



**Morgan County
Commission**

Invitation for Proposal for an Enterprise VOIP Phone System

SCHEDULE

Issued: Wednesday, September 29, 2021

Deadline for Questions: Friday, October 15, 2021

**Deadline for Submitting Proposals: Tuesday, November 16, 2021 5:00 p.m.
EST**

Contact for this RFP: Stefanie Allemong, County Administrator

E-mail: sallemong@morgancountywv.gov

RFP #08252021

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Morgan County Commission
Invitation for Proposals for an Enterprise VOIP Phone System

I. INTRODUCTION

Overview

In this **Invitation for Proposal for an Enterprise Voice over IP (VOIP) Phone System** (the "Invitation"), Morgan County Commission ("Morgan County") 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.

Morgan County is currently seeking to replace the current phone system for their entire county courthouse and all county buildings.

About Morgan County

Morgan County covers a total area of 230 square miles and consists of a population of 17,063 people. It is located in the Eastern Panhandle of West Virginia and borders Maryland, Pennsylvania and Virginia. The County Seat is Berkeley Springs, WV. Morgan County Government operates daily in 5 different buildings located throughout the County. Each of these buildings maintain phone systems, some of which are connected through the main Courthouse's PRI. Some of the newer systems are using a VOIP system, while a few others are on separate phone systems. It is our desire to incorporate all buildings into one VOIP phone system.

For more information about Morgan County Government, please go to www.morgancountywv.gov

II. GENERAL TERMS AND CONDITIONS

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.

Pre-Bid Conference

A mandatory pre-bid conference will be held on the date and time listed in the calendar of events at 77 Fairfax Street, Room 101, Berkeley Springs, WV 25411.

Vendors must sign the Pre-Bid sign-in-sheet as proof of attendance. Written questions and answers will be provided only to those in attendance.

Questions and Answers

All Vendor questions deemed relevant and material to this Invitation along with the response answers will be emailed to all vendors by close of business on Friday, October 22, 2021.

Any responses or answers provided by Morgan County to Vendor questions will automatically become a part of this Invitation.

Proposal Terms

All proposals submitted by Vendors and received by Morgan County will be treated as contract offers. A Vendor's proposal must remain open from the time of receipt of the proposal by Morgan County 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 Vendor during that period.

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

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.

Proposal Costs

Morgan County is not liable for any expenses incurred by the Vendor in the preparation, delivery, or presentation of their proposals, or in connection with any product demonstrations.

Costs of developing and delivering proposals and demonstrations pursuant to this Invitation are solely at the expense of the Vendor.

Proposal Materials

All proposals submitted, including all items and materials submitted as part of the proposals, become the property of Morgan County, whether or not selected. Proposal materials may be appended by Morgan County to any contract between Morgan County and the Vendor providing such materials.

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 Morgan County. Morgan County reserves the sole right and option to extend the contract in incremental terms of one (1) year each which, including the initial contract term or a term agreed upon by both parties.

III. OBJECTIVES AND REQUIREMENTS

Morgan County's expectation is to have a fully functional enterprise voice over IP phone system installed and ready for use at its facilities by April 2022. The selected Vendor will have access to the building as needed during the renovation phase so long as it is coordinated with Morgan County staff and the site supervisor. Necessary hardware and cabling shall be installed and tested by the Vendor. Training for administrators and users shall be conducted prior to the cut over to the new system.

General Requirements

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

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 and cabling
- Configure and install phones and necessary peripherals
- Integrate phone system with audio visual equipment in conference rooms
- Execute a cutover plan that allows us to retain existing phone numbers and extensions
- Provide training to IT staff on administrator functions
- Provide training to end users on general use of phone and phone system features
- Provide system documentation including administrator guides and user manuals

Telephone System Features

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

Required Features:

Adequate size – system must support a MINIMUM of 120 handsets and extensions but should allow scalability for future expansion

Power over Ethernet – power phones by network cable connected to POE capable switch

Retain existing phone numbers & extensions if possible

Intercom/paging system – utilized to quickly deliver critical/emergency information to all handsets

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).

