

County of Charlotte  
 PO Box 608  
 250 LeGrande Ave; Suite A  
 Charlotte Court House, VA  
 23923



**Request for Proposals for a  
 VOIP Telephone System**

**Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against a bidder because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.**

<u>Bid Number</u>	<u>Bid Due Date and Hour (Local Time)</u>	<u>Date Initiated</u>
<b>037-210</b>	<b>January 10, 2018 at 4:00 PM</b>	<b>December 12, 2017</b>

This solicitation is subject to the provisions of the General Terms and Conditions and any Special Terms and Conditions included herein. The Request for Proposal, your bid, and modifications or additions to either shall constitute an entire integrated contract.

**Address All Inquiries and Correspondence to:**

County of Charlotte P.O. Box 608 250 LeGrande Avenue; Suite A Charlotte Court House, VA 23923	Monica L. Elder, Purchasing Agent Phone: (434) 542-5117 Fax: (434) 542-5248 Email: melder@charlotteva.com
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**Special Instructions:**

1. Responses must be signed below in ink.
2. Responses will be accepted until the date and hour shown above.
3. This inquiry incurs no obligation on the part of the County of Charlotte.
4. All proposals are considered firm for our acceptance within **90 days** after the due date.
5. Charlotte County may cancel or withdraw a solicitation in whole or in part and reject any and all bids or proposals at any time prior to an award (Section 2.2-4319-Code of Virginia).

***In compliance with Request for Proposal No. 037-210, and all the conditions imposed therein, the undersigned offers and agrees to furnish products/services in accordance with the signed proposal or as mutually agreed upon by subsequent negotiation.***

SCC Number: \_\_\_\_\_

Name & Address of Offeror: \_\_\_\_\_ License Number: \_\_\_\_\_

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

\_\_\_\_\_ Name (Print): \_\_\_\_\_

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

\_\_\_\_\_ Zip Code: \_\_\_\_\_ Title: \_\_\_\_\_

FIN: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

E-mail: \_\_\_\_\_ FAX: ( ) \_\_\_\_\_

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ATTACHMENTS

Phone Inventory ..... Attachment A

Pricing Proposal (Excel Spreadsheet) ..... Attachment B

## **I. PURPOSE**

The Board of Supervisors of Charlotte County, Virginia, herein referred to as "the County," is soliciting sealed proposals from licensed, qualified Contractors for a new hosted PBX Voice over Internet Protocol (VOIP) telephone system. The County desires a "turnkey" solution. The selected Contractor shall be responsible for furnishing all equipment and services required for installation and optimization of a fully operational telephone system in accordance with the specifications included in this RFP and subsequent negotiations.

It is Charlotte County's intent that this Request for Proposal is part of a competitive procurement process which helps to serve the County's best interests while providing Offerors with a fair opportunity for their services to be considered. The process of competitive negotiation being used in this case should not be confused with the process of "competitive sealed bidding." Price is not required to be the determining factor, although it may be, and the County may negotiate with one or more Offerors to arrive at a mutually agreeable relationship.

## **II. BACKGROUND**

**Existing Systems** - Charlotte County currently utilizes multiple phone systems that are not interconnected and vary in age. System functionality varies, but is generally adequate. The new Charlotte County Courthouse Facility will be commissioned in early 2018 and the requested VOIP system will be the initial telephone system for the facility. Most of the other offices included in this project use inexpensive off-the-shelf DECT systems that were purchased as short-term solutions when their existing PBX phone systems failed. The County Administration Office currently utilizes a Nortel Norstar system. Due to the age of the Nortel system, maintenance and administration is problematic. The County's School Board Office, which previously shared the system with the Administration Office, has already migrated to a VOIP system.

**Infrastructure** - All facilities included in the scope of work have access to Mid-Atlantic Broadband Cooperative's (MBC's) fiber network either directly or indirectly through a county owned fiber line. Cable runs to individual workstations in the new courthouse facility have already been installed in accordance with the A/V plan developed by the project architect.

