

**SANITARY BOARD
OF THE CITY OF
CHARLESTON, WEST VIRGINIA,
A MUNICIPAL UTILITY**

BID DOCUMENTS

- FOR -

VOIP TELEPHONE SYSTEM REPLACEMENT

CSB

THE SANITARY BOARD



November 2018

208 Twenty-Sixth Street, West
Charleston, WV 25312
(304) 348-1084
Renee L. Graley

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1.0 RFP Introduction

1.1 Introduction

This Request for Proposals (RFP) is intended to solicit proposals from vendors capable of satisfying the Charleston Sanitary Board's needs for a small to mid-size business cost telephone system. Vendors shall provide a response outlining the roll-out of a Local Hosted Voice over Internet Protocol (VoIP) telephone system. This document provides information to assist qualified Bidders in preparing their responses and to ensure a fair and accurate subsequent evaluation and comparison process. To that end, this RFP:

- Provides information essential to soliciting meaningful recommendations and realistic commitments from the vendor;
- Specifies the format and content of proposals in response to this RFP;
- Outlines the CSB's evaluation and selection criteria;
- Establishes a schedule for the preparation and submission of proposals in response to this RFP; and,
- Establishes a performance standard for the selected vendor.

This RFP, and the selected proposal in response to this RFP, will be incorporated into the contract resulting from this solicitation; provided, however, that the contract may contain terms different from or in addition to this RFP and the successful proposal. For purposes of this RFP, the term "Vendor," "Bidder," "Responder" and "Contractor" are considered to have the same meaning.

1.2 About the CSB

The Charleston Sanitary Board (CSB) is a municipal sewer utility serving Charleston and adjacent areas of Kanawha County, WV. The CSB operates a wastewater collection system and treatment plant that provides service for approximately 23,000 customers. The CSB owns, maintains, and operates approximately 300 miles of sewage collection lines, 88 pumping stations, 5,408 manholes and a treatment plant with a sustained treatment rate capacity of 14 million gallons per day. CSB currently has Operations, Maintenance and Administrative offices at 208 26th Street West, Charleston, WV 25387.

The CSB administers a pre-treatment program for industrial customers and a grease-trap program for customers with non-domestic food preparation. These programs are administered in accordance with Charleston Ordinances and federal and state regulations. The CSB also reviews and approves building permit applications and subdivision plans prior to construction and installs taps for new customers.

The plant treatment process is preliminary, primary clarification, high purity oxygen activated sludge, digestion, secondary clarification and ultra violet disinfection. The treatment plant hydraulic capacity rate is 28 million gallons per day. Sustained full treatment rate is 14 mgpd. With an installed recombination line, CSB can short term fully treat at a rate of 21 mgpd. Average flow rate is 10 mgpd.

1.3 Project Objectives

The CSB intends to replace or update as necessary the system at multiple building locations with a modern unified system. In doing so, the CSB seeks to address several short comings in the current technology, including but not limited to:

- Limited or inadequate functionality in current systems particular Voice Mail options;
- Use of expensive and underutilized PRI type circuits from current carrier(s);
- Reduce the overall cost of ownership and recurring expenses.

To address these objectives, the CSB has published this RFP to select and implement a suitable hosted VOIP telephone system. Section 2.0, Project Scope, outlines the features and functionality desired in any proposed telephone system as well as any and all other related services bundled or part of a roll-out.

1.4 No Obligation

This RFP does not obligate the CSB to proceed with telephone system replacement project and CSB reserves the right to reject any and all proposals.

1.5 RFP Schedule of Events

The following RFP Schedule of Events represents the best estimate of the schedule the CSB intends to follow. The CSB has performed extensive planning work and intends to meet the dates described below. Vendors are encouraged to hold the demonstration dates listed. If a component of the schedule is delayed, it shall be anticipated that the remaining components will also be delayed by a similar number of days. Any significant change to the schedule will be published via RFP Addendum as specified in Section 1.11.

Table 1: RFP Schedule of Events

Event	Estimated By Date
RFP Published	November 5, 2018
Vendor/Bidder Questions Deadline	November 26, 2018
RFP Submissions Deadline	December 10, 2018, 10:00 AM
Vendor/Bidder Short List Notification (via email)	December 17, 2018
Vendor/Bidder Demonstrations / Negotiations	January 7, 2019– January 22, 2019
Contract Negotiations & Finalization	January 22, 2019– February 4, 2019
CSB Board Approval	February 16, 2019

1.6 Pre-Qualification of Vendors

No vendors are either pre-qualified or precluded from responding to this RFP unless currently barred from doing so by the state of West Virginia, the City of Charleston, West Virginia or the United States Federal Government from doing so.

