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I. Scope of Solicitation

A. Purpose of the Solicitation

The purpose of this solicitation is to invite Respondents to participate in Clemson University's (hereinafter referred to as the "university" or "Clemson") procurement process to select a firm to provide Clemson a Budgeting Solution.

B. Expectations

Clemson expects the budgeting solution will facilitate the following:

- Benefit from scale of economy in supporting regulated and standard higher education business processes
- Optimize Clemson business processes and nurture a mindful culture of operation
- Enable adoption of advanced business technologies, such as analytics (business intelligence), and workflow management
- Facilitate long range strategic planning across all business functions and disciplines with accurate, readily available data presented in intuitive and familiar formats
- Provide agile, modern interfaces (portals and dashboards) for all users to improve communication, information access, and support campus engagement
- Target development resources to strategic initiatives where unique information systems would truly provide advantages to the university
- Better compete with peer institutions in the recruitment of students, faculty, and staff and administration of key programs and services
- The ideal budgeting solution for Clemson University would be a web-based budget development and reporting system that is easily compatible with Clemson's current technology environment, including but not limited to; PeopleSoft Financials and HR, SAP Business Objects, etc.
- The ideal solution would provide budget users a one-stop location for budgeting and planning, including the annual budget development process and budget versus actual reporting, as well as entering budget adjustments throughout the fiscal year. The Clemson goal is to eliminate the need for budget users to utilize any other system for budgeting.

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45 **C.   Institutional Profile**

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47 Clemson University is a nationally ranked public research university where the student experience
48 is second to none. This institution combines the benefits of a major land-grant, science- and
49 engineering-oriented university with a strong commitment to quality teaching and individual
50 student success. Yet, even with its national recognition, Clemson remains a student-centered
51 community characterized by inclusiveness, collaboration, high academic standards, and a drive to
52 excel.

53

54 Clemson's teaching and learning environment is more characteristic of private liberal arts colleges,
55 but it still offers the academic, community service, and social opportunities found at major public
56 universities.

57 **Mission**

58

59 The mission of Clemson University is to fulfill the covenant between its founder and the people of
60 South Carolina to establish a "high seminary of learning" through its historical land-grant
61 responsibilities of teaching, research and extended public service.

62

63 **Faculty**

64

65 Clemson has 1398 faculty members, 82% (1150) of which are full-time. Ninety-eight percent of
66 all tenure-line faculty hold doctorate or equivalent degrees. Clemson has a 16 to 1 student to
67 faculty ratio. The average class size for Spring Term 2011 is fewer than 20 students.

68

69 **Academic Programs**

70

71 Students can select from approximately 80 undergraduate and 110 graduate degree programs
72 offered by five colleges: Agriculture, Forestry and Life Sciences; Architecture, Arts and
73 Humanities; Business and Behavioral Science; Engineering and Science; and Health, Education
74 and Human Development.

75

76 Clemson is well known for its prominent athletic programs and for the spirit of its fans. Another
77 important aspect of Clemson is its dedication to improving the world through public service, which
78 is why the University encourages faculty to engage their classes through service learning. With its
79 college-town, lakefront setting against a backdrop of mountains and forests, Clemson is
80 characterized by a strong sense of community, a commitment to service and a love of winning —
81 in academics, in athletics and in life.

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Students

With a student population of 19,453 at Clemson University, classes are carefully managed to ensure small sizes with 51% of its undergraduate classes having fewer than 20 students, a 16-to-1 student-to-faculty ratio, and high retention and graduation rates. Student engagement and satisfaction score well above the national average.

The university recently earned national recognition for its living learning communities, Creative Inquiry undergraduate research program, and student participation in service-learning and civic engagement.

Clemson University has a total undergraduate enrollment of 15,459, with a gender distribution of 54.3 percent male students and 45.7 percent female students.

Educational and Financial Accolades

Ranked in the top 25 among national public universities according to "U.S. News and World Report," Clemson is the number one choice of South Carolina's best high school graduates. About half of incoming freshmen ranked in the top 10 percent of their high school class.
Clemson also has a ranking in the top 10 among national universities, both public and private, in payback ratio, according to "Smart Money" magazine -- a calculation based on graduates' lifetime earning potential and the cost of tuition.

Total research funding for fiscal 2010 at Clemson University, which ended June 30, was the highest in the University's history: $187,292,161. That figure includes more than $94 million in sponsored programs, while a $43-million American Recovery and Reinvestment Act (ARRA) grant from the U.S. Department of Energy for a wind-turbine drive-train test facility at the Clemson University Restoration Institute in North Charleston accounted for approximately one-third of this year's funding. The federal government provided the majority of external research funding, 86 percent, while state and local government accounted for 8 percent and industry and other sources provided 6 percent. As was the case in 2009, more than half of Clemson's research funding was focused in two emphasis areas: sustainable environment (37 percent) and advanced materials (24 percent). The College of Engineering and Science continued to have the highest level of extramural support, with 39 percent.

Clemson's Alumni

Alumni associations gave back $73,000 to Clemson for several University priorities.   Clemson currently serves 119,971 registered alumni. Besides donating time and many talents to others, alumni generously give of their resources as well. This past year, the Alumni Association was able to give 176 Prince Scholarships totaling $143,000 and 45 Jervey Scholarships totaling $114,000. These scholarships are awarded annually from endowments originated by the Clemson Alumni Association. An additional 26 students were given financial assistance from the Welcome Back Festival contributions.

Clemson's Founding

Clemson was founded in 1889 by a bequest from Thomas Green Clemson, a Philadelphia-born, European-educated engineer, musician, and artist who married John C. Calhoun's daughter Anna and settled at her family's estate in South Carolina. Clemson believed that the way to rebuild his adopted state's war-ravaged economy was through scientific education, so he left his home and fortune to the state of South Carolina to create the institution that bears his name.

D. Computational Infrastructure

PeopleSoft HR and Finance

Clemson uses PeopleSoft Human Resources 9.0 and Finance 9.0 University wide (no additional HR / Finance shadow systems are used). Clemson anticipates upgrading PeopleSoft HR 9.0 to 9.2 and Finance 9.0 to 9.2 in 2014. Clemson utilizes Commitment Control with PeopleSoft Finance, with various rules for controlling budgets across multiple fund groups.

Clemson uses the following PeopleSoft HR modules:

- Employee time and leave management
- Payroll processing
- HR Self Service
- Recruitment

Other Interfaces include
- KRONOS time keeping
- TouchNet electronic commerce and cashiering

Data Warehouse

Clemson built and maintains a university wide centralized data warehouse that has 275 gigabytes of data that has been in use for the last 6 years. The data warehouse is the authoritative data source for university wide data reporting, business intelligence and analytics, and Institutional Research.

The data warehouse currently contains 10 years of university budget data and accepts daily data imports from other major business systems including:

- Banner Student System
- Clemson Student System (Clemson developed mainframe application & IDMS DB that is being replaced through Banner Implementation)
- Faculty Business System
- PeopleSoft Finance
- PeopleSoft Human Resources

Efficient and timely integration between the budgeting system, PeopleSoft HR / Finance, data warehouse, and business intelligence is mandatory.

Business Intelligence – Analytics and Reporting

The university uses the University data warehouse and SAP Business Objects Enterprise solution for reporting.

To date the University has developed over 150+ reports. Additional information is available via http://www.clemson.edu/ccit/software_applications/applications/cubs/busdatwh.html.

