

REQUEST FOR PROPOSALS



**Watertown Family YMCA
Watertown, NY**

The Watertown Family YMCA is requesting proposals for:

Voice over IP (VoIP) Telephone System

RELEASE DATE: May 12, 2023

RESPONSE DUE: June 12, 2023

**Watertown Family YMCA
Request for Proposal
Voice over IP (VoIP) Telephone System**

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I. PURPOSE

The Watertown Family YMCA is seeking a comprehensive Voice over IP (VoIP) phone system solution for our organization. We are looking for managed and unmanaged solutions from a vendor that can provide a reliable, secure, and scalable VoIP solution that can accommodate our growing business needs.

Our current phone systems are outdated and lack the features and functionality we require to communicate with our employees, customers, and partners efficiently and effectively. The vendor should have a proven track record of delivering high quality VoIP solutions and providing excellent customer support.

The project requires the design, implementation, and support of a VoIP telephone system. Preference will be afforded to the vendor that provides a comprehensive, cost-effective solution for current specifications, future capacity requirements, and ongoing service and support. Each respondent should include in their proposal the benefits that their system will provide including, but not limited to, the increased efficiencies and potential cost savings the YMCA will realize.

Current Watertown Family YMCA locations:

Downtown YMCA- 119 Washington Street, Watertown, NY 13601

Fairgrounds YMCA- 585 Rand Drive, Watertown, NY 13601

YMCA Daycare- 514 Washington Street, Watertown, NY 13601

Carthage YMCA- 250 State Street, Watertown, NY 13601

Downtown YMCA Community and Aquatics Center- 146 Arsenal Street, Watertown, NY 13601 (Completion Date: 11/17/2023)

II. SUBMISSION OF PROPOSAL AND TIMELINE

A. Submission Deadline

To be considered, proposals must be received by the YMCA by email submission no later than 5:00 p.m. on June 12, 2023. Submissions after this deadline will not be accepted.

Proposals must be submitted via email, labeled “**RFP VoIP Telephone Solution**” and addressed to asouza@nnyymca.org with a cc to dyoung@nnyymca.org.

Hard copies are not required (the electronic copy IS required) but if a proposer wishes they may submit hardcopies of the proposal by the same deadline to:

Ammbrose Souza
Fairgrounds YMCA
585 Rand Drive
Watertown NY, 13601

There is no expressed or implied obligation for the Watertown Family YMCA to reimburse responding vendors for any expenses incurred in preparing proposals in response to this request.



B. RFP Timeline

Request for proposal issued	Friday, May 12, 2023
Submit Questions: email asouzannyymca.org	Wednesday, May 24, 2023
Response to Questions provided to all sent RFP	Friday, May 26, 2023
YMCA in person visit with Y Team	March 30 and June 1, 2023
*If needed please schedule w/ Ammbrose Souza	(asouza@nnnymca.org)
Due date for proposals	Monday, June 12, 2023: by 5PM
Top 3 on sight Presentations/Interviews	June 20 & June 21, 2023
Award notice to successful proposer	Friday, June 23, 2023
Installation of New Equipment	Last Fall 2023
Installation Complete and Operational	Friday, November 10, 2023

C. Evaluation of Proposal

A committee comprised of users from various departments will evaluate and make the final selection based on vendor's ability to provide the service and meet the criteria established in Sections IV and V of this RFP. Interviews will be arranged with vendors to assist in making a final selection. The following **weighted** evaluation criteria will be used:

Evaluation Criteria		
SCALE: 1- Poor 2- Fair 3- Good 4- Excellent		
1	Transmittal Letter:	personalization to the YMCA and the project at hand
2	Qualification & Experience:	comparable projects with organizations of similar needs and similar size (mid-size not-for-profit)
3	Call Quality:	clarity, consistency, and the absence of echo or latency.
4	Reliability:	uptime, failover and redundancy, disaster recovery, and system backups.
5	User-Friendliness:	interface, ease of use with features such as call forwarding and voicemail.
6	Integration:	ability to integrate with other applications used by the YMCA, such as our CRM and Microsoft Suite.
7	Maintenance Support Plan:	Uptime and response time capability. Commitment to replacement if not performing.
8	Implementation Plan:	Confidence in ability to meet implementation timeline. Staff training/education plan/ materials.
9	References:	Strength of local references
10	Cost 1st year:	Reasonableness of cost for proposed device/software/solution and 1st year implementation.
11	Cost Annually:	Total cost comparison annually.
12	Other Criteria:	(items in proposal worth noting)



