



REQUEST FOR PROPOSAL (RFP)

CLOUD HOSTED VOICE OVER INTERNET PROTOCOL (VoIP) SERVICES

PROPOSAL DUE DATE & TIME:

August 13, 2021 – 11:59PM CST

ATTN: JOSH JIMENEZ

PROCUREMENT MANAGER

joshua.jimenez@cacost.org

COMMUNITY ACTION CORPORATION OF SOUTH TEXAS

204 E. FIRST ST.

ALICE, TX 78332

INTRODUCTION

The Community Action Corporation of South Texas (CACOST) is a private non-profit organization established in 1971 and funded through state and federal grants and fees for service. CACOST has a workforce of about 690 employees and a service area consisting of seventeen (17) South Texas counties. The mission of CACOST is to continuously improve the lives of South Texans by providing high quality healthcare, education, housing, and economic opportunities to reduce poverty through services and partnerships. More information on CACOST can be obtained by visiting the CACOST web site at cacost.org.

PROPOSAL SUMMARY

CACOST is seeking contract or agreement proposals from qualified providers for a renewal or migration and implementation services of a Cloud Hosted Voice over Internet Protocol (VoIP) system to replace the current Cloud Hosted VoIP products currently in use throughout the Agency. All proposals must be completed in accordance with all applicable standards, specifications, terms, and conditions as stated in this RFP. All proposals should provide CACOST with a hosted and secure Cloud Hosted VoIP solution and coordinate licensing, migration, and support, as detailed throughout this document.

CLOSING DATE

All proposals must be submitted no later than **August 13, 2021 - 11:59PM CST**.

INQUIRIES & CONTACT INFORMATION

All questions concerning this RFP should be directed to Josh Jimenez, Procurement Manager, at joshua.jimenez@cacost.org within the inquiry period as stated below. Communication with other individuals within CACOST during the duration of this RFP is strictly prohibited. CACOST reserves the right to disqualify any Proposer who is found in violation of this provision. No communication requests other than written via email within the inquiry period will be accepted and no response other than written will be binding upon CACOST. Submittals will remain on file in accordance with the Texas Open Records Act.

EXPECTED TIMELINE

The following timeline of events is expected to be followed but shall not be considered binding:

RFP EVENT	DATE
RFP Publication	July 15, 2021
Final Date for Inquiry Submission	July 21, 2021
Q&A Document Publication	July 23, 2021
Final Date for Proposal Submission	August 13, 2021
Announcement of Intent to Award	August 30, 2021
Contract Start Date	September 15, 2021

GENERAL TERMS & CONDITIONS

SUBMISSION INSTRUCTIONS

To be considered responsive and receive an evaluation, proposals must fully address all sections of the RFP. All proposals should be addressed as follows:

CACOST Cloud Hosted VoIP Services RFP
ATTN: Josh Jimenez, Procurement Manager
204 E. First St.
Alice, Texas 78332
OR via email to joshua.jimenez@cacost.org

It is the sole responsibility of the Proposer to ensure that the proposal is received by the date and time specified above in the Closing Date section. **Late proposals will not be considered.** Confirmation of receipt is the sole responsibility of the Proposer. Proposal submissions may include value-added alternatives and any relevant information in addition to the information requested in the RFP. Proposals may be withdrawn in writing prior to the deadline. Unless otherwise stated, all materials submitted by the Proposer in response to this RFP shall become the property of CACOST.

NOTIFICATION OF AWARD

CACOST anticipates, but does not guarantee, a contract or multiple contracts will be awarded on August 30, 2021. An award will be made to the Proposer(s) based on the listed evaluation criteria and the responses that are most compatible with CACOST's needs. CACOST will be the sole judge in making this determination. CACOST is not bound to accept the lowest bid, or any proposal submitted. A contract for the approved proposal will be executed based upon the factors described in this RFP. CACOST may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP. CACOST also reserves certain rights, including, but not limited to, the following:

1. Reject any or all proposals
2. Issue subsequent Requests for Proposals
3. Cancel the entire Request for Proposal
4. Remedy technical errors in the Request for Proposal process
5. Appoint evaluation committees to review qualifications and proposals
6. Seek the assistance of outside technical experts in evaluation
7. Approve or disapprove the use of certain subcontractors
8. Establish a short list of proposers eligible for discussions after review of RFP
9. Solicit best and final offers from all, some, or one of the proposers
10. Waive informalities and irregularities in RFP
11. Award without discussion
12. Cancel an awarded contract if performance is unsatisfactory, with the provision of a written notice; no penalty and/or fee may be imposed