Clemson uses the following SAP modules:

- SAP Business Objects Enterprise, CPU
- Crystal Reports
- SAP Business Objects Web Intelligence CPU
- Xcelsius Enterprise Interactive Viewing CPU
- Xcelsius Enterprise
- Data Integrator Premium CPU
- Knowledge Base Accelerator for WEbi

Continued development and enhancement of Business Intelligence University wide is an ongoing, funded tactical and strategic goal of the office of the Vice President of Finance and Operations. It is their stated and continuous goal to provide data-driven decision support services to campus leaders to identify optimal solutions for financial planning, formulating policies and procedures, and developing integrated business strategies for efficient resource utilization.

Efficient and timely integration between the budgeting system, PeopleSoft HR / Finance, data warehouse, and business intelligence is mandatory.

Network

Clemson operates a highly-redundant multi-10Gb/s-core network that connects campus users to a WPA2-encrypted 802.11A/G/N wireless network as well as 1 Gb/s to wired network ports. Additionally, campus users are connected to the Internet and other external networks with multiple 10G feeds to Atlanta and Charlotte via the Clemson-operated C-Light regional optical network.

Data Centers

Clemson operates two data centers, with multiple Storage Area Networks, application server and load balanced web servers. Core data center competencies include Fibre Channel, Ethernet (routed / switched), Microsoft (servers, databases, directory services), Linux variants, Oracle, MySQL IBM MVS mainframe and IDMS databases.

221 **E. Current Budget Process**
222
223 The budget planning and development process is an integrated part of an ongoing planning cycle at
224 the University. The process results in an annual budget for each fiscal year in support of the
225 University's mission. The Board of Trustees is responsible for approving the annual budget, which
226 establishes revenue and expenditure budgets that comprise the University's total budget.
227
228 The planning and management of the University's budget is a shared responsibility at all levels of
229 the institution. Clemson is comprised of multiple divisions (ex. academic college, library, finance
230 division, etc.) each of which include numerous departments, (ex. biology, civil engineering,
231 accounting services, etc.) and programs serving to further the mission of the division and the
232 University.
233
234 University employees with budgetary authority are expected to monitor revenues and expenses
235 regularly.   They are further expected to review budget versus actual reports to proactively assess
236 budget performance and ensure that budgeted revenues are realized and that spending is within
237 budgetary authority.
238

239 **Current Budgeting Solution and Limitations**
240
241 The current budgeting solution for annual budget development uses a series of customized
242 PeopleSoft Finance panels, with limited capabilities and no planning tools. Within the panels,
243 budget users are given information to assist with budget development, such as current budgets and
244 actuals. Search features are restricted, and totals are not real-time and cannot be provided for
245 different views, only for a specific fund source and budget center. Current application has limited
246 scenario capability. The application is simply a budget entry panel by
247 fund/department/program/account/class/project after users have used Excel and other external tools
248 to develop the budget. After the annual budgets have been entered by budget users and reviewed
249 carefully by the Budget Office, the budgets are then uploaded to the Commitment Control tables in
250 PeopleSoft Finance.
251
252 Clemson University utilizes Commitment Control for the capability to control spending at different
253 levels across multiple fund sources. When a journal entry is processed in PeopleSoft for
254 unrestricted and restricted funds, the system validates that there is a budget in place for that
255 transaction, and that there is sufficient spending authority. For unrestricted funds, such as state and
256 other E&G funding, the spending authority is controlled at the fund and budget center/division
257 level. For restricted funds, such as grants and contracts, the spending authority is controlled at the
258 detail project level. The spending authority is managed through what are called "parent" budgets.
259 Each "parent" budget has multiple "child" budgets which detail the chart field distributions
260 allowed for expenditures. The total of all "child" budgets cannot exceed the "parent" budget. The
261 budgeting solution must provide both the parent and child budgets for expenditures for all funds, as
262 well as revenue budgets where applicable. The budgeting solution should perform business rule
263 validation to ensure that the budgets can interface and post immediately to PeopleSoft Finance.
264 Please refer to the PeopleSoft Budget Training Manual, available at
265 http://www.clemson.edu/cfo/budgets/, for more details regarding Clemson's budgetary controls
266 and chart of accounts.

267
268 In addition to the annual budget process panels described above, Clemson University also utilizes
269 budget journal panels in PeopleSoft Finance for budget amendments on a daily basis. (Clemson's
270 Budget Development Training Manual and PeopleSoft Budget Training Manual are available on
271 the Budget Office's website at http://www.clemson.edu/cfo/budgets/.)
272

Functionality

To ensure the new budgeting solution is an improvement upon the current budgeting solution, the
following functionality must be included with the new solution. Note the new budgeting solution
must include at least the following items but is not limited to just these items.

- One-stop location for budgeting, budget versus actual reporting and budget performance analysis
- Systematic creation of parent and child expense budgets and revenue budgets from annual budget development process/panels and from budget amendment process/panels in order to interface to PeopleSoft Finance Commitment Control Tables
- Interface with PeopleSoft Finance for other financial and reporting activities as necessary
- Real-time reporting and data entry
- Validation with business rules
- Thorough workflow/approval process, with automatic email notifications at all levels
- Capability to enter comments/notes for budget item, and to be able to query comments/notes
- Search, sort, total capability by almost any level of detail
- Custom security groups with row-level permissions
- 100% web-based user-friendly primary interface
- Annual budget development panels
- Multi-year budgeting capability
- Multiple budget scenarios
- "Budget amendment" panels used daily (separate from annual)
- Budgeting by targets at multiple levels, such as budget center, department, project, etc.
- Interface with PeopleSoft HR to create Position Budgeting, which will then feed into the overall budget development
- Position Budgeting allows for across-the-board salary increases, such as cost of living, for certain employee types
- Position Budgeting allows for entry of other hiring costs for faculty, specifically startup costs and supplements, which are not salary accounts
- Strategic planning capabilities
- Planning with factors/variables, such as student enrollment, credit hours, resident versus non-resident, etc.
- Future year projection capability
- Revenue modeling capability
- Real-time budget reports and information for entry into the University's annual budget document
- Budget versus Actual Reporting, with drill-down to PeopleSoft capability
- Easily review status of budgets at the department and budget center level

