

SER-Jobs for Progress National, Inc.  
100 East Royal Lane, Suite 130  
Irving, Texas 75039

**Request for Quote (RFQ)  
for  
Telephone System and Services**

**Issue Date:**

**May 8, 2017**

**Response Deadline:**

**May 25, 2017**

RFQ Point of Contact (POC):

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profit corporation under Section 501(c)3 of the Internal Revenue Code. EOE-M/F/H/V

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## Section 1 - General Information

### A. Purpose of this Request for Quote (RFQ)

SER-Jobs for Progress National, Inc. (SER) is presently seeking quotes from vendors to secure a lease for TELEPHONE SYSTEM AND SERVICES for SER's Administrative office in Irving, TX. The selected vendor is also expected to assist SER-National IT Management with long-term planning to keep systems current and functional in the most cost-effective manner possible.

### B. Who May Respond

Vendors providing telephone systems and services may submit quotes for the Administrative office.

### C. Services Solicited in this RFQ

Phone System Specifications:

<b>General</b>
On Premises VOICE OVER IP (VOIP) PHONE SYSTEM /w Gig Ethernet
Integrated DHCP
Dedicated Switch or Switches for phone systems
Integrated Corporate Directory
End-user interface for configuring devices
Programmable auto-attendants
IVR capabilities with auto-attendant
Programmable Call Queue
Conforms to FCC requirements for Enhanced 911 (Explain process)
Four digit extension dialing
Hunt Groups
Ability to tag an extension for reporting/billing purposes
Failover for extensions
Announcement line
9-1-1 notification
Reporting by tag, extension, hunt group including: <ul style="list-style-type: none"><li>• tag/department/extension</li><li>• number of calls incoming</li><li>• number of calls outgoing</li><li>• billable numbers dialed</li></ul>
Reporting for call queues including: <ul style="list-style-type: none"><li>• number of calls incoming/outgoing</li><li>• time to answer</li><li>• time on hold</li><li>• disposition of call (answered or forwarded)</li><li>• extension handling call</li><li>• lost/abandoned calls</li></ul>

Configurable day/night mode for Hunt Groups
Programmable call flow
Always on and On-demand call recording
Capability to replace an extension with a spare phone
Provide a wide range of phone types including: <ul style="list-style-type: none"> <li>• Basic phone</li> <li>• Soft phones</li> <li>• Multiline phones</li> <li>• Expansion ports for secretaries</li> <li>• Wireless phones</li> <li>• Blue-tooth capable phones</li> <li>• Conference phones</li> </ul>
Programmable hold music/message by department, Hunt Group, or extension
Ability to block certain toll calls
Ability to block nuisance callers
Ability to route specific incoming calls to an extension
Ability to page a hunt group or all extensions
D2A device for modems and/or faxes
Overhead paging interface
Incoming Fax to e-mail
Supports six Fax devices
SIP Trunk Support

<b>Voicemail</b>
Time and Date of call
Extension or number of caller
Message
Save message
Delete message
Forward/copy message to extension
Forward/copy message with annotation to extension
Forward/copy message to multiple extensions
Text notification to recipient
Voicemail forward/copy to e-mail
Remote voicemail retrieval

<b>Per Extension</b>
Receptionist Phone (Qty – 1)
Expansion Module(s) [For Receptionist Phone up 50 Extensions]
Headset Wireless [For Receptionist Phone] (Qty – 1)
Executive Phones (Qty – 10)
Standard Phones (Qty – 45)
Call Hold
Do not Disturb
Call Pickup from extension

Call Pickup from Hunt Group
Call Waiting
Call transfer
Call Forward All
Call Forward Busy
Call Forward No answer
Voicemail
Distinctive Ring
Unique four digit extension
Enhanced 911 address
DID number and/or Hunt Group number
Extension monitoring by light/display
Incoming message/voicemail light/display
AutoDial
Caller ID
Three way calling
Follow me
Speed Dial
Memory Buttons
Redial
Busy Redial
Ability to reassign E911 address for mobile/travelling workers
Conference Calling (include maximum number of participants)
Forward call to extension voicemail
Difference messages for no answer or busy/DND

**D. Funding**

Any contract awarded as a result of this RFQ is contingent upon available Federal funding at currently existing levels. SER may unilaterally terminate a contract in the event that funding from Federal, State, or other resources becomes no longer available. If funding is limited in any way, this contract is subject to renegotiation under the new funding limitations and conditions. Such action is effective upon receipt of written notification from SER.

