Scope of Work

I. Scope of Solicitation
II. Instructions to Offerors
III. Scope of Work / Specifications
IV. Terms and Conditions - Special
V. Bidding Schedule (if required to breakout or compare pricing details)

I. SCOPE OF SOLICITATION

Clemson University is seeking offers from experienced and qualified offerors to furnish comprehensive **Housing Management Software** for University Housing. The proposed system should be an integrated, web-based, real-time residence housing management system incorporating areas such as, but not limited to, housing placement and occupancy reporting. With the implementation of a new residence housing management software system, University Housing hopes to improve its housing placement process and student access to integration in the housing placement process. The system offeror must have designed its core product specifically and primarily for use in the higher education housing environment. The proposed system must be in production and successfully used at institutions of higher education of similar size and scope to those described herein.

Award
The award will be made to one Offeror. Award will be made to the highest ranked, responsive and responsible Offeror whose offer is determined to be the most advantageous to the University. The contract will be based on the initial product license, annual maintenance fee, and professional services for training and implementation.

Contract Period
Any resulting contract will begin on the date specified in the notice of award. Configuration, installation and service will begin as soon as possible after the award is made. Timelines for configuration, installation and service need to be specified in the submitted proposal.

The effective date of this contract is the first day of the Maximum Contract Period as specified in the final statement of award. For bids where award statement is not required, the effective date of the contract will be the issue date on the Purchase Order. For continuing contracts the initial term of this agreement is one (1) year from the effective date as stated on the award document. At the end of the initial term, and at the end of each renewal term, this contract shall automatically renew for a period of one year, unless contractor receives notice that the University elects not to renew the contract at least thirty (30) days prior to the date of renewal. Said renewals may be less than, but will not exceed, four (4) additional one year periods. Regardless, this contract expires no later than the last date stated on the final statement of award.

Timeline for Project Implementation
The proposed targeted soft opening go live date is scheduled for November 2014 with the single system go live date January 2015.

Deadline for Receipt of Questions: All questions must be emailed to Tammy Crooks at duncant@clemson.edu prior to December 18, 2013, 12:00 Noon ET.

II. INSTRUCTIONS TO OFFERORS

DESCRIPTIVE LITERATURE – LABELLING: Include Offeror's name on the cover of any specifications or descriptive literature submitted with your proposal.

SUBMITTING YOUR PROPOSAL: 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. Do NOT simply email or mail in proposals based on this scope of work document. You must attach your complete proposal response as two separate .pdf files in the online bidding system - one file as a technical only (i.e. no cost information) and one file as a cost proposal. Submit any additional files if required as redacted proposals. These attachments must address all the specific requirements outlined in Section II, Instructions to Offerors, as well as Section III, Scope of Work/Specifications.

REQUIRED PROPOSAL CONTENT: Qualified Offerors are encouraged to submit a proposal for the Housing Management Software outlined within this solicitation specification. Each proposal must meet the minimum requirements contained within this solicitation to be considered for a contract award.

INFORMATION FOR OFFERORS TO SUBMIT - In addition to information requested elsewhere in this solicitation, Offerors should submit the following information for purposes of evaluation:

1. **Cover Letter**
    Offeror shall provide a cover letter that contains a commitment to provide the product/services described in this solicitation. The cover letter must include the name and signature of a representative of the Offeror who is authorized to negotiate a contract with the University and should summarize the overall benefits to selecting your company and what your company considers to be the most important factors involved in the selection of a Housing Management Software Solution.