312   • Flexible reporting capabilities that will allow for multiple views of the budget
313   • Automated reporting notification and/or distribution capabilities
314
315   Provided below is a diagram of the current business systems in use.
316
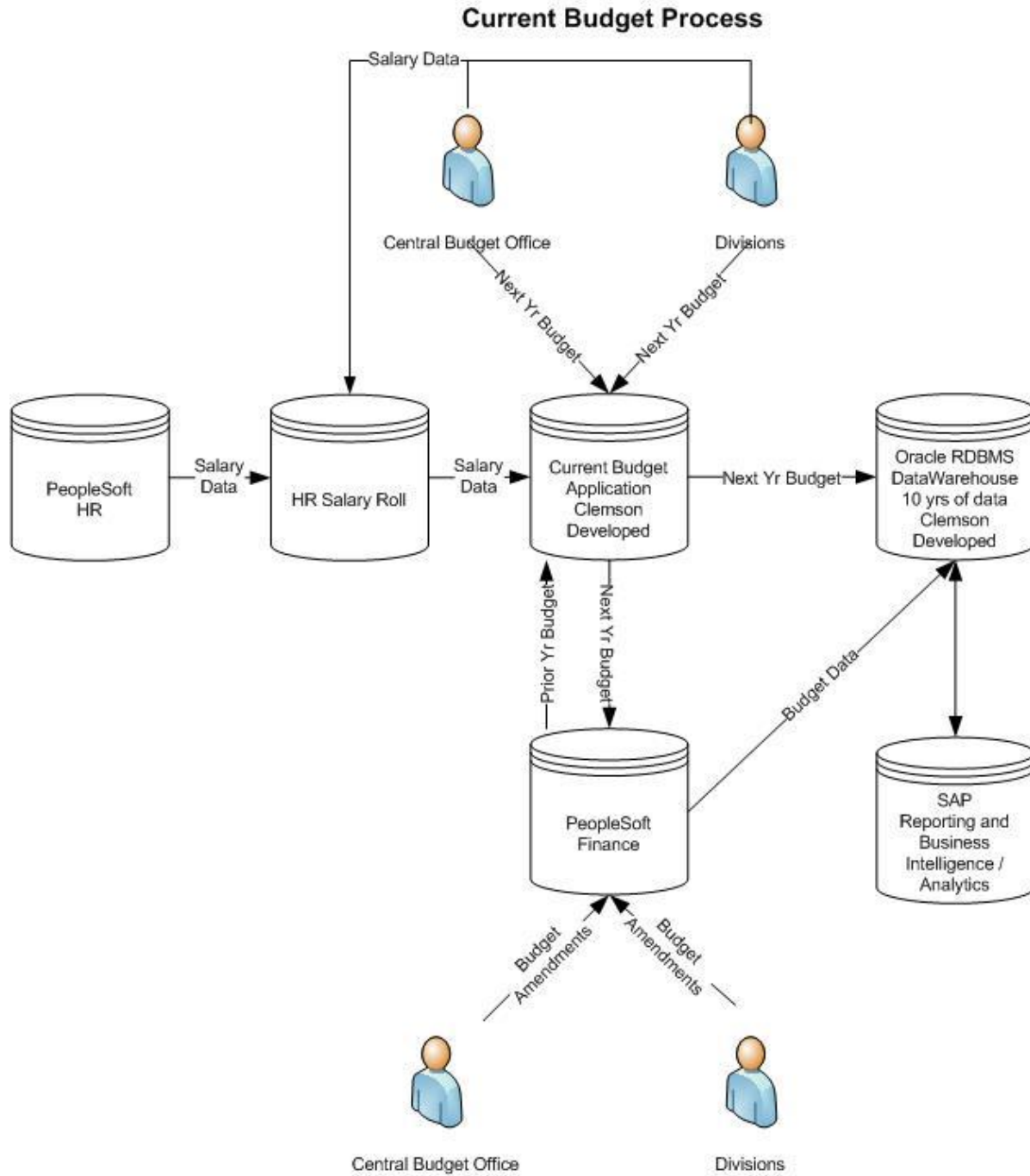
Current Budget Process

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II. Instructions To Offerors

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Regardless of specific requirements below or in this document, Offerors are required to submit their proposal electronically through the Clemson University online bidding system. To do so you must login (registering first) at https://sciquest.ionwave.net/prod/default.aspx?company=clemson, and follow specific instructions for this solicitation. You should register several days in advance of the bid closing date so you can be approved and login in time to submit a response.

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Information for Offerors to Submit – Technical Proposal

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In addition to information requested elsewhere in this solicitation, Offerors should submit the following information for purposes of evaluation as part of their Technical Proposal:

333

A. Executive Summary

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Outline the key elements of your proposal response, not to exceed six pages.

337

B. Minimum Qualifications for Implementation Respondents

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Provide evidence that the Respondent has the following qualifications:

341

1. The proposed budgeting system modules (or predecessor versions of those modules) should have been implemented at a minimum of three (3) higher education institutions. At least two (2) of these institutions should represent implementations completed in the last three (3) years.

346

2. Evidence that the proposed implementation services have been successfully implemented and used in comparable institutions of like mission, size, and complexity as Clemson.

350

C. References

352

1. Please supply higher education clients for whom you have provided implementation services for your proposed budgeting system comparable in technical environment, comparable size and structure to Clemson. Please segment these clients as follows: (1) those implemented within the last year, (2) those in production for one to five years, and (3) those in production more than five years (4) and those for whom you currently provide hosting services and for how long

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2. Provide details of the versions of the software that you have implemented, the number of years that the system has been in production, the modules implemented, including related 3rd party solutions, and the contact information for each client (name, title, email address, physical address, and phone number).

3. Provide a description of the three (3) related customer implementations which most resemble Clemson.

D. Viability

1. Provide a brief description of your corporate history, market segment(s), client base, and employee base.

2. Provide a copy of your most recent, audited, annual financial statement including a separate management letter.

3. Provide a disclosure of any judgments, including but not limited to: pending or expected litigation or other real or potential financial reversals that might affect the viability or stability of the corporations; or warrant that no such condition is known to exist.

E. Implementation Approach

Clemson thus encourages Respondents to be creative in developing an implementation strategy that will result in the most productive approaches for software implementation.

1. **Implementation tasks.** Give an overview of your implementation strategy, and then describe the implementation tasks required, complete from contract signing to installation and acceptance. Include the process proposed for data conversion, configuration, and integration of the selected budget system with PeopleSoft HR / Finance, data warehouse, and business intelligence systems. These tasks must address the specific requirements as outlined in Section III.

2. **Replacement vs. integration.** Provide an explanation of how the selected budget system will interface with PeopleSoft HR / Finance, data warehouse, and business intelligence systems. Describe the experience your firm has in integrating with PeopleSoft HR / Finance, data warehouse, and business intelligence systems and the tools you would use.

3. **Project schedule**. Provide a projected implementation schedule, including timeline, milestones, and deliverables.

4. **Total hour requirements**. Provide "total hour requirements" with details broken out for each major component. Respondent should note expectations regarding travel time for trainers or consultants.

5. **Definition of hours worked**. Describe exactly what will be included and considered "hours worked."

6. **Implementer staffing**. Provide breakdown of consultant type, level/skills including experience level, accreditation, or certification required for each task.

7. **Consultant qualifications**. Provide resumes, client references and the most recent work histories of the primary consultants/trainers you will assign to the university.

8. **Right of refusal**. Respondent should validate the university's right of refusal of individual consultants proposed or assigned to the implementation.

9. **Implementation Specific deliverables** include but not limited to

    1. Providing Subject Matter Experts to lead, facilitate, evaluate, and document initiatives to resolve readiness assessment findings and assisting the university in solving any outstanding issues that could be detrimental to the success of the project.
    2. Providing Subject Matter Experts to lead, facilitate, evaluate, and document the implementation readiness and preparedness of each campus area / department prior to, during, and after deployment.
    3. Providing Subject Matter Experts to lead, facilitate, and develop business process maps to identify as-is, to-be, and gap analysis for each of the modules implemented by each department / campus area.
    4. Providing Subject Matter Experts to lead, identify, document, and present suggested changes in policies, regulations, practices, processes, strategies, and legacy systems to ensure successful implementation.
    5. Providing Subject Matter Experts to lead and provide direction on the optimum use and configuration of supporting computational infrastructure for this effort (server architecture, network configuration / load balancing, web architecture, database, and storage architecture).
    6. Providing Subject Matter Experts to train Clemson Information Technology staff in the development and integration concepts, and tasks required to ensure successful integration with legacy applications / data.
    7. Providing Subject Matter Experts to Evaluate and document the impact to legacy applications / programs prior to, during, and after deployment on budgeting system and related applications.
    8. Providing Subject Matter experts to lead and develop applications and data transfer programs to exchange data between the budgeting solution and existing systems, to be authorized by the university in a separate work order / project change order.
    9. Providing Subject Matter experts to lead and develop a data standards document to govern integration of the budget system with existing / legacy applications.

10. Providing Subject Matter Experts to facilitate, participate, and lead the development and maintenance of detailed project plans, plan dependencies, task descriptions, tasks dependencies, time estimates, project schedules, issue logs and project deliverables. Record plans including tasks and task dependencies, and project schedules in project management software.
11. Providing Subject Matter Experts to develop and maintain project management documentation including charts, graphs, dashboards, metrics development and management reports as requested by the project team and other executives of the University as requested.

