
(559) 111-1126	52	766	\$165.00
(559) 111-1040	51	856	\$168.47
(559) 111-1162	51	743	\$162.19
(559) 111-1089	51	869	\$174.74
<b>TOTAL ALL PAGES</b>	<b>6,784</b>	<b>93,854</b>	<b>\$25,477.81</b>

**LEGACY INMATE COMMUNICATIONS**

Call Frequency (Destination Number)

From Date : 2/1/2013 12:00:00 AM To : 2/2/2013 12:00:00 AM

Report Date : Feb 21 2013 03:12:21

Destination #	Call Count	Total Minutes	Call Revenue
(559) 444-0980	22	53	\$55.71
(559) 360-8841	17	202	\$51.91
(559) 367-6680	17	285	\$56.82
(559) 313-4807	15	301	\$51.54
(559) 803-3118	15	262	\$49.31
(559) 475-6529	14	42	\$35.67
(559) 761-8727	14	238	\$46.75
(559) 745-5803	13	252	\$58.92
(559) 213-3785	13	77	\$35.55
(559) 321-6747	12	172	\$38.34
(559) 696-6706	12	205	\$39.46
(559) 704-9453	12	224	\$40.19
(559) 275-0683	11	191	\$37.35
(559) 221-0626	11	137	\$33.81
(559) 270-0202	10	173	\$32.35
(559) 285-5234	10	182	\$34.12
(559) 306-9894	10	182	\$46.07
(559) 349-9627	10	142	\$31.38
(559) 860-3800	10	81	\$27.75
(559) 892-5771	9	152	\$28.96
(559) 942-8719	9	170	\$30.46
(559) 285-6335	9	126	\$28.55
(559) 213-4406	9	173	\$30.86
(559) 213-3261	9	152	\$28.93
(559) 227-2510	9	165	\$30.24
<b>TOTAL ALL PAGES</b>	<b>3,360</b>	<b>46,668</b>	<b>\$12,535.62</b>

**LEGACY INMATE COMMUNICATIONS**

Call Frequency (Division)

From Date : 2/1/2013 12:00:00 AM To : 2/21/2013 12:00:00 AM

Report Date : Feb 21 2013 03:19:10

<b>Division</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Call Revenue</b>
North Annex	17,108	233,663	\$66,990.25
Main Jail	13,754	204,200	\$51,093.93
South Annex	4,146	55,586	\$15,266.21
<b>TOTAL ALL PAGES</b>	<b>35,008</b>	<b>49,3449</b>	<b>\$133,350.39</b>

**LEGACY INMATE COMMUNICATIONS**

Call Frequency (Location)

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:08:31

<b>Location</b>	<b>Call Count</b>	<b>Total Minutes</b>	<b>Call Revenue</b>
Third Floor	10,524	147,204	\$39,568.75
Fourth Floor	8,833	128,040	\$35,748.27
Fifth Floor	7,118	102,886	\$25,647.24
Second Floor	5,991	79,770	\$22,502.86
Sixth Floor	2,482	36,448	\$9,144.43
First Floor	493	3,127	\$2,206.65
Basement	17	198	\$54.53
<b>TOTAL ALL PAGES</b>	<b>35,458</b>	<b>497,673</b>	<b>\$134,872.73</b>

LEGACY INMATE COMMUNICATIONS

Call Frequency (Inmate PIN)

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:14:28

PIN #	Call Count	Total Minutes	Call Revenue
0	372	2,585	\$1,869.94
1442108	209	3,654	\$703.59
1745031	196	3,252	\$643.32
7033257	193	2,788	\$968.88
7012694	144	2,133	\$563.46
1230472	136	1,971	\$431.64
396126	134	2,171	\$573.19
1473992	126	1,857	\$407.55
7042283	124	1,208	\$364.54
7045083	115	2,308	\$410.10
1841156	109	1,858	\$375.05
7047753	108	1,631	\$357.71
7006979	106	961	\$307.49
7007695	106	1,115	\$316.22
803857	105	1,564	\$335.15
1629569	104	1,838	\$350.05
7050678	103	1,969	\$498.04
1671850	102	1,766	\$368.03
7051126	100	1,238	\$306.27
1108247	96	1,478	\$327.60
7049502	95	1,416	\$307.35
7048788	95	1,425	\$316.88
7051114	94	1,612	\$312.93
101090	93	1,367	\$300.45
7044070	92	1,329	\$294.47
<b>TOTAL ALL PAGES</b>	<b>35,468</b>	<b>497,810</b>	<b>\$134,907.40</b>

LEGACY INMATE COMMUNICATIONS

Call Frequency (Prepaid Account)

