1 **Scope of Work**
2
3
4 **I.   Scope of Solicitation**
5 **II.   Instructions to Offerors**
6 **III.   Scope of Work / Specifications**
7 **IV.   Terms and Conditions - Special**
8 **V.   Appendices to Scope of Work**
9
10
11 **I. SCOPE OF SOLICITATION**
12
13 **1.BACKGROUND**
14
15 *Overview*
16 Clemson University, located in Clemson, South Carolina, is requesting proposals to furnish and install a
17 fully integrated recreation management system for the Department of Campus Recreation. The
18 department provides a full line of programs and services to meet the needs of over 19,000
19 undergraduate and graduate students, 4,500 faculty and staff, and a local community of more than
20 14,000 residents.
21
22 Campus Recreation currently has 24,000+ members and offers state -of-the-art fitness equipment and
23 programs. In addition to serving the campus population, membership is open to faculty, staff and
24 residents of the Clemson community and the Center provides recreation facilities and services for a
25 variety of sporting activities. The center schedules over 100 leagues per semester.
26
27 Campus Recreation includes the Fike Recreation Center, Campus Beach & Recreation Area, Underground
28 Recreation Center, 25 acres of outdoor recreation space and several small satellite facilities throughout
29 campus. The Department's main facility is approximately 220,000 square feet.
30
31 *Scope of Work*
32 Campus Recreation requires a comprehensive solution that would include implementation, training and
33 a complete support program. The vendor will be required to provide on-site training for University
34 employees on the system proposed as well as on-going support and service including all system
35 upgrades, fixes, and enhancements to the system installed.
36
37 Proposals should specify all software and hardware required for the system to function in the manner
38 described. Existing campus applications with which the system must integrate or be compatible are
39 listed within this document.
40
41 Clemson University prefers that the Solution provide all functions described in this RFP as a fully
42 integrated solution and may not consider proposals suggesting a combination of various modules that
43 individually address the requirements described in this RFP.
44

45
46   The objectives in implementing the Solution are:

47
48   1)   Maximize efficiency, accuracy, effectiveness, and minimizing cost of administering campus
49   recreation services;
50   2)   Provide management with computerized access to membership, programs, and services and the
51   capability to generate fully customizable management reports;
52   3)   Provide customers computerized access to the system to enhance the customer experience and
53   achieve administrative efficiencies;
54   4)   Provide a flexible system that is widely compatible and can easily integrate with current systems but
55   that are compatible with the widest possible use of information captured by and stored within the
56   system.

57
58   The University will entertain solutions listed below; however, Offerors must propose only **one** of the
59   three solutions based on what the Offeror feels to be the **best** solution for Clemson University. Again,
60   Offerors must only propose **one** of the three solutions listed below for evaluation purposes.

61
62   •   Server(s) located in our data center on equipment provided by the university (Clemson Hosted),
63   •   Server(s) located in our data center on equipment provided by the vendor (Clemson Housed),
64   Server(s) hosted at a site provided by the vendor (Vendor Offsite)

65
66   To be responsive, vendor must provide a complete proposal for their offer and must respond to all
67   sections throughout the RFP document.

68
69   *AWARD*
70   Award will be made to one Offeror. Award will be made to the highest ranked, responsive and
71   responsible Offeror whose offer is determined to be the most advantageous to the University.

72
73   *MAXIMUM CONTRACT PERIOD - ESTIMATED*

74   **Software Product**
75   Start date: 03/23/2012 End date: 03/22/2013**.** Dates provided are estimates only. Any resulting
76   contract will begin on the date specified in the notice of award.

77
78   **License and Maintenance**
79   Start date: 03/23/2013 End date: 03/22/2017**.** Dates provided are estimates only. Any resulting
80   contract will begin on the date specified in the notice of award.

81
82   **Deadline for Receipt of Questions:** All questions must be emailed to Tammy Crooks at
83   duncant@clemson.edu prior to Monday, January 30, 2012, 12:00 Noon ET.

84

85
86
87 **II. INSTRUCTIONS TO OFFERORS**
88
89 *DESCRIPTIVE LITERATURE – LABELLING:* Include Offeror's name on the cover of any specifications or
90 descriptive literature submitted with your proposal.
91
92 *SUBMITTING YOUR PROPOSAL:* Regardless of specific requirements below or in this document, Offerors
93 are required to submit their proposal electronically through the Clemson University online bidding
94 system. To do so you must login (registering first) at
95 https://sciquest.ionwave.net/prod/default.aspx?company=clemson, and follow specific instructions for
96 this solicitation. Do NOT simply email or mail in proposals based on this scope of work document. You
97 must attach your complete proposal response as two separate .pdf files in the online bidding system -
98 one file as a technical only (i.e. no cost information) and one file as a cost proposal. Submit any
99 additional files if required as redacted proposals. These attachments must address all the specific
100 requirements outlined in Section II, Instructions to Offerors, as well as Section III, Scope of
101 Work/Specifications.
102
103 *REQUIRED PROPOSAL CONTENT:* Qualified Offerors are encouraged to submit a proposal for the
104 Campus Recreation Management Software outlined within this solicitation specification. Each proposal
105 must meet the minimum requirements contained within this solicitation to be considered for a contract
106 award.
107
108 *INFORMATION FOR OFFERORS TO SUBMIT* - In addition to information requested elsewhere in this
109 solicitation, Offeror's must include the following information for purposes of evaluation:
110