F. Knowledge Transfer

1. **Training Strategy**. Describe your strategy and methodology for training on the proposed budget system. Please also discuss alternative training strategies targeting lower cost of execution with associated implications.   Differentiate your proposed training solutions in terms of technical team training and end user training.

2. **Detailed Methods**. Include detailed recommendations for training methods, materials, trouble-shooting resources, benchmarks to monitor progress, and a proposed time-line.

G. Project Management

1. **Project Management Methodology**. Respondent should include a complete and detailed description of its overall approach to the management of this effort, including cost containment, schedule management, project leadership, change management practices, risk management, and other typical project management tools and processes that may be employed in this effort.

2. **Change Management**. Describe the elements of your change management plan that meet the requirements of:
   1. The processes, tools and techniques you use to manage the people-side of change to achieve the required business outcomes of this transformation project

   2. The organizational tools that can be used to help institutional stakeholders make a successful transition in the change

   3. The elements of the project communication plan for this implementation

   4. Any other change management interventions will you be providing in this implementation

H. Clemson and Respondent Roles and Responsibilities

1. **Roles and Responsibilities**. Identify the critical project roles that will be needed to implement successfully the selected software. Describe the responsibilities for each role.

2. **Project Organization**. Propose the most likely project organization structure for implementing the budget software selected.

3. **Clemson Responsibilities**. Outline the time and effort commitment needed from various Clemson personnel throughout the implementation.

I. Client Relationships

1. **Dealing with client disputes**. Describe the process your firm uses to deal with client complaints. Give examples of client disputes that were successfully resolved and those that weren't and why.
2. **Engaging the client**. Outline the process your firm uses to engage with your client's key stakeholders? What communication vehicles are used to help Clemson stakeholders to understand and embrace best practices?
3. **Resistance to change**. What methods does your firm use in dealing with resistance to change by Clemson stakeholders?

J. Optional Product or Service Offerings

Discuss products and/or services which are not part of the proposed solution that may have additional documented benefits to the solution being proposed to Clemson. Provide a breakdown of pricing for these offerings clearly indicated as optional offerings in your Cost Proposal. Do not include cost components here.

K. Third Party Products or Service Offerings

Respondent will identify all key representatives of any 3rd party business partners identified in this proposal.

Include plans for outsourcing and identify any existing arrangements with consulting firms or subcontractors, if applicable.

Respondent understands that Clemson will only be contracting with the Respondent and that any partner key 3rd party solutions executed via this agreement will be binding on the Respondent.

L. Recommended Post Implementation Technical Staffing

Given the scope of products as outlined in this RFP document Clemson seeks the following information regarding post implementation technical staffing levels that will be required for ongoing support of the budgeting solution.

Please recommend the following:

1. The number of ongoing technical staff (FTEs) that will be required
2. The types of skills that will be required (e.g. Software Developers, Database Administrators, System Aadministrators, Business Analysts, Report Writers).
3. The FTE level for each type of skill set required

M. Infrastructure

Given the scope of products as outlined in this RFP document Clemson seeks information regarding the selection and configuration of infrastructure required for ongoing support of its budgeting solution.

N. Audit and Compliance

Given the scope of products as outlined in this RFP Clemson seeks that the respondent coordinates with the university Security Office and the university Auditor's Office to ensure the implementation complies with federal, state, and university policies.

O. Additional Information

Provide any additional information that will help differentiate your proposal and make it easier to comprehend.

P. Other Implementation Considerations Discussed

This section is open to the bidders for discussion of implementation considerations not covered in other sections of this document (optional).

Information for Offerors to Submit – Cost Proposal

In addition to information requested elsewhere in this solicitation, Offerors should submit the following information for purposes of evaluation as part of their Cost Proposal.

Clemson is accepting cost and technical proposals for the budgeting system to be delivered to the university as a vendor hosted solution and/or a solution implemented at the Clemson data centers. Clemson's preference is a vendor hosted solution, but we are willing to consider offers for a Clemson hosted solution.

If a vendor can provide both solutions, they should submit a base proposal for a vendor hosted solution, with an option for a Clemson hosted solution. The option should be clearly detailed in the technical proposal identifying any differences in the solution from vendor hosted versus Clemson hosted. The cost proposal should be based on the vendor hosted with an alternate cost proposal for a Clemson hosted solution. The evaluation will only be for the vendor hosted solution only, but the Clemson hosted solution may be negotiated with the highest ranked offer if Clemson determines it is more advantageous to the University.

If a vendor can only provide a Clemson hosted solution, this must be clearly pointed out in the technical proposal, and your technical proposal will be evaluated accordingly.

The cost of the proposed solutions must be submitted separately from the technical proposal.

   A. Cost must be all inclusive of all to include any travel, lodging, and other expenses.
   B. Clemson University is requiring three (3) environments that consist of development, QA and production instances. All costs for three (3) environments must be included in Cost Proposal.
   C. The solution must accommodate a minimum of 100 concurrent users and cost must be reflective of this number.
   D. Cost must be entered in the online bidding system where required as a total, fixed price cost for the implementation as outlined in Section VI of this RFP. In addition to completion of Section VI, Cost Proposal, your separate cost proposal should show a detailed breakdown of number of hours per project segment, level/title and all inclusive hourly rates that your total, fixed price is based on. If any third-party costs make up your total cost, provide a breakdown of those as well.

   E. Payment Schedule - Respondents should provide for a payment plan to encompass the solution being offered. The payment strategy should account for payments that are tied to measurable progress and will provide a means for payment hold-back for non-performance. A percentage of the whole should be reserved for final acceptance of each module. Please provide details on the types of performance-based incentives. The final payment schedule will be negotiated with the Respondent prior to final award.

Please follow submittal requirements outlined in the Bid Attributes in the online bidding system for breakdown of proposals and number of copies that must be submitted.

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613
614 **Qualifications – Mandatory Minimum**
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616 In order to be qualified to receive award, you must meet the following mandatory minimum
617 qualifications. Clemson will evaluate the Respondent's ability to fulfill its proposed solution based
618 upon specified qualifications, references and overall viability of the company or companies. The
619 minimum qualifications are:
620
621   i.   The proposed budgeting system (or predecessor versions of those modules) should have
622   been implemented at a minimum of three (3) higher education institutions. At least two (2)
623   of these institutions should represent implementations completed in the last three (3) years.
624   ii.   Evidence that the proposed implementation services have been successfully implemented
625   and used in comparable institutions of like mission, size, and complexity as Clemson.
626
627 The Procurement Officer may, in his discretion, consider (1) the experience of a predecessor firm
628 or of a firm's key personnel which was obtained prior to the date Offeror was established, and/or
629 (2) any subcontractor proposed by Offeror. (c) Provide a detailed, narrative statement providing
630 adequate information to establish that you meet all the requirements stated in subparagraph (a)
631 above. Include all appropriate documentation.
632
633 **1.** The successful Offeror shall provide satisfactory evidence of all required insurance coverage
634   and licenses PRIOR TO PERFORMANCE or AS PART OF TECHNICAL PROPOSAL
635
636 **2.** Be sure to see the Event Activities in the online bidding system for details on deadlines for
637   questions and/or pre-bid meetings.
638
639

640 **III. Scope of Work / Specifications**
641
642 Vendors are encouraged to review the following documents from Clemson's website when
643 preparing their technical proposal.
644
645   • State Budget Process: Typical Timeline,
646   http://www.clemson.edu/public/constituency_development/budget_process.html
647   • Open Budget Process,
648   http://www.clemson.edu/cfo/budgets/policy_manual/philosophy/open.html
649   • Glossary of Terms,
650   http://www.clemson.edu/cfo/budgets/policy_manual/appendices/glossary.html
651   • Policy Manual, http://www.clemson.edu/cfo/budgets/policy_manual/
652   • Budget Document and Forms, http://www.clemson.edu/cfo/budgets/forms.html
653   • Chart of Accounts, https://coa.app.clemson.edu/
654   • Expense Account Codes Defined, http://www.clemson.edu/cfo/comptroller/codes.html

