

REQUEST FOR PROPOSALS (RFP)

Communication Center



Due Date: (EXTENDED) Friday, Sept 1st @ 5:00 PM (Central)

Housing Authority of the Cherokee Nation

Department: Information Technology

Physical Address: 1500 Hensley Dr. • Tahlequah OK 74464

Contact: 918-456-5482 | Hannah Foreman

Contact Email: ITReports@hacn.org

Fax: {Company Fax}

REQUEST FOR PROPOSALS (RFP)

Introduction:

The Housing Authority of the Cherokee Nation (HACN) was created in 1966 to provide decent, safe, and sanitary housing within the Cherokee Nation. Today, HACN continues that original mission of providing housing assistance through several diverse programs (www.hacn.org).

HACN is an entity of the Cherokee Nation and functions independently from the Cherokee Nation federal government. HACN operates on a separate infrastructure in all aspects. HACN has approximately 250 staff and covers the same 14-county reservation area of the Cherokee Nation in Northeastern Oklahoma.

The HACN-IT department mission is to deliver the best and most reliable, innovative, yet cost-effective technology solutions to help our HACN staff to efficiently improve productivity, accuracy, and data integrity, so they in turn can provide effective and quality services for the individuals, families, and communities they serve.

General Provisions

Purpose of the REQUEST FOR PROPOSALS (RFP): HACN is soliciting detailed proposals from interested parties with qualifications, credentials, and previous experience providing services for organizations similar in size and scope. The complete scope of work and specifications are included in this REQUEST FOR PROPOSALS (RFP).

Other Licenses and Registrations Requirement: All consultants are required to hold any and all necessary applicable professional licenses and registrations required by law. Proof of professional licenses are required with the proposal. Obtaining and ensuring compliance with all licensing and registering requirements is the complete responsibility of the contractor.

Cherokee and Indian Preference: HACN will be accepting proposals from Indian and Non-Indian parties. Indian preference will be given only to Vendors who provide proof of current certification from the Cherokee Nation Tribal Employment Rights Office (TERO) located in Tahlequah, OK. Proof of TERO certification must be included with the submission. The awarded contract is subject to Section 7(b) of the Indian Self-Determination and Education Assistance Act, which requires in part that to the greatest extent feasible, preference in the award of contracts and subcontracts shall be given to Indian Organizations and Indian Owned Economic Enterprises.

Conflict of Interest and Restrictions: If any contractor, contractor's employee, subcontractor, or any individual working on the proposed contract may have a possible conflict of interest that may affect the objectivity, analysis, and/or performance of the contract, it shall be declared in writing upon discovery, via contact information posted in this REQUEST FOR PROPOSALS (RFP). HACN will determine in writing if the conflict is significant and material and if so, may eliminate the contractor from submitting a proposal.

Verbal Instructions: Interested parties shall not initiate or execute any negotiation, decision, or action arising from any verbal discussion with any HACN employee. Only written communications from the designated Contact Person at HACN may be considered a duly authorized expression on behalf of HACN regarding this REQUEST FOR PROPOSALS (RFP). Additionally, only written communications from interested parties are recognized as duly authorized expressions on behalf of the vendor. The same instructions shall apply to any subsequent award and agreement communications.

Binding Contract: This REQUEST FOR PROPOSALS (RFP) does not obligate HACN or the selected contractor until a contract is signed and approved by both parties. If approved, it is effective from the date of final approval. HACN shall not be responsible for work done, even in good faith, prior to final approval of the proposed contract. Any and all costs incurred by contractor's preparing and submitting a proposal are the contractor's responsibility and shall not be charged to the HACN or reflected as an expense of a resulting contract.

Cancellation of the REQUEST FOR PROPOSALS (RFP): HACN retains the right to cancel, modify, amend, or withdraw, the REQUEST FOR PROPOSALS (RFP) process at any time, at HACN's sole discretion. HACN shall not be responsible for costs incurred by contractors for proposal preparation.

Disclosure of Proposal Contents: HACN will not disclose the list of vendors that have responded to the posted REQUEST FOR PROPOSALS (RFP), or any content from a submission, throughout the review process. Once a contract has been awarded, the winning vendor will be listed with the original post online (cherokeebids.org).

Acceptance

Submissions will be accepted from Indian and Non-Indian Vendors. HACN reserves the right to determine if the submission meets stated requirements, in the best interest of the HACN, to further the discussion with scheduled demonstrations and interviews. To be considered, submissions must be received by the specified date and time. HACN reserves the right to reject any and all submissions.

Method of Award: After reviewing all submissions received and HACN has determined the ability to move forward, a purchase order will be awarded to the responsible Vendor whose submission is determined to be the lowest, in the best interest, and most responsive in accordance with the HACN Procurement Policy.

Non-Appropriation Termination Clause: Must be agreed to with multi-year contracts. The HACN's obligation for payment under any contract/agreement is contingent upon the availability of appropriated funds from which payment for services can be made. Funds are available for the Fiscal year budget only when appropriated or authorized by the Tribal Council of the Cherokee Nation and/or the Board of Commissioners of the Housing Authority of the Cherokee Nation. The HACN's designated officer shall use their best efforts to obtain the annual appropriations of the Base Payments throughout the Lease/Contract Term.