**Support Staff** - Charlotte County Public Schools' Information Technology Department provides IT support to the County. The IT staff member that works with the County will provide internal support for the phone system once it is operational.

### **III. SCOPE OF SERVICES**

The Contractor shall be responsible for furnishing a complete and fully functional "turn-key" hosted PBX VOIP telephone system for all facilities listed in Attachment A, which is hereby incorporated into this RFP and made a part thereof. Responsibilities of the Contractor shall include, but are not limited to, the following:

- A. Engineering and system design
- B. Project management
- C. Furnishing and installing all necessary system equipment
- D. Software licenses, installation and programming
- E. Acceptance testing
- F. Training of IT staff
- G. Warranty and maintenance

#### **A. Engineering and System Design**

##### **1. General Requirements**

- a. The system shall be modular such that the County can enable and/or add additional features, as needed.
- b. The system shall provide secure method(s) for administration via local/remote logon, administrative software, and/or web interface.
- c. The system shall support backup and the restoration of operations. Backup operations shall be automated such that the most recent copy of data can be restored in the case of a system crash, disaster recovery, etc.
- d. All current phone numbers shall be ported to the new system with no penalty for decreases or increases in the number of lines.

##### **2. System Components**

A list of required components for the system is included in the Excel file identified as Attachment B, which is hereby incorporated into this RFP and made a part thereof. Please note that the Excel file includes six individual worksheets that must be completed.

##### **3. Basic System Features & Functionality:**

The system shall include:

- a. Three digit dialing from any site to any site on the network
- b. A voicemail box with remote access for each user
- c. Direct inward dialing
- d. Caller-ID for all incoming calls
- e. Ability to provide fail over dial tone and connectivity internally and externally for designated users in the event of outside loss of primary connectivity or power
- f. Access to 911 service
- g. Extension forwarding and call transfers to user defined external numbers
- h. Compatibility with headsets for hands-free operation if desired

**4. Facility Requirements:**

The County does not intend to use the existing telecommunication equipment storage room on the courthouse square for this project due to its current condition, location and lack of climate control. Therefore, all equipment will need to be located inside the facilities identified in Attachment A.

**5. System and Software Administration**

The system shall include:

- a. Ability to perform self-administration and moves, adds, deletions or changes with nominal training
- b. Provision for multiple administrators, each with a unique access password

**6. System Monitoring and Diagnostics**

- a. The system shall provide basic monitoring reports
- b. The system shall provide basic alarms and alarm notifications

**B. Project Management**

1. The Contractor shall designate a single project manager to supervise and coordinate the Contractor's work and to act as the point of contact for all project-related issues.
2. The Contractor shall provide support for an organized transition from the current system to the new system; ensuring internal and external communications are maintained during the transition.

**C. Equipment & Installation**

**1. Equipment - General**

- a. All equipment shall be provided in new condition and shall be covered by a full factory and/or manufacturer's warranty.
- b. Proposals shall not include product lines that vendors plan on discontinuing development and/or distribution of within the next four years.

**2. Phone Features:**

Phones features shall include:

- a. Voicemail
- b. A visible message waiting indicator
- c. Volume controls
- d. Conference Calling with a minimum of at least three (3) participants
- e. Speakerphone with handsfree mute
- f. Call Hold
- g. Intercom calling
- h. Call Transfer
- i. Paging through the phone system
- j. Speed-dial

- k. Redial
- l. Programmable buttons that are customizable on a per extension basis

**3. Voicemail Features:**

Voicemail features shall include:

- a. A required user password or PIN to access each user's voicemail box
- b. Ability to access voicemail remotely
- c. Notification when a user reaches their allotted voicemail storage space
- d. Ability to stamp each new message with time and date
- e. Ability for users to transfer a call directly to their own or another user's voicemail
- f. Ability to save & delete messages and transfer messages to one or more users, appending them with user comments if desired

**4. Installation**

- a. The system shall be implemented in a scheduled rollout by building, beginning with the new Charlotte County Courthouse Facility. The new VOIP system for the courthouse facility must be installed and operational by February 28, 2018.
- b. The Contactor shall be required to work with current communication service providers related to this project.
- c. The Contractor shall coordinate the seamless port of phone numbers with existing carriers.