D. Contact with the YMCA

Questions about the RFP may be directed to Ammbrose Souza via email at asouza@nnyymca.org. When corresponding via email, be sure to indicate **“RFP VoIP Telephone Solution”** in the subject line. All questions will be responded to in a group email to all prospective proposers on Friday, May 26, 2023.

E. Term of Contract

The contract will be a three- or five-year term, please provide pricing for both, subject to the satisfactory negotiation of terms (including a price acceptable to both the Watertown Family YMCA and the selected vendor). The YMCA reserves the right to reject any and all proposals received; to waive any informality on any proposal; and to be the sole judges of the relative merits of the material mentioned in the respective proposals received. Although it is the YMCA’s intention to select one vendor to perform all services, YMCA reserves the right to award multiple vendors to satisfy the YMCA’s need for different services not available from one vendor. The YMCA may also reject any item(s) or proposals that are not accompanied by the requested information.

III. BACKGROUND

A. The YMCA

The Watertown Family YMCA has more than 160 years of history delivering on the Y promise to enrich the common good and make a better life for the individuals, families, and communities we serve. The YMCA programs emphasize caring, respect, honesty, responsibility, character building, fun, and friendship. Strengthening our community is our cause. The Y is a charitable organization which creates a sense of community through involving individuals and families of all ages, genders, religions, abilities, income, and race. Positive lasting personal and social change can only come when we all work together to invest in our children, our health, and our neighbors.

The Watertown Family YMCA has 3 health and wellness locations, one stand-alone daycare center, and provides school aged childcare and youth development programs in multiple school locations. Our current Downtown YMCA will move operations to our new facility. The old downtown YMCA location will be used as YMCA Admin offices. All YMCA programs emphasize caring, respect, honesty, responsibility, character building, fun, and friendship.

For more information about the YMCA, please visit www.watertownymca.org



B. Information About the YMCA's Current Equipment

Below is a breakdown by location of the Watertown Family YMCA number of extensions needed. This number could vary slightly per location.

Facility Name	General Use Units	Receptionist Units	Total Units
Downtown YMCA	10	2	12
Fairgrounds YMCA	20	2	22
YMCA Daycare	1	1	2
Carthage YMCA	1	0	1
YMCA Aquatics Center	10	1	11
Totals:	41	7	48

*Send a quote for a quantity of 40, 50, and 60.

The equipment and services available at each YMCA location vary. We would be open to an audit of the current technology infrastructure in place at the vendor's request. Please see (II.D) on how to submit questions.

IV. SCOPE OF SERVICES- General Objective

The Watertown Family YMCA is seeking new managed and unmanaged VoIP telephone systems to replace our varying systems across the association. The YMCA will be selecting the new VoIP system based on features, functionality, implementation, and price. The YMCA reserves the right to make a recommendation of a solution that is deemed in the best long-term interest of the YMCA, which may not necessarily be made on the basis on the lowest overall cost.

The winning bidder will be expected to work directly with the YMCA Administrative Team and their network providers to ensure compatibility, call quality, and reliability.

The YMCA is open to considering proposals that offer an Internet Service bundle option.

A. General Specifications

- i. Successful vendor shall furnish, deliver, install, and make devices ready for use by the designated opening date of November 10, 2023.
- ii. Implement a voice solution that includes survivability for one phone line for all locations in the event of an emergency, power outage, or capacity issues. This line must be able to make and receive calls. Emergency 911/E911 Services are required for this system. Vendor shall provide a solution for 911/E911 dialing from within the network that achieves all of the expected performance of a 911/E911 system without substantially changing any of the expected normal operations of the system. Additional capabilities preferred from the emergency call procedure are the ability to initiate an emergency call to be automatically routed to other



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desks within the YMCA Association and to have a text number/s be notified when a 911/E911 call is placed.