No legal liability on the part of the HACN for any payment may arise until funds are made available by the designated officer of the HACN for performance and until the CONTRACTOR/VENDOR receives notice of availability from the HACN's designated officer through issuance of a purchase order (PO).

Communication

Contact for this REQUEST FOR PROPOSALS (RFP): All communication regarding this REQUEST FOR PROPOSALS (RFP), including questions, additional information, notifications, document attachments, etc., must be submitted, by specified deadlines outlined below:

- **Email:** ITReports@hacn.org With email subject line including the “2023-001-041” & **Subject Matter**. Replies to email may come from project individuals with @hacn.org domain. ALWAYS include this email contact with ALL communications regarding this RFP to be considered as a valid RFP communication.
- ✓ **Phone:** Contact Phone **918-456-5482**, Ask for “**Hannah Foreman**” from the attendant or operator.
- ~~— **Fax:** [Company Fax]~~
- ✓ **Physical Location:**

Housing Authority of the Cherokee Nation
Information Technology
1500 Hensley Dr. • Tahlequah OK 74464

Deadline for Receipt of Proposals & Submission Details: Responses must be submitted to the contact listed. It is the Vendor’s responsibility to ensure delivery of responses by the due date listed. Responses received after the deadline will not be considered.

- **Email method only** for submissions and communications (ITReports@hacn.org)
- ✓ Questions (Project specific or Provisions listed within) must be submitted no later than end of day **8/18/2023**.
 - HACN will list all questions and answers and Blind Carbon Copy (BCC) all initial inquiries, within 3 business days.
- ✓ Final submission Deadline no later than **Due Date: (EXTENDED) Friday, Sept 1st @ 5:00 PM (Central)**

REQUEST FOR PROPOSALS (RFP)

Communication Center

The Information Technology department of the Housing Authority of the Cherokee Nation is seeking REQUEST FOR PROPOSALS (RFP) from interested parties for **Communication Center** as specified below. To be considered a responsive submission, the mandatory response sheet must be fully completed and submitted no later **(EXTENDED) Friday, Sept 1st @ 5:00 PM (Central)** to ITReports@hacn.org.

Problems to Solve

HACN is looking for a **Communication Center** solution with a unified communications approach, that includes advanced call center, auto attendant, call routing, SMS, eFax, detailed PSTN reporting, and comprehensive administrative functions. Solutions will need to be integrated into our Microsoft

infrastructure and TEAMS and will need to address the following. This is not an all-inclusive list and additional details may be discoverable during further review and discussion.

- Clients calling in voicing Key Words and call routes (vs keypad selection). Example: Client calling and saying, “Rental Assistance”, call routes to designated queue.
 - If calls placed and auto attendant (2 tries) to auto route to operator rather than keeping them on the menu
- Call Queue - Managers ability to administer their assigned agents and call queues. To include:
 - Change order of agents in call queue
 - Add/Remove agents of their call queue.
 - Out of Office, call queue to handle send to next agent.
 - Call timeout routing options.
 - Call statistic reports for their agents and call queues.
- SMS/Text capabilities
 - Group
 - Clients should send SMS/Text to a main number for assigned staff to make replies from the group number.
 - Individual
 - Field workers require SMS/Text capabilities outside of (TEAMS) IM.
 - Administrative Reporting
 - Detailed track on number messaging (SMS/Text) into an HACN phone number and what number an HACN messaged out to.
- Detailed call (PSTN) and routing reports and Statistical Reporting
 - Example 1: detailed track on number calling into HACN, who answered it, or where the call ended (voice mail, transfer, drop, etc.)
 - Example 2: Track who in HACN called out to number
 - Example 3: Detailed reports on individual employee usage
 - Example 4: Statistical information of call volume through call queues and menu options
- Soft phone integration
 - Majority of staff prefer the desk phone option vs computer-based headset use.
 - Operator prefers desk phone side car options for call transfers.
- 911 calling (Kari's Law & Ray Baum's Act 2020)
- E-Fax groups

Infrastructure

Microsoft Active Directory, Office 365, Teams, and Voice. HACN has approximately 250 staff. A majority, about 70% of HACN staff have E5 licenses (+ voice number) with field worker (staff) having F3 licenses and cell phone reliant. The majority of HACN staff work in the office or on an office computer and have a team’s phone (Yealink MP54 and EPOS headset)

We have approximately:

- 211 voice numbers (Teams Voice, not SIP)
 - May need to port phone number to new service.
 - Ability to administer and assign phone numbers (port or add new phone numbers)

- (4) Direct numbers, MAIN HACN number (918-456-5482) & 3 other 'published' numbers.
- (1) single 1-800 (1-800-837-2869)
- 11 e-Fax numbers
- 17 (YakChat) SMS numbers

Call statistics, 1 month:

- Avg call volume In/Out averages around 20K
- Avg calls into Auto Attendant (918-456-5482) 70%
- Avg calls terminated/dropped: 14% (35% going to voice mail)

Other statistical information, 1 month:

- Avg number of faxes received - 88
- Avg number of faxes sent – 35

Review of Submissions

Acceptance of Conditions Governing the Procurement: Vendors must indicate their acceptance of conditions governing this procurement in their cover letter.