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

3. Executive Summary

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

4. Corporate Overview

The Corporate Overview section of the Technical Proposal must consist of the following subparts:

a. Offeror Identification and Information

The Offeror must provide the full company or corporate name, address of the company's headquarters, entity organization (corporation, partnership, proprietorship), state in which the Offeror is incorporated or otherwise organized to do business, year in which the Offeror first organized to do business, and whether the name and form of organization has changed since first organized.

b. Judgments/Litigations

The Offeror must disclose any and all judgments, pending or expected litigation, or other real or potential financial reversals, which might materially affect the viability or stability of the organization, or state that no such condition is known to exist.

c. Change of Ownership

If any change in ownership or control of the company is anticipated during the twelve (12) months following the proposal due date, the Offeror must describe the circumstances of such change and indicate when the change will likely occur. Any change of ownership to an awarded vendor(s) will require notification to Clemson.

d. Office Location

The Offeror's office location responsible for performance pursuant to an award of a contract with Clemson University must be identified.

e. Contract Documents

The Offeror shall provide copies of all contract documents. Contract documents may include, but not be limited to: software license agreements, professional services agreements, master services agreements, maintenance agreements, support and service level agreements, etc.

5. References

The Offeror shall provide a minimum of 3 references from higher education with contact information including institution, contact name, email address, and phone number. Clemson reserves the right to check any reference(s), regardless of the source of the reference information, including but not limited to, those that are identified by the company in the proposal, those indicated through the explicitly specified contacts, those that are identified during the review of the proposal, or those that result from communication with other entities involved with similar projects.

Information to be requested and evaluated from references may include, but is not limited to, some or all of the following: project description and background, job performed, functional and technical abilities, communication skills and timeliness, cost and schedule estimates and accuracy, problems (poor quality deliverables, contract disputes, work stoppages, etc), overall performance, and whether or not the reference would rehire the firm or individual.

6. Qualifications

    a. Qualifications – Mandatory Minimum
    In order to be qualified to receive award, you must meet the following mandatory minimum qualifications. The minimum qualifications are:
    (1) The system offeror must have designed its core product specifically and primarily for use in the higher education housing environment.
    (2) The proposed system must be in production and successfully used at institutions of higher education of similar size and scope to those described herein.
    (3) The proposed system must have integration capabilities with Banner (student system), PeopleSoft Finance 9.0 & 9.2, PeopleSoft HR 9.0 & 9.2, and TouchNet (secure credit card processing).
    (4) The Offeror must have proven successful implementations at universities and colleges in the USA with a minimum of 50 institutions.

    Provide a detailed, narrative statement providing adequate information to establish that you meet all the requirements stated in subparagraph (1), (2), (3), and (4) above. Include all appropriate documentation.

    b. Summary of Offeror's Corporate Experience
    The Offeror shall provide a summary matrix listing previous projects similar to this Request for Proposal in size, scope and complexity. The Evaluation Committee will use no more than three (3) narrative project descriptions submitted by the Offeror during its evaluation of the proposal.

    The Offeror must provide narrative descriptions to highlight the similarities between their experience and this Request for Proposal. These descriptions must include:

    (1) The time period of the project;
    (2) The scheduled and actual completion dates;
    (3) Staff-months expended;
    (4) The offeror's responsibilities;
    (5) For reference purposes, a customer name (including the name of a contact person, a current telephone number, a facsimile number and e-mail address);
    (6) Each project description shall identify whether the work was performed as the prime contractor or as a subcontractor. If an Offeror performed as the prime contractor, the description must provide the originally scheduled completion date and budget, as well as the actual (or currently planned) completion date and actual (or currently planned) budget.

c. **Number of Years**
Describe number of years providing comprehensive university housing solutions.

d. **Integration Partners**
List current companies that software is compatible.

e. **Event Participation**
Describe participation at industry annual association events.

f. **User Group Meetings**
Describe annual user group meetings.

g. **Offeror Key Staff**
The Offeror is expected to propose sufficient staff with the requisite skills and abilities to meet all requirements in this RFP. The Offeror must identify the personnel and provide resumes and references for the identified key staff. If the Offeror's methodology deems other staff as key, the Offeror must identify the positions, provide representative job descriptions, identify the personnel and provide resumes and references. In addition, the Offeror must provide representative job descriptions for any other positions identified in the Offeror's proposed staffing plan.