1.7 Minimum Qualifications

To ensure complete and fair consideration, proposals must adequately respond and conform in all material respects to the requirements stated by this RFP, and, Bidders shall document and validate the capability to fully perform all requirements defined by the RFP. Factors to be considered include, and may not be limited to: experience, integrity, reliability, capacity and other factors CSB deems appropriate or required to provide the services defined by the RFP.

1.8 Incurred Expenses

The CSB shall not be responsible for any cost incurred by a Bidder in preparing and/or submitting a proposal or participating in presentations as part of the evaluation process.

1.9 Questions and Inquiries

Renee Graley, CSB CIS Manager, shall be the sole point of contact for the purposes of this RFP. The following table provides the primary contact information. Email correspondence is preferred to ensure all queries are properly documented and responded to.

Table 2: Point of Contact

Point of Contact
Renee Graley, CSB CIS Manager
(304) 348-1084 ext. 225
rgraley@csb-wv.com

All questions and inquiries related to this procurement, including all technical issues are to be submitted in writing via email and directed to Renee Graley using the contact information in the Table 2 above.

All questions and inquiries related to this RFP must clearly reference this RFP, and RFP Addendum, if applicable, page number and section. Questions shall be concise and numbered. In accordance with the RFP Schedule of Events in Section 1.5, all questions must be received in writing no later than the time and date specified in Table 1. Questions will be answered as soon as possible to allow Bidders to comply with the requirements of Table 1 above. Only questions and answers published through addendum shall be binding.

Bidder and vendors shall not contact any unauthorized CSB staff with any questions or inquiries. Unauthorized contact with any CSB personnel may be cause for rejection of the Bidder’s proposal.

1.10 Clarification and Discussion of Proposals

The CSB may request clarifications and conduct discussions with any Bidder who submits a proposal. Bidders (and their associated vendors) must be made available by providing CSB current contact information.

1.11 Amendments and Addenda

All clarifications and RFP revisions will be documented in an addendum and copied via email to all active Bidders in accordance with Table 1 (RFP Schedule of Events) in a timely manner. Only questions and answers documented in an addendum shall be binding. Each addendum issued shall be acknowledged and incorporated in the Bidder’s proposal.

2.0 Project Scope of Work

2.1 Project Overview

The CSB is seeking proposals for a Locally Hosted VoIP telephone system. The scope of this Request for Proposal (RFP) is for IP Phones, network equipment (if specifically required by vendor), IP Phone services, software, and training. The system will be implemented in a scheduled rollout by building not to exceed 2 months (60 days) from the signing of a contract.

2.2 Current Environment

Network Infrastructure - The CSB network consists of 13 buildings inter-connected to the main Administration office network via fiber optic and/or CAT5E network based on bandwidth data needs (QoS). Office locations will be 10Gb/s network. The Plant locations will 1Gb/s network. The current entry point (EP) of telephone service and management software is located in the basement of Laboratory Building. The CSB maintains a standard mix of network routers and switches to support and manage the environment.

Existing Systems - The CSB currently uses a single Toshiba Strata CIX phone management system. Internally, the phone system network is a VoIP phone system. CSB has approximately 80 internal phones utilized in the PBX system. Outside lines are serviced by the local telephone company and utilize copper transmission lines using a PRI. POTS lines are utilized for 3 fax lines, SCADA, Telemetry, Fire and HVAC lines. Fax lines are converted to IP using Multi-VOIP devices and then back to POTS lines at the fax device. CSB currently has 3 ACD groups that have their own DID line. These are Customer Service, Maintenance, and Administration. Details of each ACD group are listed in section 2.4 Functional and Technical Requirements.

2.3 Definitions

Term	Definition
9-1-1 Notification	A process where, whenever an extension dials 911, an administrator is notified by either automated voice or text message containing the extension that dialed.

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Announcement Line	A phone number that is not tied to a physical extension, and simply plays a recorded message (e.g. job line).
Auto-Attendant	A process that answers calls to a Hunt Group, DID, or extension and provides an interactive menu of options for the caller
Auto-Dial	A process where an extension automatically calls another extension or phone number when the handset is picked up.
Busy Redial	A process that allows an extension to repeatedly call another extension or phone number at regular intervals until it does not receive a busy signal.
Call Flow	A process that controls what happens with an incoming call. (e.g. Calls that ring an extension or Hunt Group that do not get answered after 4 rings go to voicemail/auto-attendant)
Call Forwarding	The ability to present forward a call to another extension or phone number.
Call Queue	A process by which, when all extensions in a Hunt Group or DID are busy, the system will place the caller in a queue to wait for the next available extension.
Call Waiting	The ability to place a call on hold and take an incoming call.
Digital to Analog (D2A) device	A device that allows an analog device to use a digital phone line.
Day/Night Mode	A feature that turns off the Hunt Groups at a certain time and presents a separate call flow.
Dial in Direct (DID)	A single phone number that rings on a single extension.
Do Not Disturb(DND)	A feature that prevents an extension from ringing. The call will follow the call flow designed for the extension.
Extension monitoring	The ability for one extension to see whether another extension is currently on the line.
Failover	A process which calls a backup number when an extension is not available, either through phone or network failure.
Follow me	A process by which an incoming call is rolled to another extension or phone number after a certain number of rings or time segment. (e.g., An incoming call to the director's extension will call the director's cell phone after the main extension does not answer for 20 seconds). Failed calls should go to the original extension's voicemail.
ACD/Hunt Group	A single phone number that has the ability to ring multiple extensions. Each CSB line may have multiple Hunt Groups depending on their configuration.
Integrated Voice Response (IVR)	A process where a caller can use the phone keypad or verbal inputs to respond to or make selections in the phone system.

