

Cloud Base Voice over IP (VOIP) Phone System

Request for Proposals (RFP)

Issued 07/9/2020



1525 Washington Street West
Charleston, WV 25387
P: 304.348.6451/F: 304.348.6455
www.ckha.com



THIS PAGE INTENTIONALLY
LEFT BLANK

Table of Contents

I. GENERAL INFORMATION	1
A. Introduction.....	1
B. Overview.....	1
C. CKHA’s current phone system	2
II. GENERAL TERMS AND CONDITIONS	2
A. Review and Compliance.....	2
B. Proposal Terms	2
C. CKHA’s Reservation of Rights-Right to reject, waive, or terminate the RFP.	2
D. Contract Term.....	3
III. OBJECTIVES & REQUIREMENTS	3
A. Objectives	3
B. General Requirements.....	4
C. Specific Requirements	4
D. Current Phone Status & Locations.....	6
E. Insurance	6
F. Business References	7
IV. PROPOSAL PRICING	7
A. Cost Items	7
B. Payment.....	7
V. PROPOSAL SUBMISSION	7
A. Deadlines & Delivery	7
B. Questions from Prospective Vendors.....	8
C. Organization/Formatting.....	8
D. Content	8
VI. CONTRACT AWARD.....	9
A. Contract Conditions.....	9
B. Affirmative Action.....	9
C. Proposals Open to Public.....	9

VII. PROPOSAL EVALUATION.....10

 SCORING SUMMARY 10

Appendix A.....11

 VOIP PHONE SYSTEM APPLICATION COVERSHEET 22

 Non-Collusin Affidavit – **Signature Required**

 Form HUD-5369, Instruction to Bidders for Contracts

 Form HUD-5369A, Representations, Certifications, & Other Statements of Bidders

 Form HUD-5369-B, Instructions to Offerors - Non-Construction

 Form HUD-5369-C, Certifications and Representations of Offerors - Non-Construction Contract

 Form HUD-5370-C, General Conditions for Non-Construction Contracts

VOIP Phone System
REQUEST FOR PROPOSALS (RFP)
INSTRUCTIONS

I. GENERAL INFORMATION

A. Introduction

Charleston-Kanawha Housing Authority (CKHA) is a public housing agency established in 1939. The agency's main office is located at 1525 Washington Street West, Charleston, WV 25387.

CKHA's mission is to provide every resident with a decent, safe, affordable place to live while linking or providing programs that will assist them on their journey to self-sufficiency.

CKHA is headed by a Chief Executive Officer and governed by a five-person Board of Commissioners (BOC) and is subject to the requirements of Title 24 of the Code of Federal Regulations (CFR), state law, program and administrative policies. There are approximately 70 staff members in the organization who perform the following functions: property management, resident service coordination, administrative/finance functions, maintenance/modernization services and rental assistance program administration.

CKHA assists eligible families to address their housing needs through a variety of housing programs including Low Rent Public Housing and Housing Choice Vouchers (HCV). CKHA owns and operates 1,148 units of public housing at 12 sites and assists over 3,000 families through the HCV program in Kanawha, Putnam, and Clay Counties.

CKHA operates a non-profit instrumentality, Housing Innovations Corporation (HIC) a 501 (c) (3) entity, created in 2005 to serve as CKHA's development and management component. In 2007, CKHA began to redevelop its severely distressed public housing sites through the Low-Income Housing Tax Credit program. To date, a total of ten phases have been completed, representing an investment of \$75 million, resulting in 396 new units of affordable housing. All units are managed by HIC, including 204 through the Project-Based Voucher program.

For more information on CKHA and its rental assistance programs, please visit the Housing Authority website at www.ckha.com.

B. Overview

In this Invitation for Proposal for a Cloud Base Voice over IP (VOIP) Phone System (the "Invitation"), CKHA is requesting proposals from experienced, qualified, and professional companies to facilitate a comprehensive telephone system replacement and installation.

Services under this RFP will include, but are not limited to phone system design, equipment procurement and installation, and a comprehensive training plan for both users and administrators.

CKHA's administrative office building is located at 1525 Washington Street West, Charleston, WV 25387. The replacement cloud phone system must be installed at the location and ready for production use by October 1st, 2020. In addition, 12 other remote offices will need to be a part of this project.