The Offeror's proposal must describe policies, plans and intentions with regard to maintaining continuity of key staff assigned to the project and avoiding and minimizing the impact of necessary staff changes.

7. **Insurance**
The successful Offeror shall provide satisfactory evidence of all required insurance coverage and licenses prior to performance or as part of the technical proposal.

8. **Agreements**
Include any forms or agreements (i.e. Service Level Agreements) to include performance commitments.

9. **Consulting/Development/Customization/Programming Services**
A detailed plan for future consulting, development, customization and programming services will be submitted based on fixed hourly rate to include travel, meals, lodging and all expenses as required under South Carolina Travel Regulations and Guidelines. This cost will not be used in evaluation but may be negotiated.

10. **Technical Proposal**

In addition to the information requested above, Offerors Technical Proposal must include information regarding the ability to provide the scope of services outlined in Section III as well as any additional services above those described. This will be identified as Offeror's Base Solution. It is the intent of Clemson University to acquire the best base solution possible and for evaluation purposes it is imperative that Offerors completely and carefully word and convey all of the information requested. Offers should be prepared simply and economically providing a straightforward, concise description of Offeror's capabilities to satisfy the requirements of the

RFP. Emphasis should be on completeness and clarity of content. Offerors must demonstrate a thorough understanding of the project scope, activities, requirements and responsibilities.

Technical Proposal responses must be complete and detailed, must address each section using identical section titles, and must follow the order and use the numbering scheme contained in the RFP Instructions to Offerors and Scope of Work. Offerors must discuss their approach and methodology for each of the activities and deliverables in the proposal and identify key dates. Do not include cost in your Technical Proposal. These should be submitted as two separate documents via PDF attachments in the online bidding system.

Again, the base solution **must** describe/identify/include all products/services to fulfill the scope of this RFP document. However, there may be additional products/services/enhancements/add-ons that have **not** been requested in the scope of the RFP document but **will be required** for Offeror's product/service to fulfill the scope of the RFP document. If this is the case, Offerors **must** identify/describe/include these additional products/services in their technical proposal as the "base solution". Any additional products/services/ enhancements/ add-ons Offeror **requires** in the base solution to fulfill the scope of the RFP **must** also be identified/included in the Offeror's Cost Proposal as the cost of the "base solution".

If your offer includes any additional enhancements and/or add-on components or services that is **not required** to fulfill the scope of the RFP, these products/services **must** be identified and described in your Technical Proposal as well as your Cost Proposal documents and labeled in each proposal as Appendix A so that Clemson University can easily and clearly identify what is included in your technical base solution and what is included in your cost base solution. Including a separate appendix for products/services **not** included in the base solution will aide in our evaluation process along with providing a complete understanding of your offer contents.

Offers which include either modifications to any of the solicitation's contractual requirements or an Offeror's standard terms and conditions may be deemed non-responsive and not considered for award.

11. Cost Proposal

Offerors must submit a Cost Proposal (in a separate attachment) that includes the cost of the proposed products/services outlined throughout the proposal document. Offerors must complete Section VI, Bidding Schedule below as part of their Cost Proposal. Cost must be all inclusive including travel, lodging, and other expenses as required under South Carolina Travel Regulations and Guidelines. ***In the submitted proposals please list the initial cost of software services, license renewal and/or maintenance and support for years 1-5, additional costs for appended software needed for data validation, data conversion, migration, and training. The software will need to accommodate unlimited users. Costs must include a production and test environment. Please include if applicable the hourly rate for future consulting services, or needed assistance once installation and training has occurred.***

The costs of the proposed products/services must be itemized by Offeror in the Cost Proposal addressing all requirements listed throughout the proposal document. Offeror's proposed solution must describe and identify all products/services to fulfill the scope of this RFP document which must be identified as Offeror's "base solution".