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On demand Call recording	The ability to press a button or sequence of buttons to allow the recording of certain phone calls.
Outlook integration	The ability to start a call from a phone number in an e-mail or address book in Microsoft Outlook.
Overhead paging	The ability to page through a public-address system.
Soft phone	A program that runs on a computer or mobile device that simulates a phone extension.
Speed Dial	A process that allows a sequence of buttons to call another phone number.
Full Voice Mail Feature Set	VM service for all users including storage, forwarding to phones, PC and archive storage.
Voice Mail Recording	That specified staff (management) will have the option to record phone conversations and store such to local PC or server.
Automation and Programmability	Includes the ability for Technical staff to add/modify custom programming.

2.4 Functional and Technical Requirements

Proposals shall address the following functional and technical requirements in all four categories- General, Voicemail, Per Extension and Specific local. The proposed system must meet or exceed listed criteria. It should be stated in the proposal submission how the vendor will address listed criteria, including specific descriptions or explanations of the process where noted below.

General

The CSB is requesting the overall phone system have the following features.

ID#	Feature
G1	Integrated CSB Directory
G2	End-user interface for configuring devices
G3	Programmable auto-attendants
G4	IVR capabilities with auto-attendant
G5	Programmable Call Queue
G6	Conforms to FCC requirements for Enhanced 911
G7	3 and/or 4-digit extension dialing (currently CSB uses 3 and would like to retain same #s)
G8	ACD/Hunt Groups • Ability to log in multiple ACD/Hunt Groups
G9	Ability to tag an extension for reporting/billing purposes
G10	Failover for extensions
G11	Announcement line
G12	9-1-1 notification
G13	Reporting by tag, extension, ACD/Hunt Group including: • tag/CSB/extension • number of calls incoming • number of calls outgoing • billable numbers dialed
G14	Reporting for call queues including: • number of calls incoming/outgoing • time to answer • time on hold

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	<ul style="list-style-type: none"> • disposition of call (answered or forwarded) • extension handling call • lost/abandoned calls
G15	Configurable day/night mode for Hunt Groups
G16	Programmable call flow
G17	Always on and "On-demand" call recording
G18	Capability to replace an extension with a spare phone (explain process)
G19	Provide a wide range of phone types including: <ul style="list-style-type: none"> • Basic phone • Soft phones • Multiline phones • Expansion ports for secretaries • Wireless phones • Blue-tooth capable phones • Conference phones • Power of Ethernet
G20	Programmable hold music/message by CSB, Hunt Group, or extension
G21	Ability to block certain toll calls
G22	Ability to route specific incoming calls to an extension
G23	Ability to page a Hunt Group or all extensions
G24	Overhead paging interface
G25	Incoming Fax to e-mail
G26	D2A device for modems and/or faxes
G27	Telephone management software operating system Windows Server 2016

Voicemail

The CSB is requesting that the voicemail system have the following features.

ID#	Feature
V1	Time and Date of call
V2	Extension or number of caller
V3	Message
V4	Save message
V5	Delete message
V6	Forward/copy message to extension
V7	Forward/copy message with annotation to extension
V8	Forward/copy message to multiple extensions
V9	Text notification to recipient
V10	Voicemail forward/copy to e-mail (enable/disable capability)
V11	Remote voicemail retrieval (explain process)

Per Extension

The CSB is requesting that every extension have the following features.

ID#	Feature
E1	Call Hold
E2	Do not Disturb
E3	Call Pickup from extension

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E4	Call Pickup from Hunt Group
E5	Call Waiting
E6	Call transfer
E7	Call Forward All
E8	Call Forward Busy
E9	Call Forward No answer
E10	Voicemail
E11	Distinctive Ring
E12	Unique three or four digit extension
E13	Enhanced 911 address
E14	DID number and/or Hunt Group number
E15	Extension monitoring by light/display
E16	Incoming message/voicemail light/display
E17	AutoDial
E18	Caller ID
E19	Three way calling
E20	Follow me
E21	Speed Dial
E22	Memory Buttons
E23	Redial
E24	Busy Redial
E25	Outlook integration
E26	Password or other restriction for billable long distance
E27	Ability to reassign E911 address for mobile/travelling workers
E28	Conference Calling (include maximum number of participants)
E29	Forward call to extension voicemail
E30	Different messages for no answer or busy/DND
E31	Push to Record Conversation

Specific Requirements

The CSB will implement the system by department/call group. Specific requirements for each department/call group will be listed as a separate line item.

