



Oliver Baines Board Chair
Emilia Reyes Chief Executive Officer

1920 Mariposa St., Suite 330
Fresno, CA 93721

REQUEST FOR PROPOSAL
RFP # Fresno EOC Phone System Upgrade 042924

April 29, 2024
Information Technology Freson EOC
1920 Mariposa Street, Suite 330
Fresno, CA
93721



Fresno Economic Opportunities Commission (Fresno EOC) is soliciting proposals to a contract with one (1) qualified and experienced telecommunications vendor to supply installation, configuration and training of a high quality, Cloud Hosted Voice over Internet Protocol (VoIP) or hybrid telephone system with unified messaging included, which serves the needs of Fresno EOC.

This VoIP or hybrid telephone system should include:

- Offer reliable mainstream products for both desk phone and mobile apps with strong manufacturer commitment and vendor support.
- Transcription of voicemails and/or forwarding of voicemails to email.
- Reporting and analytics to monitor incoming calls, dropped calls, etc.
- Unlimited U.S. calls.
- Features for managers to view ongoing calls and intervene in agent calls.
- Recording of calls in the Call Center.
- Intelligent queueing system that announces queue position and offers callback option.
- Advanced features for Contact Center, Interactive Voice Response (IVR), Queues, and Call Routing.
- Dynamic notifications for campaigns via voice, email, and SMS.
- Dashboard for real-time call statistics.
- Queued Callbacks and Voicemails.
- Ability to organize by company or department

This Request for Proposal (RFP) specifies all required qualifications, the responsibilities of the selected company and Fresno EOC, the method and terms of compensation, submission instructions, the rating method, and the contract award provisions.

Proposals will be considered by qualified and experienced telecommunication firms who are regularly established in the business of unified communications , and who, in the judgment of Fresno EOC, have a responsible reputation. Through prior work performed, firms must be able to show evidence of reliability, ability, experience, and personnel to perform the services.

You can also find The Request for Proposals (RFP) on the Fresno EOC website homepage [at fresnoeoc.org](http://fresnoeoc.org)

PROPOSAL SUBMISSION:

Qualified telecommunication vendors are invited to submit a proposal digitally, meeting the requirements described herein, which must be received no later than May 31, 2024 , 2:00 pm Pacific Standard Time. The electronic file is to be sent to ian.matthews@fresnoeoc.org with the subject line of: Fresno EOC Phone System Upgrade 042924. Mail or deliver hard copy proposals in a sealed envelope to:

Request for Proposal Fresno EOC Phone System Upgrade 042924
Ian Matthews
Fresno EOC
1920 Mariposa Mall, Suite 330
Fresno, CA 93721

Failure to clearly label proposals may result in premature disclosure. It is the Bidder's responsibility to ensure that proposals are received by the above deadline. Late proposals will not be considered.

QUESTIONS:

Direct all questions regarding this RFP to Ian Matthews via email: ian.matthews@fresnoeoc.org. All questions and responses are public and posted in a timely manner on the Fresno EOC website homepage (www.fresnoeoc.org) under the RFP section at www.fresnoeoc.org/rfp. Fresno EOC will not accept questions after May 22, 2024 2:00 PM (Pacific).

This Request for Proposal does not commit Fresno EOC to award a contract or pay any costs incurred in the preparation of a proposal in response to this request. Fresno EOC reserves the right to accept the proposal it considers in its best interest. All materials submitted to Fresno EOC in response to this RFP become the sole property of Fresno EOC and may be used at its discretion unless the proposer identifies any trademarks or patents. Selection of the firm is at the sole discretion of the Fresno EOC Board of Commissioners.

COMPLAINTS:

If a bidder has a complaint relative to the RFP, please send a written statement to:

Emilia Reyes, CEO
Fresno EOC
1920 Mariposa Mall, Suite 300
Fresno, CA 93721

With a copy to:

Angela Riofrio, Finance Director
Fresno EOC
1920 Mariposa Mall, Suite 330
Fresno, CA 93721

APPEALS:

Bidders have seven (7) calendar days from the bid award to appeal the decision. Send written appeal to:

Emilia Reyes, CEO
Fresno EOC
1920 Mariposa Mall, Suite 300
Fresno, CA 93721

With a copy to:

Angela Riofrio, Finance Director
Fresno EOC
1920 Mariposa Mall, Suite 330
Fresno, CA 93721

WOMAN, DISABLED VETERAN, MINORITY-OWNED OR SMALL BUSINESS:

Fresno EOC will attempt to utilize woman, disabled veteran, minority-owned, or small business, considering that the primary responsibility is the favorable return to Fresno EOC.

