



City of Bothell™ **OR PROPOSAL #CBP-1**

Request for Proposal #CBP-1

Professional Services & Implementation of Cloud Based PBX and Teams Client Integration

Issue Date: April 26, 2024

Due Date: May 24, 2024

REQUEST FOR PROPOSALS

Notice is hereby given that proposals will be received by the City of Bothell, WA ("City") for: **RFP #CBP-1 on or before May 24 at 4:00pm.**

Lisa Rossiter, Technology Programs Manager (lisa.rossiter@bothellwa.gov)
City of Bothell Employee & Technology Services
18415 101st Avenue NE Bothell, WA 98011

Proposals submitted after the due date and time will not be considered. A copy of this Request for Proposal (RFP) may be obtained from City's web site at <https://www.bothellwa.gov/bids.aspx>.

The City of Bothell reserves the right to:

- Reject any and all proposals, and to waive irregularities and informalities in the submittal and evaluation process. This RFP does not obligate the City to pay any costs incurred by respondents in the preparation and submission of a proposal, including but not limited to a respondent doing an on-site scripted product demonstration. Furthermore, the RFP does not obligate the City to accept or contract for any expressed or implied services.
- Accept the bid, bids or parts of a bid deemed most advantageous to the City.
- Amend, cancel or reissue the RFP in any manner prior to contract award.
- Obtain clarification at any point in a vendor's proposal. Such clarifications can be in any form such as but not limited to conference calls, email communications, web demonstrations, on-site demonstrations or vendor headquarters visits.
- Share the RFP, proposals and subsequent vendor provided information with its consultant(s) in order to secure expert opinion.
- If applicable, request from the software vendor a different implementation provider than the one proposed or at its sole discretion, select a different implementation provider on its own.



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Public Disclosure Notice

In order to protect the integrity of the contracting process, proposals will not be disclosed until after award and signing of any and all contracts that may result from this Request for Proposal. All materials provided by the Vendor are subject to State of Washington and applicable County public disclosure laws. Documents identified as confidential or proprietary will not be treated as such if public disclosure laws take precedence, the information is publicly available, the information is already in the City's possession, the information is obtained from third parties without restrictions on disclosure, or the information was independently developed without reference to the confidential information.

Non-Discrimination Policy

The City of Bothell is an Equal Opportunity Employer and encourages disadvantaged, minority, and women-owned firms to respond.

The City of Bothell strives to provide accessible information for people with disabilities. Persons with disabilities may request this information be prepared and supplied in alternate forms by calling collect 425-806-6100

The City of Bothell in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, subtitle A, Office of the Secretary, Part 21, nondiscrimination in federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 26 will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin or sex in consideration for an award.



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General Information

Issue Date: April 6, 2024
Due Date: May 24, 2024
RFP Title: **RFP #CBP-1, Professional Services & Implementation of Cloud Based PBX and Teams Client Integration**

Submit Proposals To

Lisa Rossiter, Technology Programs Manager
(lisa.rossiter@bothellwa.gov)
City of Bothell Employee & Technology Services
18415 101st Avenue NE Bothell, WA 98011

1. PURPOSE

The purpose of this RFP is to solicit proposals from PBX vendors, professional service vendors, implementation partners and/or Value-Added Resellers (VARs) who can demonstrate that they possess the organizational, functional and technical capabilities to provide professional services & implementation of a Cloud Based PBX with Teams Client Integration (not Teams client dependency) that meets the City's needs. The City will consider proposals from single vendors or from multiple vendors working as a team. In the event multiple vendors submit a proposal together, the City expects that there will be one prime contact to be responsible for the project. Vendor(s) shall have experience in successfully implementing the proposed solution at local government agencies of similar size to Bothell. The successful vendor shall be responsible for the approved design and implementation of a Cloud Based PBX that offers Teams Client Integration but not a Teams client dependency, as well as user acceptance testing and any required user training.

This RFP process seeks to find the best overall solution to the City of Bothell for this investment. Factors that may contribute to the selection process include but are not limited to:

- Understanding of and ability to meet the City's requirements,
- Overall cost of service and ongoing licensing costs,
- Project approach, implementation methodology and past success,
- Feedback from customer references and experience with municipalities similar to Bothell,
- Compliance with the City's terms and conditions.

