

Resource Allocation Management Software Solution

Request For Proposal

Rev 0

RFP #37480490

Scope of Work

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I. Scope of Solicitation

II. Instructions to Offerors

III. Scope of Work / Specifications

IV. Terms and Conditions - Special

V. Appendices to Scope of Work (if required)

VI. Bidding Schedule (if required to breakout or compare pricing details)

I. SCOPE OF SOLICITATION

Clemson University Medicaid IT Services (MITS) is seeking a vendor to provide and implement a Resource Allocation Management Software Solution, which currently consists of eighty to one hundred staff members. Resources are allocated to projects and production support tickets.

The Clemson MITS requires a fully functional solution. The vendor will be required to provide training on the system as well as on-going support and service including system upgrades, fixes, and enhancements. The proposal will encompass all requirements to automate the Resource Allocation Management process.

AWARD

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.

MAXIMUM CONTRACT PERIOD - ESTIMATED

Software Product to include License and Maintenance

Start date: May 17, 2013, End date: May 16, 2018. Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award.

Timeline for Project Implementation

Installation should take place in mid spring 2013 with testing, integration, and training following right after and finished by the start for 1st July 2013.

Deadline for Receipt of Questions: All questions must be emailed to Tammy Crooks at duncant@clemson.edu prior to 03/28/2013, 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.

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45 **SUBMITTING YOUR PROPOSAL:** Regardless of specific requirements below or in this
46 document, Offerors are required to submit their proposal electronically through the Clemson
47 University online bidding system. To do so you must login (registering first) at
48 <https://sciquest.ionwave.net/prod/default.aspx?company=clemson>, and follow specific
49 instructions for this solicitation. Do NOT simply email or mail in proposals based on this scope
50 of work document. You must attach your complete proposal response as two separate .pdf files
51 in the online bidding system - one file as a technical only (i.e. no cost information) and one file
52 as a cost proposal. Submit any additional files if required as redacted proposals. These
53 attachments must address all the specific requirements outlined in Section II, Instructions to
54 Offerors, as well as Section III, Scope of Work/Specifications.

55
56 **REQUIRED PROPOSAL CONTENT:** Qualified Offerors are encouraged to submit a
57 proposal for the Resource Allocation Management Software Solution outlined within this
58 solicitation specification. Each proposal must meet the minimum requirements contained within
59 this solicitation to be considered for a contract award.

60
61 **INFORMATION FOR OFFERORS TO SUBMIT** - In addition to information requested
62 elsewhere in this solicitation, Offerors should submit the following information for purposes of
63 evaluation:

64
65 **1. Cover Letter**
66 Offeror shall provide a cover letter that contains a commitment to provide the
67 product/services described in this solicitation. The cover letter must include the
68 name and signature of a representative of the Offeror who is authorized to
69 negotiate a contract with the University and should summarize the overall
70 benefits to selecting your company and what your company considers to be the
71 most important factors involved in the selection of a Resource Allocation
72 Management Software System.

73
74 **2. Table of Exceptions**
75 A summary must state whether your proposal does or does not fully comply
76 with the requirements defined in this solicitation and shall provide a detailed list
77 of exceptions to the Scope of Work or other solicitation requirements including
78 all attachments. This list must be in table form and must identify the page,
79 section number, provision and specific exception, non-conformance and/or
80 substitute language proposed. Failure to identify any specific items of non-
81 compliance will result in the University assuming compliance. The University,
82 at its sole discretion, may modify or reject any exception or proposed change,
83 and an exception may also make a proposal non-responsive.

84
85 **3. Executive Summary**
86 The Executive Summary shall condense and highlight the contents of the
87 solution being proposed by the Offeror in such a way as to provide the
88 Evaluation Committee with a broad understanding of the Offeror's Technical
89 Proposal. Offerors must present their understanding of the problems being

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90 addressed by implementing a new system, the objectives and intended results of
91 the project, and the scope of work. Offerors shall summarize how their
92 Technical Proposal meets the requirements of the Request for Proposal, and
93 why they are best qualified to perform the work required herein.
94

