



# Unified Communications

SERVE CHALLENGE EMPOWER

## **1.0 Introduction**

- 1.1 The Challenge Academy Trust (the Trust), was established in May 2017 and currently comprises of five primary schools, 5 secondary schools and a Sixth Form College in Warrington, Cheshire. (see Appendix 1).
- 1.2 We are seeking provision of Unified communications for the period beginning December 2023 – June 2024
- 1.3 The contract period will be for 3 years with the option to continue for a further 1 year however each annual renewal within the 3-year contract period will be conditional upon satisfactory performance of the service(s) in the preceding years.
- 1.4 We are looking to appoint a provider to deliver a reliable and comprehensive Unified communications service to meet the needs of the Trust and ensure that it meets its statutory obligations. The detailed specification is in Appendix 3.
- 1.5 This tender for Unified communications is a standalone tender. However, any potential supplier needs also to be aware that this tender is applicable to each of the 11 academies within the Trust, the academies will be given the option to take up the Unified Communications telephony system. Any academy taking up the Unified comms offer on a phased academy by academy approach depending on current contractual end dates.

## **2.0 Tender Process**

- 2.1 We are inviting Unified communications and Telephony providers to tender, and the appointment will be for three years, at the discretion of the Board of Trustees, for up to a further one year.
- 2.2 Tender responses and queries before submission deadline should be submitted by email to [tenders@tcat.uk.com](mailto:tenders@tcat.uk.com).
- 2.3 Submissions received after the deadline will not be considered.
- 2.4 Tenderers should ensure that they allow enough time to submit their bid response. The Trust will accept no responsibility for difficulties during the process of submission and/or late or lost submissions.
- 2.5 Please study the documentation carefully. If you are in doubt as to any aspect of the brief, or require clarification on any part of the document, please contact [tenders@tcat.uk.com](mailto:tenders@tcat.uk.com).

- 2.6 Tenders will only be considered if they provide competitive prices strictly in accordance with the brief.
- 2.7 Tender Timescales are below.

<b>Activity</b>	<b>Date</b>
Tender published	1 <sup>st</sup> December 2023
Tender returned	5 <sup>th</sup> January 2024
Tender assessment	Week commencing 8 <sup>th</sup> January 2024
Tender Award	18 <sup>th</sup> January 2024
Work commencement	1 <sup>st</sup> February 2024
Work completed by	31 <sup>st</sup> August 2024

### **3.0 Freedom of Information**

- 3.1 In accordance with the Freedom of Information Act 2000, public organisations must respond within 20 working days to valid written requests for information from anyone. The request for information must be supplied unless it falls into specified categories of information which include confidential, personal, trade secret, or information which would or would be likely to prejudice the Tenderer's or the Trust's commercial interests. These categories are exemptions under which information may not be disclosed.
- 3.2 It will be the Tenderer's responsibility to clearly state in their bid submission any information which they regard as confidential, personal information, trade secret or may prejudice their commercial interests and to discuss this with the organisation prior to submission.
- 3.3 Tenderers are advised that information which falls into our agreed interpretation of the legal definition of confidentiality, personal information, trade secret or prejudice to their commercial interests may still have to be disclosed in some circumstances. You should be aware that the organisation may be forced to make information public as a result of an appeal by a member of the public against our initial decision not to reveal information. The public can appeal through our internal complaint's procedure and ultimately to the Information Commissioner's Office, the Government organisation responsible for the Act.

- 3.4 You will also need to provide with your submission a contact within your organisation to ensure that, should we need to consult on a Freedom of Information request, we can do this promptly. If we are unable to contact anyone to consult, we have to release the information to ensure that we remain within the 20 working days deadline.