- iii. Implement a phone system that can provide one, all-inclusive bill that includes all charges for monthly phone service, including but not limited to long distance calling charges, local calling charges, licensing fees, support and maintenance fees, hardware, fax service, installation charges, cloud service fees, taxes and fees, and any other charges or costs to the YMCA that are a direct cost resulting from the implementation of the solution.
- iv. Maintain the existing 5 main phone numbers and introduce a coordinated 4-digit dialing system to optimize communication effectiveness between YMCA Facilities.
- v. Partner with a vendor that can provide all design, planning, system architecture, installation, network analysis, training, and post installation support for the entire VoIP transition as well as provide long-term management of the VoIP system.
- vi. If devices have an unreasonable amount of failures and/or repairs during the contract period, the successful vendor shall replace said device with another device having equal or better features and value for use during the remainder of the period and at no cost. This is non-negotiable, the vendor must stand by their product.
- vii. The devices shall be new, of current manufacturer (not remanufactured or used machines) and must have been formally announced for marketing purposes before the date of the proposal.

B. Device Common Features

The items listed are meant to define **the basic features, options and technical capabilities that the equipment must provide**. Technical literature for all equipment proposed and any other elements of vendor support shall be submitted as part of the proposal. Vendors should highlight competitive advantages in their proposal.

The successful vendor for YMCA should have previous experience in providing services and recommendations on how to improve the system's usability and functionality, based on their knowledge of what other organizations our size have been using. Please identify which features are included, not included or available at an added cost.

- Automatic call back
- Call Forward Busy / No Answer / All Calls
- Call Redirect
- Call Hold / Release
- Call Park / Pickup
- Call Transfer
- Call Recording
- Call Waiting
- Calling Line ID Name and Number
- Conference Calling
- Caller ID Name and Number
- Speaker Phone Capable
- Auto / Speed Dial (directory and user-entered)



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- Programmable Buttons w/ paperless labels
- Intercom/Paging & Group Paging system
- Extension Dialing between Locations
- Automatic Call Distribution (ACD)
- Workgroups (Groups)
- Custom Call Routing (CCR) Four-digit dialing to all sites on the network
- Conference calls (Include maximum number of participants)
- Integrated messaging with email (Outlook)
- Temporary call relocation to another extension
- Built-in 1 GB switch to provide connectivity to the computer
- Flexible support for PoE or local power
- Shared Extension on Multiple Phones
- Wall-Mount Option
- Bridged Call Appearances
- Music on hold
- Support of American Disability Act (ADA) requirements
- Electronic Fax Capability / Inbound & Outbound Fax Messaging
- Electronic Fax to Email
- Find Me/Follow Me (Forwarding to Cell Phone or Other Number)
- Soft Phone PC integration

Voicemail:

- Access to all voicemail features from multiple locations
- Voicemail options for users without an assigned phone
- Password/Pin required for login
- Voicemail message easily set by the user from any location
- Voicemail forward as an audio attachment to Email
- Voicemail Light Indicator
- Automated attendant features

C. Maintenance Support

- i. The YMCA expects strong maintenance support and service for the proposed devices and management systems. The proposal shall include full maintenance services. Vendor must describe, in detail, the maintenance coverage available for the proposed system.
- ii. When the YMCA initiates a call for service between the hours of 7 am and 6 pm, the expectation is to receive a call-back within one hour stating the estimated arrival time of the service technician. The maximum response time for a service technician is 4 hours. If these conditions cannot be met please outline your service plan.
- iii. The successful vendor shall maintain the devices and system herein described by using only manufacturer-certified trained/ skilled maintenance personnel.