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:20:07

Account #	Call Count	Total Minutes	Call Revenue
559-251-4529	95	363	\$252.87
559-233-3333	77	300	\$205.75
559-210-1998	62	957	\$265.37
559-761-6043	50	728	\$162.35
559-273-5222	43	644	\$139.66
559-277-0104	42	855	\$147.07
559-240-0290	39	743	\$133.92
559-916-6575	35	646	\$119.12
559-347-4373	23	386	\$76.23
559-579-2721	23	263	\$69.84
559-431-9335	20	306	\$64.69
559-348-3546	16	284	\$54.34
559-284-5865	15	227	\$48.67
559-273-8617	14	213	\$45.19
559-708-7695	13	78	\$35.89
559-283-1699	13	178	\$39.89
559-347-9801	12	131	\$35.85
559-348-8215	11	190	\$37.35
559-709-9129	11	173	\$36.52
209-380-1556	9	77	\$68.45
559-790-6539	9	155	\$29.73
559-389-0764	9	126	\$28.61
559-360-0238	8	115	\$26.50
559-412-6529	8	52	\$21.88
559-977-3465	8	118	\$25.45
<b>TOTAL ALL PAGES</b>	<b>789</b>	<b>9,637</b>	<b>\$2,630.60</b>

**LEGACY INMATE COMMUNICATIONS**

High Call Volume (Destination Number)

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:25:59

Destination #	Total Calls	Total Minutes
(559) 444-0980	196	666
(559) 367-6680	165	2,916
(559) 394-4067	162	2,930
(559) 360-8841	154	2,147
(559) 470-2488	118	2,090
(559) 306-9894	96	1,841
(559) 251-4529	95	363
(559) 495-5070	94	1,368
(559) 790-9590	91	929
(559) 367-6959	91	925
(559) 270-0202	89	1,380
(559) 246-8082	89	1,324
(559) 776-4626	84	1,196
(559) 367-3090	82	1,619
(559) 708-5115	81	1,495
(559) 421-5541	80	1,191
(559) 803-3118	80	1,396
(559) 408-1672	78	1,247
(559) 233-3333	77	300
(559) 487-5561	74	185
(415) 467-9836	72	586
(559) 704-7637	72	1,160
(559) 704-1144	70	1,323
(559) 470-7263	69	1,156
(559) 210-1998	66	1,032
<b>TOTAL ALL PAGES</b>	<b>35,493</b>	<b>498,193</b>

LEGACY INMATE COMMUNICATIONS

High Call Volume (Inmate PIN)

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:45:39

Inmate Name	PIN #	Total Calls	Total Minutes
HAYNES, DAMENE LAMONT	1442108	210	3,674
SCHRUBB, KEVIN	1745031	196	3,252
WATTS, WALTER	7033257	194	2,809
GLENN, JONLUKE ANTONIO	7012694	144	2,133
LEWIS, DUSTY WILLIAMS	1230472	136	1,971
MONTEZ, FRANK	396126	134	2,171
PITTS, MICHAEL LEE	1473992	126	1,857
FRASER, JENNIFER DAVETTE	7042283	125	1,228
GRIDLEY, JAMES ROBERT	7045083	117	2,350
SOLORIO, JESUS MIGUEL	1841156	109	1,858
MAYBERRY, DAMONE	7047753	109	1,651
MCBRIDE, COLBY GORDON	7007695	106	1,115
REESE, CALVIN LEMAR	7006979	106	961
ESTRADA, DAVID GEORGE	803857	105	1,564
LOERA, JOSE LUIS	1629569	104	1,838
ALONZO, ANTONIO RODRIGUEZ	1671850	103	1,785
ZAVALA-BARRERA, YANEYRI	7050678	103	1,969
SMITH, ANDREW RANDALL	7051126	100	1,238
REED, WILLIAM	1108247	96	1,478
GARCIA, RICHARD LONNY	7049502	95	1,416
PRANZENICA, TANNER CHRISTOPHER	7048788	95	1,425
BOWMAN, MICHAEL	7051114	94	1,612
AVILA, ROMAN MAC	101090	93	1,367
MORO, MICHAEL MAURICE	7044070	92	1,329
GARZA, STEVE AUGSTINE	581333	87	1,307
SUAREZ, RENE ISRAEL RUIZ	7015329	87	1,461
<b>TOTAL ALL PAGES</b>		<b>35,533</b>	<b>498,750</b>

## **SAMPLE FRAUD AND SERVICE REPORTS**

Users can easily access reports from the Reports Utility of iCON. Reports are viewable from iCON within seconds of report request. iCON offers a wide array of useful Investigative Report options to substantiate every aspect of the inmate call process. The following sample reports demonstrate the capability of iCON to supply detailed commission reports. On the following pages you will find:

**Service Request Report**

**Fraud Detection Report**

LEGACY INMATE COMMUNICATIONS

Service Request Report

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:55:28

Request ID	Type	Subject	Contact	Phone	Date	Trouble Date	Status	Notes
1239	Phone	4th Floor ATA	Dele	(559) 903-1188	2/11/2013 8:04	2/10/2013	Solved	ATA down 4th floor South Annex.
1204	Other	Updated information	Gonzalez	(559) 488-2524	1/23/2013 8:58	1/23/2013	Solved	Inmate Ralph Rubio 1829396 states that he gets information from his phone it still says that a charge that he was released on 01/11/13 but it still on the inmate information system. It has been removed from OffenderTrack. Thank you
1208	Application	JID #	Daniel	(559) 488-2860	1/29/2013 10:56	1/29/2012	Solved	JID #0909866 Stephanie Randolph is in the system as 909866, please change and activate.
1349	Other	Unable to login	Karen	(559) 488-2919	12/10/2012 15:36	12/10/2012	Solved	One of our users MPizano is unable to log-in. I changed his password for him and he's still unable to log in. Please help. Thanks, Karen
1021	Data	Upload	Obanwo	(559) 903-1188	11/11/2012 10:36	11/11/2012	Solved	I have a request from an investigator to retrieve calls for this #559-233-7732 from 11/4/2012 to 5/17/2013 Thanks.
1039	Data	Recording	Obanwo	(559) 903-1188	11/18/2012 12:13	11/18/2012	Solved	Need recordings restored for defendant from 12-13-12 to 12-28-12. JID #7030709. Thanks.
1041	Voice Quality	MJ 06 C Exposed wire	Karen	(559) 903-1188	11/19/2012 8:09	11/19/2012	Solved	MJ 06 C - POD PHONES DO NOT WORK, WIRES EXPOSED. THANK YOU MENCHACA.
1042	Phone	No Dial Tone	Karen	(559) 903-1188	11/19/2012 8:11	11/19/2012	Solved	MJ 01 RELEASE B - GOOD EVENING, ON MAIN JAIL 1ST FLOOR-RELEASE B (ROOM # 1041), THE PHONE NOT WORKING. NO DIAL TONE
1044	Phone	MJ 03 E - BLUE PHONE NOT WORKING	Karen	(559) 903-1188	11/20/2012 13:17	11/20/2012	Solved	MJ 03 E - THE BLUE PHONE IN MJ03 E-POD IS BROKEN - OFFICER KLEINKNIGHT
1050	Network	SA 1st Visitor Office	Dele	(559) 903-1188	11/23/2012 18:41	11/23/2012	Solved	ATA down, called Dele to go and reset, he feels that it's the visitation ATA and it can be reset in the A.M. He will call me upon reset so we can close this ticket.

**LEGACY INMATE COMMUNICATIONS**

Fraud Detection Report

From Date : 2/1/2013 12:00:00 AM To : 2/22/2013 12:00:00 AM

Report Date : Feb 22 2013 03:55:28

Record ID	Date	Inmate Phone #	Destination #	Call Count	Total Minutes	Disconnect Descript	Call Revenue
34291196	2/22/2013 15:54	(559) 490-0298	(559) 803-1661	1	1.5	Silence detect	\$2.57
34290905	2/22/2013 15:48	(559) 490-0298	(559) 394-7318	1	3.62	Silence detect	\$0.00
34290617	2/22/2013 15:44	(559) 490-0298	(559) 436-1842	1	3.08	Silence detect	\$2.69
34290453	2/22/2013 15:37	(559) 490-0298	(559) 473-8405	1	1.33	Silence detect	\$0.00
34289324	2/22/2013 15:21	(559) 490-0298	(559) 281-7541	1	6.12	Silence detect	\$2.87
34288950	2/22/2013 15:20	(559) 490-0298	(559) 210-1350	1	13.2	Silence detect	\$4.64
34288810	2/22/2013 15:05	(559) 490-0298	(559) 227-4015	1	2.17	Silence detect	\$0.00
34288602	2/22/2013 15:02	(559) 490-0298	(559) 227-4015	1	2.17	Silence detect	\$0.00
34287754	2/22/2013 14:50	(559) 490-0298	(559) 224-6219	1	5.37	Silence detect	\$2.81
34287033	2/22/2013 14:47	(559) 490-0298	(559) 776-4564	1	14.98	Silence detect	\$3.41
34287494	2/22/2013 14:39	(559) 490-0298	(559) 600-7399	1	0.83	Silence detect	\$0.00
34286146	2/22/2013 14:22	(559) 490-0298	(559) 513-0829	1	5.03	Silence detect	\$0.00
34286065	2/22/2013 14:16	(559) 490-0298	(559) 704-0756	1	2	Silence detect	\$0.00
34285574	2/22/2013 14:14	(559) 490-0298	(559) 519-2485	1	7.22	Silence detect	\$2.93
34285808	2/22/2013 14:12	(559) 490-0298	(559) 353-0432	1	1.32	Silence detect	\$0.00
34285034	2/22/2013 14:08	(559) 490-0298	(559) 473-6170	1	13.53	Silence detect	\$3.29
34285458	2/22/2013 14:04	(559) 490-0298	(559) 444-0980	1	2.17	Silence detect	\$0.00
34284659	2/22/2013 13:51	(559) 490-0298	(559) 473-6170	1	4.12	Silence detect	\$2.75
34284033	2/22/2013 13:47	(559) 490-0298	(559) 230-2245	1	14.05	Silence detect	\$0.00
34283988	2/22/2013 13:33	(559) 490-0298	(559) 341-6147	1	1.15	Silence detect	\$0.00
34283645	2/22/2013 13:33	(559) 490-0298	(559) 589-4328	1	7.72	Silence detect	\$3.68
34283798	2/22/2013 13:29	(559) 490-0298	(559) 353-0432	1	1.33	Silence detect	\$0.00
34283167	2/22/2013 13:18	(559) 490-0298	(559) 790-8462	1	4.95	Silence detect	\$2.81
34281793	2/22/2013 12:57	(559) 490-0298	(559) 210-1350	1	10.9	Silence detect	\$4.16
34281498	2/22/2013 12:40	(559) 490-0298	(559) 704-0756	1	1.5	Silence detect	\$0.00
<b>TOTAL ALL PAGES</b>				<b>94</b>	<b>555.17</b>		<b>\$161.27</b>

