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***An IP Office™ Support Solution for:***  
**City of Carson**

RFP NO. P16-05

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August 15, 2016

Mr. Richard Moore  
City of Carson  
Interim Purchasing Manager  
RFP No. P16-05  
701 East Carson Street  
City of Carson, California 90745

**Subject:** Request For Proposal – RFP NO. P16-05

Thank you for giving Merrill & Associates, Inc the opportunity to provide and recommend support solution to meet your stated and current support needs and demands. We recognize that all customers and enterprises have unique support requirements and we look forward to working through those challenges with you step by step. At the core of our proposed solution is the award winning Avaya IP Office support solution. It is a simple, yet critical, communications support that can support the needs of any business but does require a company like Merrill to compliment the offer and ensure it is complete and comprehensive.

In the following pages of this proposal, please a solution specifically designed to address the engagement challenges and priorities you outlined.

We look forward to discussing the details of the proposal letter in more detail and offering guidance as you work through difficult questions.

Sincerely,

Charlotte Melendez-Luna

Merrill & Associates, Inc.



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## Executive Summary

Avaya and Merrill & Associates, Inc are pleased to have the opportunity to add value with the compelling offer contained in this proposal letter, so City of Carson can grow in their confidence of the vendor team.

The impact of increasing maintenance costs and availability of replacement parts is becoming a concern for many customers. The real question is how to build a trusted relationship with a service provider who can support not just reactive maintenance needs as they arise but the critical proactive steps and consultation for growth and change. At Merrill, we believe our 20+ experience and highly skill team of professionals coupled with our critical parts warehouse and access is the key to support our customer base.

## The Current Challenges

Provide proactive and reactive maintenance, repair and hardware support on Avaya IP Office systems deployed at the City. During the review of the RFP, several key items were identified which Merrill would like to respond to including:

- Being an Authorized Avaya Partner – *Merrill is an Avaya Authorized Partner. The criteria for Avaya medal status have varied over the years but generally include 4 aspects;*
  1. 1 – Customer Satisfaction – *highest score is 5 and Merrill has maintained one of the highest in the country for over 8 years at a current 4.6. The score is derived from direct customer interviews conducted by a third party contract by Avaya.*
  2. 2 – Certifications – *Avaya requires each partner to maintain current training and testing on the vast Avaya portfolio of products and services. Merrill maintains and exceeds the required certifications for our current status and we have proudly hold our team to the highest certification standards.*
  3. 3 - Sales Volume – *Avaya awards the partner community with medal status strictly driven by volume of sales. This is not that relative to our customer base and as a small business in Southern California, Merrill, although a Platinum (the highest level) partner for 5 years straight, seeks quality over quantity and no longer participate in the volume of product sales required for a medal status with Avaya.*
  4. 4 – Maintenance Renewal and Accuracy – *A separate report card Avaya keeps track of to ensure the business partner is helps the customer avoid any disruption to coverage. Merrill outrivals in this category and has an exemplary record.*
- Have experience and certification in both Heritage Avaya Blue and Red – *Merrill does have predominately and historically been a red partner of Avaya but we do work on Nortel systems and have for 5+ years. Our largest account has over 20 embedded Nortel PBX and small key system solutions.*
- Support of minimum of three Government Accounts – *Merrill supports many Government accounts included but no limited to cities, counties, public entities such as school, universities, hospitals and utility companies.*

*As required 3 References are listed below. Contact details will be provided upon request and not listed in the RFP due to customer request for limited and private access.*

1. City of Costa Mesa
  - Costa Mesa Fire Department
2. City of Rancho Margarita
3. Burbank Airport



***“Lower operational costs, increase profitability, and enhance the experience your customers enjoy”***

- Local Orange County/LA County Warehouses – *Merrill maintains a large warehouse at our location in Brea, California. The warehouse maintains new and refurbished critical parts and we have demonstrated to our customer base our ability to support their needs with a quick response time that exceeds any manufacture next business day response time. The warehouse is available for tour and customer review upon request.*

#### Support Requirements:

- Quarterly system backups – *Merrill conducts system backups for many of our customer base today. Adding the City to that calendar is included in our bid.*
- 7x24 Support – *Avaya offers 24x7 support via their web services and 800 number. Merrill compliments that with our afterhours support which can include proactive alarming upon request.*
- Two (2) hours on-site emergency response time – *Merrill acknowledges this requirement and our emergency support is included the price quoted.*
- Include labor for one (1) software release per year – *Merrill acknowledges and included in our price the labor to aid in the upgrade of any software release per year. Assumes dot releases and not full system upgrade to the next release level which may include any hardware upgrades.*

## How We Can Help Your City

At Merrill & Associates, Inc. we are helping many customers like you add value by addressing day to day support issues head on because we customized our support offers to each and every customer. We are small and agile and we can easily customize each aspect of support and service to meet the vast and varied needs of our customers from simple manufacturer support contract prepare and enforcement to fully managed to complete outsource solutions and cloud services.