## 4.0 Tender Evaluation and Award Criteria

- 4.1 The Trust does not undertake to accept the lowest of any Tender and reserves the right to accept the whole or any part of any Tender submitted.
- 4.2 Each Tender will be checked initially for compliance with all requirements of the ITT.
- 4.3 Tenders will be evaluated against the award criteria set out below.
- 4.4 During the evaluation period, the Trust reserves the right to seek clarification from any or all of the Tenderers, to assist it in its consideration of their Tenders.
- 4.5 If the Trust suspects that there has been an error in pricing of the tender, the Trust reserves the right to seek clarification as it considers necessary from that tenderer only.
- 4.6 In case a tender appears to be abnormally low in relation to the services to be provided, the Trust will request a clarification in writing and/or explanation concerning its elements. The Trust reserves the right to exclude a tender, if after a verification process based on the explanations and evidence received it comes to the conclusion that the tender is abnormally low.
- 4.7 Tenders will be evaluated to determine a short list of tenderers to make a final shortlist.
- 4.8 The criteria at the formal discussion stage will take the following into consideration:

<b>Criteria</b>	<b>Weighting</b>
Price	30%
Experience	15%
Financial Strength	10%
Service Offered	30%
Value Added	15%

## 5.0 Price Schedule

- 5.1 The Trust requires an itemised proposal of full year cost, where different rates are applicable to different aspects of the service, or to different personnel this should be disclosed.
- 5.2 All pricing submitted is to include all costs including anticipated expenses.
- 5.3 Details of the policy on price changes in future years in the case of the supplier being responsible for years four to five should be included (eg price plus inflation, RPI, CPI etc).

## **6.0 Site Visit**

- 6.1 Although we do not expect suppliers to visit the Trust in advance of their tender proposal, we will offer the opportunity to conduct a site visit.
- 6.2 If you would like to arrange a site visit, please email [tenders@tcat.uk.com](mailto:tenders@tcat.uk.com)

## **7.0 Service Requirement**

- 7.1 Full details of the information required in proposal is given in below with a full specification of requirements in Appendix 3.
- 7.2 The Challenge Academy Trust is seeking to replace the existing telephone system with a single new Unified Communications (UC) system whilst reusing some of the existing systems and hardware already procured.
- 7.3 A modernised Unified communication approach is required across all of the Trust's estates, many of the existing Telephony systems are coming the end of hardware life and or the end of the contract and will require renewing or replacing
- 7.4 The Trust have researched different systems a cloud based unified communication system with integrated voice, video and chat is a preferred system to replace the analogue and VOIP systems currently within academies and central trust.
- 7.5 It is envisaged that the acquisition of a Unified communication system will provide a robust, cloud-based system which is able to integrate seamlessly into the On-Premises and cloud systems, keeping strong security measures but allowing flexibility to both physical handsets and existing Trust wide hardware such as laptops and mobile devices
- 7.6 Other quality elements issues for the Trust are:

- 7.61 The ability to login seamlessly with SSO to the cloud-based system to make and direct calls
- 7.62 Having voicemail unified to email accounts
- 7.63 The ability to direct, transfer, park and block callers with full permission-based recording facilities
- 7.64 Ability to integrate "legacy" handsets across the Trust and a full evaluation of the handsets currently provisioned and their usage within the new unified communication system
- 7.65 A reliable cloud-based system with support available 24/7 to diagnose issues
- 7.66 A dedicated installation migration support with snagging and aftercare support

## **8.0 Overview of existing telephony and Infrastructure**

- 8.1 Telephone services are based on a combination of ISDN30 / ISDN-2 / standard analogue PSTN lines. The Trust has 12 sites with varying different levels of telephony systems with different ages
- 8.2 The charging of phone line usage lines with both BT and Virgin Media and various 3<sup>rd</sup> party companies the academies pay call usage invoices too, this may also include line rental.
- 8.3 The academies have been down their own routes regarding telephony systems over a number of years, various systems exist such as Mitel HX controller with Mitel handsets and Polycom handsets and Avaya VOIP systems.
- 8.4 The academies will have various DDI's and other analogue lines such as lift lines, red care system, fax lines and fire alarms. A breakdown of costs and provision analysis is currently in process of all academies.
- 8.5 We have 3 other "Associate academies" working with the Trust and will potentially be part of the Trust in the future, although these have been omitted from this tender there might be opportunity to add these establishments at a later date.
- 8.6 A breakdown of all academies, their handset numbers and system types are below:



Academy	Basic Handset	Conference Handset	Wireless Handsets	Advanced Handsets	Switch board
<u>Appleton Thorn Primary School</u> Controller: Mitel 3300 Handsets: Mitel 5312	12	0	0	0	1
<u>Beamont Collegiate Academy</u> Controller: Avaya IP Office 500 v2 Handsets: Avaya 960G	0	1	2	65	2
<u>Bridgewater High School</u> Controller: Avaya IP Office 500 v2 Handsets: Avaya 1416	38	2	6	37	6
<u>Broomfields Junior School</u> Controller: Panasonic KX-TD1232E Handsets: Mixed Panasonic KX-T7235E & Panasonic KX-T7433E	9	0	1	0	1
<u>Central TCAT</u> Controller: Avaya IP Office 500 v2 Handsets: BT Basic home	0	1	2	10	0
<u>Great Sankey Primary School</u> Controller: MS Teams Handsets: Yealink MP54	0	0	0	19	2
<u>Meadowside Primary School</u> Controller: MS Teams Handsets: Yealink MP54	0	0	0	22	1
<u>Padgate Academy</u> Controller: Mitel 5000 CP HX Handsets: Polycom VX400	2	1	0	37	1
<u>Penketh High School</u> Controller: Avaya IP Office 500 v2 Handsets: Avaya 5410/1608	15	1	0	39	1
<u>Priestley College</u> Controller: Mitel MiVoice 250 IP Handsets: Mitel 5304/5312/5320	106	1	1	11	2
<u>Sir Thomas Boteler High School</u>	25	1	0	27	1

Controller: Mitel 5000 CP HX Handsets: Mitel 5304/5312					
Totals	207	8	12	267	18

## 9.0 Physical Hardware – Definitions

- 9.1 Basic Handsets – A communal or shared device, basic VOIP functionality, Call transfer, hold, divert (forward), pickup, one touch speed dial, caller display, one way conference
- 9.2 Conference Handset – As above but dedicated to a conference environment with dedicated conference 2-way facilities, advanced dial in, multi way conferencing, multiple microphones, noise cancelling
- 9.3 Wireless Handsets – A mobile handset which might be connected to the Wireless network, Call transfer, hold, divert (forward), pickup, one touch speed dial, caller display, one way conference
- 9.4 Advanced Handsets – A desk based frequent phone user who needs a dedicated device to do their job - Call transfer, hold, divert (forward), pickup, one touch speed dial, caller display, 2-way conference – Possible additional panel for speed dial extensions, could be very similar to “Basic handsets”
- 9.5 Switchboard – Main usually reception controller with all call handling features for distribution across the academies by call handling staff

## 10.0 Voicemail

- 10.1 Voicemail is available on all extensions connected to the Trust academy schools, often this is Unified to email, all academy email is under a single “Priestley College” tenancy which is hosted by Microsoft 365.

## 11.0 Call Logging

- 11.1 As far as we are concerned academies are not using call logging on a day-to-day basis

## 12.0 Microsoft Teams based telephony

- 12.1 Some academies are utilising Microsoft Teams
- 12.2 These are more up to date system but will be included with the scope of this tender even though they may well still be in contract with a provider.



## 13.0 Scope

- 13.1 The Challenge Academy Trust is looking to select a supplier who has a successful track record and in-depth experience in migrating from the existing systems at the academies and a full replacement to a cloud based Unified communications system to the new solution whilst integrating with the existing methods and individual processes used at the academy sites.
- 13.2 The installation of hardware, integration into cloud based and migration of existing lines must be completed by June 2024. Each academy within the Trust will be dealt with as a separate project and planning and a phased approach is required. Therefore, the primary ambition is to create a baseline for innovation rather than deliver innovation in the initial delivery of the solution. Innovation will initially be limited to how cloud based unified communications can be utilised to improve resilience and better access to telephony. Therefore, the solution will need to achieve the following:
  - 13.21 Allow The Challenge Academy staff to voluntarily migrate to receive calls in academies by providing a new DDI or convert an existing endpoint into a softphone.
  - 13.22 Further improve the resiliency and functionality of the allowing cloud-based systems integrate into handsets, softphones (with headsets) and mobile devices.
  - 13.23 Where possible, maintaining existing configurations/services must be maintained to reduce disruption and allow the completion of capital funded works by June 2024
- 13.3 The supplier should be able to evidence a willingness to support innovation of the telephony solution for the duration of the contract and to become a partner in the improvement of telephony for the benefit of all Trust users.
- 13.4 The proposed system must include:
  - 13.41 The ability to link into existing Central tenancy arrangement to identify users.
  - 13.42 Resilient security measures.
  - 13.43 High Availability offering 99.999% reliability.
  - 13.44 Geographical Redundant.
  - 13.45 Site Survivability.
  - 13.46 Smart number capabilities as well as user abilities to enable snow and emergency messaging when needed including changing out of office messages, all this must be able to be completed at each site remotely.
  - 13.47 Support and management of the legacy systems and migrating to the new systems.
  - 13.48 Microsoft Teams integration offering on the cloud-based system.
  - 13.49 Supporting and integrating into the new Unified communications offering Legacy phone lines, such as red care, any lift lines, fire alarm and fax lines.
  - 13.50 To assess currently handset provision in each academy to see if these can be utilised.
  - 13.51 To offer a price for replacement and/or migration of handsets set in the table above.
  - 13.52 Call Line Identification available across ALL handsets.
  - 13.53 Voicemail & IVR solution for all users.