279   The Offeror must present all products/services identified as necessary to fulfill the requirements
280   of the RFP document and the cost of each must be listed separately as the "base solution". Again,
281   the base solution **must** describe/identify/include all products/services to fulfill the scope of this
282   RFP document. However, there may be additional products/services/enhancements/ add-ons that
283   have **not** been requested in the scope of the RFP document but **will be required** for Offeror's
284   product to fulfill the scope of the RFP document. If this is the case, Offeror **must**
285   identify/describe/include these additional products/services in their Cost Proposal as the "base
286   solution".

288   If your offer includes any additional enhancements and/or add-on components or services that is
289   **not required** to fulfill the scope of the RFP, these products/services **must** be identified and
290   described in your Cost Proposal and labeled as Appendix A so that Clemson University can
291   easily and clearly identify what is included in your cost base solution. Including a separate
292   appendix for   products **not** included in the base solution will aide in our evaluation process
293   along with providing a complete understanding of your offer contents.

295   All costs must be included in the Cost Proposal. Cost Proposal must be separate from the
296   Technical Proposal as stated above in RFP Submittal section.

298   **Do not include cost in Technical Proposal.** These should be submitted as two separate
299   documents via .PDF attachments in the online bidding system. Total cost to fulfill requirements
300   specified herein must also be indicated in Bid Line Item Pricing in online bidding system. Your
301   separate cost proposal may go into more detail in terms of cost breakdown, options, etc…, but it
302   must also clearly indicate the cost you enter into the online system. This is the cost that will be
303   used for evaluation purposes and should reflect the cost for the base technical proposal you are
304   offering in response to this solicitation. If there are conflicts in the costs you propose or
305   Clemson cannot clearly determine a total cost for your proposal, your response may be deemed
306   non-responsive.

309   **III. SCOPE OF WORK / SPECIFICATIONS**

311   **1. OVERVIEW**
312   Clemson University is seeking offers from experienced and qualified offerors to furnish
313   comprehensive **Housing Management Software** for University Housing. The proposed system
314   should be an integrated, web-based, real-time residence housing management system
315   incorporating areas such as, but not limited to, housing placement and occupancy reporting. With
316   the implementation of a new residence housing management software system, University
317   Housing hopes to improve its housing placement process and student access to integration in the
318   housing placement process. The system offeror must have designed its core product specifically
319   and primarily for use in the higher education housing environment. The proposed system must be
320   in production and successfully used at institutions of higher education of similar size and scope
321   to those described herein.

323   2. **BACKGROUND**
324   Clemson University was founded in 1889 as a land-grant university. Currently ranked as a Top
325   25 national public university by the *U.S. News and World Report*, Clemson University is a

326   vibrant student-centered community that thrives on leadership, collaboration and a determined
327   spirit — in academics, athletics and campus life. Total enrollment is 20,768 students; 16,562,
328   undergraduates and 4,206 graduates. Approximately 6200 students live on campus. Over the next
329   five years, an additional 1,800 newly constructed beds will be added to University Housing's
330   inventory.

331   **Vision:** Clemson will be one of the nation's top-20 public universities.

332   **Goals:** Fulfill Clemson's responsibility to students and the state of South Carolina
333   • to provide talent for the new economy by recruiting and retaining outstanding students and
334   faculty and providing an exceptional educational experience grounded in engagement;
335   • to drive innovation, through research and service, that stimulates economic growth and solves
336   problems;
337   • to serve the public good by focusing on emphasis areas that address some of the great
338   challenges of the 21st century — national priorities such as health, energy, transportation and
339   sustainable environment.

340   **Objectives**: Invest in four strategic priorities:
341   • Enhance student quality and performance
342   • Provide engagement and leadership opportunities for all students
343   • Attract, retain and reward top people
344   • Build to compete — facilities, infrastructure and technology

345   3. **REQUIREMENTS**
346   It is the intent of Clemson University to acquire the best base solution possible and for evaluation
347   purposes it is imperative that Offerors completely and carefully word and convey all of the
348   information outlined below. Offers should be prepared simply and economically providing a
349   straightforward, concise description of Offeror's capabilities to satisfy each of the requirements
350   listed below. Emphasis should be on completeness and clarity of   content. Responses must be
351   complete and detailed, must address each section using identical section titles, and must follow
352   the order and use the numbering scheme contained herein.