- Budget Development Training Manual, which provides instructions for the annual budget development process: http://media.clemson.edu/cfo/budgets/development-training-manual.pdf
- PeopleSoft Budget Training Manual, which describes the budget chart of accounts structure used at Clemson in PeopleSoft Finance (Commitment Control) available via **www.Clemson.edu/cfo/budgets/**
- Reference Guide for Salary Roll Development available via **www.Clemson.edu/cfo/budgets/**

A. Chart of Account Requirements

The proposed Budget Solution shall provide the Central Budget Office and budget users the following capabilities to include but not limited to:

1. Using Clemson's current chart of accounts
2. Ability to create multiple revenue and expenditure budgets
3. Providing each budget center an assigned number as its identifier, that shall be the first two digits of each budget center's department numbers assigned for financial reporting purposes

B. Budget Entry Requirements

The proposed Budget Solution shall provide the Central Budget Office and budget users the following capabilities to include but not limited to:

1. Loading budget data from Microsoft Office applications
2. Loading budget data from interactive web applications
3. Loading employee position budget data from PeopleSoft based on effective date and budget year
4. Budgeting for student fees
5. Budgeting for revenue accounts
6. Budgeting for Clemson University Foundation, Clemson University Research Foundation, and other related organizations activities
7. Budgeting by fund, class, department, budget center, program, project, and expense account
8. Budgeting by salary roll and vacant positions
9. Budgeting personnel effort percentages and non-personnel costs across projects and funding sources
10. Budgeting for employees using multiple chart fields (within one department and one organization, belonging to multiple departments within one organization, belonging to multiple departments and multiple organizations) and ensuring all employee distributions equate to 100% throughout the fiscal year, and then providing for the coordinated approval of two or more organizations sharing an employee
11. Budgeting for employees salaries by manually entering data or applying percentage increases across all employees

701   12. Budgeting for employee salaries by base, negotiated and incentive components, by annual
702   percentage salary increases and or a fixed dollar amount, and by applying different salary
703   distributions beginning and ending at different times of the year.
704   13. Budgeting for projects and activities that currently do not exist but will be established
705   during the upcoming fiscal year
706   14. Budgeting for expense budgets vs. revenue budgets and providing budget development
707   rules to govern budget balancing vs. targets
708   15. Reviewing, editing, and approving budget line items based on a predetermined approval
709   hierarchy through configurable workflow and routing rules
710
711

712   **C. Budget Amendment Requirements**

713

714   The proposed Budget Solution shall provide the Central Budget Office and budget users the
715   following capabilities to include but not limited to:

716

717   1. Amending budgets and limits by fund, class, department, budget center, program, project,
718   and expense account
719   2. Reviewing, amending, and approving budget line items based on a predetermined approval
720   hierarchy through configurable workflow and routing rules
721   3. Adherence to predefined business rules and/or naming convention

722

723

724   **D. Reorganization Transfer Authorizations Requirements**

725

726   The proposed Budget Solution shall provide the Central Budget Office and budget users the
727   following capabilities to include but not limited to:

728

729   1. Entering budget reorganization transfer authorizations by fund, class, department, budget
730   center, program, project, and expense account
731   2. Reviewing budget reorganization transfer authorizations and approvals based on a
732   predetermined approval hierarchy through configurable workflow and routing rules

733

734

735   **E. Budget Reporting Requirements**

736

737   The proposed Budget Solution shall provide the Central Budget Office and budget users the
738   following capabilities to include but not limited to:

739

740   1. Reporting monthly budgets versus actuals, including details of how the budgets have
741   increased/decreased in relation to the initial budget loaded at the beginning of the fiscal year
742   2. Reporting to validate budget submissions
743   3. Reporting to roll up multiple chart fields (accounts) by fund, class, department, budget
744   center, program, project, and expense account
745   3. Reporting year-end closings and associated reports for projected revenue shortfalls,
746   revenues in excess of current budgets, expenditure overruns, etc.
747   4. Providing data / reports that can imported into the Clemson University budget document
748   5. Providing data / reports that can be imported into Microsoft Office applications

6. Providing ad hoc reporting using industry standard tools
7. Providing a customizable dashboard, with an easy to read single page real-time user interface, showing a graphical presentation of the current status (snapshot) and historical trends of key performance indicators to enable instantaneous and informed decisions to be made at a glance.
8. Providing in-depth reporting capabilities to assist with reconciliation

F. Vendor Implementation Expectations

In order to effectively and efficiently implement the budget solution, Clemson requires an outstanding level of expertise from those assigned to the project. This section outlines the knowledge, skill sets, experience level and deliverables expected of individual consultants, trainers, or contracted partners. It should be noted that Clemson reserves the right to have a consultant or contracted partner replaced if they feel that entity is not qualified to do the work required or is unable to work effectively with other project resources.

It is expected that the implementation vendor will provide full implementation services for all modules licensed purchased via this RFP. In the event the implementation vendor should elect to use a 3rd party implementation service provider for any part of the implementation, the specific nature of these services should be identified, to include reasons for the exception. If this 3rd party involvement should occur, it is expected that the implementation vendor will be accountable for the quality and timeliness of the services rendered by that 3rd party provider.

Implementation Specific deliverables include but are not limited to

1. Providing Subject Matter Experts to lead, facilitate, evaluate, and document initiatives to resolve readiness assessment findings and assisting the university in solving any outstanding issues that could be detrimental to the success of the project.
2. Providing Subject Matter Experts to lead, facilitate, evaluate, and document the implementation readiness and preparedness of each campus area / department prior to, during, and after deployment.
3. Providing Subject Matter Experts to lead, facilitate, and develop business process maps to identify as-is, to-be, and gap analysis for each of the modules implemented by each department / campus area.
4. Providing Subject Matter Experts to lead, identify, document, and present suggested changes in policies, regulations, practices, processes, strategies, and legacy to ensure successful implementation.
5. Provide Subject Matter Experts to lead and provide direction on the optimum use and configuration of supporting computational infrastructure for this effort (server architecture, network configuration / load balancing, web architecture, database, and storage architecture).
6. Providing Subject Matter Experts to train Clemson Information Technology staff in the development and integration of the budgeting solution with Peoplesoft HR / Finance, data warehouse, and the business analytics systems.
7. Providing Subject Matter Experts to evaluate and document the impact to legacy applications / programs prior to, during, and after deployment on Peoplesoft HR / Finance, data warehouse, and the business analytics systems.

8. Providing Subject Matter experts to lead and develop applications and data transfer programs to exchange data between the budgeting system and existing systems, to be authorized by the university in a separate work order / project change order.
9. Providing Subject Matter Experts to facilitate, participate, and lead the development and maintenance of detailed project plans, plan dependencies, task descriptions, tasks dependencies, time estimates, project schedules, issue logs and project deliverables. Record plans including tasks and task dependencies, and project schedules in project management software.
10. Providing Subject Matter Experts to develop and maintain project management documentation including charts, graphs, dashboards and management reports as requested by the project team and other executives of the University as requested.

G. Implementation Goals

Clemson's goal it is procure a comprehensive solution, providing for the lowest possible business risk, for one total fixed price.