- 13.54 Ability to use App based technology to login to a mobile phone and utilise academies-based parameters.
- 13.55 Call recording on demand with users who have the permissions to do so.
- 13.56 Centralised Web based system management solution.
- 13.57 A option to install a Tannoy system across individual sites based on requirements from the academies.
- 13.6 The supplier must be able to provide or source:
  - 13.61 Ability to offer 24/7 365-day support for all systems / services.
  - 13.62 SLA for support.
  - 13.63 Major faults/incidents to be responded to within 4 hours.
  - 13.64 Minor faults/incidents to be responded to within 8 Hours.
  - 13.65 The ability to apply latest software releases within a timely manner and be proactive with regards to new system functions that are available to us.
  - 13.66 To consider growth of the Trust, we currently have 3 "Associate Academies" for whom may be considered in the future the Unified communications offering.

## **14 Cyber Security Requirements**

The Trust is Cyber Essentials certified, any suggested proposal must have this in mind as part of the submission.

- 14.1 SIP Trunks should be secured using the latest encryption technology.
- 14.2 The supplier must assure its software on client and server operating systems within six months of release.
- 14.2 The supplier must test and alert the authority of detrimental effect of patching client and server operating systems within 15 days of release.
- 14.3 Administration of the service should have the capability of additional forms of authentication.
- 14.4 The supplier should provide detailed TCP/UDP network connectivity requirements to support the operation of the service in a tightly controlled environment.

## **15 Infrastructure Requirements**

- 15.1 The academies quantity of physical handsets might change during the planning and implementation phase, TCAT and the academy will decide on the exact quantity during this phase.
- 15.2 Any infrastructure provided should be capable of seamless recovery in the event of a component failure.
- 15.3 All infrastructure provided should have dual power supplies or should be highly available within a single site.
- 15.4 Any infrastructure (which isn't cloud based) supplied as part of the contract should be rack mountable with no expectation of floor standing devices.
- 15.5 Services should be capable of being monitored at component / service level using industry standard monitoring protocols, such as SNMP, WMI.

- 15.6 The configuration of service components must be able to be backed up to another independent device / server.
- 15.7 Cloud based systems to be backed up on a nightly basis, backups to be protected and immutable where possible, backups to be visible to the appropriate admin for the Trust.
- 15.8 Cabling and infrastructure for a Tannoy system across individual academies
- 15.9 Data residency – Voicemails and Telephony data recordings must be stored in a secured area which is backed up and available to users with the correct privileges on demand, this area must be defined and agreed on.
- 15.10 CRM Integration - The availability to use CRM to manage relationships between 3<sup>rd</sup> party providers and the suggested phone system, a breakdown of professional services to incorporate this.

## Appendix 1: The Trust

Registered Address: c/o Bridgewater High School, Broomfields Rd, Appleton, Warrington, WA4 6RD  
Telephone: 01925 263919  
Website: [www.tcat.uk.com](http://www.tcat.uk.com)  
Sector Status: Multi-Academy Trust  
Company Number: 10689427  
Date of Incorporation: 1 May 2017  
CEO designate: Andy Moorcroft  
Finance Director: Damian McGuire  
Operations Director: Adrienne Laing  
Head of Human Resources: Ben Logan

The Challenge Academy Trust was formed on 1<sup>st</sup> May 2017 and has 10 academies currently with 4 primary academies, 5 secondary academies and 1 Sixth Form College. The Trust is Warrington- based and all academies are within the Warrington Local Authority area and within a 4-mile radius.