    111 **A. Cover Letter**
112 Offeror's shall provide a cover letter that contains a commitment to provide the
113 product/services described in this solicitation. The cover letter must include the name and
114 signature of a representative of the Offeror who is authorized to negotiate a contract with the
115 University and should summarize the overall benefits to selecting your company and what your
116 company considers to be the most important factors involved in the selection of a Campus
117 Recreation Management solution.
118

    119 **B. Table of Exceptions**
120 A summary must state whether your proposal does or does not fully comply with the
121 requirements defined in this solicitation and shall provide a detailed list of exceptions to the
122 Scope of Work or other solicitation requirements including all attachments. This list must be in
123 table form and must identify the page, section number, provision and specific exception, non-
124 conformance and/or substitute language proposed. Failure to identify any specific items of non-
125 compliance will result in the University assuming compliance. The University, at its sole
126 discretion, may modify or reject any exception or proposed change, and an exception may also
127 make a proposal non-responsive.
128

129
130 **C. Executive Summary**

131 The Executive Summary shall condense and highlight the contents of the solution being
132 proposed by the Contractor in such a way as to provide the Evaluation Committee with a broad
133 understanding of the Contractor's Technical Proposal. Contractor's must present their
134 understanding of the problems being addressed by implementing a new system, the objectives
135 and intended results of the project, and the scope of work. Contractor's shall summarize how
136 their Technical Proposal meets the requirements of the Request for Proposal, and why they are
137 best qualified to perform the work required herein.

138
139 **D. Implementation & Training**

140 1) Proposals must include an implementation plan with timeline for a project of similar

141 scope to ours including all significant milestones and the amount of time required for

142 completion of each milestone event

143 2) Bidder must provide both online and onsite training for system functions and modules

144 3) Bidder must provide an example of their online training material

145
146 **E. Vendor Qualifications**

147 This section details general vendor information that must be supplied by the Vendor in their
148 proposal.

149
150 1) Vendor must provide a work history in successfully deploying the proposed solution in

151 similar environments.

152 2) Vendor must provide a customer list of current deployments to include at minimum a

153 contact name, position/title, email, phone, business name.

154 3) Solution must be fully functional at time of bid. This is not a request for a work made for

155 hire.

156 **F. Insurance**

157 The successful Offeror shall provide satisfactory evidence of all required insurance coverage and
158 licenses PRIOR TO PERFORMANCE or AS PART OF TECHNICAL PROPOSAL.

159
160 **G. Agreements**

161 Include any forms or agreements i.e. Service Level Agreements (SLA) to include performance
162 commitments.

163
164 **H. Shipping/Handling**

165 The Cost Proposal price must include all costs associated with shipping, handling, and
166 delivery of the proposed Product to Clemson University, Clemson, SC. The successful Offeror
167 will be responsible for insurance of software during shipping and installation, and until
168 acceptance by Clemson University. As such, Clemson University assumes no ownership or

169 responsibility for the software until it has been installed and accepted by the Clemson
170 University.

171 **I. Technical Proposal**
172 Provide a technical proposal with a detailed description of how your product/service meets the
173 requirements documented in this section as well as Section III/Scope of Work/Specifications.
174 Offeror's proposed solution must describe and identify all products/services to fulfill the scope
175 of this RFP document which must be identified as Offeror's "base solution". It is the intent of
176 Clemson University to acquire the best base solution possible and for evaluation purposes, it is
177 imperative that Offeror's completely and carefully word and convey all of the information
178 requested. Offers should be prepared simply and economically, providing a straightforward,
179 concise description of Offeror's capabilities to satisfy the requirements of the RFP. Emphasis
180 should be on completeness and clarity of content. Offeror's must demonstrate a thorough
181 understanding of the project purpose, scope, activities, requirements and responsibilities.
182 Technical Proposal responses must be complete and detailed, must address each section using
183 identical section titles, and must follow the order and use the numbering scheme contained in
184 the RFP Purpose and Scope of Work. Offeror's must discuss their approach and methodology for
185 each of the activities and deliverables in the proposal and identify key dates.
186
187 Again, the base solution **must** describe/identify/include all products/services to fulfill the scope
188 of this RFP document. However, there may be additional
189 products/services/enhancements/add-ons that have **not** been requested in the scope of the RFP
190 document but **will be required** for Offeror's product/service to fulfill the scope of the RFP
191 document. If this is the case, Offeror's **must** identify/describe/include these additional
192 products/services in their technical proposal as the "base solution". Any additional
193 products/services/enhancements/add-ons Offeror **requires** in the base solution to fulfill the
194 scope of the RFP **must** also be identified/included in the Offeror's Cost Proposal as the cost of
195 the "base solution". If your offer includes any additional enhancements and/or add-on
196 components or services that is **not required** to fulfill the scope of the RFP, these
197 products/services **must** be identified and described in your Technical Proposal as well as your
198 Cost Proposal documents and labeled in each proposal as Appendix A so that Clemson
199 University can easily and clearly identify what is included in your technical base solution and
200 what is included in your cost base solution. Including a separate appendix for products/services
201 **not** included in the base solution will aide in our evaluation process along with providing a
202 complete understanding of your offer contents. Offers which include either modifications to
203 any of the solicitation's contractual requirements or an offeror's standard terms and conditions
204 may be deemed non-responsive and not considered for award.
205
206
207 **J. Cost Proposal**
208 The cost of the proposed products/services must be itemized by Offeror in the Technical
209 Proposal as well as the Cost Proposal, addressing the requirements listed throughout proposal
210 document. Offeror's proposed solution must describe and identify all products/services to fulfill
211 the scope of this RFP document which must be identified as Offeror's "base solution". It is the
212 intent of Clemson University to acquire the best base solution possible and for evaluation
213 purposes, it is imperative that Offeror's completely and carefully word and convey all of the
214 information requested. For each requirement, the Offeror's response to the item must be