2. SCOPE OF WORK

The City is seeking vendors or partnered vendors who provide:

- Professional implementation and planning services and
- Cloud based phone system with independent dialing client (thick client, browser based or otherwise) but also integrates with the Teams client.

The goal of this strategy is to ensure the city is able to successfully implement a phone modernization project, moving from a traditional PBX and desktop handsets to a solution that:



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- Provides redundant phone access through more than one client (thick client, browser based or otherwise) to promote up-time and accessibility,
- Extends access to city phones and mobile devices,
- Facilitates organizational growth and scalability, ensuring adaptability to changing business requirements,
- Supports public safety and EOC (Emergency Operations Center) phone needs through effective implementation plan,

3. GENERAL FUNCTIONALITY

The main functional areas for this project include:

- Professional planning and implementation services, including planning for an effective and redundant EOC (Emergency Operations Center) phone plan,
- With IT staff, review City's current phone bills to consolidate or realize cost savings,
- Enable function or existing pots and analog (separate from phone system) lines required for elevators, etc.
- Ongoing product support (SLA),
- Voicemail with transcription / VMT,
- Ability to set voicemail auto-deletion (time based) and method for disclosing voicemail messages,
- Seamless integration of voice, video, and messaging within Microsoft Teams,
- Transfer to any phone (including numbers outside Bothell's system),
- DID's ring on all employee devices (computer or mobile),
- Mobile app (to supplement MS Teams app),
- Voicemail access from anywhere with voicemail notifications,
- Function that eliminates the need for 'on call' cell phones currently being carried and passed between staff,
- Generally, eliminate the need for desk handsets, but has affordable handset options,
- Provide additional communication methods for EOC functionality to include POTs lines *and* virtual phones,
- Easy administration to retrieve voicemails for records requests.
- Conference calling.

Desirable features for this project include:

- On-call number and call routing available to be done by Managers/Supervisors as needed and without IT intervention,
- Ability to easily transfer an active call from computer to mobile app,
- VMTtranslation,
- Make best practice policy recommendations around distribution of phones (DIDs or mobile), handsets, etc
- Option for 24x7 support.

4. SUBMITTAL REQUIREMENTS

Submittals to be delivered on or before 4:00 p.m., April 26, 2024. **Submit via email to lisa.rossiter@bothellwa.gov with subject line: "RFP #CBP-1 Submission".** An optional hard copy (in addition to email) may be mailed to:



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Lisa Rossiter, Technology Programs Manager (RFP #CBP-1)
City of Bothell Employee & Technology Services
18415 101st Avenue NE Bothell, WA 98011

Tips to submit successfully:

- Responses to this RFP must adhere to the submittal format below with Sections (numbered as shown) and with all content included in each section.
- Please use these forms (MS Word) and do not put them in another format.
- **Do not use hyperlinks** to provide information and do not refer to other sections with similar information.
- When your proposal is complete, refer to the proposal submission instructions in this document.

SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
Section 1	Scope of Services	Include the following in this Section: <ul style="list-style-type: none"> ✓ Brief summary of your understanding of our project and the scope of work and high-level implementation strategy, ✓ Brief high-level summary of the major components/features of your proposed solution, ✓ Summary of any other products or services that you offer that you feel that we should be aware of.
Section 2	Technical and Implementation Questions	<ul style="list-style-type: none"> ✓ Complete the Technical and Implementation form in Attachment A and put it in this Section 2. Provide a response for each requirement. Leaving a question blank may deem a vendor unresponsive.
Section3	Company Information and Qualifications	<ul style="list-style-type: none"> ✓ Complete the Company Information and Qualifications form in Attachment C and put it in this Section 2. Include references. ✓ Make sure that you have included or attached a detailed price breakdown as noted in Attachment B. ✓ If a 3rd party implementation partner or a Value-Added Reseller (VAR) is part of this proposal, make sure that section 5 is completed in Attachment C.
Section 4	RFP Exceptions	<ul style="list-style-type: none"> ✓ Complete and sign the RFP Exceptions form in Attachment D and include in Section 4. Identify ALL exceptions to this RFP, including contract terms and conditions, and proposed payment schedule. If you provide a sample of your contract you are still required to identify all exceptions you have to the minimum contract terms and conditions we identified in



