



Request for Quotation

Date: 11/19/2024

Quotation Number: 8481

Specification/Quotation Documents For: Elevate Telephony Solution
with Contact Center and Service

RFQ Due Date: December 10, 2024 at 2:00 pm est

Please send all questions to purchasing@brightridge.com. All questions must be received by 5:00 pm on Thursday December 5th.

To avoid any delay, we encourage you to send responses ahead of the deadline. Responses will not be opened until the stated date and time.

Section 1 – Invitation to Bidders

Sealed bids will be received by BrightRidge until due date and time, then bids will be opened and publicly read. Bidders may participate in the public bid reading by contacting BrightRidge Purchasing at least two hours prior to the bid opening time stated on the specific bid. Bidders making this request will receive a conference call number and a participant code. BrightRidge Purchasing contact information: purchasing@brightridge.com or call 423-952-5161.

All bids must be delivered at the vendor's sole risk as shown in this request for quotation as per Section 2 Instructions to Bidders. BrightRidge is not obligated to accept quotations received after the date and time stated.

Exceptions, if any, will be considered in the quotation evaluation in determining the successful vendor. Vendor must provide supporting documentation with its quotation for any exceptions.

BrightRidge reserves the right to reject any or all quotations, to reject any bid that contains prices for individual items or services that are inconsistent or unrealistic when compared to other prices in the same or other bids, to waive any and all informalities and/or irregularities in the quotation, to negotiate and/or renegotiate with any vendor the terms of its quotation, and to accept any quotation which in its opinion may be in the best interest of BrightRidge. This Request does not commit BrightRidge to pay any costs incurred in the preparation of a proposal or to procure or to contract for service. BrightRidge reserves the sole discretion to withdraw this Request in its entirety at any time without prior notice.

Information provided in this Request is intended solely to assist the respondent in preparing a Quotation. To the best of BrightRidge's knowledge, the information provided is accurate, however, there is no warranty expressed or implied.

Quotations may be held by BrightRidge for a period not to exceed sixty (60) days from the due date of the quotations for the purpose of evaluating the quotations or investigating the qualifications of the vendors, prior to awarding of the order. All quotations shall remain effective for at least sixty (60) days after the due date.

Each vendor's quotation shall constitute an offer to sell the goods or services sought by this Request for Quotation. The award shall be made by execution of a contract mutually agreed upon by both parties.

BrightRidge is a trade name of the Johnson City Energy Authority.

***Questions about the integrity or fairness of the sealed bid process contact:
Purchasing at 423-952-5161 or email purchasing@brightridge.com***



Section 2 – Instructions to Bidders

Each Bidder shall carefully examine all specifications, drawings, and other contract documents to familiarize themselves with all the requirements, terms and conditions thereof. Any information relating to the work furnished by the Owner or others, or failure to make these examinations shall in no way relieve any Bidder from the responsibility of fulfilling all the terms of the contract, if awarded a contract.

No payment will be made for items not set up in the quotation, unless otherwise provided by contract amendment. All Bidders are cautioned that they should include in the prices quoted for the various bid items all necessary allowances for the performance of all work required for the satisfactory completion of the project.

REQUIREMENTS FOR A DIGITAL PROPOSAL/BID SUBMISSION

- **Bids should be clearly identified as:**
Bid Enclosed and Your Company Name
BrightRidge Quotation Number: 8481
Name of the Request: Elevate Telephony Solution
Due: 12/10/2024 @ 2:00 PM est
- Send an email with an attached PDF of the digital bid including all required documents listed below to: SEALEDBIDS@BRIGHTRIDGE.COM. BrightRidge quotation number should be listed in the email subject line. Documents may be combined and sent as one PDF and cannot exceed 50MB in size. An automatic delivery receipt is sent indicating that the bid email has been delivered to sealedbids@brightridge.com
- Digital Proposal/Bids (hereafter called bids) received after the stated due date and time will be disqualified. BrightRidge will not open the bid submission email or any attachment until the due date and time stated for this sealed bid, this is to maintain the integrity of the sealed bid process
- Send a **SEPARATE EMAIL**, indicating that you have submitted a digital bid also include quotation number in the subject to: PURCHASING@BRIGHTRIDGE.COM. **DO NOT ATTACH A COPY OF YOUR BID TO THIS EMAIL!**
- No fax or physically delivered sealed bids will be accepted. **Bids must be digital.** Bidders from small & minority owned businesses needing to make alternative arrangements for physical delivery may call purchasing at 423-952-5161 or 423-952-5000.