At Merrill we understand that support from a qualified service vendor is important to compliment the talents of the IT department of the City. We have many reference accounts that attest to our ability to fill that need. The City IT staff should be able to focus on other projects and rest assured they have a partner to call on for any need that arises in the communications fabric and network.



The Avaya and Merrill support solution will help provide staff with peace of mind simply because our approach is designed to work together with flexibility in mind. The solutions we deliver also help staff work more efficiently with each other and quickly handle customers' demands, no matter where they are.

## Offer Summary

Avaya Support – Express Support On-site Next Business Day 24x7 + MerrillConnect	Cost
1 Year – Annual Maintenance & Support – includes, IPO (2), Avaya SBC Portwell (1 – 12) 24x7 manufacturer support – supplement add 2 hour emergency response (billable at time of support – see labor/rate charges below).	\$4,875
Optional: Phybridge 48 Port PoLRE GOLD 27x7 Support - Per Switch Per Year. Not included in total	\$395
MerrillConnect*	Cost
Quarterly system back ups (2 IPOs only, - 4 back ups maximum – 1 year)	\$1,680
Labor for one (1) software release per year (2 IPOs only)	\$1,840
Ad Hoc Project & Services (10 hours maximum – M-F 8x5)	\$2,100
Annual MerrillConnect:	\$5,620
<b>Total Avaya and Merrill Support – 1 year:</b>	<b>\$10,495.00</b>
Merrill Labor Rates - 2016	Hourly Price
<b>Complex Labor Regular</b>	\$180
<b>Project Manager</b>	\$210
<b>Software Specialist</b>	\$210
<b>Professional Services</b>	\$210
<b>Data/Network Specialist</b>	\$240
<b>SIP/VMWare/Security Specialist</b>	\$310

**Requirement: City of Carson must provide remote desktop or VPN Access to quality for this pricing. City of Carson must submit to a site survey and possible certification of IPO servers. If customer provided server Edition – price is subject to or will include server support only on T&M support.**

## A Vendor You Can Trust

Together with Avaya, Merrill & Associates, Inc. would to thank you and your staff for being a loyal Avaya customer.

Avaya is a global leader in business communications systems. Merrill & Associates, Inc. is an experienced, certified Avaya Channel Partner who understands the challenges facing midsize operations like City of Carson. Let us work with you to implement an Avaya IP Office service and support solution that fits your unique challenges, capabilities, and needs. We look forward to embarking on a relationship as your trusted supplier of best in class telecommunications solutions and support.

Please take a moment to meet our team/family:

Michael L. Merrill - President/Owner Merrill & Associates, Inc.

- Mr. Merrill started his career at AT&T implementing many PBX systems and wire solutions. It is not uncommon even in 2016 for us to visit a location that Mike recalls installing or working on which always poses a fun opportunity to walk down memory lane. Mike likes to visit our customers at least once a year to ensure them that the buck stops with him and he invites a conversation at any time to hear how his company is doing and what if any improvements our customers envision. After many years in management at Avaya, Mike Merrill embarked on a new challenge to enter into a world as a small business owner and Avaya supplier in 1986. After landing many large accounts and recruiting some of the top talent in Southern California, Mike built one of the most respected Avaya business partners in the country. Despite size of the company he also has built quite a large and loyal customer base and over the years, and many, many Avaya awards has a reputation for being a beta test for many Avaya new products. As one example, Merrill installed and supported the first Avaya IP Office on a virtual platform for Avaya in the world. Mike also has held a seat on many prestigious Avaya Partner programs that help the manufacturer understand the needs, challenges and changes customers are expressing.

## Damion Merrill - Vice President and Financial Officer

- Damion provides a keen understanding of business operations and cost containment. He works some marquee Merrill accounts to ensure he is always aware of changing requirements and impact to business such as the effect virtualization has had on our customers in terms of value equations. Damion also support the maintenance contracts with our customers, vendors and manufacturers such as Avaya. These contracts can be confusing and often require Merrill to advocate on the customer behalf to get the right response and solution. Signing an agreement is only part of the solutions, enforcing it now days unfortunately may require a little more effort.