Fresno EOC draws upon the power of its diverse staff and board membership by producing positive and meaningful accomplishments in its human development initiatives, social ventures, and community partnerships.

The RFP's weighted evaluation process reflects Fresno EOC's Fresno commitment and support in creating inclusive employment opportunities by encouraging vendors and contractors to participate in our organization's vision.

Thank you for your interest in working with the Fresno Economic Opportunities Commission.

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KEY ACTION EVENTS AND DATES:

Listed below are the events and dates for this RFP. All dates are subject to revision.

- Release of RFP: April 29, 2024
- Mandatory Walkthrough or Q&A session: May 15, 2024
- Last day for Proposers to Submit Questions: May 22, 2024 2:00 P.M. (Pacific).
- Last Day for Fresno EOC to Answer Questions: May 27, 2024
- Proposal Deadline: May 31, 2024, 2:00 P.M. (Pacific)
- Contract Award: TBD

SECTION 1 - GENERAL PROPOSAL REQUIREMENTS

SITE WALKTHROUGH or QUESTION AND ANSWER SESSION:

There will be a MANDATORY question and answer session scheduled for Wednesday, May 15, 2024, 10:00 AM (Pacific) at [Join the meeting now](#) Microsoft Teams Meeting ID: 274 578 522 104 Passcode: 2EWg7X

SPECIFICATION CHANGES:

Fresno EOC may, during the proposal period, advise the Proposer in writing of additions, omissions, or alterations in the specifications. Changes shall be included in the RFP and become part of the specifications as if originally submitted.

AMENDMENTS:

No one is authorized to amend this proposal in any respect, by an oral statement, or to make any representation or interpretation in conflict with the provisions of this RFP. If necessary, supplementary information in addendum form will be prepared and made available to potential proposers. It is the Proposer's responsibility to obtain, sign, and submit all addendum(s) for the RFP at:

Failure of Proposer to submit signed addendum(s) with their proposal shall be cause for rejection. Any exceptions taken to this RFP shall be clearly stated in writing.

RFP WITHDRAWAL:

Any Proposer may withdraw their proposal, either personally or by written request, at any time prior to the date and time due.

RIGHT TO REJECT PROPOSALS:

Fresno EOC reserves the right to reject any and all proposals or any part of a proposal, waive minor defects or technicalities, or solicit new proposals on the same project or modified project, which may include portions of the original RFP document, as Fresno EOC may deem necessary and in its best interest. False, incomplete, or unresponsive statements in connection with a submitted proposal may be sufficient cause for rejection. Fresno EOC will be the sole judge in making such determinations.

EXAMINE SPECIFICATIONS:

Proposer shall thoroughly examine and be familiar with the specifications. Failure or omission of any Proposer to receive or examine any form, instrument, addendum or other document, or become acquainted with existing conditions, shall in no way relieve Proposer from any obligations with respect to Proposer's offer or to the contract. Submission of a proposal shall be taken as prima facie evidence of compliance with this section.

Should a Proposer find discrepancies in or omissions from proposal documents or other contract document, or should be in doubt as to their meaning, he/she shall at once notify [Click here to enter text.](#), who is Fresno EOC's representative. All written instructions will be made available to all Proposers on the Fresno EOC website at www.fresnoeoc.org. Neither Fresno EOC nor will its representative be responsible for any oral instructions. No interpretations will be issued later than five (5) calendar (working) days before the proposal date so that all inquiries can be answered in

writing and distributed to all Proposers in the form of an addendum to the contract in ample time before the proposal opening date.

RESPONSIBILITY OF BIDDER:

Proposers shall have attended Q&A Session , and shall be responsible for having acquired full knowledge of the job and of all issues affecting it. No variations or allowances from the contract sum will be made because of lack of such examination.

ALL RFP DOCUMENTS PART OF FINAL CONTRACT:

Any RFP documents, letters, and materials submitted by the Proposer shall be binding and included as part of the final contract. Unauthorized conditions, limitations, or provisions attached to proposals may cause their rejection.

EXCEPTIONS:

Any exceptions to this RFP must be stated in your proposal. It is otherwise assumed that the wording within this document is acceptable and agreed to by the Proposer.

RESULTING CONTRACT:

Through the RFP process, Fresno EOC reserves the right to negotiate a contract based on all factors involved in the written proposal without further discussion or interview. The performance of the contract resulting from this proposal shall be governed, construed, and interpreted according to the laws of the State of California.

The terms and Conditions of a resulting contract shall be those of Exhibit A, "Sample Contract." Any contentions must be submitted with your RFP.