V. PROPOSAL REQUIREMENTS

A. Proposal Format

i. Title Page

1. Title page should include "RFP for Voice Over IP Telephone System for the Watertown Family YMCA", the firm's name, and the date of the proposal.

ii. Table of Contents

iii. Transmittal Letter

1. The letter should be addressed to Denise Young, CEO

iv. Detailed Proposal

1. Qualifications and Experience - The proposal should provide background information of the Company, including the location of the nearest local office and corporate office, and any information demonstrating its ability to provide the services requested in Section IV – Scope of Services.
2. Technical Qualifications - The technical portion of the proposal should address all the points outlined in the request for proposals in Section IV – Scope of Services. Explain in detail the complete Management System Solution. If the desired features are not currently imbedded into the proposed system clearly price out separately the cost of the Management System solution you offer in your proposal. State as a deviation any items which are either not offered with your product at this time and those which are available as a separate add-on option (giving the costs associated with applicable software modules).
3. Vendor proposals should distinguish between managed and unmanaged solutions.
4. Maintenance Support Plan including response time.
5. Implementation Plan – address all relevant aspects of the implementation
 - a. Training – required staff time
 - b. IT support required if any
6. References - Provide references from at least three companies/non for profits for which you have provided similar services. At least two references must currently be your customer for no less than three (3) years.

v. Cost of Proposal

All costs must be clearly labeled to be understood by the YMCA. All costs must be entered in the Handset Model Pricing Options Table (V.A.vi) and in, Total Cost Tables (V.A.vi), but vendors can provide quotes as explanation for each heading. Narrative descriptions are not required.

1. Year One Cost- The YMCA recognizes there will be annual cost associated with phone system.
 - a. As stated in the General Specifications (IV.A.iii.), the YMCA wishes to, "Implement a phone system that can provide one, all-inclusive bill that includes all charges for monthly phone service, including but not



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limited to long distance calling charges, local calling charges, licensing fees, support and maintenance fees, hardware, fax service, installation charges, cloud service fees, taxes and fees, and any other charges or costs to the YMCA that are a direct cost resulting from the implementation of the cloud hosted solution.

- b. There is an expectation that the year one cost will include one-time implementation costs. Respondents should include the annual total cost for the “one YMCA Association bill” for the first year.
 - c. Offerors can include a narrative with this requirement, but a detailed quote or a sample bill is sufficient. Two prices can be included if there is an option to both lease and purchase phones.
2. Year Two and Beyond Annual Cost (estimate based on number of phones, lines, users, etc.)
 - a. Vendors should include an estimated annual total cost for the “one YMCA Association bill” for year 2.
 - b. Vendors can include a narrative with this requirement, but a detailed quote or a sample bill is sufficient. Two prices can be included if there is an option to both lease and purchase phones.
3. Handset Installation Options
 - a. The YMCA is interested in all options for deploying handsets in our facilities, although the preferred method is for the provider to deliver and set up all handsets at all locations. Please describe all options available for deploying handsets at all locations. Pricing should be included for all available options.
4. Handset Model Pricing Options
 - a. The YMCA is requesting pricing for both purchasing and leasing handsets. Offerors can supply multiple options for handsets as well as recommend models for different locations such as shared phones, executive phones, or administrative phones. Camera phones can be listed as an option; however, they are not required.
 - b. Complete the blank table below with the recommended handsets for the system being proposed. The YMCA does not have a preference as to handset manufacturer or model.
 - c. Vendors may include additional information such as flyers, brochures, or technical specifications for all proposed handsets, but the table must be completed for the handsets recommended for locations.
 - d. Additional available items such as additional handsets, audio-conferencing phones or headsets can be included with the proposal. Clearly identify them as optional items that are available for purchase. Do not include them on this form. Quotes can be included as supporting information.
5. Extra Costs Associated with Survivability
 - a. The YMCA requires one phone line at each location (~5) that can be used to make and receive calls in an emergency, power outage, or capacity issues. If this is an extra cost, it must be clearly outlined in



the response.

6. Extra Costs Associated with Fax Services

- a. The YMCA requires the new VoIP provider to provide fax services at 3 locations (1-Y Admin office, 2-Daycare, 3- Health and Wellness office in New Facility). If this is an additional cost, it must be clearly outlined in the response.