## **SAMPLE CALL ATTEMPT REPORTS**

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### **Call Attempt Report**

#### **Daily Call Attempt Report – Graph**

#### **Monthly Call Attempt Report – Graph**

LEGACY INMATE COMMUNICATIONS

Call Attempts Report

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

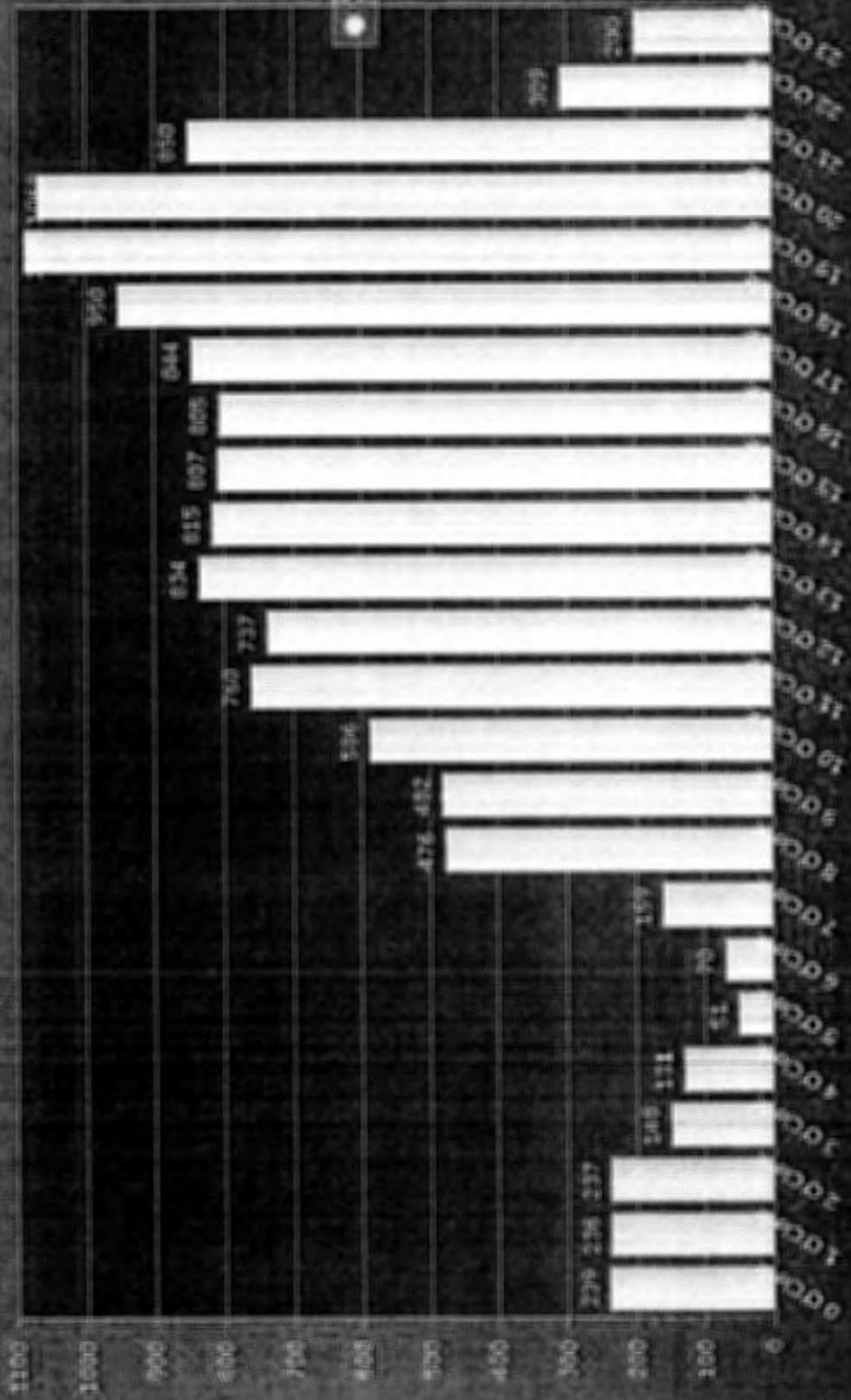
Report Date : Feb 21 2013 02:43:52

Inmate Phone #	Destination #	Connection Date	Connection Time	Bill Type	Duration
(559) 111-1014	(559) 381-2949	2/1/2013	11:40:00	Collect w/ CC	0
(559) 111-1007	(559) 229-1980	2/1/2013	11:39:00	Free	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:38:00	Collect	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:21:00	Collect w/ CC	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:21:00	TTY Call	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:20:00	TTY Call	0
(559) 111-1139	(559) 892-5771	2/1/2013	11:19:20	Collect w/ CC	20
(559) 111-1014	(559) 381-2949	2/1/2013	11:19:00	Collect	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:18:00	Collect w/ CC	0
(559) 111-1016	(559) 394-4404	2/1/2013	11:18:00	Free	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:18:00	TTY Call	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:17:00	Collect	0