ID#	Department/Call Group
	Customer Service
CS1	9 Agents (2 supervisors)
CS2	1 D2A device for Fax
CS3	1 DID
CS4	1 Auto-attendant for Pool DID
CS5	Currently 1 Day mode, 1 Night mode, 1 Holiday mode
	Maintenance
MT1	9 Agents (1 Supervisor)
MT2	1 D2A device for Fax
MT3	1 DID

MT4	1 Auto-attendant for Pool DID
MT5	Currently 1 Day mode, 1 Night mode, 1 Holiday mode
	Administration
AD1	13 extensions (1 Supervisor)
AD2	1 D2A device for Fax
AD3	1 DID
AD4	1 Auto-attendant for Pool DID
AD5	Currently 1 Day mode, 1 Night mode, 1 Holiday mode

2.5 Training Plan

As part of the Project Scope, the selected vendor will develop, provide, and manage an adequate plan for training. This Training Plan must include the information described below.

1. The role and responsibility of the system and/or roll-out vendor in the design and implementation of the training plan (e.g., development of customized training materials, delivering training to CSB end-users).
2. The role and responsibility of the CSB staff in the design and implementation of the training plan.
3. Overview of proposed training plan/strategy, including options for on-site and/or off-site training services, for the core project team, end-users, and technology personnel.
4. Proposed training schedule for CSB personnel of various user and interaction levels.
5. Descriptions of classes/courses proposed in the training plan. (The vendor should specify the unit of measure for its training, e.g., units, classes, days, etc., and define the hours associated with these units of measure.) The vendor must be very clear about exactly what training courses are included in the cost of the proposal.
6. The knowledge transfer strategy proposed by the software and/or roll-out vendor to prepare CSB staff to maintain the system after it is placed into production.
7. Detailed description of system documentation and resources that will be included as part of the roll-out by the vendor including, but not limited to, detailed system user manuals, "Quick Reference" guides, online support, help desk support, user group community resources, and others as available.

It is the CSB's intention that the selected vendor will coordinate the training of CSB personnel in the use of its system/s and that satisfactory implementation of an approved training plan will be a key component of this project's deliverables.

Documentation, including training manuals and agendas, will be provided by the Bidder/vendor before each training session with CSB staff.

2.6 System Documentation

As part of the Project Scope, the selected vendor will develop and provide documentation that describes the features and functions of the proposed application software. The documentation shall be provided for both users and the technical personnel who will administer and maintain the system. It is desirable that differing levels of documentation (user documentation and technical documentation) exist. The selected vendor shall provide documentation in web-based and PDF forms for each application module.

Bidders shall provide sample System Documentation as part of proposal submission, in accordance with the Submittal Response Format described in Section 5.0. In addition, vendors shall provide an overview of the system documentation that will be provided as part of system roll-out.

3.0 General Terms & Conditions

GOVERNING LAW: This Request for Proposal shall be subject to and governed under the laws of the State of West Virginia.

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TAXES: All sales to the Sanitary Board of the City of Charleston, West Virginia are exempt from Consumers Sales Tax and Use Tax of the State of West Virginia and all Federal Taxes.

REVISIONS TO THE OFFICIAL RFP: No vendor/Bidder shall modify, revise, edit or make any unauthorized change(s) to this Request for Proposal (RFP). The Official solicitation document and the Addenda(s) are the documents posted on the CSB's web site and/or available at the CSB Administration office. Any such violation as stated above may result in rejection of a RFP response. In addition, violations may result in the debarment of the vendor/Bidder by the CSB from any future requests to bid.

CLARIFICATION OF TERMS: If any prospective (vendor/Bidder) has questions about the specifications or other solicitation documents, the prospective (vendor/Bidder) should contact the person whose name appears on the face of the solicitation no later than five working days before the Bid due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.

PAYMENT:

1. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
2. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. However, this shall not affect offers of discounts for payment in less than 30 days.
3. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail.
4. Individual contractors shall provide their social security numbers, and proprietors, partnerships, and corporations shall provide the CSB with a federal employer identification number, prior to receiving any payment from the authority.
5. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should take notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve the CSB of its prompt payment obligations with respect to those charges which are not in dispute.

PRECEDENCE OF TERMS: General Terms and Conditions shall apply in all instances. In the event there is a conflict between any of the General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.