353

354   **** Please note that items contained in Sections 1-4 on the following pages are required and**
355   **must be included in the cost of Offerors base solution as defined in Section II, Instructions**
356   **to Offerors, #10, Technical Proposal and #11, Cost Proposal.**

357   **Again, all required items identified below in Sections 1-4 must be included in Offerors**
358   **Technical and Cost Proposal. All items identified below in Section 5 are optional**
359   **functionality and features. These items are preferred but not required.**

360   **It is imperative for all Offerors to describe and provide complete details regarding their**
361   **offerings on the items identified in Section 5 for evaluation purposes; however, Offerors**
362   **must include all costs for items identified in Section 5 as an attachment to their Cost**
363   **Proposal entitled "Appendix A – Optional Functionality and Features".**

364   **This will enable us to clearly determine what is the base solution cost and what is an add-on**
365   **based on Section 5 below. Cost will be evaluated on the base solution.**

366

Section 1: Technical Requirements		
Proposed system interfaces with current and future campus systems. Includes, but not limited to; Banner, Oracle/PeopleSoft, TouchNet, CBORD, and TMA.		
Reference	**Describe the following:**	**Required**
1.1	Database hosting requirements: Oracle, MySQL, or MS SQL. Include detailed specifications for minimum and recommended CPU/Memory/Disk space allocations and firewall exceptions.	Y
Response Comment:		
1.2	Shibboleth or Secure LDAP authentication.	Y
Response Comment:		
1.3	Mature API for external programming and data	Y
Response Comment:		
1.4	Clemson University will host the Housing Management Software Solution in its virtual infrastructure provided by the University's IT organization in a local data center. The Housing Management Software Solution must be able to run in a virtual environment, which includes the ability to move from one virtual host to another without service interruption. We are requesting, however, that Offeror specify all software and hardware required for the system to function in the manner described. Be specific if any particular software versions are required. Web Server hosting requirements: RedHat Linux or Windows IIS Server 2008+. Include detailed specifications for minimum and recommended CPU/Memory/Disk space allocations and firewall exceptions.	Y
Response Comment:		
1.5	Instance management: functional/testing	Y
Response Comment:		
1.6	IPv6 Compliant	Y
Response Comment:		
1.7	Must comply with all applicable laws and regulations commonly found in a higher education environment as well as timely implementation of compliance with future changes to laws and regulations. Current laws and regulations include, but are not limited to: FERPA, Clery Act, Section 508 (ADA) Compliant. Offerors must also	Y

	include documentation of how Clemson University data is kept secure and confidential. Offerors must provide documentation showing solution is Section 508 (ADA) Compliant.	
Response Comment:		
1.8	Integration capabilities with Banner (student system), PeopleSoft Finance 9.0 & 9.2, PeopleSoft HR 9.0 & 9.2, and TouchNet (secure credit card processing). Include how data is exchanged with noted systems.	Y
Response Comment:		
1.9	Card access interface.	Y
Response Comment:		

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Section 2: Data, Back-up, Integration, Implementation and Support		
Reference	**Describe the following:**	**Required**
2.1	Comprehensive integration and installation plan. Describe all components of proposed system. Define all interface capabilities. Provide detailed timeline. Successful vendor must provide a comprehensive installation that includes: - Vendor project manager who has in-depth knowledge of full system - On-site training - On-site go-live assistance - Requires minimal additional IT or other technical resources from Clemson University to develop and/or maintain proposed system	Y
Response Comment:		
2.2	Data conversion plan of existing room configuration and current resident data. Successful vendor must convert 5 years of Clemson Housing data to new system.	Y
Response Comment:		
2.3	Technical and user support. Include training/consulting and end user documentation (include from RFP selection to Go Live). Provide comprehensive ongoing customer support plan. Successful vendor must be able to provide customer and technical support during standard business hours of Clemson University (EST – 8 AM to 5 PM) with vendors response time less than 1 hour after initial contact from customer; must provide toll free telephone number.	Y
Response Comment:		