**D. Software Licensing, Installation & Programming**

The Contractor must supply and include in its pricing software assurance and other regular software upgrades for the duration of the warranty.

**E. Acceptance Testing**

The Contractor is responsible for final system connections and a complete functional test of the system. Charlotte County reserves the right to conduct any test/inspection it may deem advisable to assure materials and services conform to the specification.

**F. Training**

- 1. It is the County's intention that the selected vendor will coordinate the training of County personnel in the use of its system.
- 2. The Contractor shall identify the training roles & responsibilities of the Contractor and the County, a proposed training schedule, description of the strategy to prepare County IT staff to maintain the system once it is operational, and a description of the system documentation and resources that will be provided to the County (including, but not limited to, system user manuals, "Quick Reference" guides, online support, help desk support, user group community resources, and others as available.)

**G. Warranty, Maintenance and Support**

1. Warranty and maintenance agreements must be included as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.
2. Proposals should also include estimates for the cost of support services on an annualized basis beyond the term of the warranty.
3. During the warranty period and any subsequent maintenance agreement, any defective components shall be repaired or replaced at no cost to the County.
4. All system maintenance during the warranty period and under any maintenance agreements shall be performed by the successful bidding organization using personnel employed by the Offeror and at no additional cost to the County other than those charges stipulated to maintain the warranty.
5. During the warranty period, the Contractor must supply no more than a four (4) hour on-site response to major problems, 24 hours a day, 7 days a week. Offerors must describe their definitions of major and minor problems.
6. Offerors shall provide information in their proposal regarding the availability of spare parts for critical hardware.

**IV. ALTERNATE PROPOSALS**

The County, at the County's discretion, may accept alternate proposals for evaluation, provided that the technology proposed provides the features, functions, performance and reliability of the specifications. Alternate proposals shall follow the required proposal outline.

**V. PRICING AND PAYMENT TERMS**

- A. All Offerors shall complete the six pricing sheets provided as Attachment B. Any additions, deletions or modifications to the equipment list by the Offeror shall be noted and explained in detail.
- B. Negotiated prices shall be firm and shall not be subject to increase during the term of any contract that arises between the County and the Contractor as a result of this RFP except in accordance with law.
- C. Invoices for items ordered, delivered and accepted shall be submitted by the Contractor directly to the payment address shown on the contract.

**VI. PRE-BID CONFERENCE**

A pre-bid conference will not be held.

**VII. SUBMISSION OF PROPOSALS**

**A. Submission Procedures**

1. To receive consideration your proposal with original signature along with two (2) hardcopies and one electronic copy must be received in the Charlotte County Administrator's Office no later than 4:00 pm on January 10, 2018.
2. The submission of proposals by fax, phone, e-mail, or verbal offer will not be accepted.

3. The original proposal must be clearly identified on the outside cover.
4. All proposals must be in a sealed package clearly marked "RFP- Phone System."
5. It is the responsibility of each Offeror to see that their proposal is in the Office of the County Administrator by the specified time and date.
- \*6. Please note that some overnight courier services cannot guarantee delivery to this location by 4:00 p.m. and plan accordingly.**
7. Any offers or amendments received by the County after the date and time specified for the scheduled opening of proposals will not be considered. Date of postmark will not be considered. There will be no extensions and no exceptions.
8. Submittals can be hand-delivered or mailed to the following address:

Charlotte County Administrator's Office  
Attention: Monica Elder, Purchasing Agent  
P. O. Box 608  
250 LeGrande Avenue, Suite A  
Charlotte Court House, Virginia 23923

**B. Proprietary Information**

All proposals submitted under this RFP shall become the property of Charlotte County and will be subject to public inspection in accordance with the *Virginia Freedom of Information Act*. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the *Virginia Freedom of Information Act*. However, the Offeror must invoke the protections of Section 2.2-4342F of the *Code of Virginia*, in writing, either before or at the time the material is submitted. The written notice must specifically identify the materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method, such as highlighting or underlining, and must indicate only the specific words, figures or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document as proprietary or trade secrets is not acceptable and will result in rejection of the proposal.