**E. Description of SER**

SER-Jobs for Progress National, Inc., is a private, 501(c)3 nonprofit corporation, which receives and administers Federal funds to provide employment, training, and support services to eligible economically disadvantaged individuals and dislocated workers.

SER is a national network of employment and training organizations that formulates and advocates initiatives that result in the increased development and utilization of America’s human resources, with special emphasis on the needs of Hispanics, in the areas of education, training, employment, business and economic opportunity.

SER National aims to develop the employment and training capabilities of the SER network through the provision of technical assistance, research and planning, and program and policy development.

Founded in 1964, SER operates with a network of affiliates comprised of training centers distributed in 19 states, Puerto Rico and the District of Columbia. SER is governed by a Board of Directors composed of representatives of business, industry, community-based organizations, economic development agencies, and educational entities. The primary responsibility of the SER board is to provide policy and program guidance, and to exercise independent oversight of program activities.

#### **F. Governing Laws**

Programs and activities solicited in this RFQ are governed by all applicable Federal and State rules and regulations, including, but not limited to, those specifically governing each program operated by SER.

#### **G. Method of Procurement & Type of Contract**

All goods and services solicited under this RFQ shall be procured by the competitive negotiation method. SER's intent is to execute a Cost-Reimbursement contract with the successful respondent.

#### **H. Eligible Respondent and Competency**

**SER** is prohibited from awarding funds to any party debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs in accordance with the Department of Labor regulation at 29 CFR Part 98. Any interested and qualified individual, organization, or company may submit a proposal. Respondents shall demonstrate the necessary technical skills and other resources to deliver the solicited goods and services.

#### **I. Period of Performance**

The contract negotiated as a result of this solicitation may commence on or after July 1, 2017. This first contract period is a 12 month contract, from July 1, 2017 to June 30, 2018. After that, SER will have the option to renew the contract in one year periods for up to two (2) additional years dependent on performance. The contract period may be varied by SER as necessary in compliance with State and Federal regulations. Additionally, the term of the contract shall be contingent upon the continuation of SER's contract for the operations and resulting funding of the programs. SER may exercise a Month-to-Month contract during transition period.

#### **J. Response Deadline**

**The response deadline for this RFQ is due at 12:00pm on May 25, 2017.** Quotes must be received via e-mail in PDF format. The response to the RFQ must be officially received by Andy Overton at [aoverton@ser-national.org](mailto:aoverton@ser-national.org). Submission electronically email quote to [aoverton@ser-national.org](mailto:aoverton@ser-national.org), only one (1) electronic submission via e-mail is required. Official electronically receipt of quotes will be a return email by Andy Overton. Late quotes will be disqualified regardless of circumstances.

Additions or deletions to the quotes must be submitted and included in the quote on or before the deadline. The withdrawal of a quote is allowable in person with proper authorization prior to the response deadline. All quotes become the property of SER.

## **K. Governing Provisions and Limitations**

The purpose of this RFQ is to ensure maximum, open, and free competition in the solicitation of and procurement of the goods and services described above. This RFQ is not to be considered as a purchase agreement or contract or as a commitment of any kind; nor does it obligate SER to award any contract or pay for costs incurred prior to the execution of a contract unless such costs are specifically authorized in writing by SER.

SER reserves the right to:

- Accept or reject any or all proposals received, or to cancel or reissue this RFQ in part or its entirety;
- Award a contract for any goods and services in any quantity that SER determines, at its sole discretion, is in its best interest;
- Award a contract to other than the lowest cost/priced respondent;
- Reject any proposal that fails to confirm the essential requirements of this RFQ;
- Contact any individual or entity listed in the RFQ or otherwise known to SER, who may have knowledge of the respondent's experience, performance, and qualifications; and
- Request additional information from any and all respondents.

Proposers shall not, under penalty of law, offer to provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of SER for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder. In addition, no employee, officer, or agent of SER shall participate in the selection, award of administration of a contract supported by Federal funds, if a conflict of interest, real or apparent, would be involved.

Proposers shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a proposal to be rejected. This does not preclude joint ventures or subcontracts.