4. Corporate Overview

95 The Corporate Overview section of the Technical Proposal must consist of the
96 following subparts:
97

a. Offeror Identification and Information

98 The Offeror must provide the full company or corporate name, address of the
99 company's headquarters, entity organization (corporation, partnership,
100 proprietorship), state in which the Offeror is incorporated or otherwise
101 organized to do business, year in which the Offeror first organized to do
102 business, whether the name and form of organization has changed since first
103 organized, and Federal Employer Identification Number.
104

b. 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

110 If any change in ownership or control of the company is anticipated during the
111 twelve (12) months following the proposal due date, the Offeror must describe
112 the circumstances of such change and indicate when the change will likely
113 occur. Any change of ownership to an awarded vendor(s) will require
114 notification to Clemson.
115

d. Office Location

116 The Offeror's office location responsible for performance pursuant to an
117 award of a contract with Clemson University must be identified.
118

e. Contract Documents

119 The Offeror shall provide copies of all contract documents. Contract
120 documents may include, but not be limited to: software license agreements,
121 professional services agreements, master services agreements, maintenance
122 agreements, support and service level agreements, etc.
123

5. References

124 The Offeror shall provide a minimum of 3 references from higher education
125 with contact information including email addresses. Clemson reserves the right
126 to check any reference(s), regardless of the source of the reference information,
127 including but not limited to, those that are identified by the company in the
128 proposal, those indicated through the explicitly specified contacts, those that are
129 identified during the review of the proposal, or those that result from
130 communication with other entities involved with similar projects.
131

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132 Information to be requested and evaluated from references may include, but is
133 not limited to, some or all of the following: project description and background,
134 job performed, functional and technical abilities, communication skills and
135 timeliness, cost and schedule estimates and accuracy, problems (poor quality
136 deliverables, contract disputes, work stoppages, etc), overall performance, and
137 whether or not the reference would rehire the firm or individual. Only top
138 scoring Offerors may receive reference checks and negative references may
139 eliminate Offerors from consideration for award.
140

141
142 **6. Qualifications:**

- 143
144 A. **Summary of Offeror's Corporate Experience:** The Offeror shall provide a
145 summary matrix listing previous projects similar to this Request for Proposal
146 in size, scope and complexity. The Evaluation Committee will use no more
147 than three (3) narrative project descriptions submitted by the Offeror during
148 its evaluation of the proposal.

149
150 The Offeror must provide narrative descriptions to highlight the similarities
151 between their experience and this Request for Proposal. These descriptions
152 must include:

- 153
154 1) The time period of the project;
155 2) The scheduled and actual completion dates;
156 3) Staff-months expended;
157 4) The offeror's responsibilities;
158 5) For reference purposes, a customer name (including the name of a contact
159 person, a current telephone number, a facsimile number and e-mail
160 address);
161 6) Each project description shall identify whether the work was performed as
162 the prime contractor or as a subcontractor. If an Offeror performed as the
163 prime contractor, the description must provide the originally scheduled
164 completion date and budget, as well as the actual (or currently planned)
165 completion date and actual (or currently planned) budget.
166

- 167 B. **Offeror Key Staff:** The Offeror is expected to propose sufficient staff with
168 the requisite skills and abilities to meet all requirements in this RFP. The
169 Offeror must identify the personnel and provide resumes and references for
170 the identified key staff. If the Offeror's methodology deems other staff as
171 key, the Offeror must identify the positions, provide representative job
172 descriptions, identify the personnel and provide resumes and references. In
173 addition, the Offeror must provide representative job descriptions for any
174 other positions identified in the Offeror's proposed staffing plan.
175

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176 The Offeror's proposal must describe policies, plans and intentions with
177 regard to maintaining continuity of key staff assigned to the project and
178 avoiding and minimizing the impact of necessary staff changes.
179

7. Installation/Implementation Plan/Timeline

180 The successful Offeror, as part of the Cost Proposal price, will be responsible
181 for installation, configuration, and implementation of the proposed product as
182 may be requested by Clemson University. Such assistance shall include
183 telephone, e-mail and on-site support, if requested by Clemson University. All
184 other work required to complete the implementation must be included in the
185 fixed price cost, this should include a detailed implementation timeline. Cost
186 must include travel, meals, lodging and all expenses as required under South
187 Carolina Travel Regulations and Guidelines. As part of the implementation the
188 Offeror will keep Clemson University personnel informed of the steps required
189 to implement and maintain the solution through a formal knowledge transfer.
190 Offeror must provide detailed information on the installation requirements as
191 well as detailed information on the schedule.
192

193
194 Provide a detailed implementation plan that includes a timeline with dates of
195 initiation and completion. Include all requirements, if any, for university
196 resources that must be used for each step of the implementation.