7. Training

- a. If there is an extra cost for training, it must be clearly outlined in the response.

8. Additional Costs

- a. If there are any additional one-time or annual costs, please ensure they are clearly provided and outlined.

vi. Handset Model Pricing Options and Total Cost Table

The cost tables below are for the solution the vendor is recommending as the best option for the YMCA. There is a table for handset model and a lease option for phones, or a purchase option for phones. Vendors are not required to complete both Total Cost tables.

Recommended Handset Model Prices and Options				
Manufacturer and Model	Recommended For Locations	Annual Lease Cost (12 months)	Purchase Cost	Includes Licensing

Costs for Implementing the Recommended Solution – Purchase Phones

Description	Total Cost Proposed
v.1 Year One Cost (includes licenses)	
v.2 Year Two and Beyond Annual Cost (Includes licenses)	
v.3 Handset Installation Costs	
v.4 Handset Costs (options provided on cost table under 5.A.vi)	****
v.5 Extra Costs Associated with Survivability (annual or one time)	
v.6 Extra Costs Associated with Fax Services (annual or one time)	
v.7 Training	
v.8 Additional Costs	

Costs for Implementing the Recommended Solution – Leasing Phones

Description	Total Cost Proposed
v.1 Year One Cost (includes licenses)	
v.2 Year Two and Beyond Annual Cost (Includes licenses)	
v.3 Handset Installation Costs	
v.4 Handset Costs (options provided on cost table under 5.A.vi)	****
v.5 Extra Costs Associated with Survivability (annual or one time)	
v.6 Extra Costs Associated with Fax Services (annual or one time)	
v.7 Training	
v.8 Additional Costs	



VI. OTHER CONDITIONS AND REQUIREMENTS

A. Changes, Additions or Deletions

Any changes, additions, or deletions made to this request for proposals will be made in writing under the signature of the CEO. Changes, additions, or deletions to this request for proposal not in writing have no force or effect on the terms and conditions contained within this request for proposals.

B. Insurance and Hold Harmless Requirements

The vendor shall demonstrate the willingness and ability to provide the required insurance coverage and hold harmless provisions as set forth by the YMCA requirements.

C. Execution of Agreement

The vendor to whom the award is made will be required to enter into a written Agreement with the YMCA. A copy of the Request for Proposal, the vendor proposal, and the contract specifications will be attached to, and will form a part of the contract. All materials, supplies, equipment, and services supplied by the vendor shall conform to the specifications herein. In case of default by the vendor, the YMCA reserves the right to procure the articles from other sources and to hold the vendor responsible for excess costs incurred by the YMCA.

D. Invoicing

All invoices must be sent electronically to: laalexander@nnyymca.org; and addressed:

Watertown Family YMCA
119 Washington Street
Watertown, NY 13601

E. Undue Influence

The proposer declares and warrants that no undue influence or pressure is used against, or in concert with, any officer or employee of the YMCA in connection with the award or terms of the Agreement that will be executed as a result of this RFP, including any method of coercion, confidential financial arrangement, or financial inducement. No officer or employee of the YMCA will receive compensation, directly or indirectly, from the proposer, or from any officer, employee or agent of the proposer, in connection with the award of the Agreement or any work to be conducted as a result of the RFP. Violation of this Section shall be a material breach of the Agreement/Contract entitling the YMCA to any and all remedies by law or in equity.



Attachment A
Insurance and Hold Harmless Agreement



Watertown Family YMCA

119 Washington Street ☐ Watertown, NY 13601 ☐ (315-782-3100)

NOTICE TO OBTAIN INSURANCE DOCUMENTATION*

Current copies of the following insurances need to be on file with the Watertown Family YMCA:

- 1) General Liability
- 2) Automobile
- 3) Workers Compensation

Please send the **Certificate of Insurance and Additional Insured Endorsement forms**, naming as Additional Insured ("Watertown Family YMCA, its officers, employees and agents." electronically, to:

Ammbrose Souza: asouza@nnyymca.org

You may be receiving this for one of the following reasons:

___ You are a new contractor or subcontractor with the YMCA.

___ You are a new vendor providing a service to the YMCA.

___ One or all of your prior policies has expired.

___ Your contract is due for renewal or a new PO has been issued.

___ Your insurance information is not compliant or has not been received.

Please send the copies along with Page 2 of this form **signed** to the e-mail address above. Failure to have these documents on file and current can delay the issuance of a purchase order or the payment of an invoice. The YMCA thanks you for your cooperation in keeping our records up to date.