REQUIRED PAGES TO INCLUDE FROM BRIGHTRIDGE BID PACKAGE

1. BrightRidge Request for Quotation Form – If applicable
2. Section 3-Quotation Information Form
3. Specification Exception Form
4. No Bid Questionnaire – If applicable
5. Business and Taxpayer Identification or W9 form – for NEW vendors

Note:

Any bidder that submits a bid to BrightRidge of at least \$250,000 or more that provides services, supplies, information technology or construction must certify that it is not currently engaged in, and will not for the duration of this Agreement engage in, a boycott of Israel as defined by Tenn. Code Ann. §12-4-119.



Contract

BrightRidge reserves the right to accept or reject any or all bids or portions thereof. Vendors may bid multiple options, unless otherwise stated.

Vendors must complete the BrightRidge Request for Quotation Form, if applicable and included in the request for quotation. As a backup, a vendor may include their company quote form, however, items must be quoted in the same order and in the unit of measure requested on the BrightRidge Request for Quotation form, a no-bid line needs to be included also in the order of our request if not bidding on an item.

Delivery

The price bid will be FOB Johnson City, Tennessee, at the location specified below. The bid price shown will be the full charge, including all applicable taxes, surcharges and other incidental fees, shipping charges included.

Delivery Site:

BrightRidge
Shipping/Receiving Entrance
2610 Boones Creek Rd
Johnson City, TN 37615

Invoicing

Unless otherwise stated, submit invoices upon delivery or pickup to ap@brightridge.com. The invoice must include an itemization of all items, supplies, repairs, or labor furnished, including unit list price, net price, extensions, and total amount due.

Payment

Unless otherwise stated, payment will be made within thirty (30) days of the completion of delivery of all items or services in acceptable condition to BrightRidge and receipt of invoice, whichever is later.

Taxes and Fees

BrightRidge is exempt from all Sales and Federal Excise Taxes please quote less these taxes.

BrightRidge is not responsible for financial or legal obligations of the bidders that may include bond premiums, fees, insurance, licenses, permits, taxes, tariffs, or other costs of compliance, unless agreed to in writing by BrightRidge. Taxes may include federal, state, or local taxes or levies. Particular attention should be given to bids that provide construction, installation, and maintenance services that utilize the materials and supplies purchased by BrightRidge. BrightRidge does not pay Tennessee sales and use tax when materials, supplies, and equipment are purchased. If the Bidder wants information about the value of the items that will be used, contact BrightRidge Purchasing. Make a note of Tennessee Code Annotated 67-6-209 section (b) and (e).

If the Bidder wishes to recoup obligations they owe as a result of work performed for BrightRidge, the Bidder must include them in the quotation price. Otherwise, the Bidder should not expect additional payment from BrightRidge for these obligations.

Equal Employment Opportunity Clause

To the extent not exempt therefrom, the vendor/subcontractor designated herein agrees to in all respects comply with and abide by the provisions of Executive Order 11246, Section 503 of the Rehabilitation Act of 1973, and the Vietnam Era Veterans' Readjustment Assistance Act of 1974, each as amended, and applicable implementing Regulations, including the Equal Employment Opportunity Clause referred to at 41 C.F.R. § 60-1.4, 41 C.F.R. § 60-741.5, and 41 C.F.R. § 60-250.5, as well as those otherwise appearing at 41 C.F.R. § 60-1, et seq., 41 C.F.R. § 60-741.1, et seq., and 41 C.F.R. § 60-250.1, et seq., each as amended.