2.4	Warranty/maintenance plan.	Y
Response Comment:		
2.5	Software upgrades and update plan. Include contingency plans for upgrade failures. Successful vendor must provide updates and upgrades remotely, must be fully tested in a demo/test environment prior to moving to production.	Y
Response Comment:		
2.6	Emergency response for critical outages vs. minor outages. Include average response times for mission-critical failures/emergencies.	Y
Response Comment:		
2.7	Detailed Backup, Disaster Recovery and Business Continuity Plans	Y
Response Comment:		
2.8	Archiving data. (include the number of years data accessible)	Y
Response Comment:		
2.9	Identify any use or reliance on third-parties related to product development, implementation, on-going use, cost, and/or technical support.	Y
Response Comment:		

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Section 3: Core Functionality and Features		
Reference	**Describe the following:**	**Required**
3.1	Web-based student self-service and other web-based tools must be compatible with but not limited to the following web browsers: Internet Explorer, Mozilla Firefox, Safari, Google Chrome, and Opera.	Y
Response Comment:		
3.2	Student application and room selection process and functionality	Y
Response Comment:		
3.3	Real-time room selection for new residents and search capability for new room according to customizable business rules on room eligibility. Allow returning residents to keep their own room or search for new, eligible rooms.	Y
Response Comment:		

3.4	Roommate Matching that supports secure search, messaging and automatic matching must be built-into the online solution (third party plug in tools are not considered). Please provide information about security measures taken with this tool.	Y
Response Comment:		
3.5	Contract/Addendum, e-signature and payment functionality (include process for student(s) under the age of 18).	Y
Response Comment:		
3.6	Building preferences based on application type or application period.	Y
Response Comment:		
3.7	Comprehensive audit trails of critical changes to records and transactions which includes staff/userid of party that made change.	Y
Response Comment:		
3.8	Security/access levels (ability to grant access based on role/responsibility).	Y
Response Comment:		
3.9	Rates/space configuration and profile by date/timeframe.	Y
Response Comment:		
3.10	Application and contract setup (include move in/move out date functionality as related to contract terms, assignments and billing).	Y
Response Comment:		
3.11	Wizard driven auto allocation that steps users through setup, testing, and allocation of selected rooms, buildings, floors, and residents.	Y
Response Comment:		
3.12	Easy to configure user-defined room types and locations.	Y
Response Comment:		
3.13	Front desk operations application that includes: check-in, check-out, key distribution with features for individuals or in bulk.	Y
Response Comment:		
3.14	Room/Space key management and inventory (include process for recore/work orders).	Y
Response Comment:		
3.15	Room Inventory/Condition management. (include ability to bulk add or modify inventory items).	Y

Response Comment:		
3.16	Wait list management.	Y
Response Comment:		
3.17	Ability to enter comments (must include built-in spell checker on all comments/notes fields).	Y
Response Comment:		
3.18	Solution must be web-based and provide web-based housing portal framework that provides a single sign on or login to a suite of student self-service tools. Provide examples.	Y
Response Comment:		
3.19	Housing Portal must be customizable by vendor to match look and feel of institution website, making it seamless for applicants. Describe and provide examples.	Y
Response Comment:		
3.20	Housing portal and other delivered online functions do not require the purchase of third party web authoring or application development software such as ColdFusion, Dreamweaver, or FrontPage for either implementation, maintenance, or ongoing support.	Y
Response Comment:		
3.21	Expandable and scalable online application management system (housing portal) that is configured, developed, delivered, and supported by vendor. No web development resource is required by the institution.	Y
Response Comment:		
3.22	Online application management software/system allows the institution to make textual updates and modify application process via a built-in configuration tool. This tool does not require html or web development, however, provides the flexibility to access html code if desired.	Y
Response Comment:		
3.23	Audit trail of the online student application progress, including which steps have been completed, date and time of completion.	Y
Response Comment:		
3.24	Assignment functionality (i.e., auto, manual, self-assign, lottery).	Y
Response Comment:		