215 presented, along with which product/service addresses the requirement. At the end of the
216 document in the Cost Proposal, the Offeror must present all products/services identified as
217 necessary to fulfill the requirements of the RFP document and the cost of each must be listed
218 separately as the "base solution". Again, the base solution **must** describe/identify/include all
219 products/services to fulfill the scope of this RFP document. However, there may be additional
220 products/services/enhancements/add-ons that have **not** been requested in the scope of the RFP
221 document but **will be required** for Offeror's product to fulfill the scope of the RFP document. If
222 this is the case, Offeror's **must** identify/describe/include these additional products/services in
223 their Cost Proposal as the "base solution". If your offer includes any additional enhancements
224 and/or add-on components or services that is **not required** to fulfill the scope of the RFP, these
225 products/services **must** be identified and described in your Cost Proposal and labeled as
226 Appendix A so that Clemson University can easily and clearly identify what is included in your
227 cost base solution. Including a separate appendix for products **not** included in the base solution
228 will aide in our evaluation process along with providing a complete understanding of your offer
229 contents. All costs must be included in the Cost Proposal. Cost Proposal must be separate from
230 the Technical Proposal as stated above in RFP Submittal section. **Do not include cost in**
231 **Technical Proposal.   These should be submitted as two separate documents via .PDF**
232 **attachments in the online bidding system. Total cost to fulfill requirements specified herein**
233 **must also be indicated in Bid Line Item Pricing in online bidding system.** Your separate cost
234 proposal may go into more detail in terms of cost breakdown, options, etc…, but it must also
235 clearly indicate the cost you enter into the online system. This is the cost that will be used for
236 evaluation purposes and should reflect the cost for the base technical proposal you are offering
237 in response to this solicitation. If there are conflicts in the costs you propose or Clemson cannot
238 clearly determine a total cost for your proposal, your response may be deemed non-responsive.
239
240 Cost must be all inclusive of all to include any travel, meals, lodging, and other expenses.
241
242 *Costs identified in Cost Proposal section must accommodate unlimited*
243 *users with 50 concurrent users." Additional costs may be detailed/itemized*
244 *as each vendor's licensing model dictates; however, evaluation will be*
245 *based on the costs to accommodate unlimited users with 50 concurrent*
246 *users. This cost must be clearly identified in Cost Proposal for evaluation*
247 *purposes.*
248
249 *Please provide the following in the separate cost proposal:*
250
251 Detailed pricing for all items and services required to implement a turn-key system as
252 described in this RFP should be broken down into the categories listed below as applicable.
253 *A total firm fixed price of Categories A-H listed below (base solution) must be indicated in*
254 *Bid Line Item Pricing in online bidding system for evaluation purposes.*
255
256 A. Hardware

257 B. Software

258 C. Implementation Services

259	D.	Customization Services
260	E.	Training
261	F.	Annual Maintenance and Support for years 1 - 5
262	G.	Licensing
263	H.	Other (provide details)
264	I.	Please include, if applicable, the hourly rate for future consulting services, or
265		needed assistance once installation and training has occurred.