NOTICE:

Any notice, demand, request, consent, approval, or communication that either party desires or is required to give the other party shall be in writing and either served personally or sent by pre-paid first-class mail, or the equivalent thereof by private carrier. Any such writing shall be addressed to Fresno EOC, Ian Matthews at 1920 Mariposa St, Suite 320 Fresno, CA 93721

NON-EXCLUSIVE AGREEMENT:

This RFP does not establish an exclusive arrangement between Fresno EOC and the Proposer. Fresno EOC reserves, among others, the following rights:

- The right to use others to perform work and services described in the RFP.
- The right to request future proposals from other Contractors for work described in this RFP without requesting a proposal from the Contractor.
- The unrestricted right to bid on any work or services described herein.

SECTION 2 - QUALIFICATIONS, SPECIFICATIONS AND RFP REQUIREMENTS

DESCRIPTION OF SERVICES:

Fresno Economic Opportunities Commission (Fresno EOC) is soliciting proposals to a contract with one (1) qualified and experienced telecommunications vendor to supply installation, configuration and training of a high quality, Cloud Hosted Voice over Internet Protocol (VoIP) or hybrid telephone system with unified messaging included, which serves the needs of Fresno EOC.

This VoIP or hybrid telephone system should include:

- Keep the existing phone numbers.
- Offer reliable mainstream products for both desk phone and mobile apps with strong manufacturer commitment and vendor support.
 - Transcription of voicemails and/or forwarding of voicemails to email.
 - Reporting and analytics to monitor ongoing calls, dropped calls, etc.
- Unlimited U.S. calls.
- Features for managers to view ongoing calls and intervene in agent calls.
- Recording of calls in the Call Center.
- Intelligent queueing system that announces queue position and offers callback option.
- Advanced features for Contact Center, Interactive Voice Response (IVR), Queues, and Call Routing.
- Dynamic notifications for campaigns via voice, email, and SMS.
- Dashboard for real-time call statistics.
- Queued Callbacks and Voicemails.
- Ability to organize by company or department

LICENSE AND PERMITS:

[Click here to enter text.](#)

A copy of the following shall be submitted with the Contractor's proposal:

[Click here to enter text.](#)

BACKGROUND CHECK:

If applicable, the contractor shall certify that all personnel have successfully passed a criminal background check prior to assignment to Fresno EOC.

EDUCATION AND EXPERIENCE:

N/A

RECOGNIZED HOLIDAYS:

Fresno EOC offices are closed on the following holidays.

- New Year's Day
- Martin Luther King Jr's Birthday
- Lincoln's Birthday

- President's Birthday
- Cesar Chavez Day
- Memorial Day
- Juneteenth
- Independence Day - Fourth of July
- Labor Day
- Indigenous People's Day
- Veteran's Day
- Thanksgiving Day
- Christmas Day

REMEDIES IN THE EVENT OF A DEFAULT:

Should Fresno EOC determine a contractor to be in contract default, the determination shall be final. In such an event, Fresno EOC may proceed, but is not limited to, with the following,

- Instruct the Contractor to immediately correct the deficiency causing the default.
- Demand a Service Guarantee Credit.
- Terminate the contract.

SECTION 3 - COST PROPOSAL

Provide a detailed explanation of the costs associated with the products and services that will be provided.

Provide cost options for Cloud Hosted and On Premises/Hybrid systems

The breakdown should be comprehensive and include information on the costs associated with each item line

An example of costs we are expecting include:

- Desktop Phones
- Licenses
- Call Center Add-On licenses if applicable
- Monthly
- One Time
- Cloud storage
- Training

SECTION 4 - RFP RESPONSE CONTENT

RESPONSE:

Proposers are to respond to all information requested in this RFP. Brochures and advertisements will not be accepted as a substitute for these requirements. A qualified proposal must address all items.

CONTENT:

Proposals shall be organized and submitted in the format prescribed below. When replying to a particular paragraph or question, ensure that your response references the section and paragraph that asks that question. Proposers are required to submit an electronic document and one (1) hard copy of the original of their proposal. The original must be labeled "Original".

Proposals submitted must contain the following information to be considered:

- A brief cover letter.
- Identification Sheet.
- Licensing Form.
- Proof of Insurance appropriate for the type and scope of work being proposed
- W-9 Form.
- References Form.
- Cost Proposal.
- Public Contract Code Section and Non-Collusion Affidavit.
- Proposal Authorization Signature Page.
- RFP Content Requirements (read carefully).
- Brochures, Pamphlets (optional).
- One (1) proposal clearly marked "ORIGINAL"
- A digital proposal in pdf format sent to Fresno EOC.