## Barry Welker – Director of Sales Operations

- Barry has a long history of employment in the Bell system and while at Avaya supported many large enterprise accounts and forged some of the first out sourcing and managed solutions that are now common place in the Avaya support portfolio. Barry's current role at Merrill is provide design and quality assurance to our customer's communication solutions. When faced with a customer request, Merrill first tries to resolve the issue or fulfill the request with the invested, embedded solution. You will not find Merrill is quick to respond to each request with a proposal for a net new product or solution. Barry's team is responsible for the design and solution build and that includes direct Merrill employees and a vast array of contract employees that fulfill specialty needs. His team includes, network specialist, VMWare and Application specialist, Software Engineers and Solution Architects.

## James Martinez – Director of Operations

- Like many members of the Merrill team, James also started his career at Avaya (AT&T/Lucent) and held a variety of roles in management before joining Merrill. James is responsible for Support, Implementation and Add, Move, Change requests at Merrill. His team consists of the team that answer the initial customer request and begin a ticket or MAC request for our customer base. His team also monitors the alarm system and provides quarterly updates and review. James also runs our vendor management program. Many Avaya and non-Avaya communication companies across the country rely on Merrill to support aspects of their business. James develops relationships with many companies to ensure they know our talents and warehouse inventory. We work under contract to support their end customers in a variety of ways that include Network Assessments, Network Analysis and more. He runs small projects and is

generally considered the face of Merrill because of his and his team's constant contact with our customers.

Charlotte Melendez-Luna – Director of Sales & Marketing

- Started with AT&T in 1981 and has worked at Merrill since 2010. Charlotte is responsible for the marketing, sales and product portfolio of Merrill. She is involved with each and every account at Merrill to ensure that our customer satisfaction remains the focus of our company. Through her experience and relationships in the communication industry, Merrill has continued to achieve a modern product and service portfolio including but not limited to SIP, Virtualization, Data Center and Cloud solutions. At Merrill, no account is too small, too large or too complex for the Merrill sales and marketing team to address and positively affect.

Deployment Team:

Aside from leadership the deployment and support team are without a doubt our greatest pride. If we are fortunate enough to support City of Carson, you will undoubtedly work with this team and you will come to know what our 2000+ loyal customer base knows, which is how talented and easy to work with they are.

Avaya IP Office Support Services

## ***Reinforcing and extending the value delivered by your Avaya communications solution***

Business success can be highly dependent on the ability of employees to communicate effectively with one another and with customers. When unforeseen issues arise that, disrupt the flow of business communications, support that is easily accessible, highly efficient, and delivered by properly qualified resources is crucial to already have in place. To meet those exact needs and provide peace of mind, IP Office Support Services are available in 8 x 5 x 5 and 24 x 7 options. To simplify budgeting and billing, one-, three-, and five-year prepaid contract services can be selected. IP Office applications can be securely managed remotely so that support is provided quickly and easily without the need for an onsite visit by a technician.

## **Features and Benefits Summary**

Experience the following benefits that Avaya IP Office Support Services provides:

- Comprehensive support offerings
  - Rapid remote hardware and software support
  - Enhanced remote connectivity for quicker troubleshooting that is easy to set up and provides increased security
  - Technical expertise and quality verification from the manufacturer
  - Simple pricing structure makes budgeting easy, accurate, and consistent
- Improved system performance
  - Access to software patches and updates
  - Comprehensive support quickly delivered
  - Certified parts replacement options
  - Support specifically designed for your company's environment
- Added value
  - Enjoy high-quality services at a competitive price





- Rapid and seamless scale with a multitude of applications
- Access to all major upgrades during the term of your support agreement to keep technology up-to-date
- Scalable
  - Scale up to 2,000 or 2,500 users based on the deployed platform
- Seamlessly transition licenses
  - Avaya application licenses can be transitioned to centralized viewing and management with no additional support fees
- Quickly integrate new sites
  - Sites can easily be added and coverage adjusted accordingly to adapt to changing needs

## Conclusion

Thank you for reviewing our response to your RFP request. We look forward to an opportunity to discuss our history and capability with any member of the City of Carson. Per request, accompanying this proposal letter are the following requirements:

- Affidavit of Non-Collusion
- Certificate of Non-Discrimination by Contractor
- Designation of Subcontractors
- Insurance Coverage – see below. Per RFP P16-05, page 7 contract documents shall be submitted after award and include all insurance documents etc... Merrill will comply as stated.

COVERAGES		CERTIFICATE NUMBER: Cert ID 1595		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	ADDITIONAL USER RSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	Y	72SBAAR8333	2/8/2016	2/8/2017	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 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
A	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		72UECHA0996	2/8/2016	2/8/2017	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
A	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 <input type="checkbox"/> N/A	72WECZH1842	2/8/2016	2/8/2017	<input checked="" type="checkbox"/> PER STATUTE <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
						\$ \$