266
267
268 **III. SCOPE OF WORK / SPECIFICATIONS**
269
270 Campus Recreation requires a comprehensive solution that would include implementation, training and
271 a complete support program. The vendor will be required to provide on-site training for University
272 employees on the system proposed as well as on-going support and service including all system
273 upgrades, fixes, and enhancements to the system installed.
274
275 Proposals should specify all software and hardware required for the system to function in the manner
276 described. Existing campus applications with which the system must integrate or be compatible are
277 listed within this document.
278
279 Clemson University prefers that the Solution provide all functions described in this RFP as a fully
280 integrated solution and may not consider proposals suggesting a combination of various modules that
281 individually address the requirements described in this RFP.
282
283 The objectives in implementing the Solution are:
284
285   1) Maximize efficiency, accuracy, effectiveness, and minimizing cost of administering campus
286   recreation services;
287   2) Provide management with computerized access to membership, programs, and services and the
288   capability to generate fully customizable management reports;
289   3) Provide customers computerized access to the system to enhance the customer experience and
290   achieve administrative efficiencies;
291   4) Provide a flexible system that is widely compatible and can easily integrate with current systems
292   but that are compatible with the widest possible use of information captured by and stored
293   within the system.
294
295 The University will entertain solutions listed below; however, Offerors must propose only **one** of the
296 three solutions based on what the Offeror feels to be the **best** solution for Clemson University. Again,
297 Offerors must only propose **one** of the three solutions listed below for evaluation purposes.
298
299   • Server(s) located in our data center on equipment provided by the university (Clemson Hosted),
300   • Server(s) located in our data center on equipment provided by the vendor (Clemson Housed),
301   Server(s) hosted at a site provided by the vendor (Vendor Offsite)

302
303   To be responsive, vendor must provide a complete proposal for their offer and must respond to all
304   sections throughout the RFP document.

305   **1. SYSTEM FEATURES**

306   *Recreational Management Software*

307   The general list of system features is listed below with more specific requirements outlined in
308   each individual subsection.
309
310   Items marked with an **(R)** are mandatory minimum requirements that the proposed solution
311   must meet in order to be considered. Please acknowledge in your proposal your adherence to
312   each of these requirements.
313

314   A.   **Point of Sale**
315   B.   **Series Sales**
316   C.   **Equipment Checkout/Inventory**
317   D.   **Program Registration**
318   E.   League Scheduler
319   F.   **Member Management / Front Desk Check-in**
320   G.   **Locker Management**
321   H.   **Facility Reservation/Event Management**
322   I.   **Accounts Receivable/Billing**
323   J.   **Reports**
324

325   *A. Point of Sale*
326   The Point of Sale functionality will have the ability to transact sales and accept various forms
327   of payment such as debit/PIN and credit card, cash, checks etc., in a safe and secure
328   manner. Additional functionality of user account POS management, cross module
329   management, and advanced reporting. Other functionality includes but not limited to:
330
331   1.   **(R)** Ability to have multiple POS stations

332   2.   **(R)** Ability and option to combine/separate/customize POS stations based on function
333   and/or location

334   3.   Ability to setup multilevel category menus and item buttons

335   4.   **(R)** Ability to setup account as manager with override capabilities over other POS users.

336   5.   Ability to have unlimited staff user accounts

337   6.   Point of Sale registers may be grouped together in multiple locations

338   7.   Ability to see member picture in POS from imported pictures

339   8.   **(R)** Ability to create pricing schemes

340   9. **(R)** Ability to define multiple tender types, ie. Cash, check, credit card, TigerStripe -- the
341   university's declining balance account

342   10. **(R)** Ability to void or delete item

343   11. **(R)** Ability to prorate item

344   12. Ability to discount an item

345   13. **(R)** Ability to toggle sales tax or no sales tax

346   14. **(R)** Ability to split tender

347   15. Ability to accept payment on member's account

348   16. Ability to post payments to external accounts receivable system – the university uses
349   PeopleSoft Financials

350   17. Ability to refund item(s) utilizing all tender types

351   18. Ability to check inventory levels and generate reorder notices

352   19. **(R)** Full reporting capabilities and reporting tools to create unlimited reports; Vendor
353   should provide samples of available reports

354   20. **(R)** Ability to generate reports on amounts and usage of credit and debit cards

355   21. **(R)** Ability to create reports on all POS activity including items sold, refunds, voids, and
356   payments made during shifts and by specifying a time range

357   22. Ability to create customized receipts with logo

358   23. Ability to add notes/details for each program to support POS staff

359   24. Custom Prompts (add-ons to pop up to remind staff during registration process)

360   25. Option for each element to be included/not included for online customer use

361   26. **(R)** Ability to create reports by product type, payment type, operator, location and by
362   daily, monthly and annual totals

363   27. **(R)** Any credit card integration / payment gateway system must be PCI compliant and
364   on the VISA Merchant list as being PCI compliant

365   28. Audit trail of all transactions processed

366
367   ***B. Series Sales***
368   The Series Sales functionality allows the sales of group items such as personal training,
369   massage therapy sessions, swim lessons, and tender them over time. Determine original
370   purchase date and when each session used. Other functionality includes but not limited to:
371
372   1. Ability to place expiration dates on packages sold

373   2. Ability to display sessions remaining in a series, sessions used or refunded

374   3. Ability to setup pay rates in percentages

375   4. Ability to "comp" a session

376   5. Ability to attach staff/instructors to each session

377   6. Ability to generate reports by staff/instructor by given date range; Vendor should

378   provide samples of available reports

379
380   ***C. Equipment Checkout/Inventory Management***
381   The equipment check out functionality allows for the rental of equipment and tracking of
382   rented equipment such as sports balls, racquets, canoes, life jackets etc. Program allows
383   employees to track useful life of equipment by querying the number of times a piece of
384   equipment has been used. System will allow for charging of damaged or unreturned items.
385   Other functionality includes but not limited to:

386
387   1. **(R)** Ability to track inventory with unlimited equipment rental items

388   2. **(R)** Ability to reserve equipment and charge a reservation fee that can be applied to the

389   final balance at time of pickup

390   3. **(R)** Ability to integrate with POS & Member Management in case of lost/damaged

391   equipment allowing the ability to block access until item is returned or paid for

392   4. **(R)** Ability to manage both internal program use and rental/reservation use of

393   equipment

394   5. Ability to set up duration-based price calculation

395   6. Ability to use SKU bar code associated with multiple types of equipment by inventory

396   number

397   7. Ability to determine set points for reorder

398   8. Ability read UPC codes

399   9. **(R)** Ability to generate reports: summary of inventory adjustments, count sheets by

400   product category, ability to display units in stock as examples; Vendor should provide

401   samples of available reports

402   10. **(R)** Automatically decrement units in stock

403   11. **(R)** Fully integrated with POS module

404   12. Inventory tracking should allow an individual piece of equipment to be toggled as active

405   or inactive.

406   13. Ability to comp a piece of rental equipment

407   14. Ability to create rental packages (canoe, life jacket and paddle) or rent individual piece

408   of equipment (lifejacket only).

409   15. Ability to manage multiple set of inventory based on functional area or location (i.e.

410   outdoor equipment rental separate from front desk equipment checkout)

411

412   ### D. Program Registration
413   Program Registration must allow enrolling members and non-members in any number of
414   user defined programs/classes. Additionally, must allow for organization by session or
415   category, create wait lists, and display available seats for registration requirements including
416   registration start/end dates. Other functionality includes but not limited to:

417

418   1. **(R)** Registration start and end dates

419   2. Manage various registration start and end dates based on member type

420   3. **(R)** Online registration

421   4. **(R)** Ability to manage multiple registration fees, deposits, balances for any single

422   program

423   5. **(R)** Member/non-member fees

424   6. **(R)** Email and print enrollment confirmations

425   7. **(R)** Maximum and minimum class sizes and wait list

426   8. Ability to utilize hardware such as card readers or biometrics for course check-in

427   9. **(R)** Integrate hardware and program registration with member management system for

428   accurate eligibility

429   10. Ability to create and implement on-line user defined waivers for each program

430   11. **(R)** Ability to generate established and customized reports; Vendor should provide

431   samples of available reports

432   12. Ability to create roster reports with contact information

433   13. Ability to generate email lists for individual programs or for a group of programs.

434   14. Ability to track and view rosters in real time.

435   15. Ability to generate reports that show total participant data that is collected or pulled

436   from a member database.

437   ### E. League Scheduler
438   The League Scheduler component will have the ability to manage the organization of a
439   comprehensive collegiate intramural program including the registration process of team's
440   and individuals, integrated scheduling of leagues, facilities, and officials (if necessary) as well
441   as integrating with the member management system for participant eligibility.

442
443   1. Schedule games and tournaments

444   2. Unlimited leagues, division and teams

445   3. Manage statistics and standings

446   4. Manage teams, captains, players, and referees

447   5. Create and edit brackets

448   6. Ability to manage eligibility of individual participants

449   7. Ability to integrate participant check-in with member management system

450   8. Online Registration

451   a) Ability to set time parameters on registration period

452   b) Open to faculty, staff, undergraduate, graduate, and bridge students, Fike
453   members and spouses.

454   c) Ability to verify current status of membership with University (not enrolled, fees
455   not paid, etc.) with minimum daily updates

456   d) Directly connected to student/employee/member id number.

457   e) Ability to register team(s) and participants

458   f) Ability to monitor the number of teams person is on

459   g) Ability to provide Waiting List option

460   h) Ability to add divisions, leagues, teams, participants, etc. throughout process

461   i) Ability for users to add/remove players

462   j) Ability for administrator to set timeframe for roster changes

463   k) Ability for administrator to set roster limits per sport

464   l) Ability to register Free Agents by sports and divisions

465   m) Ability to offer messages and updates on registration pages

466   n) Ability to integrate waiver acknowledgement to registration or game check-in
467   process

468   9. Reports; Vendor should provide samples of available reports

469   a) Multiple Roster Report

470   b) Divisions Report with Team Name, Captain, Contact Information and Date/Time
471   added