QUALIFICATIONS OF (BIDDERS/VENDORS): The CSB may make such reasonable investigations as it deems appropriate to determine the ability of the (Bidder/Vendor) to perform the services/furnish the goods and the (Bidder/Vendor) shall furnish to the CSB all such information and data for this purpose as may be requested. The CSB reserves the right to inspect (Bidder's/Vendor's) physical facilities prior to award to satisfy questions regarding the (Bidder's/Vendor's) capabilities. The CSB further reserves the right to reject any (bid/ proposal) if the evidence submitted by, or investigations of, such (Bidder/Vendor) fails to satisfy the CSB, in its sole judgement, that such (Bidder/Vendor) is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.

TESTING AND INSPECTION: The CSB reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written prior consent of the CSB, which consent may be given or denied in the sole judgment of CSB.

CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:

1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

2. The CSB delegated agent may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for reasonable additional costs incurred as the result of such order and shall give the CSB a credit for any savings.

DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the CSB, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies, which the CSB may have.

CANCELLATION OF THE CONTRACT: The CSB may cancel this order without penalty or payment of cancellation charges of the seller contractor fails to make delivery as specified, or within a reasonable time if no time for delivery is specified or fails to comply with any provisions of this order or for any other good cause.

TRANSPORTATION AND PACKAGING: By submitting their (bids/proposals), all (Bidders/Vendors) certify and warrant that the price offered for FOB destination includes only the actual freight rate costs at the lowest and best rate and is based upon the actual weight of the goods to be shipped. Except as otherwise specified herein, standard commercial packaging, packing and shipping containers shall be used. All shipping containers shall be legibly marked or labeled on the outside with purchase order number, commodity description, and quantity (NOT NORMALLY REQUIRED FOR SERVICE CONTRACTS).

INDEMNIFICATION: Seller shall indemnify, defend, and hold CSB and its officers, directors, agents, employees, successors and customers harmless from any and all claims, liabilities, loss, cost, expenses, settlements or damages arising out of infringement of any patent, trademark, copyright, or misappropriation of any trade secret, or infringement of any other intellectual property right.

BID/PROPOSAL ACCEPTANCE PERIOD: Any bid/proposal resulting from this solicitation shall be valid for (60) days. At the end of the (60) days the bid/proposal may be withdrawn at the written request of the Bidder/Vendor. If the bid or proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is canceled.

4.0 Proposal Evaluation and Award

4.1 Evaluation Process

The CSB's Evaluation Committee will initially review and evaluate each proposal received to determine the Vendor's ability to meet the RFP requirements. The evaluation criteria described in Section 4.2 will be the basis for evaluation.

The Evaluation Committee will select a minimum of two (2) bids by Vendors best suited to meet the needs of the CSB based on the scoring of the evaluation criteria.

The CSB, at its sole discretion, reserves the right to have system demonstrations with those Vendors on the Vendor Short List. Such demonstrations will be conducted at CSB offices. Time limitations and demonstration requirements will be provided with the notification. Each Evaluation Committee member will score the demonstration. Demonstrations may involve a scripted demonstration as well as a demonstration "lab."

The CSB may request additional information or clarification of proposals and hereby reserves the right to select the particular response to this RFP that it believes will best serve its business and operational requirements, considering the evaluation criteria set forth below.

4.2 Evaluation Criteria

Selection shall be made of two (2) or more Vendors, deemed to be fully qualified and best suited among those submitting proposals, on the basis of the factors involved in the RFP, including price. Negotiations shall then be conducted with each of the Vendors so selected. Price shall be considered but need not be the sole determining factor. After negotiations have been conducted with each Vendor so selected, the CSB shall select the Vendor which, in its sole opinion, has made the best proposal, and shall award the contract to that Vendor.

The evaluation criteria in the following table are intended to be the basis by which each proposal will be evaluated, measured, and ranked. The CSB hereby reserves the right to evaluate, at its sole discretion, the extent to which each proposal received compares to the stated criteria. The recommendation of the Evaluation Committee shall be based on the evaluations using the criteria.

Table 3: Evaluation Criteria

Criteria	Description	Maximum Score
Functional & Technical	A clearly demonstrated understanding of the work to be performed and completeness and reasonableness of the proposing firm's plan for accomplishing the requested services.	30 points
Experience	This criterion considers (1) the Vendor's past performance on any CSB contracts, (2) the results of reference checks, and (3) the Vendor's experience in providing the services solicited by this RFP as set forth in the Vendor's response.	30 points
Initial Cost	Phone types presented as well as the reasonableness of initial equipment pricing.	20 points
Ongoing Costs	The cost of on-going maintenance and service. This includes service request response time and proximity to CSB.	20 points
TOTAL POSSIBLE POINTS:		100 points

As part of the evaluation process, the CSB may ask questions from Vendors. The CSB reserves the right to cancel this RFP at any time or reject any or all proposals received as a result of this RFP if it is in the best interest of the CSB.