(559) 111-2071	(559) 421-5541	2/1/2013	11:16:42	Prepaid w/CC	21
(559) 111-1010	(916) 717-2837	2/1/2013	11:15:00	Collect	0
(559) 111-1027	(559) 273-1524	2/1/2013	11:13:29	Collect w/ CC	21
(559) 111-1121	(559) 859-1370	2/1/2013	11:13:24	Prepaid-Collect	21
(559) 111-1016	(559) 412-0444	2/1/2013	11:11:00	Free	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:11:00	TTY Call	0
(559) 111-1016	(559) 412-0411	2/1/2013	11:10:00	Free	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:08:00	Collect w/ CC	0
(559) 111-2077	(559) 360-8841	2/1/2013	11:07:38	Prepaid-Collect	9
(559) 111-1014	(559) 381-2949	2/1/2013	11:07:00	Collect	0
(559) 111-1014	(559) 389-3878	2/1/2013	11:06:00	Free	0
(559) 111-1015	(559) 412-0644	2/1/2013	11:06:00	Free	0
(559) 111-1005	(559) 530-6773	2/1/2013	11:05:00	Collect	0

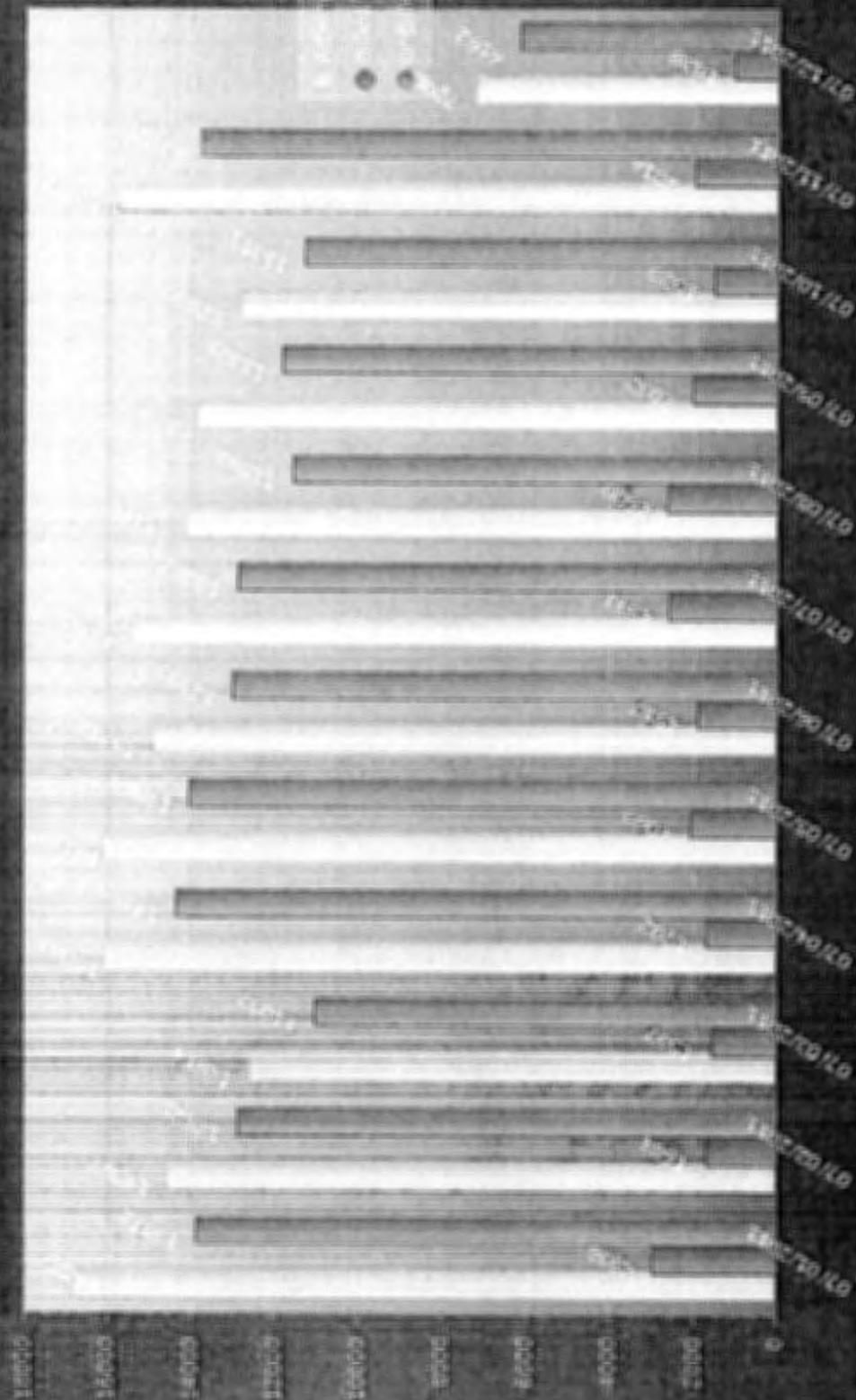
TOTAL FOR ALL PAGES

23,732

# Call Attempts for 07/07/2011



# Combined Call Attempts for July, 2011



## **SAMPLE CALL ATTEMPT REPORTS**

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**LEGACY INMATE COMMUNICATIONS**