472   c)   Waiting List Report that lists Team Name, Captain, Contact Information,
473   Date/Time Entered, Days/Time Team is Available/Not Available to play
474   d)   Captains List Report with All Captains and Contact List and ability to pull specific
475   divisions
476   e)   Participation reports by sport, league, overall including ability to customize by
477   user-defined fields
478   f)   Ability to provide unique participation reports by sport and overall
479
480 **F. Member Management/Facility Access**
481 The Member Management functionality will have the ability make membership related
482 operations efficient and easily managed. The Member Management functionality must
483 have the ability to view member type, status of membership, add family memberships,
484 medical limitations, and store notes/comments. The Front Desk Check-in functionality
485 should have physical access controls that interact with software and hardware, allowing or
486 denying physical access to the facility. Other functionality includes but not limited to:
487
488 1. **(R)** Unlimited membership types
489 2. **(R)** User defined fields
490 3. Email capabilities including HTML and attachments
491 4. Take / store photos
492 5. Track history of use
493 6. Ability to track and maintain notes
494 7. Ability to use signature capture
495 8. Ability to track member activity reports
496 9. Ability to report member demographics by any user defined field
497 10. **(R)** Payments integrated with access control for immediate updating
498 11. **(R)** Minimum of daily updates of student/member information and status – current data
499   feed originates on the mainframe – future integration will be with Banner or other
500   designated data source
501 12. Ability to send member letters via email automatically as set by user
502 13. Ability to automatically generate and send reports in csv format
503 14. Device must be capable of reading from track 1 or track 2 of a magnetic stripe badge
504 15. Ability to display notes and pending expiration dates for renewal
505 16. **(R)** Ability to check in members by swiping or scanning ID card

506   17. **(R)** Ability to integrate or control entry gates

507   18. Ability to handle biometric check-ins

508   19. Functionality for customers to access their account online, showing all activity including

509   program registration, participation and payments

510   20. **(R)** Selective encryption of certain fields according to role-based security levels

511   21. Ability to update member data with managerial over ride

512   22. PDA Remote validation (Methods for participation tracking)

513   23. Guest Pass Management (determine # of visits, # per member, etc)

514   24. Ability to capture waiver and/or registration forms with each customer / program

515   (strongly prefer online option for capturing signatures)

516
517   *G. Locker Management*
518   The Locker Management functionality will have the ability to keep track of locker inventory,
519   locker assignment, combinations and other pertinent information. It should have the ability
520   to set up numbering system according to our facility /locker configuration up to 600 lockers.
521   Ability to integrate with POS so lockers can be sold at touch of a button during the
522   membership sale or added to waiting list. Other functionality includes but not limited to:
523
524   1.   Color coded grid for easy viewing of available and unavailable lockers

525   2.   Integrated sale capability with POS system

526   3.   Lock and combination management

527   4.   **(R)** Ability to manage waiting list

528   5.   Set up locker banks

529
530   *H. Facility Reservation/Event Management*
531   The facility reservation/event management functionality allows the facility scheduler to
532   manage all use of rooms and spaces in one system. It will allow for prep time and tear
533   down. System must be able to be configured to our specific facilities, and must allow for
534   initial contact through final billing. Other functionality includes but not limited to:
535
536   1.   Allows for complicated pricing structures(multi-tier and variable pricing structures)

537   2.   **(R)** Ability to email confirmation of bookings/reservations

538   3.   **(R)** Ability to setup users for POS via secure interface

539   4.   Ability to allow for minimum and maximum bookings

540   5. **(R)** Ability to attach 'resources' (tables, chairs, etc) to reservations and manage

541   inventory of those resources

542   6. **(R)** Ability to invoice for reservations

543   7. **(R)** Ability to notify in case of double booking or multiple requests (with option to

544   approve double-booking or change)

545   8. **(R)** Ability to move/change reservations/bookings

546   9. Ability to pull reservation clients from membership database.

547   10. **(R)** Allows for cancellations

548   11. **(R)** Ability to track all reservations/bookings with user defined fields

549   12. **(R)** Ability to generate and send user defined emails to patrons regarding their

550   reservation

551   (e.g., 7 days from reservation for confirmation and reminders)

552   13. Option for online reservations and payments by customers

553   14. **(R)** Option for online reservation requests by customers

554   15. **(R)** Ability to change rooms/facilities

555   16. **(R)** Ability to make overnight reservations

556   17. **(R)** Ability to combine individual rooms/spaces for larger reservations (reserve whole

557   gym, makes individual courts unavailable

558   18. **(R)** Ability to handle organizations as reservation customers

559   19. Option to link individual member to organization and/or reservation

560

561   ***I. Accounts Receivable/Billing***

562   The Accounts Receivable and Billing will integrate with all other functions of the program.

563   Function(s) should allow for billing by credit card draft, EFT or by statement. Other

564   functionality includes but not limited to:

565

566   1. **(R)** Defer revenue management – to assign fees charged and collected to the

567   appropriate fiscal year

568   2. **(R)** No third party process fees

569   3. **(R)** Online Account management and payment

570   4. Bank direct EFT and credit card processing

571   5. **(R)** Fully integrated with POS module

572   6. **(R)** Ability to export data to/from PeopleSoft system

573
574 *J. Reports*
575 The Reports section allows for user defined and custom reports regarding facility use and
576 program participation on individual and aggregate levels. In addition to the predefined
577 reports and the functions listed below, vendor should describe in detail the capabilities of
578 the solution related to the creation of unlimited custom reports. Other functionality
579 includes but not limited to:
580
581 1. **(R)** Ability to create unlimited custom reports including member, facility, revenue, credit
582   card, program, and equipment usage and availability etc.