WOMEN/DISABLED VETERANS/MINORITY-OWNED AND SMALL BUSINESSES

Does your firm qualify as a woman, disabled veteran, minority-owned, or small business? If yes, provide publicly certified documentation or a self-certification statement that is subject to examination.

GRADING CRITERIA

Following the deadline for receipt of proposals, all proposals submitted will be analyzed and reviewed by a review panel consisting of representative(s) of the various departments requesting service and the Purchasing Department. Fresno EOC reserves the right to negotiate a contract based on all factors involved in the written proposal without further discussion or interview.

Proposals will be evaluated for cost and compliance with all requirements set forth in this RFP, including timely submission and provision of all documents requested, and for the following minimum requirements:

PHASE 1

Proposals will be examined as to whether or not proposers responded in accordance with the following requirements:

- Proper completion and submittal of required proposal documents.
- Proof of a valid business or professional license from the State of California.
- Submission of a valid proof of insurance certificate.
- If applicable, submission of Women, Minority, or Veteran Owned Business. See the links below for more information about getting certified.
 - <https://resources.smartbizloans.com/blog/business-owners/how-to-get-a-minority-owned-business-certification/>
 - <https://nmsdc.org/>
 - <https://sch.thesupplierclearinghouse.com/>
 - <https://www.uschamber.com/co/run/business-financing/certification-guide-for-minority-owned-business>
 - <https://www.sba.gov/federal-contracting/contracting-assistance-programs/8a-business-development-program>

Proposers who do not respond in accordance with any of the above requirements will be immediately disqualified. This is a non-exclusive agreement. Fresno EOC reserves the right to enter into multiple agreements from this RFP.

PHASE 2

Proposals that were not disqualified in PHASE 1 will be evaluated and scored using the table below:

Evaluation Criteria	Maximum Points	Score
QUALIFICATIONS (25 POINTS)		
Reputation and Experience	25	Click here to enter text.
REFERENCES (25 POINTS)		
Quality	15	Click here to enter text.
Timeline	5	Click here to enter text.
Reliability / Dependability	5	Click here to enter text.
CAPACITY / CAPABILITIES (25 POINTS)		
Staff experience	10	Click here to enter text.
Small, Women, Disabled, Veteran, and Minority Owned Businesses	15	Click here to enter text.
OTHER (10)		
Click here to enter text.	10	Click here to enter text.
PRICE (30 POINTS)		
Proposal Rates and Rate Structure	30	Click here to enter text.
PROPOSAL RESPONSIVENESS (10 POINTS)		
Adherence to the RFP provisions, specifications, terms, and conditions	5	Click here to enter text.
Completeness of answers	5	Click here to enter text.
TOTAL SCORE PHASE II (125 POINTS)	125	Click here to enter text.

SUBMITTAL OF PROPOSALS

Sealed Proposals will be received at the Fresno Economic Opportunities Commission (EOC) Main Office at 1920 Mariposa Mall, Suite # 330, Fresno, CA, 93721, until [Click here to enter text.](#) , PST, [Click here to enter a date.](#).

ALL PROPOSALS SHALL BE ADDRESSED AS FOLLOWS:

Request for Proposal Fresno EOC Phone System Upgrade 042924
Ian Matthews
Fresno EOC
1920 Mariposa Mall, Suite 330
Fresno, CA 93721

The Proposal envelope shall have stated thereon the name and address of the submitting Contractor.

PROPOSALS WILL NOT BE ACCEPTED AFTER 2:00 PM , (PACIFIC) Friday, May 31, 2024
ALL PROPOSALS RECEIVED AFTER SAID TIME AND DATE WILL BE TIME-STAMPED
AND RETURNED UNOPENED TO THE SUBMITTER.

SECTION 5 – SUBMISSION FORMS

BLANK

**1. IDENTIFICATION SHEET
RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL**

Type or print the following information:

Company: _____

Address: _____

City State Zip

Name: _____

Title: E-mail: _____

Telephone: _____ Fax: _____

Years in business: _____

Number of employees: _____

Name of Insurance carriers: _____

Public Liability: _____ Expires: _____

Workers' Compensation: _____

2. LICENSING
RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL

By submission of a proposal, Proposer attests to having possession of a duly issued valid business license issued by the State of California. Such license authorizes a proposer to contract to perform type of work required by the specifications. Should the Proposer fail to provide below, the number and classification of Proposer's State of California License, Private Patrol Permit from the City of Fresno, Fresno Economic Opportunities Commission (EOC) may reject this proposal.