The contents of a successful quote may become a contractual obligation if selected for award. Failure of the respondent to accept this obligation may result in cancellation of the award.

No pleas of error or mistake shall be available to successful respondent as a basis of release of proposed services at stated price/cost. Any damages accruing to SER as a result of the respondent's failure to deliver the proposed goods and services may be recovered from the respondent.

A contract with the selected respondent may be withheld, at SER's sole discretion, if issues or questions of compliance are not satisfactorily resolved. Award of goods and services may be withdrawn if resolution is not satisfactory to SER.

SER reserves the rights to clarify, explain, or verify any aspect of a response to this RFQ, and to require the submission of any price, technical, or other revision to the RFQ that results



from negotiations conducted.

#### **L. Selection Process**

The quote selection process includes the evaluation, rating, and ranking of the proposals. All respondents to this RFQ shall be notified of their status by mail.

In the selection and award of goods or services procured under this RFQ, SER shall ensure:

- Awards shall be made only to responsible respondents who have demonstrated ability to perform based upon delivering comparable or related services;
- Staff and organization qualifications, including a satisfactory record of past performance and experience;
- All proposals considered are received on time and are responsive to the specifications of the RFQ; and
- Positive efforts are made to utilize Historically Underutilized Business' (HUB's) in the provisions of program services.

**SER may, at its discretion, request oral presentations or discussions with the most qualified proposers.**

#### **M. Proposal Evaluation Criteria**

Only proposals submitted on a timely basis will be evaluated, using the following criteria and point system.

- *Demonstrated Effectiveness - 60 points*
  - *Comprehensiveness of Services Provided*
    - *Overall capabilities of the vendor to meet service levels requested in this RFQ*
  - *Rural/Multi-Location Experience*
    - *Vendor's experience in providing services to the Rural locations and multiple sites*
  - *Service Enhancements*
    - *Vendor's effort to understand SER's requirements, and the creativity the vendor shows in introducing new technologies and efficiencies to improve our current practices and procedures.*
- *Reasonableness of Cost - 25 points. The reasonableness of cost for services proposed.*
- *Other – 15 points*
  - *Any other factors that we believe are in SER's best interest to consider which were not previously described.*
- *Total points – 100*
- *HUB – 5 additional points. See Section 2, Paragraph B for definition of HUB.*

#### **N. Respondent Inquiry and Appeal Process**

SER is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. No protest shall be accepted by the grantor

(state or federal) until all administrative remedies at the grantee (SER) level have been exhausted. This includes, but is not limited to: disputes, claims, protests of award, or non-selection for award, source evaluation, or other matters of a contractual or procurement nature. If any respondent disagrees with the procurement and/or selection process, a written appeal, stating the reason for the appeal, must be filed with the President of SER within seven calendar days from the date of the award notification.

#### **O. Payment Provisions**

Payment on invoices to SER will be made within the terms and processes usual and customary in the industry.

#### **P. Equal Opportunity**

It is the policy of SER to encourage and support equal opportunity in the purchase of goods and services. No person shall, on the grounds of race, color, religion, sex, handicap, national origin, age, citizenship, sexual orientation, marital status, political affiliation, or belief, be discriminated against under any program or activity receiving Federal funds.

Participation shall be open to citizens and nationals of the United States, lawfully admitted resident aliens, and lawfully admitted refugees and parolees.

In compliance with the Department of Labor regulations implementing Section 504 of the Rehabilitation Act of 1973, as amended, no qualified disabled individual shall be discriminated against in the admission or access to, or treatment, or employment in any program or activity.

### ***Section 2 - Instructions for Submitting a Quote***

#### **A. Quote Response**

All proposals must include the following information in the order stated:

1. The quote cover sheet must identify a primary contact person, as well as the signatory authority, with the legal authority to enter into legal agreements on behalf of the proposing organization.
2. The complete proposal will include:
  - Statement of Respondent's understanding of this RFQ, its requirements, and services to be performed;
  - A statement from the authorized signatory that the proposal is valid for 90 days after the submittal deadline; and
  - A positive statement of commitment to perform the services within the period specified.
  - Complete, detailed response to Section 1, Item "C" above. The response should be organized by section, and within each section a response to every bullet should be provided.
  - A complete budget for this contract consisting of detailed fee information (including early termination fees and terms), updates, and maintenance. Costs should be inclusive of tax reporting, and other services identified in Section 1, Item "C" of this RFQ.