**C. Proposal Content**

All proposals should be prepared simply and economically. Emphasis should be on completeness and clarity of content. Contents shall include:

1. The cover page of this RFP completed & signed by an authorized individual
2. Signed copies of any addenda issued
3. Qualifications
  - A description of the respondent's qualifications including experience in providing similar products and services
  - Resumes of key personnel that will be assisting with the project
  - A list of references for at least three systems of similar size and complexity installed by the client. Include system descriptions, cost, contact name & contact number.



2. Description of the proposed system including design and equipment, software and licensing information, services to be provided, methodology for testing system performance and effectiveness, warranties, and maintenance and support options
3. A list of proposed subcontractors (if any)
4. Preliminary Schedule
5. Pricing Proposal (Attachment B)
6. Additional pricing information for the following:
  - Future software upgrades beyond the term of the warranty
  - Maintenance/Service Contracts beyond the term of the warranty
7. Additional information to include the following:
  - Information on current client workload and the projects for which you are under contract
  - Any other information the respondent deems relevant to the project

D. Additional Information

The County may contact the Offeror to clarify any response, may solicit information from any available sources concerning any aspect of the proposal, and may seek and review any other information deemed pertinent to the evaluation process.

**VIII. QUESTIONS & ADDENDA**

A. Questions

1. All questions regarding this RFP must be submitted in writing. Questions can be e-mailed or hand-delivered to the Charlotte County Purchasing Agent, Monica Elder, and must be received no later than 4:00 pm on December 28, 2017.
2. All revisions to this solicitation will be provided in an official written addendum.
3. The County will not assume responsibility for claims of oral instructions.

B. Addenda

1. All addenda issued shall become part of this RFP.
2. Addenda will be posted on eVA and on the County's purchasing webpage at [www.charlotteva.com/purchasing.htm](http://www.charlotteva.com/purchasing.htm)
3. It is the sole responsibility of each Offeror to ensure that he/she obtains a copy of all addenda.

**IX. SELECTION PROCEDURE AND EVALUATION OF PROPOSALS**

The evaluation and selection processes will be governed by and completed in accordance with the Virginia Public Procurement Act (VPPA). If any provision of this RFP is found to be inconsistent or in conflict with such policy, the terms of the VPPA shall govern.

A. Selection Process

1. Using the proposal evaluation criteria specified in this RFP, the County will review all proposals received.
2. After review of the proposals, the County shall engage in discussion meetings and/or interviews with two or more Offerors who have been deemed to be fully qualified, responsible, responsive, and suitable to provide the services set forth by this RFP. The Offerors shall be encouraged to elaborate on their qualifications and expertise pertinent to the proposed project.
3. At the conclusion of the interview stage, selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals, on the basis of the evaluation criteria specified below. Negotiations shall then be conducted with each of the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror.
4. Should the Charlotte County Board of Supervisors determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror.

B. Proposal Evaluation Criteria:

The following criteria will be used to review and evaluate Offerors' proposals:

1. Expertise and experience - Including, but not limited to, client references and demonstrated ability and reputation in providing similar services (25%)
2. System capabilities, features and functionality (30%)
3. Warranty, maintenance and support options (10%)
4. Pricing Proposal (35%)

**X. SPECIAL TERMS AND CONDITIONS**

A. Insurance

The selected Offeror shall, during the entire performance of the contract, keep in force at least the following minimum limits of Insurance:

1. Workers compensation insurance - shall comply with requirements of the laws of the Commonwealth of Virginia.
2. Professional Liability - \$500,000.00 - Insurance Coverage for Errors and Omissions on Claims Made Basis

3. Commercial General Liability - \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage.

No insurance certificate is required at the time of proposal submission. The selected Offeror shall furnish proof of the required insurance before the County issues their intent to award.