197 Along with the implementation plan, timeline, provide a detailed work plan.
198 The detailed work plan should include a complete work breakdown structure
199 with all tasks having work forecasts, clear deliverables, and appropriate
200 dependencies (predecessors, successors). The plan should prove that the target
201 dates are achievable and support is provided. Any on-site visits required to
202 perform the services herein must be included in the cost of the base solution.
203 This must include all travel, meals, lodging and expenses as required under
204 South Carolina Travel Regulations and Guidelines.
205

8. Insurance

206 The successful Offeror shall provide satisfactory evidence of all required
207 insurance coverage and licenses prior to performance or as part of the technical
208 proposal.
209

9. Maintenance/Support Agreement

210
211 Maintenance/Support Agreement must include, but not limited to, any upgrades,
212 updates, enhancements, new releases, etc. to the product released during the
213 term of the contract. Offerors must detail what is contained in their
214 maintenance/support agreement, to include descriptions of service level
215 offerings and licensing considerations.
216

10. Training Plan

217
218 The Offeror must develop and submit a Training Plan that supports all
219 requirements of this RFP. The Offeror must supply initial technical training on
220

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221 the proper use of any software solution. The training must be sufficient to
222 enable technical individuals designated by Clemson to fully understand, test,
223 validate, use tools for, and operate and instruct others as to the features,
224 functions, capabilities and maintenance (e.g., trouble identification) of the
225 software so as to perform all functions effectively and without error. The
226 Offeror shall also identify user groups and additional training resources that
227 might be beneficial to Clemson University's implementation.
228

11. Quality Assurance Plan

229 The Offeror must develop and submit a Quality Assurance Plan that supports all
230 requirements of this RFP. The plan must describe how the Offeror will ensure
231 the quality of services being provided, how it will identify inappropriate service,
232 how it will correct identified problems, and how it will respond to issues of
233 service and quality identified by Clemson.
234

12. Third Party Use

235 Identify any use or reliance on third-parties related to product development,
236 implementation, on-going use, cost, and/or technical support.
237

13. Documentation of Product

238 Provide both on-line and printed materials that document the product.
239

14. Appended Software

240 Identify and describe in detail any appended software needed for data
241 validation, data conversion, migration, cost, and training.
242

15. Conversion/Migration/Integration

243 Identify and describe, in detail, the plan for conversion/migration of data and
244 integration with existing systems.
245

16. Agreements

246 Include any forms or agreements (i.e. Service Level Agreements) to include
247 performance commitments.
248

17. Shipping/Handling

249 The Cost Proposal price must include all costs associated with shipping,
250 handling, and delivery of the proposed Product to Clemson University,
251 Clemson, SC. The successful Offeror will be responsible for insurance of
252 software during shipping and installation, and until acceptance by Clemson
253 University. As such, Clemson University assumes no ownership or
254 responsibility for the software until it has been installed and accepted by
255 Clemson University.
256

18. Additional Functionality/Services

257 Additional enhancements that may benefit the application, i.e. any
258 specifications for future expansion, or for features or capabilities that will likely
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267 be needed by Clemson University at some time in the future may be submitted.
268 Products under development to meet these future needs should be referenced
269 with anticipated release dates.
270

271 **19. Consulting/Development/Customization/Programming Services**

272 A detailed plan for future consulting, development, customization and
273 programming services will be submitted based on fixed hourly rate to include
274 travel, meals, lodging and all expenses as required under South Carolina Travel
275 Regulations and Guidelines. This cost will not be used in evaluation but may be
276 negotiated. This cost will not be used in evaluation but may be
277 negotiated.
278

279 **20. Security**

280 A. Must comply with all applicable laws and regulations commonly found in a
281 higher education environment as well as timely implementation of
282 compliance with future changes to laws and regulations. Current laws and
283 regulations include, but are not limited to: FERPA, Clery Act, ADA 508
284 compliance.
285

286 B. Offerors should also include documentation of how Clemson University
287 data is kept secure and confidential.
288