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SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
		Attachment E – Sample Professional Services Agreement.
Section 6	Price Proposal	✓ Complete the Price Proposal form (see Attachment B – Price Proposal), and include it.
Section 7	Contracts, Terms and Conditions	<p>The contract for implementation and other professional services must be similar to the one shown in Attachment E. Sample Professional Services Agreement. Any license, hosting or subscription contracts should also contain terms and conditions similar to those shown in Attachment E – Contract, Terms and Conditions.</p> <p>Include in this Section a copy of your proposed license, maintenance and implementation services agreements.</p> <p>It is preferred that we use The City of Bothell’s standard professional services agreement with your terms and conditions as supplementals.</p>
Section 8	Other Requirements	<p>Please provide insurance requirements as outlined in Section 12 of this document. Insurance Requirements. Please provide evidence of current liability insurance applicable to this type of project. <u>Please note that an additional endorsement will be required if proposal selected.</u></p>

Vendor’s Cost to Develop Proposals: Costs for developing proposals in response to the RFP are entirely the obligation of the vendor and shall not be chargeable in any manner to the City.

5. RFP PRELIMINARY SCHEDULE

These dates are estimates and are subject to change by the City.

- Release RFP: April 26, 2024



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- Questions (if any) Due: May 22, 2024
- Proposal Responses Due: no later than 4:00 p.m. Pacific Time, May 24, 2024
- Proposal Evaluation Complete: June 14, 2024
- Vendor Demonstrations: June 24 – July 3, 2024
- Contract / Vendor Selection: July 12 – July 31, 2024

6. RFP COORDINATOR/COMMUNICATIONS

Upon release of this RFP, all vendor communications should be directed in writing to the RFP Coordinator listed below. Unauthorized contact regarding this RFP with other City employees may result in disqualification. Any oral communications will be considered unofficial and non-binding on the City. The RFP Coordinator is **Lisa Rossiter, Technology Programs Manager** (Lisa.rossiter@bothellwa.gov) 425-806-6170. Address: 18415 101st Avenue NE Bothell, WA 98011.

7. EVALUATION PROCEDURES

The RFP coordinator and other staff will evaluate the submitted proposals. As part of the evaluation, the City reserves the right to request additional information and ask for a demo, following a demo-script developed by the City.

The City reserves the right to conduct conference calls to go over the response, or take any other action it deems necessary in order to do a thorough and objective evaluation of each response. This evaluation includes checking references. The evaluation process is intended to help the City select the vendor with the best combination of attributes (including but not limited to total cost of ownership, ease-of-use, performance, reliability, vision, flexibility, stability, sustainability, Vendor viability and vendor capacity to successfully implement this project) that meets its needs.

8. QUESTIONS

Questions regarding this project may be directed to RFP coordinator via e-mail at lisa.rossiter@bothellwa.gov.

9. REJECTION OF PROPOSALS

The City reserves the right to reject any and all Proposals and to waive irregularities and informalities in the submittal and evaluation process. This RFP does not obligate the City to pay any costs incurred by respondents in the preparation



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and submission of their Proposals. Furthermore, the RFP does not obligate the City to accept or contract for any expressed or implied services.

10. PROPOSING PARTY'S EXCEPTIONS

Submittals must clearly identify on the RFP Exceptions form (see Attachment D) any and all exceptions that the proposing party takes to this RFP including but not limited to any terms and conditions listed in the RFP document, the Professional Services Agreement in Attachment E, and the City's Standard Insurance Requirements.

11. CONTRACT NEGOTIATION AND AWARD

The City reserves the right to negotiate with the selected vendor that, in the opinion of the City, has submitted a proposal that is the "best value". In no event will the City be required to offer any modified terms to any other vendor prior to entering into an agreement with a proposer and the City shall incur no liability to any proposer as a result of such negotiation or modifications. It is the intent of the City to ensure it has the flexibility it needs to arrive at a mutually acceptable agreement. Negotiations may include, but not be limited to, matters such as: Minor changes to scope of work, Contract details, Contract payment details and Service requirements.

The City reserves the right to make an award without further discussion of the proposals. The selected vendor will be expected to enter into a contract with the City. A sample Professional Services Agreement is provided in Attachment E. Please review this agreement and the terms and conditions prior to submitting a proposal. If the selected vendor fails to sign the contract within 5 (five) business days of delivery of the final contract, the City may elect to negotiate a contract with the next-highest ranked vendor. The City shall not be bound, or in any way obligated, until both parties have executed a contract. No party may incur any chargeable costs prior to the execution of the final contract.