3.25	Automatic Room Assignment tool that can bulk assign rooms using matching attributes such as room preferences, gender, personal profiles (such as personality types, non-smokers, learning community preferences). This must include detailed built-in reporting that allows for review before finalizing the allocation process.	Y
Response Comment:		
3.26	Integrated Lottery management to allow random time slot generation for online room selection.	Y
Response Comment:		
3.27	Drag and drop assignments allowing the selection of room types, locations, and resident groups. Resident can be dragged and dropped into the appropriate room booking.	Y
Response Comment:		
3.28	System allows for manual room selection and assignment functions.	Y
Response Comment:		
3.29	Ability to quickly modify booking details for room changes.	Y
Response Comment:		
3.30	Display booking history for any selected room(s).	Y
Response Comment:		
3.31	Ability to bulk re-allocate returning residents according to their previous room/bed assignments.	Y
Response Comment:		
3.32	The software will provide reporting via a comprehensive built in report writer without the use of third party products (such as Access Reports, Crystal Reports) and allows for direct editing of SQL syntax. Describe your software's reporting capability.	Y
Response Comment:		
3.33	Must include a wide range of standard reports that can be quickly selected and customized by users. Please provide a list of standard reports and provide examples.	Y
Response Comment:		
3.33	Built-in report generator that allows report design/formatting including font, colors, field positions, field and line wrapping of text, subtotal, and shade alternate records.	Y
Response Comment:		
3.34	Built-in report generator allows reporting on the entire main database tables.	Y
Response Comment:		

3.35	Ability to display current status of all rooms available (occupancy).	Y
Response Comment:		
3.36	Maintains a resident's history of room assignments, viewable from one window.	Y
Response Comment:		
3.37	Student demographics.	Y
Response Comment:		
3.38	Reporting/graphing capabilities (must be able to export directly to .PDF, .XLS, .XML, .txt and .cvs file format).	Y
Response Comment:		
3.39	Describe and provide examples of how the software includes a user definable dashboard, including graphical summaries, summary reports, and other customizable user information. Dashboard should be able to be modified at any time by the end user.	Y
Response Comment:		

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Section 4: Communications/Mail Capabilities		
Reference	**Describe the following:**	**Required**
4.1	Communication/automated email capability including tracking.	Y
Response Comment:		
4.2	Automatic email confirmations that allow users to configure the email content, maintain changes via a built-in configuration tool, and track correspondence. This functionality does not require web development knowledge or expertise.	Y
Response Comment:		
4.3	Mail merge and Email merge directly from vendor software for offer letters and correspondence. Mail Merge/Email functionality must allow users to send correspondence in Bulk (with user defined list) or to individuals as required. Mail merge functionality must be fully integrated with MS Word and not require export of data source or any technical skills to perform merge or email. Successful vendor/system must work within the limitations of the University's ability to mass email successfully. Must be able to send emails in intervals.	Y
Response Comment:		

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Section 5: Optional Functionality and Features		
Reference	**Describe the following:**	**Preferred**
5.1	Conference/Events management.	Y
Response Comment:		
5.2	Meal plan selection (must be able to interface/export to CBORD (CS Gold v6) and/or Banner).	Y
Response Comment:		
5.3	Maintenance/work order request.	Y
Response Comment:		
5.4	Ability to create forms with interface capabilities to software program.	Y
Response Comment:		
5.5	Employment application, staff selection capabilities (RAs/Grad staff/Student assistant).	Y
Response Comment:		
5.6	Staff/resident interaction tracking.	Y
Response Comment:		
5.7	SMS/Text messaging capabilities.	Y
Response Comment:		

371

372 **IV. TERMS AND CONDITIONS - SPECIAL**

373

374   **1. Evaluation Factors - Proposals**

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

379

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

383

384   **Evaluation Criteria:**

385

386   a. **Technical Proposal:** The degree, completeness, and suitability of the Offeror's proposed
387   technical solutions to meet or exceed the requirements of this RFP. **55%**

16

b. **Cost Proposal:** The total cost of ownership for the base solution for the potential five year contract period. **25%**

c. **Demonstration**: On site demonstration. 1**0%**

d. **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%**

2. **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.