583 2. Ability to create participation reports for unique users as well as overall users

584 3. Ability to create reports across multiple programs and/or facilities

585 4. **(R)** Ability to create mailings/letters and mailing labels

586 5. **(R)** Built-in Query Builder

587 6. Reporting tool has the ability to schedule reports for automatic email delivery to users
588   (e.g., the first day of each month, every Monday at 8:00AM).

589 7. Reporting tool has the ability to be edited by a user to meet their specific report
590   requirements.

591 8. A user is able to define and save personalized reports.

592 9. **(R)** Reporting tool has the ability to reflect data in real-time.

593 10. **(R)** Reporting tool has the ability to filter on date ranges in report results.

594 11. Ability to create ageing reports

595 12. Vendor should identify and describe the pre-defined and custom reporting capabilities
596   applicable to the modules listed in modules A through I.

597 **2. OPERATING ENVIRONMENT**
598
599 A. *System Integration and Technical Environment*
600 A number of university systems are in place in which this system will share data. The vendor
601 is required to outline the full interface capabilities of their solution such that we can
602 determine options.
603
604 1. **(R)** Vendor must provide and support a flexible bi-directional interface to a number of
605   university systems and/or data sources to include but not limited to:

606   a) Current Student Information System (Mainframe)

607   b) Banner (Future SIS)

608   c) CBORD (ID Card Solution)

609   d) PeopleSoft (Financials and Human Resources)

610   e) Student Affairs Database (MySQL)

611   f) University Data Vault

612   2. **(R)** Vendor must describe in detail the proposed methodology for interfacing with other

613   university systems and data sources

614   3. **(R)** Solution must use Shibboleth or LDAP authentication with Clemson user ID and

615   password

616   4. **(R)** Email notification will be required using Clemson's existing email system

617   5. **(R)** The solution must provide a fully functional World Wide Web (web) interface that

618   works with commonly used Web browsers

619   6. **(R)** The proposal must state any version requirements for the browsers and operating

620   systems or any version or plug-in requirements for the browsers

621   7. **(R)** Vendor must specify optimal server configuration specifications sized to support our

622   current requirements

623   8. **(R)** Components available only from the vendor or not directly available to the university

624   must be specifically identified

625   *B.* *Security*

626

627   1. **(R)** All data transfers must be utilizing a minimal of HTTPS 128 bit SSL encryption. All

628   data in transit must be encrypted. All data must be stored on secure servers

629   2.   **(R)** Must comply with all applicable laws and regulations commonly found in a higher

630   education environment as well as timely implementation of compliance with future

631   changes to laws and regulations. Current laws and regulations include, but are not

632   limited to: FERPA, Clery Act, ADA 508 compliance.

633   **FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT (FERPA)**: (a) Vendor warrants that it
634   will not make available or distribute any student
635   education records it receives from Clemson University in violation of the federal Family
636   Educational Rights and Privacy Act (FERPA) 20 U.S.C. sction
637   1232g. Vendor agrees to limit access to records provided by Clemson University to its
638   employees with a legitimate need to know in order for Vendor to
639   fulfill its obligations under this agreement. Vendor warrants that it has procedures in
640   place to prevent unauthorized access to data provided by Clemson
641   University, and the procedures will be documented and available to Clemson University
642   upon request. Vendor will notify Clemson University

643   immediately in the event of a security breach that could or does impact Clemson
644   University records or data. (b) Vendor agrees that Clemson University
645   data will not be shared or sold to third parties without prior written authorization from
646   Clemson University. Vendor agrees to notify Clemson University
647   immediately if it receives s subpoena, court order or other request for Clemson
648   University data so Clemson University can take appropriate action if
649   needed.
650

651   3. **(R)** Ability to support Role Based Access Control (RBAC) and have robust levels of
652   granular security for supervisors and employees. Some examples but not limited to are:
653   • Basic user, someone who operationally needs access and functionality is limited
654   to carry out daily duties of their job
655   • Advanced user, might be someone who serves multiple functions or is a
656   supervisor over a particular area
657   • Super User, might be the site administrator, creates users and grants rights to
658   others, performs audits, other admin functions
659   4. **(R)** Individual functions can be turned on and off for individual employees and/or
660   managers to support utilizing a least privilege methodology
661   5. **(R)** Unavailable functions and tabs removed from screen and drop down menus, i.e. the
662   employee won't see an option if they don't have access to it
663   6. **(R)** Screen timeout/lockout when inactive for a certain amount of time -- time of lockout
664   must be variable and controlled locally within the system
665   7. **(R)** The system must maintain an audit trail of events that tracks access, data changes
666   (successful and unsuccessful), elevation or changes in user rights, and retain original
667   data and user name of the person modifying or viewing an item. Vendor must specify
668   scope audit capabilities to customer
669   8. **(R)** Any use of passwords, passphrases, or other identifying authentication methods
670   must be accomplished in an obfuscated secure manner
671

672   **C. Implementation & Training**
673
674   1. **(R)** The Vendor will work with various department contacts to ensure that all required
675   interfaces with other university systems are configured and tested prior to system
676   implementation

677   2. **(R)** Bidder must provide both online and onsite training for system functions and

678   modules

679

680   **D. Technical Support and System Maintenance**

681   1. **(R)** System Support/Maintenance must include major and minor bug fixes and all system

682   upgrades and enhancements.