12. EQUAL OPPORTUNITY EMPLOYMENT

The successful vendor or vendors must comply with the City's equal opportunity requirements. The City is committed to a program of equal employment opportunity regardless of race, color, creed, sex, age, nationality, disability or sexual orientation.

13. TITLE VI

It is the City's policy to assure that no person shall, on the grounds of race, color, national origin or sex, as provided by Title VI of the Civil Rights Act of 1964, be excluded from participation in, be denied the benefits of, or be otherwise discriminated against under any of its federally funded programs and activities.



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14. INSURANCE REQUIREMENTS

The selected vendor or vendors shall maintain liability insurance that is sufficient to protect the vendor's business against all applicable risks. If selected, the vendor must provide an additional insurance endorsement, naming the City of Bothell. If the selected vendor is unable to meet these standard requirements, please note current or proposed insurance coverages as an exception to the RFP. Standard requirements may be negotiated if it is in the best interest of the City.

15. COMPLIANCE WITH LAWS AND REGULATIONS

In addition to nondiscrimination compliance requirements previously listed, the vendor or vendors ultimately awarded a contract shall comply with federal, state and local laws, statutes and ordinances relative to the execution of the work. This requirement includes, but is not limited to, protection of public and employee safety and health; environmental protection; waste reduction and recycling; the protection of natural resources; permits; fees; taxes; and similar subjects. The vendor or vendors ultimately awarded a contract must be organized and validly exist as a corporation or partnership in good standing, and licensed to do business in the City of Bothell, Washington.

16. PUBLIC DISCLOSURE NOTICE

In order to protect the integrity of the contracting process, proposals will not be disclosed until after award and signing of any and all contracts that may result from this Request for Proposal. All materials provided by the Vendor are subject to State of Washington, and applicable King County, Washington public disclosure laws.

Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this request for proposals (the "documents") become a public record upon submission to the City, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law.

If the City receives a request for inspection or copying of any such documents provided by a Vendor in response to this RFP, it will promptly notify the Vendor at the address given in response to this RFP that it has received such a request. Such notice will inform the Vendor of the date the City intends to disclose the documents requested and affording the Vendor a reasonable opportunity to obtain a court order prohibiting or conditioning the release of the documents. The City assumes no contractual obligation to enforce any exemption.

Any information contained in the proposal that the Vendor desires to claim as proprietary or confidential, and exempt from disclosure must be clearly designated, including identifying the page and particular exception(s) from disclosure. The City will try to respect all material identified by the Vendor as being Proprietary or Confidential, but requests that



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Vendors be highly selective of what they mark as Confidential. The City will make a decision predicated upon applicable laws and can choose to disclose information despite its being marked as confidential or proprietary.

Marking the entire proposal as proprietary or confidential, and therefore, exempt from disclosure will NOT be accepted or honored, and may result in disclosure of the entire proposal or disqualification of the proposal solely at the discretion of the City.

Documents identified as confidential or proprietary will not be treated as such if public disclosure laws take precedence, the information is publicly available, the information is already in the City's possession, the information is obtained from third parties without restrictions on disclosure, or the information was independently developed without reference to the Confidential information.

17. OWNERSHIP OF DOCUMENTS

Any reports, studies, conclusions and summaries prepared by the vendor shall become the property of the City.



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Attachments

- **Attachment A– Technical and Implementation Questionnaire.** Complete Attachment A and submit in the appropriate section of the proposal. Attachment form can be found on the [Business Opportunities page](#)
- **Attachment B – Price Proposal.** Complete the Price Proposal form for the City and submit it in the appropriate section of the proposal. Attachment form can be found on the [Business Opportunities page](#)
- **Attachment C – Company Information and Qualifications.** Complete the Company Information and Qualifications form embedded in this Attachment C for the Vendor and for any Implementation Partner or Value Added Reseller (VAR) participating in the proposal, and submit in the appropriate section of the proposal. Attachment form can be found on the [Business Opportunities page](#)
- **Attachment D – RFP Exceptions.** Complete the Functional Requirements form embedded in this Attachment D and submit in the appropriate section of the proposal. Attachment form can be found on the [Business Opportunities page](#)
- **Attachment E – Sample Professional Services Agreement.** Please review the sample Professional Services Agreement which is embedded in Attachment E. Attachment form can be found on the [Business Opportunities page](#)