4.3 Best and Final Offer

A Best-and-Final-Offer process may be initiated if CSB determines that is in its best interest. Such process may be initiated following the Vendor Short List, ongoing contract negotiations or at any other evaluation process step.

Additional processes of scope and cost clarification may be employed as part of this evaluation process.

4.4 Notice of Award

After the completion of contract negotiations and board approval, the CSB will issue a written Notice of Award. The scores and placement of other Vendors will not be part of the Notice of Award.

5.0 Submittal Response Format

5.1 General Instructions

The following instructions must be followed by Vendors submitting proposals:

1. Each proposal must be submitted in a sealed envelope bearing on the outside the Name of the Bidder, Bidder Address, "Bid Proposal- VOIP Telephone System Replacement, December 10, 2018, 10:00 AM".
2. Where sealed proposals are forwarded by mail, they shall be enclosed in another envelope addressed labeled with the Name of the Bidder, Bidder Address, "Bid Proposal- VOIP Telephone System Replacement, December 10, 2018, 10:00 AM". This is to ensure the bid being received at the proper location by the proper bidding time and to prevent accidental opening of the main bid package.
3. All bids must be submitted upon the Bid or Proposal Form furnished by the Owner. All blank spaces must be filled in as noted in ink or type written. Bids must give the prices proposed in figures with

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amounts extended and totaled where required. No changes shall be made in the form or in the items mentioned therein. Erasures and other changes in the bid must be explained or noted over the initials of the bidder's representative. In the event of any discrepancy between the written amounts and the figures, the written amounts shall govern. The form shall be completely executed in ink or type written and shall be signed by the Bidder. Bid Proposal Form is provided as **Attachment C**.

4. Bids by corporations must be executed in the corporate name by the president or a vice president (or other corporate officer accompanied by evidence of authority to sign). The corporate address must be shown below the signature. Bids by partnerships must be executed in the partnership name and signed by a partner, whose title must appear under the signature, and the official address of the partnership must be shown below the signature. All names must be typed or printed below the signature.
5. The bidder shall submit a list by name and address of all stockholders owning 5% or more of the bidders outstanding stock. In the case of partnerships or sole proprietorships, those owning 5% or more interest in the entity must be listed.
6. Vendors shall submit four (4) identical hardcopies of the Proposal to the CSB at the address contained in Table 4 below. One (1) hardcopy of the Proposal should be clearly marked as "Original," and the remaining copies should be clearly marked "Copy."
7. All expenses for making this proposal to the CSB shall be borne by the Vendor.
8. Time is of the essence with respect to the deadline specified in Table 1, RFP Schedule of Events, above. Any proposal received after this time and date will not be considered. No faxed or emailed proposals will be accepted. It is the sole responsibility of the Vendor to see that the proposal is delivered and received on time. Late or incomplete proposals will not be accepted. The CSB reserves the right to reject any and/or all proposals and further reserves the right to waive or not waive any informality in any proposal.
9. Proposals should be provided in three-ring binders, or other suitable binding, with tab separators. The organizational guidelines for proposal responses are listed in Table 5 below.
10. Proposals should be mailed, or hand delivered to the mailing address contained in the following table.

Table 4: Proposal Mailing Addresses

CSB Mailing Address
Charleston Sanitary Board 208 26 th Street W Charleston, WV 25387 RFP- VOIP Telephone System Replacement ATTN: Renee Graley

The following table contains the organization suggested guidelines for proposal responses.

Table 5: Technical Proposal Organization Guidelines

Tab/Section No.	Proposal Section	RFP Sec. No.
Tab 1	Cover Page and Executive Summary	5.2
Tab 2	Proposed System	5.3
Tab 3	System Support	5.4
Tab 4	Company Background and History	5.5
Tab 5	Functional and Technical Requirements Response	5.6
Tab 6	Sub-Contracting	5.7
Tab 7	References	5.8

Tab 8	Exceptions to Terms and Conditions	5.9
Tab 9	Attachments: Required Forms	5.10
Tab 10	Bid Proposal Form	5.11

5.2 Cover Page and Executive Summary

The first tab of the proposal should contain the Cover Page of the RFP and an Executive Summary. The Cover Page shall be signed by an authorized representative of the company such as the owner, partner, or in the case of a corporation, the President, Vice President, Secretary, or other corporate officer(s).

The Executive Summary should provide a brief summary of the proposal contents, emphasizing any unique aspects or strengths of the proposal. Tab 1 should not exceed four pages.

5.3 Proposed System

The second tab of the proposal should include a textual description of the proposed system for providing the services described in Section 2.0, Project Scope. This section must include a summary description of the system’s capabilities to meet the requirements set forth in Section 2.6, Functional and Technical Requirements. The purpose of this summary is to ensure the CSB has a high-level understanding of the proposed system. The narrative should be written for an audience of the end-user community.