For any questions, please contact Ammbrose Souza, 315-755-2005

*If you are not currently providing a service, acting as a contractor, or as a subcontractor, within or for the Watertown Family YMCA, and do not intend to do so in the near future, you may choose to disregard this notice.



INSURANCE & HOLD HARMLESS REQUIREMENTS

Hold Harmless and Indemnification: The successful bidder shall agree to indemnify, defend and hold harmless the YMCA and its agents, in proportionate part to the successful bidder's relative fault, (including its officers and employees) for/from any and all judgments *claims or actions of any kind presented*, entered into, against the YMCA and its agents arising out of the vendor's (including vendor's employees, representatives, products and subcontractors), negligent performance under this agreement, excepting only such claims or actions which may arise out of *sole* negligence of the YMCA and its agents, or any third parties not acting on behalf of, at the direction of, or under the control of the successful bidder.

Insurance Provisions:

1. General Liability including coverage for premises, products and completed operations, independent contractors, personal injury and contractual obligations with combined single limits of coverage of at least \$1,000,000 per occurrence, \$2,000,000 aggregate.
 - Additional Insured Endorsement form, using one of the listed forms, naming as Additional Insured ("Watertown Family YMCA, its officers, employees and agents."
Endorsement Waiver of the Right of Subrogation for General Liability against the Watertown Family YMCA.
2. Auto Liability, including owned, non-owned and hired vehicles, with at least the following limits of liability:
 - (a) Primary Bodily Injury with limits of at least \$1,000,000 per person, \$2,000,000 per occurrence;
 - (b) Primary Property Damage of at least \$1,000,000 per occurrence; or
 - (c) Combined single limit of \$1,000,000 per occurrence.
3. Workers' Compensation Insurance: as required by NYS.
 - Endorsement Waiver of the Right of Subrogation for Workers' Compensation against the Watertown Family YMCA.
4. Watertown Family YMCA and its agents to be named as an Additional Insured on the above- captioned insurance coverage as respects the YMCA's and its agent's interests under this agreement. This is to be complied with by presenting an appropriate insurance certificate (at no additional cost) to the YMCA and its agents prior to award of contract and commencement of work under this contract; and by presenting to the YMCA and / its agents an endorsement to the policy, signed by an officer of the insurance company within thirty (30) days of the inception date of this agreement. **Purchase Order/s will not be issued until completed paperwork is received and approved.**
5. All policies of insurance shall provide for a minimum of thirty (30) days written notice of any change or cancellation of the policy.
6. Insurance policies to be in a form and written through companies acceptable to the YMCA and its agents; and shall include those endorsements which are necessary to extend coverage which is appropriate to the nature of the agreement.

Submitted by:

Company name: _____ Signature: _____ (Print) _____ YMCA
Contact Person's Name: _____ Date: _____ E-mail : _____

Phone: () _____ Terms: _____

1. In case of default, the Watertown Family YMCA and its agents may procure its materials/services from other sources and shall hold the original bidder or contractor liable for resulting increased costs.
2. During the performance of this contract, the vendor/contractor warrants that it will provide equal employment opportunities, and that the vendor/contractor and each subcontractor will take affirmative action to ensure that in its employment practices, persons are employed and employees are treated equally and without regard to, or because of, race, religion, creed, color, national origin, sex, age, physical handicap, or medical condition. This provision applies to work or services performed or materials manufactured or assembled in the United States.
3. The vendor/contractor warrants that it possesses legally adequate Workers' Compensation Insurance.