Situational voice messages/recordings – leave a message on the public phone number to communicate unexpected closures (snow days) or other important information

- Ability to update the message remotely so there is no need to come to the office during inclement weather

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

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 how-to videos, user guides, or cheat sheets
- Training for administrative staff on configuring/maintaining the system
- Training for switchboard-specific features

Technical support service level agreements – ensuring that the turnaround time for technical support issues is within an acceptable timeframe

Call presence settings –

- Pre-defined voicemail/call-routing options for different scenarios such as out of office, on vacation, away from desk, etc.
- Ability to record different messages depending on presence setting
- Support for integration with Outlook calendar to automatically adjust phone presence setting to match busy/out of office

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

AV system integration – integration with our audio/visual conference room systems (ceiling mounted microphones and speakers)

SIP phone support – support for any SIP capable phone such as third-party conference phone systems (Polycom)

Optional/Desired Features:

Voicemail transcription – receive a transcription of voicemails to email or other digital format

Call recording – ability to record calls to audio files and store the files in a cloud environment

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)

Robo-call/text system – automate outbound calling to leave a voicemail if no one answers, or connect the call to staff if someone picks up (could be utilized if we serviced loans in-house). Call or text clients to remind them of scheduled appointments/inspections. **Faxing** – ability to send online faxes or faxes through email – this could also be outsourced

Video calls – support for handsets with screens and video-calling capability

Work Conditions

The Vendor will:

Store all of materials and equipment in a safe and orderly fashion and dispose of any install-related waste in proper disposal containers, and/or remove from the premises.

Be in full compliance with all applicable State, Federal and local laws, rules, and safety regulations. The Vendor shall perform its obligations in a safe manner, utilizing proper technique and equipment to preserve both worker and staff safety.

Any lost, stolen, or damaged items, including damage to finished surfaces resulting from the performance of this contract will be repaired to Morgan County Commission's satisfaction at the Vendor's expense.

Security Requirements

The Vendor will be responsible for any privacy breaches caused by its actions or inaction or those of its agents/employees allowing any unauthorized person(s) gaining access to any confidential or protected information. The Vendor will take every precaution to maintain the highest level of security protection of all sensitive, protected, and/or confidential documentation & materials throughout the project.

Identification

Each person who is an employee or agent of the Vendor shall display his or her company ID badge at all times while on Morgan County premises.

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:

- (i) 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
- (ii) Professional Services Liability or Errors and Omissions coverage, with a minimum limit of insurance of \$2,000,000.

Vendor's insurance coverages must be primary insurance with respect to Morgan County. Any insurance maintained by Morgan County 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?

Yes		No	
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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, Morgan County 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 Morgan County.

IV. 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. Morgan County reserves the right to contact and verify any or all references provided.

Using the following table format, Vendors must provide up-to-date, accurate, and complete contact information for each of the three (3) business references:

Invitation: Morgan County Invitation for Proposal for VOIP Phone System	
Business Name:	
Business Reference Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code:	
Email address:	
Alternate Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code:	
Email address:	
Project Information	
Brief description of the VOIP Phone System project and services performed for you:	
Project start and end dates:	
Was project completed in time originally allotted, and if not, why?:	

Was project completed within or under the original budget/ cost proposal, and if not, why?:	
Briefly summarize overall satisfaction in work performed:	

V. PROPOSAL PRICING

Cost Items

The Vendor must provide:

A detailed, **all-inclusive firm fixed pricing** for all costs associated with this Invitation. Please be sure to indicate **\$0.00** if there is no associated cost(s); do not leave the cost of a listed item blank.

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, excluding regulatory taxes and fees.

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 a minimum of 120 handsets and peripherals such as headsets and allow for quantity adjustments as needed.

Payment

Generally, payment by Morgan County 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 Morgan County and acceptance of deliverable (after testing).

VI. PROPOSAL SUBMISSION

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

RFP Point of Contact

To ensure clear communications, the following individual has been designated the point contact for this RFP. All requests, questions, proposal documents and/or correspondence must be communicated through this designated RFP contact:

Name:	Stefanie Allemong
Title/Dept:	County Administrator
Address:	77 Fairfax Street, Room 101, Berkeley Springs, WV 25411
Email:	sallemong@morgancountywv.gov
Tele#:	304-867-3131

Vendor contact with any Morgan County employee, consultant, or other Morgan County representative concerning this Invitation other than the Morgan County contact person given above will be grounds for proposal rejection.