B. Ownership of Contract Documents

One reproducible copy of every drawing, plan, specification and map prepared or obtained under the terms of the Contract shall be delivered to and shall become the property of the County.

C. Ethics in Public Procurement

By submitting their proposals, Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer, or subContractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, service, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

D. Termination of Contract for Convenience

Charlotte County, by written notice, may terminate the resulting contract in whole or in part when it is determined by the public body to be in the County's best interest. Termination shall be effected by serving a notice of termination. In the event of termination pursuant to this paragraph, the County shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of this termination.

E. Termination of Contract by Default

Should the selected Offeror fail to deliver the services in accordance with the contract terms and conditions, the County has the right to terminate any contract resulting from this solicitation for default. Termination shall be effected by serving a notice of termination stating the manner of the default. In the event of termination pursuant to this paragraph, the County shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of this termination less any fines or other fees that may be withheld.

**XI. GENERAL TERMS AND CONDITIONS**

- A. All proposals must be submitted in accordance with this RFP. All information received shall become part of the proposal.
- B. The Offeror certifies that it knows of nothing that could raise the issue of conflict of interest with regard to this RFP.
- C. A contract shall be deemed executory only to the extent of appropriations available for the purchase of such the same or similar goods or services as requested in this proposal. Future obligations shall be subject to future appropriations, if any, by the Board of Supervisors. Nothing contained herein shall be construed to require any future obligation by the Board of Supervisors.
- D. The award of a contract shall be at the sole discretion of the County Board of Supervisors. The award shall be based upon the evaluation of all information made available to the County. The Board reserves the right to enter into any contract deemed to be in its best interest. The County shall not be obligated to furnish a statement of the reason why a proposal was not deemed to be the most advantageous.
- E. An officer of the proposing Offeror must sign the proposal and all issued addenda. Such signature shall bind the Offeror to all obligations under this RFP.
- F. The Offeror agrees that their proposal shall be good and may not be withdrawn for a period of ninety (90) days.
- G. The County shall not be responsible for any expense incurred by any Offeror in preparing and submitting a proposal or participating in the interview and negotiation processes.
- H. All proposals shall become the property of Charlotte County. In accordance with the VPPA, they will not be open for public inspection prior to final selection by the Board of Supervisors.
- I. The County Board of Supervisors reserves the right to accept or reject any or all proposals in whole or in part and to waive any informality in the RFP.
- J. This RFP, any subsequent contract and the work performed there under shall be governed in all respects by the laws of the Commonwealth of Virginia. The Offeror shall comply with applicable federal, state, and local laws and regulations.
- K. The Offeror shall not assign, transfer, convey, sublet, or otherwise dispose of any award, or any or all of its rights, obligations, or interests under this contract, without the prior written consent of the County.

- L. The Offeror shall indemnify and save harmless Charlotte County, its supervisors, officers, agents, servants, and employees from and against any and all liability, claims, losses, suits, legal proceedings, and costs occurring from any cause whatsoever in any work required by this RFP.
- M. The Offeror shall agree to the nondiscrimination provisions set out in § 2.2-4311, Code of Virginia.
- N. The Offeror shall agree to the drug-free workplace provisions set out in § 2.2-4312, Code of Virginia.
- O. The Offeror shall agree to comply with all federal immigration laws. The Contractor shall not knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.
- P. **Proof of Authority to Transact Business in Virginia**  
In accordance with § 2.2-4311.2, Code of Virginia, Offerors organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 shall include the identification number issued to it by the State Corporation Commission. Any Offeror not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law shall include a statement describing why they are not required to be so authorized.