Additionally, this section must also more specifically address the following:

- What is the product name and version/level being supplied?
- Are phones provided through the vendor? If so, please list available phones and include price list. Include any warranty information for phones. If no, give a list of supported phone vendors and models, and briefly explain the commissioning process for phones.
- Must phones be provided through the vendor and only through the vendor?
- How often is the software for the phone system upgraded? What is the cost of the upgrade(s)?
- Does the product require specialized switching equipment? If so, please include specifications and procurement options and pricing.
- How and where is voicemail stored? How is it secured? What is the maximum storage capacity per user/system?
- How and where are recorded calls stored? How are the calls retrieved? How are they secured? What is the maximum storage capacity per user?
- Provide screen shots of administrative interface.
- Provide screen shots of end-user interface.
- Provide sample reports for departmental usage, call queue reports, etc.
- Does your solution provide for monitoring an extension (no parties can hear), coaching an extension (only the extension can hear you), or “barging in” on a call (all parties can hear)?
- What is the maximum number of incoming calls supported?

Marketing materials should not be submitted on the proposed functionality.

Vendors shall describe any assumptions made in proposals in detail. These should include any assumptions related to the current CSB technical environment, staffing, project management approach, and CSB resources available during roll-out and support phases.

5.4 System Support

The third tab of the proposal should include a textual description of the support available for the proposed system. This section must include a summary description of the support system’s operations and capabilities and any potential limitations. The purpose of this summary is to ensure the CSB has a high-level understanding of the support process. The narrative should be written for an audience of the end-user community.

This section must also more specifically address the following:

- What is your total downtime for the past 1 year? 2 Years?
- What are your technical support hours?

- Do you provide a Service Level Agreement? Please summarize and include.
- What is your average resolution time for incidents, events, and problems?
- What is the pricing structure for support and maintenance based upon? Number of users, lines, etc?

Marketing materials should not be submitted on the system support.

Vendors shall describe any assumptions made in proposals in detail. These should include any assumptions related to the current CSB technical environment, staffing, project management approach, and CSB resources available during roll-out and support phases.

5.5 Company Background and History

The fourth tab of the proposal should include a comprehensive narrative history of the firm, including the development of its experience in providing services similar to those described in Section 2.0, Project Scope. The following points should be addressed in the third tab of the proposal.

- Total number of employees;
- Office locations;
- Total number of active clients;
- Total number of active government clients;
- Total number of active similar clients (if any);
- Total years offering systems similar to the proposed system;
- Largest active government installation including population;
- Smallest active government installation including population;
- Other products offered by company;
- If the firm’s legal name was changed in the last 5 years;
- If the firm is currently involved in any pending or current litigation.
- (For contracts greater than \$25,000 only), if selected to be on the short list the firm will provide copies of their current financial statements.

If a partnership with third-party companies is a part of a proposal, the company background and history shall be provided for all third-party companies. It is expected that all of the points above shall be addressed for each company involved in a proposal, prime or third-party.

5.6 Functional and Technical Requirements Response

The fifth tab of the proposal should include a textual description of the vendor’s capability to provide the CSB’s requirements set forth in Section 2.6, Functional and Technical Requirements. This tab shall include a completed requirements matrix aligned with the specific requirements set forth in Section 2.6, Functional and Technical Requirements. Vendor shall provide the completed matrix in table format and will align with the following format. Responses shall be provided utilizing the indicators in Table 6 below. Additional comments may be added in the “Comments/Notes” column.

Requirement ID	Feature	Response	Comments/Notes
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When providing responses to the requirements set forth in Section 2.6, Vendors shall use the response indicators contained in the following table.

Table 6: Requirements Response Indicators

Indicator	Definition
S	Feature/Function is included in the proposed system release.
F	Feature/Function will be available in a future system release.
C	Feature/Function is not included in the current system release, and is not planned to be a part of a future system release. However, this feature could be provided with custom modifications.

T	Feature/Function is not included in the current system release, and is not planned to be a part of a future system release. However, this feature could be provided with integration with a third-party system.
N	Feature/Function cannot be provided.

If a response indicator of “F” is provided for a requirement that will be met in a future system release, the Vendor shall indicate the planned release version as well as the time the release will be generally available. If a response indicator of “C” is provided for a requirement that will be met through a custom modification, the Vendor shall indicate the cost of such a modification. If a response indicator of “T” is provided for a requirement that will be met by integration with a third-party system, the Vendor shall identify this third-party system and include a cost proposal to secure this system.

5.7 Sub-Contracting

The sixth tab of the proposal should identify any of the required services that are proposed to be sub-contracted, if any. For each of these services the following shall be provided:

- Summary of service;
- Reasons for sub-contracting;
- Proposed sub-contractor(s);
- Detailed sub-contractor responsibilities;
- Sub-contractor name;
- Sub-contractor location;
- Sub-contractor experience;
- Previous use of sub-contractor; and
- All additional relevant information.