Call Attempts Report

From Date : 2/1/2013 12:00:00 AM To : 2/1/2013 12:00:00 AM

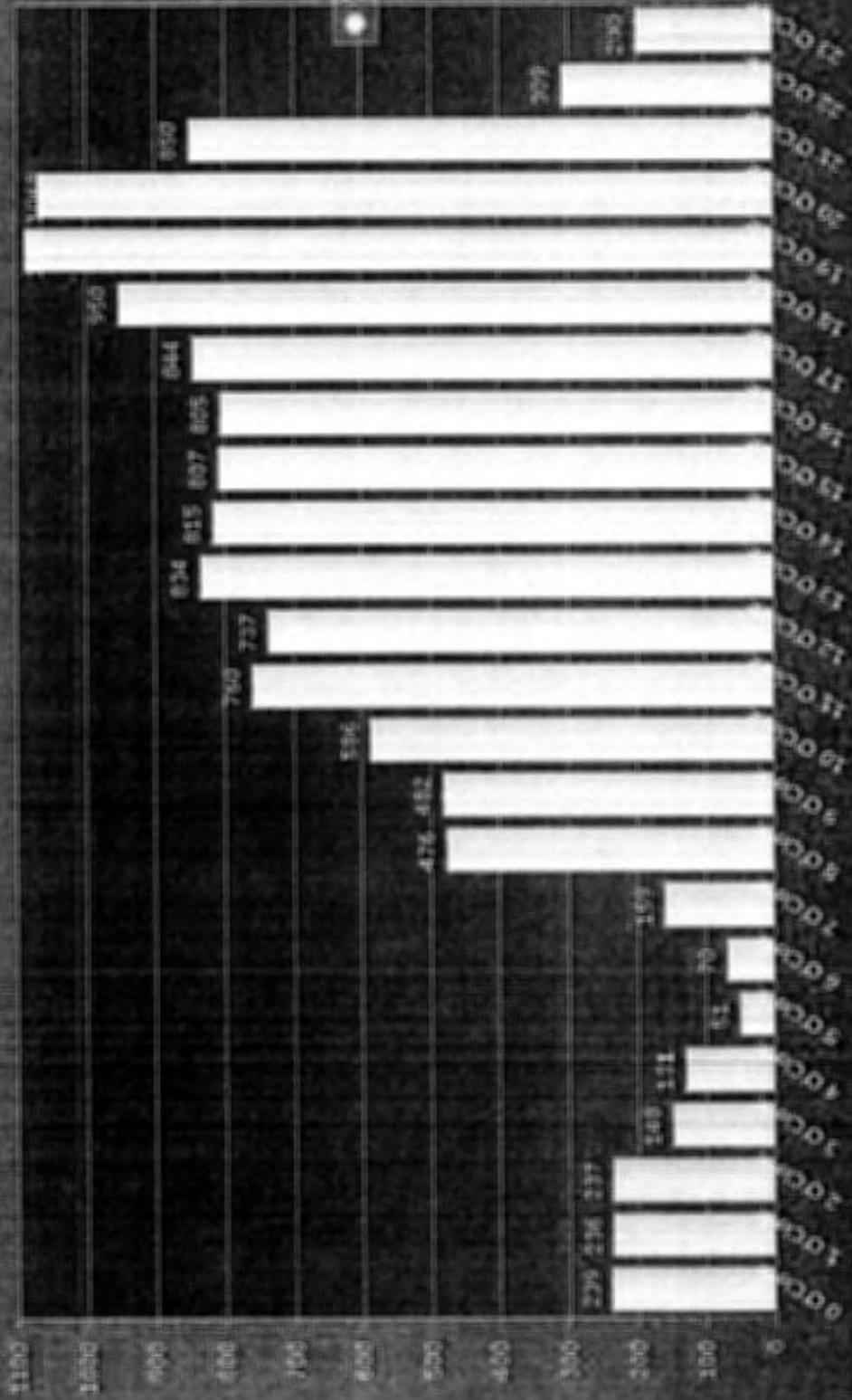
Report Date : Feb 21 2013 02:43:52

Inmate Phone #	Destination #	Connection Date	Connection Time	Bill Type	Duration
(559) 111-1014	(559) 381-2949	2/1/2013	11:40:00	Collect w/ CC	0
(559) 111-1007	(559) 229-1980	2/1/2013	11:39:00	Free	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:38:00	Collect	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:21:00	Collect w/ CC	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:21:00	TTY Call	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:20:00	TTY Call	0
(559) 111-1139	(559) 892-5771	2/1/2013	11:19:20	Collect w/ CC	20
(559) 111-1014	(559) 381-2949	2/1/2013	11:19:00	Collect	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:18:00	Collect w/ CC	0
(559) 111-1016	(559) 394-4404	2/1/2013	11:18:00	Free	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:18:00	TTY Call	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:17:00	Collect	0