- Costs for additional services on a per-transaction or hourly basis.
- Profile of the Respondent Firm including the location of the office(s) from which this work is to be performed.
- A copy of your current HUB certification, if applicable.
- Suspension/Debarment Certification (Attachment "B")
- Drug-Free Workplace Certification (Attachment "C")
- Certification of Bidder (Attachment "D")
- Liability coverage of firm (submit proof of insurance).
- Certificate regarding conflict of interest (attachment "E")
- Proof of Bonding/Certification of Insurance

## **B. Historically Underutilized Business (HUB)**

A **HUB** is defined by the Texas Government Code §2161.001 as an entity with its principal place of business in this state that is:

- (A) a corporation formed for the purpose of making a profit in which 51 percent or more of all classes of the shares of stock or other equitable securities are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the corporation's control, operation, and management;
- (B) a sole proprietorship created for the purpose of making a profit that is completely owned, operated, and controlled by an economically disadvantaged person;
- (C) a partnership formed for the purpose of making a profit in which 51 percent or more of the assets and interest in the partnership are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the partnership's control, operation, and management;
- (D) a joint venture in which each entity in the venture is a historically underutilized business, as determined under another paragraph of this subdivision; or
- (E) a supplier contract between a historically underutilized business as determined under another paragraph of this subdivision and a prime contractor under which the historically underutilized business is directly involved in the manufacture or distribution of the goods or otherwise warehouses and ships the goods.

An "Economically disadvantaged person" means a person who:

- (A) is economically disadvantaged because of the person's identification as a member of a certain group, including:
  - (i) Black Americans;
  - (ii) Hispanic Americans;
  - (iii) Women;
  - (iv) Asian Pacific Americans;
  - (v) Native Americans; and
  - (vi) Veterans as defined by 38 U.S.C. Section 101(2) who have suffered at least a 20 percent service-connected disability as defined by 38 U.S.C. Section 101(16); and
- (B) has suffered the effects of discriminatory practices or other similar insidious circumstances over which the person has no control.

Five points will be awarded to the responsive proposals providing current documentation of certification from the Texas Comptroller of PublicAccounts.

### **C. Format**

Quotes must be typed and submitted on 8 1/2" x 11" paper in accordance with the instructions in this request. Proposal will have at least 1" margins and use a commonly used font no smaller than 10 points. Fancy or bulky binding, colored displays, and promotional material are discouraged and will not improve the evaluation score. Emphasis must be placed on addressing all the requirements of this **RFQ** in a clear, complete, and concise manner.

Quote narrative shall be sequentially numbered and total not more than eight (8) pages.

### **D. Number of Copies**

Only one (1) electronic submission in **PDF format** is required by the deadline. All documents submitted must be legible and complete. SER is not responsible for copying incomplete quotes.

### **E. Quote Subject Line and Submission**

Quotes must be titled **RFQ – Telephone System and Services** and submitted in via email to [aoverton@ser-national.org](mailto:aoverton@ser-national.org)

**Dated Material: Telephone System and Services RFQ is due at 12:00pm on May 25, 2017.**

### **F. Response Forms**

Cover Sheet  
Budget and Narrative (Addressing Section C)  
Proof of Insurance  
Documentation of Bonded Staff  
Detail Budget and Narrative, including Fee Schedule  
Suspension/Debarment Certifications (Attachment B)  
Drug-Free Certification (Attachment C)  
Certification of Bidder (Attachment D)  
Certificate Regarding Conflict of Interest (Attachment E)

SER-Jobs for Progress National, Inc.  
RFQ Dated Issued, May 1, 2017; Internet Services

**QUOTE COVER SHEET**

Legal Name of Organization: \_\_\_\_\_

Authorized Signer: \_\_\_\_\_

Title: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Physical Address (If Different): \_\_\_\_\_

Telephone Number: \_\_\_\_\_

FAX Number: \_\_\_\_\_

Contact Person Name: \_\_\_\_\_

Contact Person Title: \_\_\_\_\_

Entity Type:                     Corporation                     Sole Proprietor

Partnership                     Other

Is Responder a HUB?                     Yes                     No

Certifying Agency: \_\_\_\_\_

**Attachment B - Certification Regarding Debarment Suspension,  
Ineligibility, and Voluntary Exclusion Lower Tier Covered Transactions**

This Certification is required by regulations implementing Executive Order 12549, Debarment and Suspension, 20 CFR Part 98. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 1916019211).