Questions

All questions must be in writing and submitted only to the designated RFP contact email address previously given. Attempting to ask questions in person, or by telephone, will not be allowed and can disqualify a Vendor.

Vendors will only rely on written statements issued from Morgan County's designated RFP point of contact.

Deadlines & Delivery

It is the responsibility of each Vendor to ensure a timely submission of their proposal to Morgan County at 77 Fairfax Street, Room 101, Berkeley Springs, WV 25411. Attention: Stefanie Allemong

All proposals **must be submitted by mail in an enclosed envelope with the word Bid written on the envelope and provide PDF copy in the envelope as well** and must be received by Morgan County on **Tuesday, November 16, 2021, no later than 5:00 pm EST**. Morgan County is not responsible for late delivery of a proposal for any reason.

Late proposals submitted after 5:00 pm. EST on **November 16, 2021, will not be accepted or considered.** Facsimile or telephone proposals **will not be accepted or considered.**

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:

1. Submitted via hardcopy and pdf.
2. Pages numbered consecutively.

3. Provided in the sequential order listed below:

1. Vendor Information 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 (See table under Section IV)
7. Itemized Costs
8. Vendor Certification Form. (see Appendix B)

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 Morgan County outside this Invitation process or references to Internet website addresses will be deemed non-responsive and will not be considered by Morgan County.

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 Information Sheet (Appendix A) included in this Invitation. The Vendor Information Sheet must be placed at the front of the proposal.

All proposals must include a completed and signed Vendor Certification form attached to this Invitation under Appendix B.

VII. PROPOSAL EVALUATION

An RFP Evaluation Committee, consisting of Morgan County 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, Morgan County will select the proposal most advantageous to Morgan County. 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 Morgan County'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 Morgan County, unless and until such time Morgan County 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 Morgan County 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.

Evaluation Scoring	Points
Qualifications and experience of persons assigned to project:	20
Ability of proposed solution meet functional requirements outlined in RFP	30
Completeness of proposal; all required documentation submitted	20
Methodology/Work Plan and Time Line	10
Proposal Pricing - Costs covered under this proposal are exempt from all Federal and State Taxes. Prices must be clear, accountable, and auditable, covering the full spectrum of services required. Costs and compensations must be consistent with current market rates	30
Maximum Award Points:	110

VIII. TERMS AND CONDITIONS

Rights Reserved by Morgan County

In addition to the rights reserved by Morgan County elsewhere in this Invitation, Morgan County reserves the right to:

Adjust the timetable for this Invitation as deemed necessary.

Waive informalities and minor irregularities in proposals received.

Reject and not consider any or all Vendors who do not meet the requirements of this Invitation, including but not limited to incomplete responses and/or non-responsive proposals.

Reject any or all proposals received and not to award a contract pursuant to this Invitation, or to cancel or terminate this Invitation process at any time, whether before or after any proposals have been submitted or received, if deemed by Morgan County to be in its best interest.

Negotiate price or other factors included in any proposal submitted to Morgan County and in the event Morgan County is unable to negotiate a mutually satisfactory contract with the successful Vendor under this Invitation, Morgan County may, in its sole discretion, negotiate with another Vendor or cancel this Invitation and not award a contract to any Vendor.

Reject the Vendor selected pursuant to this Invitation and to offer a contract to another Vendor in the event the selected Vendor does not enter into the required contract to provide moving

services and related services described in this Invitation.

Negotiate directly with one Vendor if the responses to this Invitation demonstrate a lack of competition.

Correct or amend this Invitation. In no case will this Invitation be amended within seven (7) days of the proposal submission deadline unless the amendment includes an extension of time. Morgan County will not be liable for any costs incurred as a result of changes to this Invitation.

Other Terms and Conditions

Vendor Certification Form. As a mandatory requirement of this proposal, all Vendors must complete and submit the Vendor Certification Form attached to this Invitation as **Appendix B**, along with their proposal submission.