(559) 111-2071	(559) 421-5541	2/1/2013	11:16:42	Prepaid w/CC	21
(559) 111-1010	(916) 717-2837	2/1/2013	11:15:00	Collect	0
(559) 111-1027	(559) 273-1524	2/1/2013	11:13:29	Collect w/ CC	21
(559) 111-1121	(559) 859-1370	2/1/2013	11:13:24	Prepaid-Collect	21
(559) 111-1016	(559) 412-0444	2/1/2013	11:11:00	Free	0
(559) 111-1076	(800) 735-2929	2/1/2013	11:11:00	TTY Call	0
(559) 111-1016	(559) 412-0411	2/1/2013	11:10:00	Free	0
(559) 111-1014	(559) 381-2949	2/1/2013	11:08:00	Collect w/ CC	0
(559) 111-2077	(559) 360-8841	2/1/2013	11:07:38	Prepaid-Collect	9
(559) 111-1014	(559) 381-2949	2/1/2013	11:07:00	Collect	0
(559) 111-1014	(559) 389-3878	2/1/2013	11:06:00	Free	0
(559) 111-1015	(559) 412-0644	2/1/2013	11:06:00	Free	0
(559) 111-1005	(559) 530-6773	2/1/2013	11:05:00	Collect	0

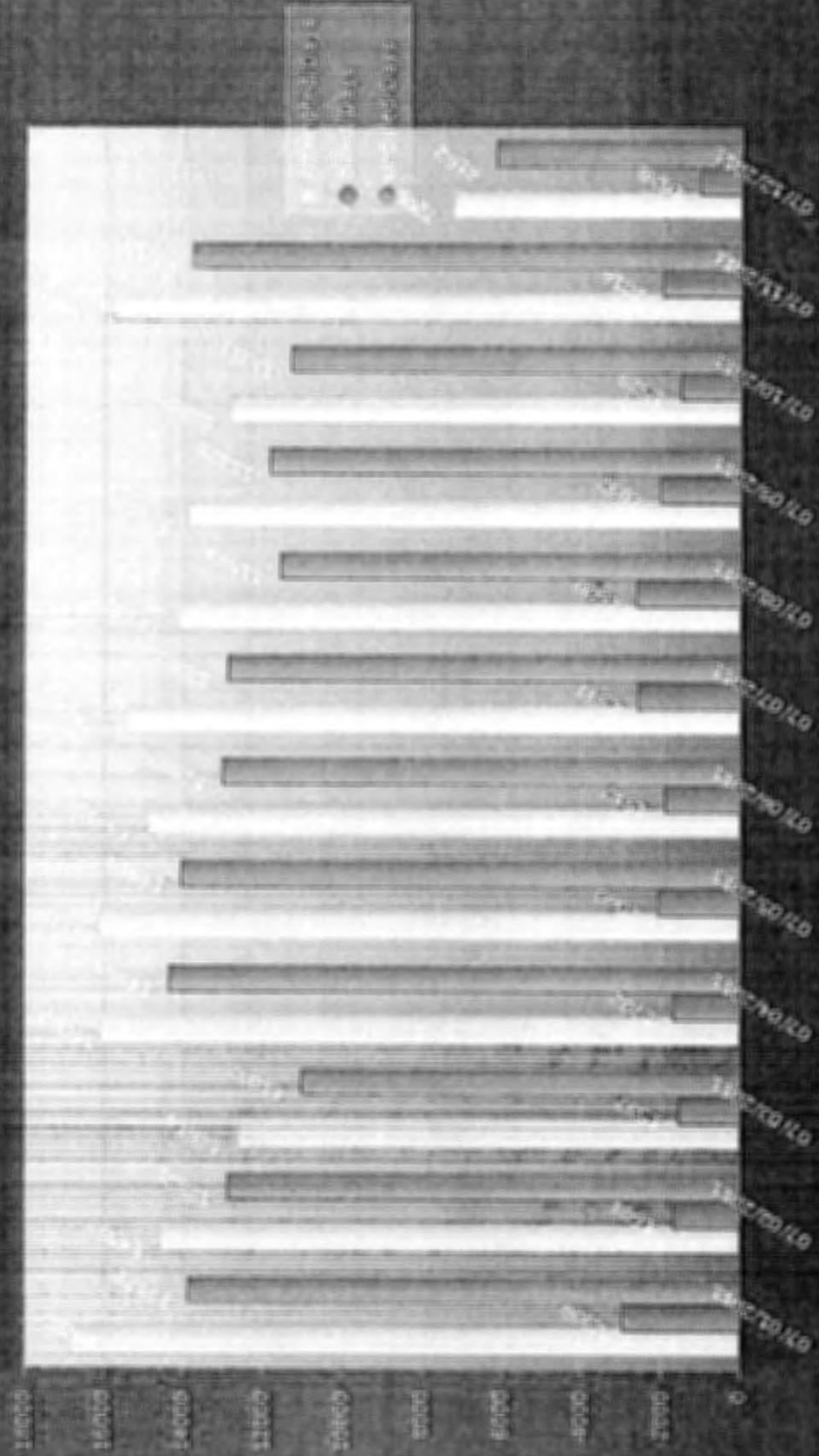
TOTAL FOR ALL PAGES

23,732

# Call Attempts for 07/07/2011



# Combined Call Attempts for July, 2011



# CERTIFIED COPY OF ORDER

February Session of the January Adjourned

Term. 20 18

STATE OF MISSOURI

County of Boone

} ea.