Insurance

Worker’s Compensation and Employer’s Liability - Contractor shall obtain, worker’s compensation and employer’s liability insurance to protect the Contractor against all claims under applicable state worker’s compensation laws and against claims for injury, disease, or death of its employees which, for any reason, may not fall within the provision of the applicable worker’s compensation law. The worker’s compensation and employer’s liability insurance policy shall include an “all states” endorsement. BrightRidge requires workers’ compensation insurance on all construction and installation services regardless of if the bidder/contractor is deemed exempted from workers’ compensation insurance. BrightRidge’s requirement for workers’ compensation insurance may exceed the minimum requirements of the State of Tennessee. The Contractor’s liability limits shall not be less than the following:

WORKERS’ COMPENSATION AND EMPLOYER’S LIABILITY LIMITS	
WORKERS’ COMPENSATION	STATUTORY
EMPLOYER’S LIABILITY	\$ 1,000,000 EACH PERSON

Comprehensive Automobile Liability - Contractor’s insurance for automotive liability coverage shall be written in comprehensive form and shall protect the Contractor and BrightRidge against all claims or injuries to members of the public and damage to property of others arising from the use of motor vehicles and shall cover operation on or off the site of all motor vehicles licensed for highway use, whether they are owned, non-owned, or hired by Contractor. The Contractor’s liability limits shall not be less than the following:

AUTOMOBILE LIABILITY	
COMBINED SINGLE LIMIT	\$1,000,000 COMBINED SINGLE LIMIT EACH ACCIDENT

Commercial General Liability – Contractor’s General Liability Insurance shall be written in comprehensive form and shall protect the Contractor and BrightRidge against all written claims arising from injuries to members of the public or damage to property of others arising out of any act or omission of the Contractor or their agents, employees, or sub-contractors. Contractor’s liability limits shall not be less than the following:

COMPREHENSIVE GENERAL LIABILITY LIMITS	
BODILY INJURY	\$1,000,000 EACH PERSON \$2,000,000 EACH OCCURRENCE
PROPERTY DAMAGE	\$1,000,000 EACH OCCURRENCE



Section 3 – Quotation Information

The successful contractor agrees to indemnify, investigate, protect, defend, and save harmless BrightRidge, its officials, officers, agents, and employees from any and all third-party claims and losses accruing or resulting from bodily injury or damage to property caused by the successful contractor in performance of this contract.

The successful contractor also agrees to indemnify, investigate, protect, defend, and save harmless BrightRidge, its officials, officers, agents, and employees from any and all third-party claims and losses accruing or resulting from bodily injury or damage to property caused by the successful contractor's sub-contractors, suppliers, laborers, and any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies to the successful contractor in connection with the performance of this contract.

If the successful contractor supplies products it manufactures (in whole or in part), the successful contractor agrees to indemnify BrightRidge, its officials, officers, agents, and employees from any and all third-party claims and losses accruing or resulting from bodily injury or damage to property caused by the failure of such products.

If the successful contractor only supplies products manufactured by others, the successful contractor is not obligated to indemnify BrightRidge for a failure of any such products manufactured by others. If the successful contractor only supplies products manufactured by others, the successful contractor agrees to cooperate with BrightRidge and take all reasonable steps to assist BrightRidge in making claims against any such product's manufacturer for any such product's failure.

In any case, the foregoing provisions concerning indemnification shall not be construed to indemnify BrightRidge from damage arising out of bodily injury to persons or damage to property caused by or resulting from the sole negligence of BrightRidge or its employees. This indemnification shall survive the expiration or early termination of this contract.