CONTRACTOR: _____

BY: _____

TITLE: _____

MAILING ADDRESS: _____

City

State

Zip

TELEPHONE NUMBER: _____

STATE OF CALIFORNIA LICENSE NO. : _____

(Private Patrol Operators License): _____

Private Patrol Permit (City of Fresno): _____

Contractor's Signature

Date

3. REFERENCES RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL

SIMILAR CONTRACTS/RFPS PERFORMED: List below contracts under which the Proposer has provided similar services during the past three (3) years.

Proposer's financial stability, technical and support capabilities will be verified through reference checking, which may include site visits and contact with other clients or vendors.

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

FIRM NAME: _____

ADDRESS: _____

PHONE NUMBER: _____

CONTACT PERSON: _____

DATE OF CONTRACT: _____ through _____

4. FRESNO EOC DIVERSITY CERTIFICATION CHECK LIST RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL (OPTIONAL)

Please check the diversity code that best represents your company and sign below:

Minority Business Enterprise (MBE)

To qualify as a MBE, the firm must be a for-profit enterprise, regardless of size, physically located in the United States or its trust territories, which is owned, operated, and controlled by minority group members. Ownership by minority individuals means the business is at least 51% owned by such individuals or, in the case of a publicly-owned business, at least 51% of the stock is owned by one or more such individuals. Further, those minority group members control the management and daily operations. Minority group members are defined as:

- Asian-Indian - A U.S. citizen whose origins are from India, Pakistan or Bangladesh.
- Asian-Pacific - A U.S. citizen whose origins are from Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, the U.S. Trust Territories of the Pacific or the Northern Marianas.
- African-American - A U.S. citizen having origins in any of the Black racial groups of Africa.
- Hispanic - A U.S. citizen of true-born Hispanic heritage, from any of the Spanish-speaking areas of Latin America or the following regions: Mexico, Central America, South America, and the Caribbean Basin, only.
- Native American - A person who is an American Indian, Eskimo, Aleut or Native Hawaiian, and regarded as such by the community of which the person claims to be a part. Native Americans must be documented members of a North American tribe, band or otherwise organized group of native people who are indigenous to the continental United States and proof can be provided through a Native American Blood Degree Certificate (i.e., tribal registry letter, tribal roll register number). To certify your business as an MBE, contact your local SBA office to register as a "Small Disadvantaged Business" or 8(a) corporation on SBA Pro-Net or visit the National Minority Supplier Development Council home page.
- US Pan Asian American Chamber of Commerce

Women Business Enterprise (WBE)

To qualify as a WBE, the firm must be a for-profit enterprise, regardless of size, physically located in the United States or its trust territories, which is owned, operated, and controlled, by a woman or women members. Ownership by female individual's means the business is at least 51% owned by such individuals or, in the case of a publicly-owned business, at least 51% of the stock is owned by one or more such individuals. Further, the management and daily operations are controlled by the woman or women members. Woman-owned businesses can be certified in any of three ways:

- Register with the Women's Business Enterprise National Council
- Register with the National Women Business Owners Corporation
- Current state or municipal certifications clearly stating woman-owned status (subject to review)
- All individuals must have a net worth of less than \$750,000, excluding the equity of the business and primary residence.
- All applicants must also meet applicable size standards for small businesses in their industry. To become SDB certified, visit the SBA SDB home page.

Veteran-Owned Business (VOB)

Business must meet the requirements as a Small Business. It must be at least 51% owned and controlled by a U.S. Veteran or Veterans possessing a discharge other than dishonorable.

Veteran-owned business can be certified two ways:

- Register with SBA Veterans' Program
- Register with SBA Pro-net

Disabled Veteran-Owned Business (DVOB)

Business must meet the requirements as a Small Business. It must be at least 51% owned and controlled by a U.S. Veteran or Veterans possessing a discharge other than dishonorable. Disability may be any degree that was acquired or aggravated

**5. SIGNATURE PAGE
RESPONDENT TO COMPLETE AND RETURN WITH PROPOSAL**

The undersigned, having carefully read and examined this RFP, and being familiar with (1) all the conditions applicable to the work for which this proposal is submitted; (2) with availability of the required equipment, materials and labor hereby agrees to provide everything necessary to complete the work for which this proposal is submitted in accordance with the proposal documents for the amounts quoted herein and further agrees that if this proposal is accepted, within five (5) days after the contract is presented for acceptance, will execute, and mail a signed contract to the Fresno Economic Opportunities Commission EOC (EOC).

This Signature/Authorization page must be in Section 1 of your Proposal.

Signature of Authorized Agent Date

Printed Name of Authorized Agent Date

EXHIBIT A
"SAMPLE CONTRACT"

INSERT APPROPRIATE CONTRACT FORMAT HERE (ex. Consultant Contract, General Use Contract, Services Contract, Customized Contract, etc.)