Confidentiality and Nondisclosure. Vendor shall maintain in trust and confidence and shall not disclose to any third party, except as such disclosure may be authorized in writing in advance by Morgan County, and shall not use for any unauthorized purpose, any and all information, documents and data received or obtained from or on behalf of Morgan County. Vendor may use such information, documents and data only to the extent required for the purposes described in this Invitation. Vendor shall adhere to all security, confidentiality and nondisclosure policies and procedures required by Morgan County for the protection of such information and data from unauthorized use and disclosure and from loss.

APPENDIX A
VENDOR INFORMATION SHEET

for

Morgan County Invitation for Proposals for an Enterprise VOIP Phone System

Please provide the following information, completed and signed, and place this form at the front of the proposal:

General Information	
Company Name:	
Federal Tax ID:	
Street Address:	
City, State, Zip:	
Telephone#:	
Contact Person for Questions	
Name:	
Title:	
E-mail Address:	
Telephone#:	
Business Description	
# Years in Business:	
# Years providing VOIP phone systems of similar scale and composition as described in this Invitation:	
Current Company Size:	
Current # Workers:	
Evidence of Workforce expertise, experience, qualifications, and knowledge in VOIP phones system implementation and support services:	<i>Please be sure to include all supplemental qualification documents.</i>

Summarized Narrative of Vendor's ability to provide the services, materials, and labor required under this RFP:	
List of planned resources to be included to meet the obligations of this Invitation:	

APPENDIX B
VENDOR CERTIFICATION FORM

for

Morgan County Invitation for Proposals for an Enterprise VOIP Phone System

Vendor Name	
Vendor Address	

The undersigned Vendor represents and certifies as follows:

1. The prices in this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other Vendor or potential Vendor.
2. No attempt has been made at any time to induce any firm or person to submit any intentionally high or noncompetitive proposal or to otherwise submit or refrain from submitting a proposal for the purpose of restricting competition.
3. Vendor has not given, and will not give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to any employee or representative of Morgan County in connection with this Invitation.
4. Vendor acknowledges that Morgan County will determine whether a conflict of interest exists and that Morgan County reserves the right to disqualify any Vendor on the grounds of actual or apparent conflict of interest.
5. Vendor has not employed or retained any person or entity to solicit or obtain any contract resulting from this Invitation and has not paid or agreed to pay to any person or entity any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of any such contract.
6. Vendor understands and acknowledges that the representations in its proposal are material and important and will be relied on by Morgan County in evaluating the proposal. Vendor certifies that, to the best of its knowledge, all of the information contained in its proposal is true, correct and complete and acknowledges that any intentional misrepresentation by Vendor will disqualify Vendor from further consideration in connection with this Invitation.
7. The undersigned individual is legally authorized to sign this Vendor Certification Form for and on behalf of Vendor and to bind Vendor to the statements made herein.

Name, Title and Signature of Individual with Authority to Bind Vendor	
Name	
Title	
Signature	
Date	

APPENDIX C
KEY PROPOSAL DATES

for

Morgan County Invitation for Proposals for an Enterprise VOIP Phone System

All dates are subject to change at Morgan County's discretion.

All proposal correspondence, and/or questions must be emailed to: sallemong@morgancountywv.gov.

RFP Issuance:	
Date Issued:	<u>Wednesday, September 29, 2021</u>
Questions & Answers:	
Pre-Bid Meeting	A MANDATORY Pre-Bid meeting will be held on Monday, October 4, 2021. If you do not attend the meeting, you will not be able to bid. Meeting will be held at 111 Fairfax Street, In the Office Of Emergency Services Conference room at 10:00 am.
Questions will be received:	<u>From: Wednesday, September 29, 2021 to Friday, October 15, 2021, no later than 5 pm. EST.</u>
Answers:	Question must be emailed directly to: sallemong@morgancountywv.gov All questions, and their subsequent answers, will be emailed to all vendors. Questions <u>will be answered by Friday, October 22, 2021.</u>
Pertinent Proposal Dates:	
Deadline for Proposal Submission:	Tuesday, November 16, 2021 @ 5:00 pm EST
Bid Opening	Opening is Wednesday, November 17, 2021, during County Commission Meeting
Proposal Evaluation Review:	From: <u>Monday, November 29, 2021 to Tuesday, November 30, 2021</u>
Contract Award Date:	Wednesday, December 1, 2021.