The undersigned acknowledges: That he/she is an authorized agent of the vendor submitting this quotation. The receipt of the following addenda (if any). The provision of the indemnification agreement.

Company Name: _____

Company Address: _____

Taxpayer ID: _____

Telephone Number: _____ **Mobile Number:** _____

E-mail: _____ **Fax Number:** _____

Primary Point of Contact: _____

Authorized Signature: _____

Date of Signature: _____ **Title:** _____

Printed or Typed Name: _____

***FAILURE TO SUBMIT THIS COMPLETED FORM WITH YOUR BID SUBMISSION
WILL RESULT IN YOUR BID BEING REJECTED AS UNRESPONSIVE.***



BrightRidge Specifications Exception Form

In the interest of fairness and sound business practice, it is mandatory that you state any exceptions taken by you to our specifications.

It should not be the responsibility of BrightRidge to ferret out information concerning the materials which you intend to furnish.

If your bid/quotation does not meet all of our specifications, you must so state in the space provided below.

Bids on equipment, vehicles, supplies, services, and materials not meeting specifications may be considered by BrightRidge, however, all deviations must be listed below.

I do meet specifications.

Signature: _____

I do not meet specifications. *Exceptions are in the space provided.*

Signature: _____

**FAILURE TO SUBMIT THIS COMPLETED FORM WITH YOUR BID SUBMISSION
WILL RESULT IN YOUR BID BEING REJECTED AS UNRESPONSIVE.**

Exceptions (please list below and specify exceptions)



No Bid Questionnaire

BrightRidge
Attn: Purchasing
2600 Boones Creek Rd
Johnson City, TN 37615

Quotation Number: _____

If you choose not to bid, please complete the questionnaire below and return it with your response by the bid opening date. Your assistance in helping us to analyze no bid rationale is very much appreciated.

For the following reason(s) we are submitting a no bid:

_____ Item not supplied by our company.

_____ Bid specifications (e.g. too restricted, not clear, etc.) Please explain.

_____ Profit margin on municipal bids is too low.

_____ Past experience with BrightRidge (e.g. payment delay, bid process, administrative problems, etc.) Please explain. _____

_____ Insufficient time allowed to prepare and respond to bid request.

_____ Bid requirement Too Large or Too Small for our company.

_____ Priority of other business opportunities limit time/other resources available to deliver or perform according to bid specifications.

_____ Other reason(s). Please explain. _____

Company Name: _____

Address: _____

Telephone: _____ E-mail: _____

(Signature)

(Printed/Typed Name)

Title: _____ Date: _____



BrightRidge

Business and Taxpayer Identification Information

This Business is operating as a:

Individual/Sole Proprietor or Single Member LLC Partnership Trust/Estate

C Corporation S Corporation

Limited Liability Company

(Enter the tax classification (C=Corporation, S=S Corporation, P=Partnership) _____)

Other (please describe) _____

Licensed or otherwise authorize to business by the state of: _____

Taxpayer Identification Number: ____ - ____

- ____ - ____ - ____ - ____ - ____ Or

Social Security Number ----- _ _ _ _

Legal Name: (as shown on your income tax return)

Doing Business as Name: (DBA)

Address: _____

City, State, Zip: _____

Note:

If applicable, your bid may be rejected if you do not complete and submit this page and/or a W-9 with your bid. Checks in payment of obligations by BrightRidge will be made payable to your legally issued name unless you state a DBA. Federal Tax reporting, if required, will also be in your legal name.



Invitation for Bid (IFB) for Elevate Telephony Solution with Contact Center and Service

Introduction

BrightRidge (BR) exists under the laws of the State of Tennessee, under Johnson City Energy ~Authority and is an independent agency. BR provides electric service in Washington County and parts of Greene, Sullivan, and Carter Counties. BR provides services covering an area of more than 350 square miles, 2100 miles of electrical distribution, and 120 miles of electrical Transmission lines. BrightRidge is a not-for-profit, public power provider employing over 200 full-time employees and is ranked 10th largest among the 153 local power distributors in TVA's service area and the 38th largest municipal electrical system in the United States.