To accomplish this goal, Clemson is seeking an all-encompassing Implementation Plan and a total estimated Fixed Price cost to execute this plan. Clemson expects the vendor response to have cost detail reflected in a way that the University is able to understand what makes up these costs and what "is" and "is not" included. We accept the fact that there are unknowns in terms of critical implementation decisions which will drive Implementation schedules, resources and cost. Therefore, we are expecting the selected vendor to provide a detailed listing of the work requirements necessary to perform the needed "due-diligence" to create a final plan. The associated final Fixed Price should be included in the Cost Proposal only.

If the quality of any implementation service work does not meet with Clemson's approval, the university reserves the right to take the following actions:

1. Selected Vendor will either 1) remedy the problems identified by Clemson, or 2) provide for alternative services of equal or better value.
2. If the problem(s) cannot be resolved, Clemson reserves the right to solicit new bids for the work in question and to seek other remedies to complete this project. In this case, the selected vendor will be paid only for work that has been completed and Clemson will no longer be obligated to continue paying for implementation of any non-implemented product or further services.

H. Functional Training Requirements

The Implementation partner will provide a comprehensive training plan to be executed at Clemson. This plan will include both functional training and configuration requirements. The plan will include curriculum, delivery mechanism, participant make-up, and recommended class sizes. Functional trainers should be experienced and knowledgeable, not only in the major modules being implemented, but also experienced with workflow and its design for most effective use across all affected departmental areas.

Functional Training specific deliverables include but are not limited to:
.

22

845   1. Conduct session and provide assistance in "train the trainer" related needs. This would
846   include, but not be limited to, assembling project documentation, assist in development of
847   end user job descriptions, recommendations and specifications for help desk requirements,
848   development of training materials and development of training programs
849   2. Training university departments / campus areas on the use of the budgeting solution,
850   including development of curriculum to promote a successful transition.
851   3. Training university departments / campus areas on the concepts and tasks required to ensure
852   its operational availability.
853   4. Training the university Finance department staff so they can provide subject matter
854   expertise and first line support to all budget system users, campus wide.
855   5. Training Clemson Information Technology staff in the concepts and tasks required to
856   ensure its operational availability.
857   6. Training CCIT in the optimum use and configuration of supporting computational
858   infrastructure for this effort (server architecture, network configuration / load balancing,
859   web architecture, database, and storage architecture).
860
861

I. Functional Consulting Requirements

864 Functional Consulting Training specific deliverables include but are not limited to:

865

866   1. Providing knowledgeable and highly skilled consultants to functional teams based on their
867   expertise. More specificity in this regard is included in subsequent sections.
868   2. Providing consultants to aid in the training, module configuration, data conversion and
869   provide guidance and counsel on design and specification of business rules.
870   3. Providing consultants to assist Clemson in determining the requirements and use of
871   workflow within budgeting solution for development, approval, and updates to budget
872   submissions.

873

J. Project Management Requirements

875

876 Clemson expects that a project manager will be assigned to the university to schedule, manage and
877 supervise all vendor and contract resources assigned to the project. This project manager will assist
878 Clemson in discussions with the selected vendor to resolve software product issues and will elevate
879 critical software issues to the appropriate levels within the selected vendor's organization.

880

881 The project manager will provide ongoing support and project management expertise to the
882 Clemson project director and other stakeholders throughout the implementation. The project
883 manager will collaborate with and support Clemson's project director in carrying out day-to-day
884 project management activities and resolving project issues. The assigned project manager will
885 collaborate with Clemson technical project manager and other project teams as defined and
886 requested by the project director. The assigned project manager will be the single-point of contact
887 and the primary communication point for any project communications with vendors or sub-
888 contractors external to Clemson. The Clemson project director will be the single-point of contact
889 and the primary communication point for any project communications and issues internal to
890 Clemson.

891

892   It is mandatory that the project manager have direct prior experience managing the vendor's budget
893   system deployment in an environment that includes PeopleSoft HR / Finance, a data warehouse,
894   and business intelligence (preferably SAP).
895
896   Project Management Requirement deliverables include but are not limited to providing a Project
897   Manager to:
898

899   1. Collaborate closely with Clemson project director and assist in day-to-day project
900   managements activities as requested by the project director.
901   2. Provide ongoing guidance to project teams to keep them focused on team responsibilities,
902   deliverables, and task completion.
903   3. Under the project director supervision, assisting and supporting teams experiencing delays
904   and having outstanding unresolved issues that could impede the progress and success of the
905   team or the project.
906   4. Collaborating with the Project Director to establish project management processes and
907   metrics that will provide the necessary controls for keeping the project on schedule.
908   5. Facilitate and participate in the development of detailed project plans, plan dependencies,
909   project schedules, task descriptions, tasks dependencies, task duration estimates, task
910   owners, issue logs and project deliverables. Project management software will be used for
911   developing and tracking the project schedule, to include both vendor tasks and university
912   required tasks.
913   6. Assist the project director with updating and support of project plans, deliverables and
914   project schedules.
915   7. Develop and maintain project management documentation as requested or needed by the
916   project director and/or Clemson stakeholders.
917   8. Develop and facilitate a process for weekly updates to project schedules, to include analysis
918   of progress against schedule, to ensure that the project schedule and project scope are not at
919   risk. Recommend remedial action to the project director in the event the schedule should
920   become at risk.
921   9. Assist the project director in execution of a project communication plan.
922   10. Develop and/or assist in the development and production of project status reports, executive
923   level dashboards, and other required reports in accord with the project communication plan
924   and based on the project director directions and recommendations.
925   11. Assist the project director in oversight of the project issues log(s).
926   12. Analyze and facilitate the assessment of requests for project scope changes or software
927   modifications, with a primary goal of finding 'work around' alternatives, thus supporting
928   the desire of the university to minimize any extraneous software customizations.
929   13. Assist the project director in facilitation of risk assessment sessions as needed to identify
930   and analyze potential issues or roadblocks, and recommend to the project director
931   corrective action to alleviate or mitigate potential problems.
932   14. Collaborate with project director and university stakeholders to develop final check out
933   processes and procedures as modules are made ready for production.
934
935   The Clemson Project Director deliverables include but not limited to:
936
937   1. Meet regularly with the project sponsors and/or the project executive steering committee to
938   provide project status and discuss resolutions to project issues.

2. Manage and guide project management support team (implementation partner project manager, technical project manager and project scheduler) to ensure day-to-day project management activities are completed.
3. Assist in establishing and staffing the appropriate project teams to ensure an efficient and effective implementation.
4. Control and track project budget and expenditure.
5. Provide oversight of project plans and project deliverables.
6. Manage the execution of a project communication plan that ensures all stakeholders understand the goals of the project, the reasons for the project, the progress being made on the project and that stakeholders are prepared for milestone events throughout the life of the project. The project management support team will assist the project director in building and maintaining all communications materials.
7. Present and communicate project status reports, executive level dashboards, and other required reports during meetings and other forms of project communications based on the project communication plan.
8. Oversee the management of the issues log(s) with the support of the implementation partner project manager.
9. Control and oversee the requests for project scope changes or software modifications.
10. Conduct risk assessment sessions in collaboration with the implementation partner project manager to identify and analyze potential issues or roadblocks.

K. Change Management Requirements

It is anticipated that transitioning from job functions related to the current legacy system operations to the duties related to the new budgeting systems could create apprehension and fear for some of the Clemson departmental staff.

Change Management specific deliverables include but are not limited to:

1. Providing consultants experienced in appropriate communications and training skills to assist and support this transition. The consultants will collaborate with Clemson stakeholders to develop strategies, and possibly coaching sessions or workshops, for executing a smooth transition.

L. Technical Consulting Requirements

Clemson requires technical support for each implementation area/project to be provided by the selected vendor. The vendor needs to assign an experienced technical consultant(s) to the implementation team.