13. Conduct pre-contract negotiations with any and/or all potential qualified contractors

This RFP shall not, in any manner, be construed to be an obligation on CACOST to enter a contract or result in any claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

CONFIDENTIALITY

The Proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to CACOST, the Proposer agrees not to publish, reproduce, or otherwise divulge such information, in whole or in part, in any manner or form, or authorize or permit others to do so taking such reasonable measures as are necessary to restrict access to the information while in the Proposer's possession to these employees on the Proposer's staff who must have the information on a "need-to-know" basis. The Proposer agrees to notify immediately, in writing, CACOST's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

LIMITATIONS & RESERVATIONS

CACOST reserves the right to negotiate the terms and conditions of the contract with any of the evaluated Proposers. Should the successful Proposer and CACOST fail to come to an agreement, CACOST may at its sole discretion award work to any of the remaining Proposers. The Proposer to whom the contract is awarded shall be required to enter a written contract with CACOST. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract. CACOST specifically reserves the right to vary the provisions set forth herein any time before the execution of a contract where such variance is deemed to be in the best interest of the needs of CACOST. If selected for negotiations, Proposer may be required to prepare and submit additional information before final Proposer(s) selection, to reach terms for the provision of services, which are agreeable to both parties.

FINANCIAL RESPONSIBILITY

CACOST assumes no financial responsibility for any costs in developing and submitting a proposal or any amendments or addenda, participating in bid conferences, participating in any negotiation sessions or discussions, or any other costs incurred by Proposers prior to award of a contract or agreement pursuant to this RFP. All costs incurred in the preparation of any response to this RFP and/or associated costs will be the sole responsibility of the Proposer and will not be reimbursed by CACOST.

STEVENS AMENDMENT

This project will be supported by the U.S. Department of Health and Human Services (HHS) as part of an annual award totaling \$38,851,223.74 with 72% funded by HHS and 28% funded by non-government source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, Administration for Children and Families, ACYF-FYSB, HHS or the U.S. Government.

SMALL, WOMEN, AND/OR MINORITY-OWNED BUSINESSES

Efforts will be made by CACOST to utilize small businesses and women and minority-owned businesses with the consideration that the primary responsibility is the most favorable return to CACOST. A Proposer qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201).

HISTORICALLY UNDERUTILIZED BUSINESSES

It is CACOST policy to encourage participation of small and historically underutilized businesses (HUBs), as defined in Government Code, Chapter 2161. "Historically underutilized business (HUB): means an entity with its principal place of Business in this state that is:

1. a corporation formed for the purpose of making a profit in which 51 percent or more of all classes of the shares of stock or other equitable securities are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the corporation's control, operation, and management;
2. a sole proprietorship created for the purpose of making a profit that is completely owned, operated, and controlled by an economically disadvantaged person;
3. a partnership formed for the purpose of making a profit in which 51 percent or more of the assets and interest in the partnership are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the partnership's control, operation, and management;
4. a joint venture in which each entity in the venture is a historically underutilized business, as determined under Government Code Chapter 2161; or
5. a supplier contract between a historically underutilized business as determined under Government Code Chapter 2161 and a prime contractor under which the historically underutilized business is directly involved in the manufacture or distribution of the goods or otherwise warehouses and ships the goods.

EQUAL OPPORTUNITY

It is the policy of CACOST not to discriminate on the basis of race, color, creed, gender, religion, marital status, age, national origin or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief or any other consideration made unlawful by applicable federal, state, or local laws. Contractor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Agreement, with respect to hiring, tenure, terms, conditions, and privileges of employment, or a matter directly or indirectly related to employment, because of age or race, color, creed, gender, religion, marital status, age, national origin, or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation, or belief. Contractor further agrees that every subcontractor entered into for the performance of the Agreement shall contain a provision requiring non-discrimination in employment herein specified, binding upon each subcontractor. Breach of the covenant may be regarded as a material breach of the Agreement.

CERTIFICATION WITH REGARDS TO LOBBYING

No federal appropriated funds will be paid to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant or loan, the entering into of any cooperative agreement or the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan, or cooperative agreement.

PROHIBITED SUBSTANCES IN THE WORKPLACE

The contractor is considered a representative of CACOST while carrying out the duties of the contract. CACOST has a policy that prohibits the possession and/or use of alcohol or illegal drugs when conducting CACOST business. If the contractor is observed engaging in this type of behavior while performing any aspect of the contract, termination of the contract will occur.