HACN is Tax exempt. Please include acknowledgement of Tax exemption status.

Non-Appropriation Termination Clause: Vendors must indicate their acceptance of the non-appropriations clause with multi-year contracts.

Incurring Cost: Any costs incurred by the vendor in preparation, transmittal, or presentation of any proposal, or material submitted in response to this REQUEST FOR PROPOSALS (RFP) shall be the responsibility of the vendor. The vendor is responsible for all costs associated with travel for on-site demonstrations upon the request of HACN.

Responsiveness: Prior to evaluation, each submission shall be reviewed to determine whether it is responsive. Nonresponsive submissions shall be eliminated and will not be evaluated. Factors that may result in a submission being declared nonresponsive are:

- 1) Not providing evidence of meeting the Minimum Requirements.
- 2) When applicable, Not attending mandatory meetings or site visit.
- 3) Substantive and material conflicts of interest which were not declared and/or were declared and determined to be significant enough that the HACN requested the potential contractor not submit a REQUEST FOR PROPOSALS (RFP).
- 4) Substantive and material noncompliance to requirements listed or adherence to submission guideline.
- 5) Not providing a price or timeline, if applicable.
- 6) Not meeting established deadlines

Evaluation Process: An evaluation committee consisting of HACN employees shall evaluate responsive submissions. Each member of the evaluation committee shall independently evaluate each submission. The evaluation will be based on the evaluation factors and values stated in this REQUEST FOR

PROPOSALS (RFP). Discussions, presentations, and/or site visits, if held, may result in individual evaluation committee members changing their scores.

Review Cycle: HACN is aware that a final proposal may require product demonstrations, detail interviews, and further discovery meetings. Here is what to expect during the review process following the submission due date **(EXTENDED) Friday, Sept 1st @ 5:00 PM (Central)**. HACN reserves the right to extend or alter timelines if deemed necessary or beneficial to the HACN project:

Stage 1: The week following the submission deadline, the review committee will review all proposals and a project coordinator will schedule an introductory call that will allow a time for a detailed discussion and product demonstrations, to further define the scope of the project and allow vendor/contractor to revise proposals and estimated cost.

- Deadline for revised proposals and estimates will be the end of the second week (14 days) following the submission deadline.

Stage 2: (Week 3) After deadline for revised proposals and estimates, the review committee will review all submissions and choose the top 3 vendors accepted to continue to stage 3. Notifications will be sent to all contacts by end of week.

- Accepted proposals and estimates will be scheduled for a final meeting for the following week (week 4), to detail and finalize the scope of work and pricing.

Stage 3: (Week 4) Deadline for FINAL PROPOSALS, QUOTES/BIDS will be the end of the fourth week.

- Final review and vendor selection to be completed on the following week (week 5). Notifications will be sent to all contacts at conclusion.

Example calendar of events:

| Deadline | | | | | | | Stage 1 | | | | | | | Stage 2 | | | | | | | Stage 3 (Final) | | | | | | | | | | | |
|----------|---------|-----------|----------|--------|----------|--------|---------|---------|-----------|----------|--------|----------|--------|---------|---------|-----------|----------|--------|----------|--------|-----------------|---------|-----------|----------|--------|----------|--------|--|--|--|--|--|
| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | | | | | |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | | | | | |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | | | |

Evaluation Factors: The evaluation factors listed below and must be clearly stated and addressed and stated in the submission. The Evaluation Factors and the value of each are:

| EVALUATION FACTORS | Points |
|---|--------|
| TERO Certification (certificate must be included) | 10 |
| Experience; Qualifications; Accreditations; Company history | 20 |
| Required and Minimum Solutions Requirements (Problems to Solve section) | 40 |
| Additional considerations (Added value) | 10 |
| Costs | 20 |
| | |

| | |
|--------------|------------|
| | |
| TOTAL | 100 |

MANDATORY RESPONSE SHEET

BASE REQUEST FOR PROPOSALS (RFP) Includes: (Check List)

- Proposed Solution(s)
- Company & Project Team Information (Experience & Qualifications)
- Pre-Interview Estimated Costs
- Contracts/Agreements/Support Assurances
- References (with valid email/phone contacts)
- Acceptance of Conditions Governing the Procurement
- Acceptance of HACN is Tax exemption status
- Acceptance of Non-Appropriation Termination Clause (applicable for multi-year contracts)

INDIAN PREFERENCE

TERO Certified Vendor: Yes No
 (Proof of certification **must** be included) Front & Back

SUBMITTED: _____

Supplier Name & Phone Number

Supplier Address

Authorized Signature