289 **21. Technical Proposal**

290 Provide a technical proposal with a detailed description of how your
291 product/service meets the requirements documented in this section as well as
292 Section III/Scope of Work/Specifications. Offeror's proposed solution must
293 describe and identify all products/services to fulfill the scope of this RFP
294 document which must be identified as Offeror's "base solution". It is the intent
295 of Clemson University to acquire the best base solution possible and for
296 evaluation purposes, it is imperative that Offerors completely and carefully
297 word and convey all of the information requested. Offers should be prepared
298 simply and economically, providing a straightforward, concise description of
299 Offeror's capabilities to satisfy the requirements of the RFP. Emphasis should
300 be on completeness and clarity of content. Offerors must demonstrate a
301 thorough understanding of the project purpose, scope, activities, requirements
302 and responsibilities. Technical Proposal responses must be complete and
303 detailed, must address each section using identical section titles, and must
304 follow the order and use the numbering scheme contained in the RFP Purpose
305 and Scope of Work. Offerors must discuss their approach and methodology for
306 each of the activities and deliverables in the proposal and identify key dates.
307
308
309

310 Again, the base solution **must** describe/identify/include all products/services to
311 fulfill the scope of this RFP document. However, there may be additional

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312 products/services/enhancements/add-ons that have **not** been requested in the
313 scope of the RFP document but **will be required** for Offeror's product/service
314 to fulfill the scope of the RFP document. If this is the case, Offerors **must**
315 identify/describe/include these additional products/services in their technical
316 proposal as the "base solution". Any additional products/services/
317 enhancements/ add-ons Offeror **requires** in the base solution to fulfill the scope
318 of the RFP **must** also be identified/included in the Offeror's Cost Proposal as
319 the cost of the "base solution". If your offer includes any additional
320 enhancements and/or add-on components or services that is **not required** to
321 fulfill the scope of the RFP, these products/services **must** be identified and
322 described in your Technical Proposal as well as your Cost Proposal documents
323 and labeled in each proposal as Appendix A so that Clemson University can
324 easily and clearly identify what is included in your technical base solution and
325 what is included in your cost base solution. Including a separate appendix for
326 products/services **not** included in the base solution will aide in our evaluation
327 process along with providing a complete understanding of your offer contents.
328 Offers which include either modifications to any of the solicitation's contractual
329 requirements or an Offeror's standard terms and conditions may be deemed non-
330 responsive and not considered for award.

22. Cost Proposal

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332
333 The cost of the proposed products/services must be itemized by Offeror in the
334 Cost Proposal, addressing requirements listed throughout the proposal
335 document. Offeror's proposed solution must describe and identify all
336 products/services to fulfill the scope of this RFP document which must be
337 identified as Offeror's "base solution". It is the intent of Clemson University to
338 acquire the best base solution possible and for evaluation purposes, it is
339 imperative that Offerors completely and carefully word and convey all of the
340 information requested. For each requirement, the Offeror's response to the item
341 must be presented, along with which product/service addresses the requirement.
342 At the end of the document in the Cost Proposal, the Offeror must present all
343 products/services identified as necessary to fulfill the requirements of the RFP
344 document and the cost of each must be listed separately as the "base solution".
345 Again, the base solution **must** describe/identify/include all products/services to
346 fulfill the scope of this RFP document. However, there may be additional
347 products/services/enhancements/ add-ons that have **not** been requested in the
348 scope of the RFP document but **will be required** for Offeror's product to fulfill
349 the scope of the RFP document. If this is the case, Offeror **must**
350 identify/describe/include these additional products/services in their Cost
351 Proposal as the "base solution". If your offer includes any additional
352 enhancements and/or add-on components or services that is **not required** to
353 fulfill the scope of the RFP, these products/services **must** be identified and
354 described in your Cost Proposal and labeled as Appendix A so that Clemson
355 University can easily and clearly identify what is included in your cost base
356 solution. Including a separate appendix for products **not** included in the base
357 solution will aide in our evaluation process along with providing a complete