C. CKHA's current phone system

CKHA currently has the following:

- Key System Units (KSU) Phone System
- Currently have Meraki networking at our Administrative Office and CISCO 800 series for all remote locations.
- Do not currently have any phone over ethernet capabilities
- For a list of number of phones please see Section III.D.

II. GENERAL TERMS AND CONDITIONS

A. Review and Compliance

It is the responsibility of each Vendor to review this entire document, including its attachments, and comply with all requirements of this Invitation. "Vendor" refers to any person or entity who may, or does, submit a proposal in response to this Invitation.

B. Proposal Terms

All proposals submitted by Vendors and received by CKHA will be treated as contract offers. A Vendor's proposal must remain open from the time of receipt of the proposal by CKHA and continue for a minimum of 90 days after the date of Vendor's product demonstration, pursuant to this Invitation, and may not be unilaterally modified by the Vendor during that period.

Alterations, modifications or variations of a proposal after the submission deadline will not be considered by CKHA, unless authorized by an amendment or addendum to this Invitation issued by CKHA.

In the case of any award pursuant to this Invitation, the awarded Vendor must keep in effect all proposal terms, including pricing, throughout any contract negotiations.

C. CKHA's Reservation of Rights-Right to reject, waive, or terminate the RFP.

CKHA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, in its sole and absolute discretion if deemed by CKHA to be in its best interests.

1. Right to Not Award. CKHA reserves the right not to award a contract pursuant to this RFP.

2. Right to Terminate. CKHA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon five (5) days written notice to the successful Vendor(s).
3. Right to Determine Time and Location. CKHA reserves the right to determine the days, hours and locations that the successful Vendor(s) shall provide the services called for in this RFP.
4. Right to Retain Proposals. All proposals submitted, including all items and materials submitted as part of the proposals, become the property of CKHA, whether or not selected. Proposals may be appended by CKHA to any contract between CKHA and Vendor providing such materials. CKHA may permit the withdrawal of proposals when requested in writing by the Vendor.
5. Right to Reject Any Proposal. CKHA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not limited to incomplete proposals and/or proposals offering alternate or non-requested services.
6. No Obligation to Compensate. CKHA shall have no obligation to compensate any Vendor for any costs incurred in responding to this RFP.
7. Right to Prohibit. CKHA shall reserve the right to at any time during the RFP or contract process to prohibit any further participation by a Vendor or reject any proposal submitted that does not conform to any of the requirements detailed herein.

In no event will CKHA permit modification to a Proposal after the submission deadline.

D. Contract Term

The initial term of the contract awarded, pursuant to this invitation, will be for a minimum of three (3) years from the date the contract is executed between the Vendor and CKHA. CKHA reserves the sole right and option to extend the contract in incremental terms of one (1) year each which, including the initial contract term, will not exceed a total of five (5) years.

III. OBJECTIVES & REQUIREMENTS

A. Objectives

CKHA's expectation is to have a fully functional cloud base voice over IP phone system installed and ready for use at all CKHA offices by October of 2020. The selected Vendor will have access to buildings as needed during install as so long as it is coordinated with the CKHA Project Coordinator. Necessary hardware and cabling shall be installed and tested by the Vendor. Training for administrators and users shall be conducted prior to the cutover to the new system.

B. General Requirements

Proposals must demonstrate the Vendor's understanding of CKHA's needs and expectations as prescribed in this Invitation, and must demonstrate the Vendor's capability to meet those needs and requirements

C. Specific Requirements

The Vendor will provide the following scope of work:

Propose a solution that the Vendor deems the best fit based on the size of the organization and scope of the RFP:

- Design, configure, install, and test any necessary phone system hardware
- Configure and install phones and necessary peripherals
- Execute a cutover plan that allows us to retain existing phone numbers and extensions
- Provide training to staff on administrator functions
- Provide training to end users on general use of phone and phone system features

Below are the telephone system features, both required and optional, that CKHA is seeking under this Invitation:

Required Features:

- Adequate size – system must support a minimum of 80 handsets and extensions but should allow scalability for future expansion
- Retain existing phone numbers & extensions if possible
- Redundancy/high availability – ensure there is no “single point of failure” for the system, or that it is quickly recoverable
- Auto Call Distribution (ACD) – the ability for multiple users to login to a queue and have the system distribute calls across the available users. Single sign-on or login from the computer would be desirable.
- Auto-attendant / call flow programming – self-service call routing by listening to menu options and selecting the appropriate option.
- Dial by name/extension directory - allow users to search for an employee if they know the name or extension without having to go through reception
- Call logging and reporting – run reports on incoming and outgoing call volume, call distribution, call length, numbers, etc.
 - Intuitive user-driven ad-hoc report building capabilities
- Day/night mode – automatic or easily changeable call routing when the business is closed (for example, after 5 pm, calls go straight to voicemail or auto-attendant).
- Headset support – support for wireless/hands-free headsets either provided by the system manufacturer or support for third-party options
 - Staff would like longer range headsets for mobility (for example, going to retrieve a file while still being able to speak to a caller)

- Soft phone support – make/receive calls through a PC, and/or allow the routing of calls through the computer if someone is away from their desk
- Must have mobility/cellular app
- Device to user routing
- Call recording – ability to record calls to audio files
- Support for integration with Outlook
- Click to Call Applications
- Faxing – ability to send online faxes or faxes through email – this could also be outsourced
- Staff directory – quickly locate a staff phone number/extension through the phone system or computer without having to manually update phone lists
- Unified messaging – voicemail sent to email, or voicemail stored online on the phone system, ideally with size limitation/quota options
- Staff training – vendor-provided training on phone system usage and features
- Including user guides, or cheat sheets
- Technical support service level agreements – ensuring that the turnaround time for technical support issues is within an acceptable timeframe
- Must be Cloud Base System

Call presence settings –

- Pre-defined voicemail/call-routing options for different scenarios such as out of office, on vacation, away from desk, etc.
- Support for integration with Outlook
- Voicemail customization – ability to customize settings such as allowed length
- Conference/two-way calling – call one or more people, or provide conference lines that can accommodate three or more people
- Caller ID – display name and number of caller when possible
- Phone handset controls – ability to easily mute, transfer, silence, send calls to voicemail
- Call forwarding – ability to forward calls to a different extension or mobile phone with an option of where voicemail is left if no one answers
- Intuitive user interface – administrative console that is easy to navigate with the ability to allow users to control some phone functions online
- Emergency/911 call alerting – notify select users if someone dials 911 from a company phone so that first responders can assist
- Multiple extensions on a single handset – ability for an executive assistant to see multiple lines ringing from a single handset and be able to answer any of them
- Speed dial – allow users to have simple or one-button calling to extensions they frequently dial

Optional/Desired Features:

- Power over Ethernet – power phones by network cable connected to POE capable switch
- Hold music – callers listen to music while placed on hold (statistically they are likely to remain on the line longer if the line is not silent)
- Video calls – support for handsets with screens and video-calling capability

D. Current Phone Status & Locations

Administrative Office – (2) Reception Console
(3) Conference Sound stations
(45) IP Desk Phones
(2) Analog – 1 for fire and 1 for elevator
Administrative Office Central Supply – (1) IP Desk Phone, (1) Fax Line
Dunbar – (1) IP Desk Phone, (1) Fax Line
Rand – (1) IP Desk Phone, (1) Fax Line
Orchard – (3) IP Desk Phones, (1) Fax Line, (3) Fire Alarm Cell Dialers
Orchard Maintenance Shop – (1) IP Phone
Little Page – (1) IP Desk Phone, (1) Fax Line, (7) Fire Alarm Cell Dialers
Jarrett – (1) IP Desk Phone, (2) Analog lines – 1 for fire and 1 for elevator, (1) Fax Line, and (1) Fire Alarm Cell Dialer
Lippert – (2) IP Desk Phones, (1) Fax Line, (2) Analog lines – 1 for fire and 1 for elevator
South Park – (1) IP Desk Phone, (1) Fax Line
Lee – (1) IP Desk Phone, (2) Analog lines – 1 for fire and 1 for elevator, (1) Fax Line
Washington Manor – (2) IP Desk Phones, (1) Fax Line, (6) Fire Alarm Cell Dialers, (1) Analog for Elevator
Oakhurst – (1) IP Desk Phone, (1) Fax Line
Hillcrest – (1) IP Desk Phone, (1) Fax Line
Carroll – (1) IP Desk Phone, (1) Fax Line, (2) Analog lines, 1 for fire and 1 for elevator

E. Insurance

During the term of any contract awarded pursuant to this RFP, Vendor, at its sole cost and expense, will provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the contract. At a minimum, such insurance shall include:

Commercial General Liability coverage, occurrence basis, with a minimum of \$1,000,000 combined single limit (with defense cost in excess of limit of liability); and (Professional Services Liability or Errors and Omissions coverage, with a minimum limit of insurance of \$1,000,000.