5.8 References

The seventh tab of the proposal should identify the Vendor’s references for the project. Vendors shall provide at least three (3) substantive clients with whom the Vendor has worked during the past three (3) years that are of similar size and complexity to the CSB. References shall be from past clients that have been live with the vendor installed phone system for a minimum of one (1) year where possible.

Vendors shall complete a Vendor Reference Form for each of the references as contained in Attachment A. Completion of Attachment A shall indicate that the Vendor grants consent for the CSB to contact references given.

In the event the Vendor cannot provide the required references, substitution of other organizations should be made to ensure three (3) total references are provided. Vendors shall indicate how these substitute references deviate from the requested characteristics.

5.9 Exceptions to Terms and Conditions

The eighth tab of the proposal should include any exception the Vendor takes to the terms and conditions set forth in this RFP. It is the CSB’s intention to be made aware of any exceptions to terms or conditions prior to contract negotiations.

5.10 Required Forms

The ninth tab shall include all required forms. These include:

- Any and all addenda, signed (if applicable)
- Any and all forms contained within.

5.11 Bid Proposal Form

The tenth tab is the Bid Proposal Form.

6.0 Contract Term

The initial term of the contract will be for six (6) months from the date that the contract is signed. At the CSB's option, any extended service contract may be renewed or extended for up to five (5) additional one (1) year terms. All terms and conditions shall remain in force for the term of the contract and for any renewal period unless modified by mutual agreement of both parties. Cost of services shall not be increased during the initial term of the contract. Cost of services for any renewal periods will be subject to the mutual agreement of both parties. Attachment B is offered as an example contract format.

ATTACHMENT A: Vendor Reference Form

Vendors shall complete a Vendor Reference Form for each provided reference in accordance with Section 5.8 of the RFP.

1. General Background

Name of Client:

Number of Employees:

Operating Budget:

Address:

Project Manager/Contract:

Title:

Phone Number:

E-Mail Address:

Summary of Project and Current Status:

2. Project Scope

Please indicate all modules that were implemented as part of the project:

3. Project Information

Total Project Budget:

Project Start Date:

Project End Date:

ATTACHMENT B: SAMPLE STANDARD CONTRACT RFP

This Contract entered into this ___ day of _____ 20___, by _____ hereinafter called the "Contractor" and Charleston Sanitary Board, called the "CSB".

WITNESSETH that the Contractor and the CSB, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the goods/services to the CSB as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From _____ through _____.

The contract documents shall consist of:

(1) This signed form;

(2) The entire CSB Request for Proposal (no revisions by the Contractor)

dated: _____

If applicable, any Official CSB Addenda:

#1, dated: _____

(3) The Contractor's Proposal dated _____ and the attached negotiated modifications (if applicable) to the Proposal, all of which documents are incorporated herein.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

CHARLESTON SANITARY BOARD:

By: _____

By: _____

Title: _____

Title: _____

ATTACHMENT C: BID PROPOSAL FORM

**THE SANITARY BOARD OF THE CITY OF CHARLESTON, WV
FOR
VOIP TELEPHONE SYSTEM REPLACEMENT**

Bid Opening: Monday, December 10, 2018, 10:00 EST

Company Name: _____

Company Address: _____

Telephone No.: _____

Fax No.: _____

Email Address: _____

The above named company having carefully examined the Bid Documents and being fully informed with regard to the conditions to be met with the proposed equipment and/or items, and having read and examined the Bid Documents, Bid Proposal Form and any and all Addenda pertaining to this bid, and having had all questions or apparent discrepancies fully resolved, the undersigned proposes to provide and deliver all items specified in the Bid Documents, complete in every detail, all in full compliance and conformity with the Specifications on file at the Sanitary Board of the City of Charleston at 208 26th Street W, Charleston, WV 25387, for the following prices:

Qty	Unit	Description Bid in Pricing in Writing	Bid Price in Numbers
100	EA	Telephone Handset _____ dollars, and _____ cents	
1	EA	System Software License (per agent/phone) _____ dollars, and _____ cents	
1	YR	Maintenance and Support _____ dollars, and _____ cents	
1	EA	Initial Setup Cost _____ dollars, and _____ cents	

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AT THE OWNER'S DESCRETION, THE OWNER MAY ORDER ADDITIONAL UNITS, INCLUDING ANY OPTIONAL EQUIPMENT, BASED ON THE UNIT PRICES SHOWN ABOVE.

Total Bid Price in Writing	Total Bid Price in Numbers
<p align="right">_____dollars, and</p> <p align="center">_____cents</p>	<p align="center">\$ _____</p>

Respectfully submitted:

SIGNATURE	TITLE	DATE