



## REQUEST FOR PROPOSAL # CBP-1

### Request for Proposal (RFP) #CPS1

## Professional Services & Implementation of Cloud-Based Phone System and Teams Client Integration

Issue Date: March 17, 2025

Due Date: April 28, 2025

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Notice is hereby given that proposals will be received by the City of Wenatchee, WA ("City") for:

**RFP #CPS1 on or before April 23, 2025 at 4:00pm.**

#### RFP Coordinator:

Elizabeth Rossiter, Information Technology Director (erossiter@wenatcheewa.gov)  
City of Wenatchee Information Technology  
301 Yakima St Wenatchee, WA 98801  
509-888-3699

### PRELIMINARY SCHEDULE

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

- Release RFP: March 17, 2025
- Questions (if any) Due to RFP Coordinator: April 23, 2025
- Proposal Responses Due: no later than 4:00 p.m. Pacific Time, April 28, 2025
- Proposal Evaluation Complete: June 25, 2025
- Vendor Demonstrations: July 1 – July 31, 2025
- Contract Negotiations: Sept 1 – Oct 31, 2025



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### I. PURPOSE

The purpose of this RFP is to solicit proposals from cloud-based phone system 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 Phone System with Teams Client Integration (not Teams client dependency) that meets the City's needs and improves resident experience when contacting the City. We have a rich and diverse community and are focused on implementing a solution that can help aid in meeting the need to communicate effectively with both English and Spanish speaking residents.

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 primary 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 Wenatchee. The successful vendor shall be responsible for the approved design and implementation of a cloud-based phone system 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 Wenatchee 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 Wenatchee,

### II. SCOPE OF WORK

The City is seeking vendors or partnered vendors who will provide Professional implementation & planning services and a cloud-based phone system with independent dialing client but also integrates with the Microsoft Teams client. The required functional areas for this project include:

- Provide redundant phone access through more than one client option to promote up-time and accessibility,
- Professional planning and implementation services, including planning for an effective and redundant EOC (Emergency Operations Center) phone plan,
- Recommendations on how the city might effectively consolidate existing phone costs through billing analysis,
- Solution for existing POTS and analog lines required for elevators, EOC operations, panic buttons, etc.,
- Plan for additional communication methods for EOC functionality to include POTS lines *and* virtual phones,
- Ongoing product support (SLA),
- Mobile App and twinning,
- Voicemail with transcription / VMT,
- Ability to set voicemail deletion / retention and method for disclosing voicemail messages,
- Seamless integration with Microsoft Teams,
- Generally, eliminate the need for desk handsets, but has affordable handset options,



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- Text to Speech Phone Tree Programming,
- IVR with language translation and strategies to best serve non-English speaking residents, and-
- Review Appendix A for full list of requirements and additional desirable functionality.

### III. SUBMITTAL REQUIREMENTS

#### IMPORTANT

- Responses to this RFP must include all attachments with all requested content included in each.
- Please use these forms in Microsoft Word. **DO NOT SUBMIT PDFS OR SCANNED COPIES.**
- **DO NOT USE HYPERLINKS** to provide information and do not refer to other sections with similar information. Type out all detail or information.
- All submissions must be made in compliance with the instructions provided. The City reserves the right to reject any submissions that are not in compliance with the RFP and/or redact those portions of the submissions that are not in compliance and decline to evaluate non-compliant sections.
- Vendor is responsible for ensuring timely delivery of submittals. The City is not responsible for technical difficulties in submissions.

#### A. SUBMITAL DOCUMENTS

The City is requiring Vendors to submit the following documents with its response to this RFP:

- ✓ Attachment A – Technical and Implementation Questionnaire in Microsoft Word.
- ✓ Attachment B – Company Information and Qualifications.
- ✓ Attachment C – Price proposal or quote.
- ✓ Attachment D – A sample of any required subscription agreements.

#### B. SUBMITAL PROCESS

All submissions must to be delivered no later than 4:00 p.m. Pacific Time, April 28, 2025

Vendors must submit via email to [ERossiter@Wenatcheewa.gov](mailto:ERossiter@Wenatcheewa.gov) with subject line: “RFP #CPS1 Submission”.

An optional hard copy (in addition to email) may be mailed to:



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*Elizabeth Rossiter, Information Technology Director (RFP #CPS1)*  
*City of Wenatchee Information Technology*  
*PO Box 519 Wenatchee, WA 98801*

**Please note that RFP responses received only via hard copy may not be considered.**

### IV. EVALUATION CRITERIA

Project Understanding	20
Firm Experience	20
Proposed technical and implementation methodology	40
References response	20
Total	100

### V. EVALUATION -PROCEDURES

Each proposal will be evaluated based on the vendor's responses to the requirements of this RFP. The City will perform evaluations, rank submittals, and make a selection based on consensus.