683   2. **(R)** Upgrades handled automatically with no need for manual efforts on each

684   workstation.

685   3. **(R)** Support must be available via toll-free telephone.

686   4. **(R)** Support must be available 24x7.

687   5. **(R)** Bidder must provide fixes for critical system "bugs" within 72 hours after

688   notification.

689   6. **(R)** Critical fixes are defined as rendering the entire system inaccessible or any

690   interference with POS operations

691   7. **(R)** Bidder must provide fixes for non-critical within 60 days after notification.

692   8. **(R)** Proposal must include details of the software upgrade migration including costs if

693   not included in support and maintenance contracts.

694 **IV. TERMS AND CONDITIONS – SPECIAL**

695

696 **PAYMENT**

697 Payment for implementation costs will not be made until system is tested by Clemson University and

698 deemed up and running successfully.

699

700 **EVALUATION FACTORS -- PROPOSALS**

701 Offers will be evaluated using only the factors stated below. Evaluation factors are stated in the relative

702 order of importance, with the first factor being the most important. Once evaluation is complete, all

703 responsive offerors will be ranked from most advantageous to least advantageous.

704

705 **Offerors responding to this RFP will be evaluated based on the information provided in the Offeror's**

706 **proposal (Phase I) and Demonstration (Phase II). Evaluation will be conducted by an Evaluation Panel**

707 **on the basis of the following criteria, which are listed in order of importance**:

708

709 **PHASE I** **Evaluation Criteria:**

710

711 1. **Proposed Solution (**Technical Proposal) - The degree, completeness and suitability of the

712   Offeror's proposed technical solution to meet or exceed the requirements of this RFP.

713   (45 points)

714
715 2. **Cost Proposal** – The total cost of ownership for the base solution for the potential five year
716   contract period. (30 points)
717
718 3**. Qualifications** – The Offeror's experience and references must provide evidence of successful
719   past performance with projects of similar size and scope. (25 points)
720
721
722
723 <u>**PHASE II**</u> -   <u>**DEMONSTRATIONS**</u>
724
725 After the evaluation of Phase I criterion, based on the weights assigned to each individual criteria, all
726 Offerors' proposals ranked close enough to the highest scoring Offeror where the award of points
727 allowed for a demonstration could shift the final ranking, will be asked to provide a demonstration and
728 evaluated in Phase II.
729
730 If after the evaluation of Phase I, the point spread is too wide to be bridged by a second ranking during a
731 demonstration phase, then only the top ranked Offeror will be asked to provide a demonstration which
732 will be evaluated on a pass/fail basis only.
733
734 If only one Offeror is invited to demonstrate, its demonstration will be evaluated according to Phase II
735 criterion and if the Offeror passes, then negotiations may take place with the Offeror. If the
736 demonstration "fails", then the next Offeror in line along with any other Offerors(s) within a 10 point
737 range from the next highest ranked Offeror will be invited to demonstrations.
738 If multiple Offerors are invited to demonstrate, their proposal will be evaluated in Phase II as presented
739 below.
740
741 Demonstrations are tentatively set on February 27 – March 2, 2012. Each offeror(s) invited to
742 demonstrate will be required to furnish all equipment, items, and services they need to present their
743 demonstration. Only power and Internet access will be made available to the offeror. Further
744 instructions and directions will be provided to those Offeror(s) invited to provide a demonstration.
745
746 The following specifications should apply to all live demos given by the Offeror
747   1) The demo should not last more than 2 hours.
748   2) All demo components in the Offeror's solution must be with existing solution software and
749   live servers.
750   3) All data used by all demo components in the Offeror's solution must use existing live data
751   and servers.
752 <u>NOTE: Offeror(s) will be totally re-evaluated for Phase II. The highest Total scorer in Phase II will be the</u>
753 <u>apparent winner, subject to negotiations and validation by the Clemson University Procurement Services</u>
754 <u>Office's Procurement Officer.</u>
755
756 Based on the above, the top ranked offeror(s) will be scheduled for an on-site demonstration. The
757 criterion upon which Phase II evaluation will be made is listed below in order of importance:
758

759
760   **Phase II Evaluation Criteria**:
761
762   1. **Proposed Solution (**Technical Proposal): The degree, completeness and suitability of the
763   Offeror's proposed technical solutions to meet or exceed the requirements of this RFP.
764   (35 points)
765
766   2. **Cost Proposal:** The total cost of ownership for the base solution for the potential five year
767   contract period. (25 points)
768
769   3. **Qualifications:** The Offeror's experience and references must provide evidence of successful
770   past performance with projects of similar size and scope. (20 points)
771
772   4. **On-Site Demonstration**: The offeror's solution demonstrated capabilities and functionality of
773   use to meet or exceed the functions identified in this RFP. (20 points)
774
775
776   **V. APPENDICES TO SCOPE OF WORK**
777   **N/A**
778
779
780
781