1. Scope of Work

BrightRidge needs to replace its aging ShoreTel/Mitel telephone system with the Elevate cloud-based PBX solution with Contact Center. The Elevate PBX needs licensing for 177 desk phone users and 34 Contact Center agents. The Elevate system must be able to handle hundreds of calls at a time as we service over 82,000 customers. The selected vendor must replace all desk phones with new VOIP phones, port all current BrightRidge numbers to the new hosted system, recreate all Call Groups and routing rules and support several analog lines for fax machines.

- 1.1 The contractor will provide personnel with the technical skill and training to install and configure the new Elevate hosted telephone system as well as conduct training.
- 1.2 The contractor will provide all necessary telephones, supplies, and equipment for contract fulfillment.
- 1.3 BrightRidge personnel will coordinate with the contractor to schedule access to the BrightRidge network and physical locations on BrightRidge campus.

2. Performance Specifications and Requirements

2.1 System Integration

- Enterprise Software Integration: Ability to integrate with enterprise software, NISC, for screen- pops.
- API Availability: Open APIs for custom integrations as needed.

2.2 Contact Center Features

- Elevate UC: Capability for handling calls, email, chat, and SMS from a unified interface.
- Call Queuing and Routing: Skills-based routing, priority routing, and queue callback options.
- Real-Time Analytics and Reporting: Dashboards for monitoring key metrics, historical data, and customizable reports.
- Voice Archiving and Monitoring: Secure, searchable call recordings and options for call barging, whisper, and monitor features.
- Automated Call Distribution (ACD): To manage incoming calls effectively across agents.
- IVR (Interactive Voice Response): Customizable IVR menus with integration to back-end systems for self-service options.

3. Telephony Hardware and Compatibility

- Desk Phones Provided: Desktop phones with multiple call appearances and programmable soft keys. Yealink T55w or similar.
- Softphone Option: Elevate Desktop and mobile softphone applications for remote and hybrid workforces.
- Hardware Support: Guaranteed compatibility with other peripherals, such as headsets for the BrightRidge Contact Center agents.

4. Onsite Service and Repair

- On-Site Support SLA: 4-hour on site support required, with escalation processes outlined.
- Remote Troubleshooting and Maintenance: Access to 24/7 remote support for urgent issues.
- Regular System Updates: Automatic update to the system, with optional test environments for major changes.

5. Security and Compliance

- Data Encryption: End-to-end encryption for voice and data.
- Compliance with Standards: Compliance with industry standards (e.g., HIPAA, GDPR, PCI-DSS, depending on needs).
- Access Control and Authentication: Active Directory integration with multi-factor (SSO) authentication for users and administrators.
- Redundancy and Disaster Recovery: Options for disaster recovery, with redundancy at multiple locations only inside the United States.

6. Summary

The selected vendor will provide all hardware and software needed to deploy the Elevate hosted telephone solution. The vendor will duplicate the existing ShoreTel configuration and integrate the new Elevate system with our Enterprise systems. The vendor will provide comprehensive on-site training for BrightRidge employees. The vendor will provide 4-hour on-site support and ongoing 24/7 remote support for BrightRidge telephone operations.

7. Bid Selection Process

BrightRidge reserves the right to reject any and/or proposals or to accept the offer deemed to be in the utility's best interest. All proposals shall be evaluated on the following criteria: Compliance with Proposal Specifications, Cost, Qualifications/Experience, References.

BrightRidge reserves the right to waive any and/or all the requirements contained within this invitation at its sole discretion.

Personal interviews with the proposers may be requested.

Evaluations will be based on the following table, with consideration given to all components of the statements above:

Compliance with proposal specifications	50 Points
Cost	25 Points
Qualifications/Experience	15 Points
References	10 Points