In the County Commission of said county, on the

20th

day of

February

20

18

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the request from the Public Works Department to purchase a replacement crane/hoist out of anticipated cost savings in account 2040-92300 in the amount of \$3,699.60.

Done this 20th day of February, 2018.

ATTEST:

*Taylor W. Burks*  
Taylor W. Burks  
Clerk of the County Commission

*Daniel K. Atwill*  
Daniel K. Atwill

Presiding Commissioner

*Fred J. Parry*  
Fred J. Parry

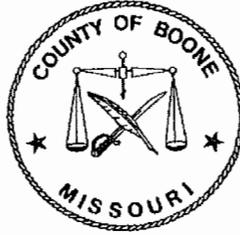
District I Commissioner

*Janet M. Thompson*  
Janet M. Thompson

District II Commissioner

# Boone County Road and Bridge

Gregory P. Edington  
Director



5551 S Tom Bass Rd  
Columbia, Missouri 65201-9711  
(573) 449-8515 ext (226)  
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EMAIL: [gedington@boonecountymo.org](mailto:gedington@boonecountymo.org)

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Date: February 13, 2018

From: Greg Edington 

To: Commissioners

Subject: Replacement of Overhead Crane Hoist

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The Department utilizes an overhead crane/hoist that is located near the Salt Storage Facility as an aid to remove/install and store dump truck tailgates. The unit ceased to function several weeks ago and a recent inspection from one of our vendors revealed that the existing crane/hoist cannot be repaired therefore necessitates a replacement.

We are seeking Commission approval to purchase a replacement crane/hoist out of anticipated cost savings in account 2040-92300 (replacement equipment). The cost for a new crane/hoist (see attached estimate) is \$3,699.60. Thank you for your consideration of the purchase.

February 13, 2018

Attention: Rickey Harvey

Reference: Konecranes Proposal # 2618foxza

Konecranes is pleased to offer the following quotation for your consideration and review.

1	.CLX05 04 1 050 5 - CLX Electric Chain Hoist	<b>\$3549.60</b>
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CLX ELECTRIC CHAIN HOIST	
Rated Capacity	1/2 ton
Height of Lift	15 ft
Load Chain	Galvanized
Reeving	01
Hoisting Speed	16 / 5 fpm
Hoisting Motor Power	0.72 HP
Hoist Duty Group	H4
Hoist Suspension	Rigid
Trolley Type	Motor Trolley
Flange width range	4 1/8" - 6"
Flange Width	5 1/2"
Travel Speed Control	Inverter two steps
Travel Speed High	65 fpm
Travel Speed Low	16 fpm
Main Voltage	460 V
Phase	3-Phases
Frequency	60 Hz
Control Voltage	115 V
Pendant Cable Length	13'-0"
Chain bag	Yes
Hoisting Motor - Nominal Current	2.5/1.9 A
Hoisting Motor - Starting Current	5/2.3 A
Mechanical Overload Device	Friction torque limiter
Hoisting limit switch	Electrical upper & lower limit switch (2 steps)
Paint	RAL 7021
Control Pendant	Standard 4 button pendant with emergency stop
Standard Maximum Humidity	90 %
Overheating Protection for Hoisting Motor	Included
C-Dimension (Headroom)	1'-4 11/16"
Protection Class	IP55
Standard Temperature Range	14°F to +104°F with rated load and speed

Estimated Freight \$150.00

**Total with Freight \$3699.60**

Deliver to Boone County Public Works

This quotation, proposal or offer is subject to and incorporates as if fully rewritten herein the Seller's Standard Terms and Conditions of Sale (Service) (Revision 12.31.2012), a copy of which is attached hereto or is available at [www.konecranesUSA.com](http://www.konecranesUSA.com) or upon request of Buyer.

# KONECRANES®

Lifting Businesses™

Price quoted is based on clear access to the work area, and work being completed during a normal workday. It is our intent to work with our customer's production schedule as much as possible. However, please note that quoted prices are based upon the equipment being available to the service technician(s) at the expected time of arrival through completion of the required work. Any unexpected delays caused by the customer will be charged at the applicable hourly rate.

Taxes and freight for material are extra if applicable.

Terms: Net 15 days, our standard terms and conditions of sale apply

Quote valid for 30 days.

All concealed damages and/or items found necessary to be repaired or replaced upon start of the above items, and not readily apparent prior to the beginning of the work, and not otherwise covered by the purchase order, shall be brought to your immediate attention and a price for said work agreed upon prior to proceeding with the repairs.

Thank you,

Zach Fox  
Inside Sales  
St. Louis MO  
314-258-5737

**KONECRANES**  
Lifting Businesses  
[www.konecranesamericas.com](http://www.konecranesamericas.com)