Vendor's insurance coverages must be primary insurance with respect to CKHA. Any insurance maintained by CKHA will be excess of Vendor's insurance and will not contribute with it.

Vendors must address this question in their proposals: Does your organization currently have or will your organization be able to provide the insurance requirements as specified in this RFP?

Any exceptions and/or assumptions to the insurance requirements must be identified in the Vendor's response. Exceptions and/or assumptions will be taken into consideration as part of the evaluation process; however, vendors must be specific. If vendors do not specify any exceptions and/or assumptions at time of proposal submission, CKHA will not consider any additional exceptions and/or assumptions during any negotiations.

Upon contract award, the successful Vendor must provide certificates of insurance identifying the coverages specified in this RFP in a form acceptable to CKHA.

F. Business References

Vendors must provide a minimum of three (3) business references from clients who implemented a new VOIP Phone System of similar scale and composition as described in this Invitation within the last three (3) years. CKHA reserves the right to contact and verify any or all references provided.

IV. PROPOSAL PRICING

A. Cost Items

The Vendor must provide:

- A pricing break-down of monthly and upfront install cost.
- An all-inclusive firm fixed price covers all deliverables, labor, materials, and out-of-pocket, travel and other expenses relating to the specific item listed below.
- The basis of the price and any underlying assumptions (including assumptions concerning travel expenses) must be included in the Vendor's cost proposal.
- Include all necessary labor, hardware, software, configuration and programming and the selection of the proper type and quantities of the system components and accessories to assure a complete and operational system. Include unit pricing for 80 handsets and peripherals such as headsets and allow for quantity adjustments as needed.

B. Payment

Generally, payment by CKHA will be tied to specific milestones, which may include satisfactory acceptance testing, and/or deliverables.

Payment terms are net 30 days after receipt of correct invoice containing information required by CKHA and acceptance of deliverable (after testing).

V. PROPOSAL SUBMISSION

This section of the invitation deals with the requirements for contents and submission of proposals.

A. Deadlines & Delivery

It is the responsibility of each Vendor to ensure a timely submission of their proposal to CKHA at ceaster@ckha.com.

All proposals must be submitted by e-mail in PDF format and must be received by CKHA on Monday, August 10th, 2020, no later than 4:00 p.m. EST. CKHA is not responsible for late delivery of a proposal for any reason.

Late proposals submitted after 4:00 p.m. EST on Monday, August 10th, 2020, will not be accepted or considered.

Hard copy, facsimile or telephone proposals will not be accepted or considered.

When submitting your proposal to ceaster@ckha.com, the email subject line must state: "RESPONSE To Cloud Base Voice over IP (VOIP) Phone System"

B. Questions from Prospective Vendors

Any prospective Vendor desiring an explanation or interpretation of the RFP, statement of work, etc., must request it in writing. Oral explanations or instructions will not be binding. Any information given to a perspective Vendor concerning a RFP will be posted on the CKHA website as an addendum to the RFP.

All questions regarding this RFP should be directed to Carmen Easter no later than 3:00 p.m. on July 23rd, 2020. Inquiries may be sent via email to ceaster@ckha.com. All addendums will be placed on CKHA's website at www.ckha.com by close of business day on July 28th, 2020.

C. Organization/Formatting

Proposals must be presented following the prescribed instructions within this Invitation. The proposal, along with all supplemental documentation required under this Invitation must be:

- Submitted in electronic .PDF format
- Pages numbered consecutively

Provided in the sequential order listed below:

1. Vendor Application Cover Sheet (see Appendix A)
2. Vendor Proposal Response
3. Company W-9
4. Current Certificate of General Liability Insurance
5. Current Certificate of Workers Compensation Insurance
6. Business References
7. Itemized Costs

D. Content

All information requested by this Invitation must be submitted as part of Vendor's proposal. Only information that is received in response to this Invitation will be evaluated.

References to information submitted to CKHA outside this Invitation process or references to Internet website addresses will be deemed non-responsive and will not be considered by CKHA.