Demonstrations are tentatively set for **January 23-24, 2014, and January 27, 2014**. Each Offeror invited to demonstrate will be furnished with a detailed list of items Clemson University would like to see addressed during the demonstration. This list will be provided via email by Clemson University's Procurement Officer. Once this list is provided, Offeror(s) will have one week for preparation prior to the actual demo being scheduled and presented for evaluation purposes. Each Offeror(s) invited to demonstrate will be required to furnish all equipment, items, and services they need to present their demonstration. Only power and Internet access will be made available to the Offeror. Further instructions and directions will be provided to those Offeror(s) invited to provide a demonstration.

The following specifications should apply to all live on-site demos. All on-site demos will be provided at vendor's expense.

a. The demonstration should not last more than 2 hours for demonstration and questions.

b. A brief outline of the components to be covered in the demo will be provided to the offeror(s) by Clemson University's Procurement Officer as stated above.

c. All components covered in the demo must be components necessary to fulfill the requirements of the scope of the RFP document. It is understood that any components covered in the demonstration phase are included in the Offeror's Technical and Cost Proposal as the base solution with no additional costs incurred. Any demonstration including add-ons or additional enhancements that are **not** part of the base solution **must** clearly point this out during the demonstration phase so that the evaluation team understands that the components are **not** part of the base solution and may incur additional costs. These components would be considered additional enhancements as outlined in Section II. Although it is strictly prohibited to discuss costs in the demonstration phase, Offeror's must clearly identify any components covered in the demo that are additional enhancements.

437   **NOTE: After demonstrations are considered and factored into the evaluation process, the**
438   **highest Total scorer will be the apparent winner, subject to negotiations and validation by**
439   **Clemson University Procurement Services Procurement Officer**.

440

441 **V. Cost Proposal/Bidding Schedule**

442

443 BID IN ENGLISH & DOLLARS - Offers submitted in response to this solicitation shall be in the
444 English language and in US dollars.

445

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

448

Cost Component	Cost					Total
	Year 1	Year 2	Year 3	Year 4	Year 5	
Cost of Software (to include unlimited users and a minimum of two environments – Test and Production)						
Software Maintenance & Support (years 1-5 – to include unlimited users and a minimum of two environments – Test & 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						

449

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

453

Offeror should clearly list optional items and any other charges associated with any item in their cost proposal. 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 must be included as part of your Cost Proposal.

The offeror should not include any technical information in the cost proposal.

<u>Optional Items:</u>
(This cost will not be used in the evaluation but may be negotiated.)

001   1   Day   Optional Item - This item will not $_____/day
                                     be used for evaluation purposes
                                     but is an optional item to handle
                                     any additional off-site training
                                     needed beyond what is included
                                     in initial software training as
                                     specified in table above.
                                     Please indicate daily rate for off-site training.

002   1   Day   Optional Item - This item will not $_____/day
                                     be used for evaluation purposes but is
                                     an optional item to handle any additional
                                     on-site training at Clemson University
                                     needed beyond what is included in initial
                                     software training as specified in table above.
                                     Please indicate daily rate for on-site training
                                     to include travel, meals, lodging and all expenses.

003   1   HR   Optional Item – This item will not $_____/hr
                                     be used for evaluation purposes but is
                                     an optional item to handle any future
                                     programming/development/customization/
                                     consulting services.
                                     Cost for future programming/development/
                                     customization/consulting
                                     services based on hourly rate as outlined in
                                     Scope of Work above. Rate must be all inclusive
                                     of travel, meals, lodging and all expenses.