1. The prospective recipients of Federal assistance funds certify, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
2. Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participants shall attach an explanation to this proposal.

\_\_\_\_\_  
Name of Authorized Representative

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## **Attachment C - Certification Regarding Drug-Free Workplace**

- A. The grantee certifies that it will or will continue to provide a drug-free workplace by:
1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violation of such prohibition.
  2. Establishing an outgoing drug-free awareness program to inform employees about
    - a. The dangers of drug abuse in the workplace;
    - b. The grantee's policy of maintaining a drug-free workplace;
    - c. Any available drug counseling, rehabilitation, and employee assistance programs; and
    - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
  3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1.
  4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee will:
    - a. Abide by the terms of this statement;
    - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such violation.
  5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph 4b from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position, title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification numbers(s) of each affected grant.
  6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4b, with respect to any employee who is so convicted:
    - a. Taking appropriate personnel action against such an employee, up to and including termination consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
    - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency.

7. Making good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.

B. The grantee may insert in the space provided below the site(s) for the performance of work down in connection with the specific grant:

Place of Performance: Check ( ) if there are workplaces on file that are not identified here.  
( ) Not Applicable.

Name of Applicant Organization:

Name & Title of Authorized Signatory:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



**Attachment D - Certification of Bidder**

1. The individual signing certifies that he/she is authorized to contract on behalf of the Respondent.
2. The individual signing certifies that the Respondent is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Respondent.
3. The individual signing certifies that the prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition.
4. The individual signing certifies that the prices quoted in this proposal have not been knowingly disclosed by the Respondent prior to an award to any other Respondent or potential Respondent.
5. The individual signing certifies that there has been no attempt by the Respondent to discourage any potential Respondent from submitting a proposal.
6. The individual signing certifies that he/she has read and understands all of the information in this Request for Proposal.

I, \_\_\_\_\_ am the \_\_\_\_\_ of the  
(Type Name of Signatory Authority) (Title)  
 Corporation, partnership, association, public agency, or other entity named as the respondent herein and that I am legally authorized to sign this proposal and submit it to SER Jobs for Progress National, Inc. on behalf of said organization by the authority of its governing body. I also certify that I have read and understand the "Governing Provisions and Limitations" sections presented in this RFQ and will comply with the terms, thereof.

Respondent:  
 \_\_\_\_\_  
(Respondent Signature) / Date

Attest:  
 \_\_\_\_\_  
(Collateral Signature) / Date

\_\_\_\_\_  
(Typed Name)

\_\_\_\_\_  
(Typed Name)

\_\_\_\_\_  
(Typed Title)

\_\_\_\_\_  
(Typed Title)

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, in  
 \_\_\_\_\_ County, State of \_\_\_\_\_.

(SEAL)

Notary Public in and for \_\_\_\_\_ County, State of \_\_\_\_\_

Date Commission Expires: \_\_\_\_\_

**ATTACHMENT E  
CERTIFICATE REGARDING CONFLICT OF INTEREST**

By signature of this Certificate, Respondent covenants and affirms that:

1. No manager, employee or paid consultant of the Respondent is a member of the Policy Board, the President, or an employee of SER;
2. No manager or paid consultant of the Respondent is married to a member of the Policy Board, the President, or an employee of SER;
3. No member of the Policy Board, the President or an employee of SER owns or controls more than a 10 percent share in the Respondent's organization;
4. No spouse of a member of the Policy Board, President, or employee of SER receives compensation from Respondent for lobbying activities as defined in Chapter 305 of the Texas Government Code;
5. Respondent has disclosed within the proposal response any interest, fact or circumstance, which does or may present a potential. conflict of interest;
6. Should Respondent fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Respondent shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with SER and shall immediately refund to SER any fees or expenses that may have been paid under the contact and shall further be liable for any others costs incurred or damages sustained by SER relating to that contract.

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Name of Individual or Organization submitting application.

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Name and Title of Authorized Signatory.

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Signature

Date

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