The Trust educates 8,850 children and young people, and has a total of over 791.2 FTE staff employing over 1000 people. These statistics are as of November 2023 and do not include casually employed staff.

<b>Institution</b>	<b>Age Range</b>	<b>No. Students</b>
Appleton Thorn Primary School	3-11	196
Broomfields Junior School	7-11	349
Great Sankey Primary School	3-11	355
Meadowside Community Primary and Nursery School	3-11	269
Penketh South Primary School	3-11	245
Beamont Collegiate Academy	11-16	896
Bridgewater High School	11-16	1655
Padgate Academy	11-16	628
Penketh High School	11-16	968

Sir Thomas Boteler Church of England High School	11-16	859
Priestley Sixth Form College	16-19	2430
Central TCAT	N/A	N/A
TOTAL		8850

## **Appendix 2: Information required for the Services Proposal**

### **About your company**

- Briefly outline your firm/company's credentials to provide Unified communication services for the Trust
- Demonstrate your firm/company's experience as a provider for:
  - o Academies and independent schools
  - o Other education establishments
  - o Companies with charitable status

### **About your personnel**

- Please specify the personnel who would be assigned to provide the services and their work base/office location
- Please provide a simple team organisation structure

### **Approach to supply of services**

- Please feel free to attach your company literature, service level agreement details and general specification but please also make sure to complete our tender specification to allow us to compare all submittals fairly
- Please outline your expectations of the Trust?

### **Services Specification**

- Please complete the summary specification (Appendix 3) to demonstrate which of our requirements you are able to provide

### **Pricing**

- Please complete the attached Pricing Schedule (Appendix 4) and confirm that prices quoted are fixed and inclusive of expenses and disbursements for the first full year
- Please confirm your approach to any price changes in the second and subsequent years should the firm be reappointed

### **References**

- Please give names and addresses of two referees in the education sector, one of which should be a multi-academy trust if possible

### **Added value**

- Please give details of any other support/services provided to clients designed to add value to your relationship (Appendix 4)

## Appendix 3 – Services Specification

Service	Is this included in your service provision Y/N
<b>Requirement 1</b>	
Cloud based Infrastructure	
On-Premises Infrastructure	
Microsoft Teams integration	
Main switchboard	
Physical Handsets	
Headsets	
Voicemail	
Unified communication to Email	
SSO and seamless 365/Tenancy integration	
<b>Requirement 2</b>	
App based call provision	
SIP Trunks	
Tannoy system	
Call Line Identification available across ALL handsets	
Call handling and emergency messages remote management	
Customisable call recording	
Voicemail and system backup provision	
Centralised Web based system management	
<b>Requirement 3</b>	
DDI provision	
CRM Integration	
Lift Line consideration	
Red Care Consideration	
Fire Alarm consideration	
SLA Support – 4-hour response on critical jobs	
New hardware specific multi year warranty coverage	
Associate academy – Unified comms future offering	



## Appendix 4 – Costing Return

Note – We do not have a confirmed number for the replacement of handsets currently. Therefore, please provide best price for bulk purchase. Purchasing of handsets and the final quantity will be determined during the project.

Cost	Total (excl. VAT) Annual	Total (excl. VAT) Contract Lifetime (3 Years)
Hardware – To enable a cloud based Unified comms system		
(Insert breakdown of items here, add more rows if required)		
Hardware – to enable integration with Microsoft Teams		
(Insert breakdown of items here, add more rows if required)		
Hardware – Analogue phones*		
Hardware – Digital phones*		
Hardware – IP Based phones**		
Professional Services i.e., installation, project management		
Software – Annual Costs		
(Insert breakdown of items here, add more rows if required)		
Support – Annual Costs		
Other Costs		
(Insert breakdown of items here, add more rows if required)		

\*Assume quantity is 1000 and provide best price

\*\*Assume quantity is 500 and provide best price

Total Price for service per annum .....

Signed .....

Name .....

Position .....

Date .....