The evaluation process is intended to help the City select the best qualified vendor, with the best combination of attributes that meets the City's needs, as determined by the City in its sole discretion. In addition to the criteria above, the City's may consider, without limitation, total cost of ownership, ease-of-use, performance, reliability, vision, flexibility, stability, sustainability, vendor viability and vendor capacity to successfully implement this project, and any other factor deemed important by the City. 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. This evaluation includes checking references. Proposals submitted after the due date/time will not be considered.

This RFP does not obligate the City to pay any costs incurred by vendors in the preparation and submission of a proposal nor does it obligate the City to accept or contract for any expressed or implied services. The City reserves the right to award the contract in whole or in part if it is deemed in the City's best interests. All contracts are subject to City Council approval.



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The City of Wenatchee reserves the right to:

- To reject any and all proposals,
- Accept the bid 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.
- Share the RFP, proposals and subsequent vendor provided information with its consultant(s) in order to secure expert opinion.

### **VI. CONTRACT NEGOTIATION AND AWARD**

The City's Professional Services Agreement (PSA) will be the contract document for these services. A copy of the PSA may be requested for review. 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, and contract payment details.

### **VII. PUBLIC DISCLOSURE**

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 Chelan County, Washington public disclosure laws.

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 Vendors be highly selective of what they mark as Confidential. All submissions will be held in confidence by the City unless otherwise required by law. Applicants should be aware the City is a "public entity" defined by and subject to the Public Records Act.

RFPs are therefore subject to these laws. 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.

### **VIII. NON-DISCRIMINATION**



## **REQUEST FOR PROPOSAL # CBP-1**

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

The City of Wenatchee 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 **509-888-3699**.

### **IX. INSURANCE REQUIREMENTS**

The selected vendor or vendors shall be required to maintain liability insurance that is sufficient to protect the vendor's business against all applicable risks, including but not limited to commercial general liability insurance, professional liability insurance, worker's compensation coverage as required by the Industrial Insurance laws of the State of Washington, and any other coverage required in the City's PSA in the amounts required. If selected, the vendor must provide an additional insurance endorsement, naming the City of Wenatchee.

## Technical and Implementation Information

The information must be completed, addressing all questions and submitted in the format provided.

*\*If you are not using a PARTNER or value-added reseller (VAR), you may remove that column.*

### CONSIDERATIONS WHILE COMPLETING THIS SECTION

#### City Departments / Functions

- Water treatment plan
- Police (no dispatch) and EOC
- Public Works
- Community Development
- Human Resources
- Finance
- Information Technology
- Parks and Recreation
- Mayor & Council

#### Demographics

- Population: 35,526

#### Service Overview

- Number of users: ~200
- DIDs
- Current number of handsets: ~100
- Desired number of handsets: 10-20

FUNCTIONALITY	YES/NO	DETAILS
Indicate if your solution has the below functionality.		
Users can hear their phone ring even when not wearing their headset		
Intuitive administration interface with role-based admin controls.		
Native client and mobile app		
MS Teams client integration		
Transfer active call to a different device and transfer to voicemail		
Call park, Group ring / hunt groups		
Warm transfer		

Ability to see and answer lines (with caller ID in tact) of other staff if needed		
Conference calling function for every user (both adding somebody to an existing call and somebody being able to dial in to be added to an active call		
Flexible and easily updated call tree and IVR. Something that can be updated regularly without having to re-work the whole process.		
Call tree that functions well with translation		
Night modes and After-hours option to forward some numbers or groups to answering service		
hold music library		
User and Administrative knowledgebase		
User training videos on demand		
Long distance calling		
Ability to integrate with overhead paging system and to page through devices		
Caller ID that continues to identify original caller regardless of whether the call is transferred.		
Supports or provides solution for panic buttons		
Option to be able to change caller ID for staff to show a different or main city number		
Reliable—able to function in the context of any kind of emergency		
Redundant—able to use alternate communications methods when primary systems go down		
Call recording		
Call masking		
Standardized technologies and protocols.		
Scalable—suitable for use on a small or large scale as the needs during an emergency incident		
Option for shared handsets		

phones in shared spaces that somebody doesn't have to log into		
Ability to tell if somebody is logged in and active before transferring - calendar integration and auto response		
Easy way to route calls to somebody else when I'm out of the office		
speed dial buttons		
other people on call indicator (call busy)		
With handset or client, mimic up to 30 quick buttons / shortcuts		
Ability to identify incoming call types (ie: cell phones vs. land lines)		
Loud ring for shop bays and shared phones		
Easy transfer to any phone number		
voicemail notification and transcription to email		
Voicemail only lines (like inspection scheduling)		
web voicemail portal		
Reliable message indicator (app and handsets)		
Translator app (Spanish – English). On a call and switch to voice-to-text translation		
Easy to access and print phone directory		
Call twinning		
Hold announcements by group that can be changed using text to speech		
IVR with effective translation (English – Spanish)		
Set user default location to include address, floor, office etc that can be part of address for 911 calling.		
Prompt user to enter new address if they log in from somewhere else		
Spam filtering		
Easier configuration of individual line and features		