Cross-references to other portions of a Vendor's proposal submitted in response to this Invitation are acceptable but must reference the specific section number and heading for identification.

All proposals must include completed and signed Vendor Application Cover Sheet (Appendix A) included in this Invitation. The Vendor Application Cover Sheet must be placed at the front of the proposal.

VI. CONTRACT AWARD

A. Contract Conditions

The following provisions are considered mandatory conditions of any contract award made by the CKHA pursuant to this RFP:

1. Contract Form: The CKHA will not execute a contract on the successful Vendor's form--contracts will only be executed on the CKHA form, or any other form substantially approved as to form and substance by CKHA and by submitting a proposal in response to this RFP, the successful Vendor agrees to do so (please note that the CKHA reserves the right to amend this form as the CKHA deems necessary).
2. Assignment of Personnel: The CKHA shall retain the right, in its sole and absolute discretion, to demand and receive a change in personnel assigned to the work to be performed pursuant to the contract if the CKHA believes that such change is in the best interest of the CKHA and the completion of the contracted work.
3. Unauthorized Sub-Contracting Prohibited: The successful Vendor shall not have the right to , assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CKHA CEO or designee, in his/her sole and absolute discretion. Any purported assignment of interest or delegation of duty, without the prior written consent of the CKHA CEO or designee shall be void and may result in the cancellation of the contract with the CKHA, or may result in the full or partial forfeiture of funds paid to the successful Vendor as a result of the proposed contract; either as determined by the CKHA CEO or designee.

B. Affirmative Action

CKHA promotes competitive solicitations and does not discriminate on the basis of race, color, religion, creed, national origin, sex, disability, age or sexual orientation.

C. Proposals Open to Public

Subsequent to the award of the contract, all information submitted as part of, or in support of the proposal will be available for public inspection in compliance with state and federal laws.

VII. PROPOSAL EVALUATION

An RFP Evaluation Committee, consisting of CKHA employees, will review all proposals. This Evaluation Committee may contact any of the references provided by the Vendor, contact any Vendor for clarification of response, and/or seek information from any other sources concerning any aspect of this Invitation.

Subject to the selection factors, reservation of rights, and other terms and conditions of this Invitation, CKHA will select the proposal most advantageous to CKHA. The Evaluation Committee will be evaluating the detail, completeness, and accuracy of each proposal and will select the proposal that provides the best value in meeting CKHA's business objectives.

Vendors are cautioned the Evaluation Committee is in no way obligated to make inquiries for clarification or omitted information regarded essential to complete a thorough evaluation of a Vendor proposal. Proposals at the time of submission that are not complete, accurate or concise, or contain discrepancies or omissions may not be considered.

Any award is contingent upon the successful negotiation of finalized contract terms. In no event will any claimed obligations of any kind be enforceable against CKHA, unless and until such time CKHA and the selected Vendor have entered into a written contract.

This Invitation and the successful Vendor's proposal, as may be modified pursuant to this Invitation, will be incorporated by reference into, and be a part of, any contract between CKHA and the Vendor.

RFP award scores will be based on both technical and financial evaluations through a comprehensive review and analysis by the evaluation committee.

SCORING SUMMARY

SCORING CRITERIA	POINT POSSIBLE
Completeness of proposal; all required documentation submitted	10
Ability of proposed solution meet functional requirements outlined in RFP	20
Demonstration	10
Methodology/Work Plan and Timeline	30
References	10
Proposal Pricing - Prices must be clear, accountable, and auditable, covering the full spectrum of services required.	20
TOTAL POINTS	100

Appendix A

THIS PAGE INTENTIONALLY
LEFT BLANK



VOIP PHONE SYSTEM APPLICATION COVERSHEET

Date of Application: _____

Legal Name of Organization _____

Address _____

City, State, Zip _____

Phone _____

Fax _____

Web site _____

Name of contact person regarding the application _____

Title _____

Tax ID Number _____

Email _____

Certifications

By signing this application, the following certifications are made:

1. The owner and its agents will comply with all applicable fair housing and civil rights requirements found in 24 CFR 5.105(1), including, but not limited to, the Fair Housing Act, Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, and Titles II and III of the Americans with Disabilities Act, as applicable.

Authorization

Authorized Signature: _____

Printed Name/Title: _____