Technical Consulting specific deliverables include but are not limited to:

1. Providing on call technical consulting on an 'as needed' basis during predetermined periods during the project implementation to ensure smooth transition to production during critical times as each module goes on-line, as needed on a task order basis.
2. In collaboration with Clemson staff, developing a comprehensive strategy for installing, integrating and interfacing the budgeting solution modules, developing workflows, and reflect how the budgeting system will be integrated with PeopleSoft HR and Finance, the

data warehouse, and the business intelligence systems. This strategy will include a plan for communications, training and project transition from development into production. The project plan will be refined and finalized to include project scope, project schedule, project milestones, project deliverables, staffing levels, success criteria, and training requirements for the project staff.

M. Technical Training Requirements

Technical Training specific deliverables include but are not limited to:

1. Delivering technical training to the Clemson technical staff to bridge the gaps and ensure that the technical knowledge required for supporting budgeting system and integrating it with PeopleSoft HR and Finance, the data warehouse, and the business intelligence systems.

N. Data Migration and Integration Requirements

Data Migration and Integration deliverables include but are not limited to:

1. Providing applications programming support to Clemson technical staff to help facilitate and migrate data to / from People PeopleSoft HR and Finance, the data warehouse, and the business intelligence systems, as needed on a task order basis.
2. Assigning technical resources/programmers who are highly experienced in using Oracle development tools, data migration tools, reporting tools and other utilities needed. Migration assignments may include programming of data conversion processes, loading of converted data, programming of interfaces, as needed on a task order basis (data loads and data extracts)

1019
1020   Provided below is a diagram of the business systems after the proposed budgeting solution has
1021   been implemented. Note, that the scope of this effort is limited to a purchase and implementation
1022   of a budgeting solution. It does not include replacement of the Data Warehouse or Business
1023   Intelligence / Analytic systems.
1024
1025

**Post Budget Solution Rollout
RFP Scope**
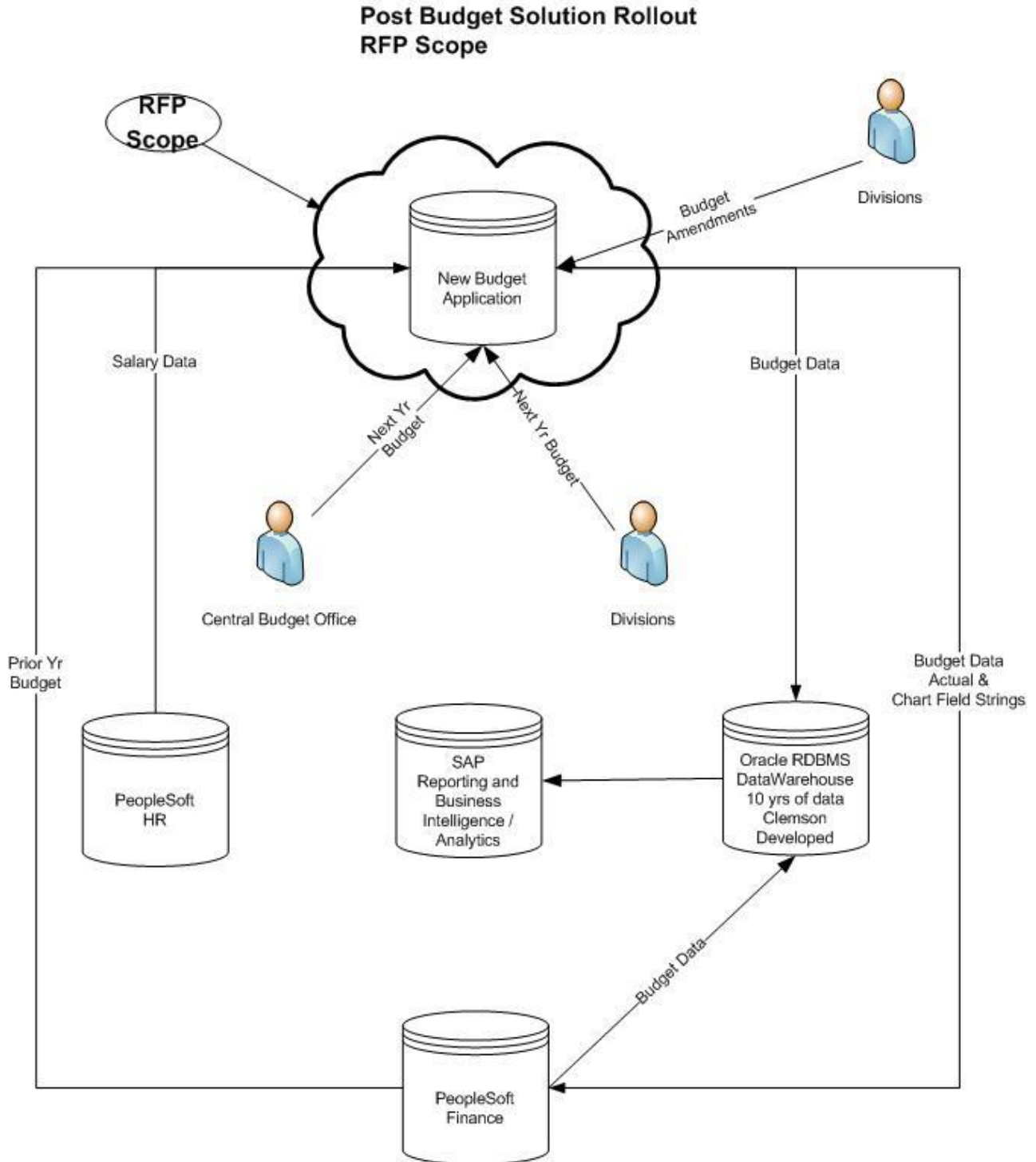
1026
1027
1028   27

1029
1030
O. System Customization Requirements

1032

1033 The selected vendor will be expected to advise Clemson on options available that will ensure
1034 required data transaction flows.

1035

1036 System Customization deliverables include but are not limited to:

1037

1038   1. Estimating and proposing costs for needed customizations based on gaps in required
1039   functionality discovered during fit-gaps and business process analysis.

1040

P.   Hosting Requirements

1042

1043 Clemson is accepting cost and technical proposals for the budgeting system to be delivered to the
1044 university as a vendor hosted solution and/or a solution implemented at the Clemson data centers.
1045 Clemson's preference is a vendor hosted solution, but we are willing to consider offers for a
1046 Clemson hosted solution.

1047

1048 If a vendor can provide both solutions, they should submit a base proposal for a vendor hosted
1049 solution, with an option for a Clemson hosted solution. The option should be clearly detailed in the
1050 technical proposal identifying any differences in the solution from vendor hosted versus Clemson
1051 hosted. The cost proposal should be based on the vendor hosted with an alternate cost proposal for
1052 a Clemson hosted solution. The evaluation will only be for the vendor hosted solution only, but the
1053 Clemson hosted solution may be negotiated with the highest ranked offer if Clemson determines it
1054 is more advantageous to the University.

1055

1056 If a vendor can only provide a Clemson hosted solution, this must be clearly pointed out in the
1057 technical proposal, and your technical proposal will be evaluated accordingly.

Clemson Hosting Requirements

1059

1060 Clemson Hosting requirements include but are not limited to:

1061

1062   1. Shall provide the university a budget system that runs on Redhat Linux Enterprise version 6
1063   or higher, Windows Servers 2008 Service Pack 2 or higher, Oracle Enterprise Edition
1064   version 11.2 or higher, and or Microsoft SQL Server 2008 R2 or higher.
1065   2. Integrate with the Clemson Identity Management System for authentication and
1066   authorization via either Shibboleth/SAML2 (preferred) or Secure LDAP (LDAPS).
1067   3. A system hosted in Clemson's datacenter must be supported on virtualized hardware.
1068   4. Vendor should specify all software as well as the computing, graphics, RAM and storage
1069   capacity required.
1070   5. The system must be compatible with and accessible via the IPV6 networking standard.
1071   6. The system must provide an API for provisioning of user accounts.
1072   7. The system should provide for disaster recovery and business continuity either through
1073   vendor hosted solution or integration with Clemson's DR/BC architecture.