On-call line scheduling. Can we create a schedule that will send the on-call phone calls to different staff based on that schedule.		
Begin typing a name to call employee		
Easy to program handsets		
Short voicemail menu to reach messages		
Holiday scheduled with alternate greetings for systemwide or depts		

IMPLEMENTATION	COMMENTS
Experience in implementations for Washington Cities with Police Departments	
Call tree planning / redesign consulting services	
Explain how your proposed solution provides redundant phone access to promote up-time and accessibility.	
How can the proposed solution/plan supports the most effective EOC and public safety up-time in the event of an internet outage?	
How do you help organizations like Wenatchee consolidate phone lines/devices for ongoing costs savings?	
With your proposed solution, how are existing pots and analog lines required for elevators, etc managed?	
Explain how voicemail for the proposed solution can be retained, autodeleted, and disclosed centrally?	
Who will Wenatchee work with in the delivery of the Solution or Service? Who will be our primary point of contact? Please include roles, responsibilities, expertise.	
Will your application or services require the use of proprietary technology that Wenatchee must purchase or install? If so, please list all pertinent information related to this technology, including hardware, software, networking, middleware and database requirements. <b>Include any associated costs as a separate line item in your quote.</b>	

What do you see as the approximate overall duration to transition to full operation? Provide a timeline with your underlying assumptions.

Attachment B

**Company Information and Qualifications**

*\*If you are not using a PARTNER or value-added reseller (VAR), you may remove that column.*

<b>COMPANY INFORMATION</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Company Name, Address and Phone		
Name and Title of Primary Contact Person		
Website URL		
Where is your company headquartered?		
Year founded		
Regional office servicing this engagement		
Characteristics that set your company apart? (optional)		
Number of years your company has offered the products/services associated with this RFP.		
What percentage of your company revenue for the trailing 12 months is products/services associated with this RFP?		
Disclose any recent litigation (and outcomes) and litigation currently underway.		
Please list all incidents in the past 5 years in which you have had a contract terminated for default due to your performance or otherwise.		
Will your company provide Wenatchee with a specific liability insurance endorsement?		
List any recent awards your company has received (within the last two years).		
Are there any planned acquisitions or mergers in the future?		
Does any attorney or employee of the firm have any conflict of interest with the City, or can reasonably anticipate any conflict of interest? How will any conflict be addressed?		
<b>EMPLOYEE INFORMATION</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Number of employees		
Number of U.S. staff dedicated to the		

products/services associated with this RFP.		
How are support employees geographically distributed?		
What is the average employment time within your company?		
How does your organization approach and incorporate diversity and equity into your work?		
<b>CUSTOMER BASE</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Total municipal customers in U.S.		
Number of cities with Police Departments in the City of Washington using the proposed solution (at proposed version).		
What is the average population size for the majority of your municipal customers?		
<b>SUPPORT AND LICENSING</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Describe the support and SLA that would be offered to the City. INCLUDE ANY ADDITIONAL COSTS FOR SUPPORT IN QUOTE.		
What are the hours of support that would be offered to the City.		
Where is support geographically located? If support 'follows the sun', please describe.		
Describe the process for adding new services or features?		
What is your application upgrade schedule and method, if applicable.		
Do you notify customers of feature changes, service interruptions or upgrades? How are customers notified?		
Are customers ever charged for upgrades? If so, how often has this historically occurred and what is the average cost?		
Briefly describe your backup, redundancy, and disaster recovery plan.		
Briefly describe your customer training: Approach and philosophy Options (Learning center, interactive Web		

courses, CD/DVD, onsite, train-the-trainer, etc.) Prices/rates		
Please provide an overview of your plans for continuity of service to Wenatchee.		
<b>INFORMATION SECURITY</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Do you monitor your staff compliance to internal information security policies and procedures?		
What regulatory regimes and frameworks do you comply with? What banking or criminal justice requirements do you meet?		
What is your company's process for notifying customers of a potential tenant/data breach?		
<b>INFORMATION SECURITY</b>	<b>SERVICE / SOLUTION PROVIDER</b>	<b>PARTNER OR VAR (IF APPLICABLE)</b>
Describe the licensing model for the proposed solution? (subscription, annual / monthly payments, etc)		
Have you included a support agreement in your pricing? (YES/NO)		
Which solution(s) are you proposing? Please explain quote line items or part numbers.		
What is the hourly cost for any additional consulting hours available for purchase beyond the scope included in quote?		
Are there any third-party products that Wenatchee will be required to purchase to support the proposed solution?		
Briefly describe your fee structure for professional services for implementation. Has this been included in the quote?		
Provide a preliminary payment schedule and describe when billing would begin.		

## 9.0 CUSTOMER REFERENCES

Provide three Municipal references that:

- ✓ **are similar in size to Wenatchee**
- ✓ **are similar in requirements**
- ✓ **have implemented within in the past three years.**

<b>Name of City:</b>	
<b>Population:</b>	<b>Number of Users:</b>
<b>Contact Name/Title:</b>	<b>Telephone #:</b>
<b>Comments:</b>	