EQUAL EMPLOYMENT OPPORTUNITY

The Equal Employment Opportunity Clause required under Executive Order 11246, the affirmative action commitment for disabled veterans, recently separated veterans, other protected veterans, and Armed Forces Service Medal Veterans, the affirmative action clause for handicapped workers and the related regulations of the Secretary of Labor, 41 CFR Chapter 60, are incorporated by reference in the contract. By accepting the contract, the vendor certifies that it complies with the authorities cited above, and that it does not maintain segregated facilities or permit its employees to perform services at locations where segregated facilities are maintained, as required by 41 CFR 60.

DEBARMENT AND SUSPENSION

The contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency

SCOPE OF SERVICES

PROJECT OVERVIEW

CACOST currently has forty-six (46) locations with telecom services which are provided by an existing Cloud Hosted VoIP service provider. These locations include, but are not limited to, main offices, field offices, education centers, and health clinics. The sites are interconnected leveraging SD-WAN technology with each site having its own dedicated internet access. CACOST currently utilizes Polycom VVX 310, 311, 410, 411 desk phones, IP 6000 conference phones, Panasonic Dect cordless phones, Obihai and CISCO ATAs.

It is the agency's intent to obtain quotes for renewal or a replacement VoIP service provider that will allow direct connectivity and enhanced communications through various mediums. This RFP is requesting the telephone system, telecommunication lines and services, team collaboration, a contact center system, and reporting.

PROPOSAL REQUIREMENTS

General Requirements – The following items are required with all proposals submitted:

1. Completed **CACOST Cloud Hosted VoIP Services RFP – Attachment A, Proposed Pricing.**
2. Completed **Required Features Checklist Form.**
3. Pricing must be proposed in monthly terms for a 12, 24, 36, and/or 48-month term contract.
4. Pricing must include all costs associated with deployment of the proposed system.
5. All components and specifications necessary to deploy the proposed system must be included, even if not explicitly mentioned in this RFP.
6. All components must be factory new, not reconditioned or refurbished.
7. Proposers are required to include replacement desk and cordless phones in submitted proposals.
8. Proposal contents submitted to CACOST, including technical specifications for hardware and software, software maintenance fees, and taxes shall remain valid for a minimum of 90 calendar days from the Proposal due date.
9. Explanation of any penalty or liability charges for reducing equipment prior to or after installation of the proposed system.
10. Statement regarding CACOST's responsibility in assuming risk of loss or damage.

Vendor/Company Information – All Proposers must include company background information that provides, at a minimum, the following details:

1. Company ownership
2. Length of time in the telecommunications industry
3. Number of office locations and/or service centers
4. Number of employees
5. Primary contact information – name, address, phone, fax, and email
6. Disclosure of potential conflicts of interest

References – All Proposers must include a list of at least three (3) business references, preferably customers that are currently using a system similar to the system being proposed with multiple location sites and contact centers. The following details must be included:

1. Customer name
2. Primary contact information – name, position, address, phone, and email
3. Number of users
4. Number of sites

System Requirements – In order for a proposal to be considered, the proposed system must comply with the following requirements:

1. All regulatory, e-911, state, and local requirements must be met.
2. System management through on-site or remote system administrators.
3. System must be HIPAA and FERPA compliant.
4. A detailed voice system security plan that addresses the liabilities of the proposed system should be included. Each system may require different protection measures; it is our expectation that the selected vendor will provide recommendations regarding protection of this system environment.
5. System administration features and capabilities, or functional equivalents, must be provided as part of the proposed system.
6. Change history documentation.
7. Survivability processes for each site.
8. Disaster recovery processes including system back-up and restoration details.
9. While not a requirement, CACOST would prefer the ability to adjust codecs based on bandwidth availability at each site.

Proof of compliance with the above requirements must be provided through proper documentation, such as literature, historical reports, certifications, or other forms of validation.

Hardware Requirements – In order for a proposal to be considered, the following hardware to be used in conjunction with the system must be included and must comply with the following requirements:

- 1. Desk Phones**
 - a. Digital display
 - b. 1Gigabit speed switch port
 - c. Supplemental LAN port for PC connectivity
- 2. Conference Phones**
 - a. High quality wireless IP speakerphone
 - b. Digital display
 - c. 1Gigabit speed switch port
 - d. Supplemental LAN port for PC connectivity
 - e. Suitable for 10 person to 30 person conference rooms
- 3. Receptionist Phones**
 - a. Ability to have 100 users/extensions with corresponding use presence indication
 - b. Expansion module option
 - c. Digital display

- d. 1Gigabit speed switch port
- e. Supplemental LAN port for PC connectivity

Please note that the hardware quantities detailed in the **CACOST Cloud Hosted VoIP Services RFP – Attachment A, Inventory** are not necessarily the final quantities CACOST will purchase. Exact quantities may increase or decrease subsequent to the release of this document.