1074

Vendor Service Level and Hosting Agreement Requirements

The vendor shall provide Service Level and Hosting Agreements that define and address:

- Application latency
  - Error correction time
  - Remedies
  - Price caps
- Monitoring
- Support
  - Technical support hours / days
  - End user support hours / days
  - Escalation requirements and timelines
- Disaster recovery
  - Process, procedure, timeline
- Scaling
  - Network capacity
  - Compute capacity
  - Storage capacity
  - Memory capacity
- Backups
  - Cold, hot, full, incremental, retention schedules
  - Data deletion
  - Chain of custody
- Cooling
  - Capacity, redundancy
- Security
  - Firewalls, Intrusion detection, stateful packet inspection (dynamic packet filtering), physical, logical
- Data Center Certifications
  - Data Center Audits
- Software licensing
  - Change of service providers
  - Load balancing
  - Password management
  - Root access
- Identity management
  - LDAP, Schibbolleth
- Change Control
- Partners
  - Use of 3rd party vendors
  - Off shore vendors
  - Mergers and acquisitions
- Performance before payment
- Holdbacks

- Warranty and disclaimer
- Term
- Duties and obligations
- Technology refresh
- Project management
- Dispute resolution
- Contract Termination
    - Process and timeline of data transfer
    - Mergers and acquisitions
    - 3rd party vendors

V. Terms and Conditions Special

EVALUATION FACTORS -- PROPOSAL

The proposal will be evaluated using only the factors stated below. Evaluation factors are stated in the relative order of importance, with the first factor being the most important. Once evaluation is complete, all responsive Offerors will be ranked from most advantageous to least advantageous.

Offerors responding to this RFP will be evaluated based on the information provided in the Offeror's proposal and on the basis of the following criteria, which are listed in order of importance:

Evaluation Criteria:

1. Technical Proposal: The degree, completeness, and suitability of the Offeror's proposed technical solutions to meet or exceed the requirements of this RFP; vendor hosted solution vs. Clemson hosted solution. **50%**

2. Cost Proposal: The total cost of ownership for the base solution for the potential five year contract period. **20%**

3. Demonstration: On site demonstration. **20%**

4. Offeror's Qualifications: The Offeror's experience, references and key staff must provide evidence of its depth and breadth of experience, and evidence of successful past performance with projects of this similar size and scope. **10%**

Demonstration:

After the evaluation of the Technical Proposal, Offeror's Qualifications and factoring the Cost Proposal into the evaluation as outlined by the points assigned to each of those criterion above, all Offerors' proposals ranked close enough to the highest scoring Offeror where the award of points allowed for a demonstration could shift the final ranking, will be asked to provide a demonstration. These Offerors will then be evaluated based on the number of points listed above for the on-site Demonstration Criterion.

1166
1167 Demonstrations are tentatively set for **July 22, 2013 – July 26, 2013**. Each Offeror invited to
1168 demonstrate will be furnished with a detailed list of items Clemson University would like to see
1169 addressed during the demonstration. This list will be provided via email by Clemson University's
1170 Procurement Officer. Once this list is provided, Offeror(s) will have one week for preparation
1171 prior to the actual demo being scheduled and presented for evaluation purposes. Each Offeror(s)
1172 invited to demonstrate will be required to furnish all equipment, items, and services they need to
1173 present their demonstration. Only power and Internet access will be made available to the Offeror.
1174 Further instructions and directions will be provided to those Offeror(s) invited to provide a
1175 demonstration.
1176
1177 The following specifications should apply to all live on-site demos. All on-site demos will be
1178 provided at vendor's expense.
1179
1180   1) The demonstration should not last more than 3 hours for demonstration and questions.
1181
1182   2) A brief outline of the components to be covered in the demo will be provided to the
1183   offeror(s) by Clemson University's Procurement Officer as stated above.
1184
1185   3) All components covered in the demo must be components necessary to fulfill the
1186   requirements of the scope of the RFP document. It is understood that any components
1187   covered in the demonstration phase are included in the Offeror's Technical and Cost
1188   Proposal as the base solution with no additional costs incurred. Any demonstration
1189   including add-ons or additional enhancements that are **not** part of the base solution **must**
1190   clearly point this out during the demonstration phase so that the evaluation team
1191   understands that the components are **not** part of the base solution and may incur additional
1192   costs. These components would be considered additional enhancements as outlined in
1193   Section II. Although it is strictly prohibited to discuss costs in the demonstration phase,
1194   Offeror's must clearly identify any components covered in the demo that are additional
1195   enhancements.
1196
1197 NOTE: After demonstrations are considered and factored into the evaluation process, the highest
1198 Total scorer will be the apparent winner, subject to negotiations and validation by Clemson
1199 University Procurement Services Procurement Officer.
1200
1201
1202

1203 **VI. Cost Proposal**

1204

1205 PRICE PROPOSAL: Notwithstanding any other instructions herein, you shall submit the following
1206 price information as a separate document:

1207

Cost Component	Cost					Total
	Year 1	Year 2	Year 3	Year 4	Year 5	
Cost of Software (to include a minimum of 100 concurrent users and three environments – Development, QA & Production)						
Software Maintenance & Support (years 1-5 – to include a minimum of 100 concurrent users and three environments – Development, QA & Production)						
Appended Software (if applicable)						
Hardware costs (if applicable)						
Training Costs						
Implementation Costs						
Data Conversion & Integration						
Documentation & Training Materials						
Costs for Additional Professional Services						
Any Other Costs not defined above						
TOTAL						

1208

1209 *Total for years 1-5 above will be used for evaluation purposes and considered to be the "Base*
1210 *Solution" costs. This Base Solution Cost (years 1-5) must be transferred to Total Price in*
1211 *Online Bidding system as well.*

1212

1213 **Offeror should clearly list optional items and any other charges associated with any item in**
1214 **their cost proposal. A detailed breakdown of number of hours per project segment, level/title**
1215 **and all inclusive hourly rates that your total, fixed price is based on must be included as part**
1216 **of your Cost Proposal.**

1217

1218 **The offeror should not include any technical information in the cost proposal.**
1219
1220
1221 **<u>Optional Items:</u>**
1222 **(*This cost will not be used in the evaluation but may be negotiated.*)**
1223
1224 001   1   Day   Optional Item - This item will not $_____/day
1225   be used for evaluation purposes
1226   but is an optional item to handle
1227   any additional off-site training
1228   needed beyond what is included
1229   in initial software training as
1230   specified in table above.
1231   Please indicate daily rate for off-site training.
1232
1233 002   1   Day   Optional Item - This item will not $_____/day
1234   be used for evaluation purposes but is
1235   an optional item to handle any additional
1236   on-site training at Clemson University
1237   needed beyond what is included in initial
1238   software training as specified in table above.
1239   Please indicate daily rate for on-site training
1240   to include travel, meals, lodging and all expenses.
1241
1242 003   1   HR   Optional Item – This item will not $_____/hr
1243   be used for evaluation purposes but is
1244   an optional item to handle any future
1245   programming/development/customization/
1246   consulting services.
1247   Cost for future programming/development/
1248   customization/consulting
1249   services based on hourly rate as outlined in
1250   Scope of Work above. Rate must be all inclusive
1251   of travel, meals, lodging and all expenses.
1252
1253