Implementation & Training – All Proposers must include a tentative implementation plan with estimated dates related to the delivery and installation of all components required to place the complete system into service. The implementation plan must clearly identify the tasks and resources required of CACOST and Proposer during the entire process. The implementation plan must also include the following elements in addition to the other processes necessary:

1. A minimum of two (2) hours for a review session with the CACOST IT team focused on routing, QoS, and VLAN design/configuration.
2. Ongoing assistance/support with all VoIP-related VLAN and QoS configurations.
3. A test plan that will include testing of all connectivity of call flows, business hours configurations, porting, DID, and user migration mapping.
4. Complete testing of all system components and software prior to system cutover.
5. A thorough and complete account review.

All Proposers must include a training plan with detailed information for all user groups, such as end users, management staff, and system administrators. This may be provided as literature, online media, online classes, or through other common mediums. All costs associated with training personnel must be disclosed within the proposal.

Maintenance, Warranty, & Support – All Proposers must include the following requirements related to system maintenance, warranty, and ongoing support services:

1. Software update processes and all associated costs.
2. Description of maintenance processes and all associated costs.
3. 12 months parts/labor warranty.
4. 24/7 remote system monitoring and alarming.
5. User manuals for all proposed equipment and software.
6. Locations of all service centers providing maintenance/repairs for our sites.
7. Description of support included for the proposed system.
8. Description of remediation processes.

Documentation – All Proposers must include the following documents:

1. Service Level Agreement that will be used for the proposed system
2. Historical uptime report
3. Unified Communications uptime report
4. Contact Center uptime report
5. Security certification documents
6. All warranty-related documentation
7. Reporting samples – call quality reporting, contact center reporting, administrative reporting

VENDOR SELECTION PROCESS

PROPOSAL REVIEW & EVALUATION

A committee selected by CACOST will review and evaluate all proposals based on the criteria listed in the *Evaluation Criteria* section of this RFP. The Proposers may be asked to interview with CACOST representatives, make an oral presentation and/or respond to questions regarding the submittal response. CACOST may elect to negotiate pricing with one or more of the most qualified Proposers. Once all proposals are reviewed and evaluated, the submitted proposal that will provide the most value to CACOST will be selected and will be submitted as a recommendation to the CACOST Executive Director. CACOST is not bound to accept the lowest priced proposal if it is not in the best interest of CACOST as determined by the review committee.

EVALUATION CRITERIA

The following table illustrates the general evaluation criteria that will be used to determine which proposal provides the most value to CACOST:

EVALUATION CATEGORIES	WEIGHT
Pricing	40%
Qualifications	10%
Functionality	30%
Support	20%
Total	100%

The evaluation categories can be broken down as follows:

1. Pricing – all costs associated with the deployment and use of the proposed system through the respective terms offered. These costs must all be included in **CACOST Cloud Hosted VoIP Services RFP – Attachment A, Proposed Pricing** to ensure proper evaluation.
2. Qualifications – all information provided in the *Vendor/Company Information and References* section of this RFP. Proposers that are considered HUBs and/or Small, Women, and/or Minority-Owned Businesses will receive added value in this category; however, total weight of this category will not be more than ten percent (10%) for all Proposers.
3. Functionality – all information provided to meet or exceed the *Special Requirements, System Requirements, Hardware Requirements*, and the **Required Features Checklist Form** attached to this RFP.
4. Support – all information provided in the *Implementation & Training, Maintenance, Warranty, & Support*, and *Documentation* section of this RFP.
5. All other voluntarily submitted material will be categorized into the evaluation category most closely associated with it.

In accordance with applicable laws, rules and regulations for public purchasing, an award will be made to the responsible Proposer whose proposal is determined to provide the best value to CACOST. The proposal must be submitted on time and must materially satisfy all mandatory requirements identified above to qualify for evaluation. A written acceptance mailed or otherwise

furnished to the qualified proposer and a fully executed contract is required prior to commencement of any work under this RFP. Protest procedures are available upon request and must be submitted within ten (10) days of award determination for consideration.