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358 understanding of your offer contents. All costs must be included in the Cost
359 Proposal. Cost Proposal must be separate from the Technical Proposal as stated
360 above in RFP Submittal section. **Do not include cost in Technical Proposal.**
361 **These should be submitted as two separate documents via .PDF**
362 **attachments in the online bidding system. Total cost to fulfill requirements**
363 **specified herein must also be indicated in Bid Line Item Pricing in online**
364 **bidding system.** Your separate cost proposal may go into more detail in terms
365 of cost breakdown, options, etc..., but it must also clearly indicate the cost you
366 enter into the online system. This is the cost that will be used for evaluation
367 purposes and should reflect the cost for the base technical proposal you are
368 offering in response to this solicitation. If there are conflicts in the costs you
369 propose or Clemson cannot clearly determine a total cost for your proposal,
370 your response may be deemed non-responsive.
371

372 Cost must be all inclusive including travel, lodging, and other expenses as
373 required under South Carolina Travel Regulations and Guidelines.
374

375 *Please provide the following in the separate cost proposal:*

376
377 *In the submitted proposals please list the initial cost of software services,*
378 *license renewal and/or maintenance and support for years 1-5, additional*
379 *costs for appended software needed for data validation, data conversion,*
380 *migration, and training. The software will need to accommodate a minimum*
381 *of 80 users. Costs must include a production and test environment. Please*
382 *include if applicable the hourly rate for future consulting services, or needed*
383 *assistance once installation and training has occurred.*
384

23. Hardware

385
386 Clemson University will host the Resource Allocation Management system on
387 equipment provided by the University's IT organization in a local data center.
388 We are requesting, however, that Offeror specify all software and hardware
389 required for the system to function in the manner described. Be specific if any
390 particular software versions are required.
391

III. SCOPE OF WORK / SPECIFICATIONS

392
393
394 Clemson University MITS requires that the Resource Allocation Management System provide
395 all functions described in this RFP as a fully integrated solution and may not consider proposals
396 suggesting a combination of various modules that individually address the requirements.
397

REQUIREMENTS

1) System Configuration

- 398 a) Utilize an enterprise database such as Microsoft SQL Server
- 399 b) Compatibility with Microsoft Office products: Word, Excel, and PowerPoint
- 400 c) Support for Microsoft IE v.9, Mozilla FireFox v.19.0.2 and Safari v.5.1.7 or later

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- 404 d) Provide multiple security levels in the application that allow for a separation of duties
405 e) Provide setup for the database including backup/maintenance scripts
406 f) Include recommendations for optimal server configuration (including VMWare)
407 g) Identify any single sign-on offerings for the application preferred
408
- 409 2) Resource Allocation Management Planning for the allocation of people to projects/tickets
410 over long periods of time.
- 411 a) Has a database of all people, along with their skillsets, available times, vacation times,
412 etc. Has a separate database of all projects, with projected start and end dates and other
413 project-specific topics.
- 414 i) This product enables people to be linked to projects, showing all aspects of their
415 availability.
- 416 ii) Allows ability to keep baselines stored and also allows the ability to show “what if”
417 scenarios for fitting new projects into the existing baseline and how people would be
418 shifted to make this happen. Has ability to save a “what if” scenario as a new
419 baseline.
- 420 iii) This combination of projects and people constitutes a “portfolio” of all of the projects
421 being worked at any given time.
- 422 b) Has customizable dashboard, an easy to read, single page, real-time user interface,
423 showing a graphical presentation of the current status (snapshot) and historical trends of
424 key performance indicators to enable instantaneous and informed decisions to be made at
425 a glance. It must also allow for printing and exporting in Word, Excel, or PDF formats.
- 426 c) Software that can handle both projects and production support work
- 427 d) Tracks project prioritizations. The “what if “scenarios" previously discussed need to
428 include the ability to move projects around as their prioritizations shift.
- 429 e) Ability to create Resource Allocation Management scenarios for planning resources
- 430 f) Provide budgeting support for Resource Allocation Management plans that will report on
431 deviations from projected to actual project time
- 432 g) An integrated solution that encompasses the following, if possible:
- 433 i) Works with SharePoint
- 434 ii) Works with Outlook
- 435 iii) Interacts with MS Project or offers ability to upload/download.
- 436 h) Ability to see projected time and actual time worked in addition to billing time.
- 437 i) Ability to track time for Resource Allocation Management projects, training, other
438 chargeable (e.g. committee meetings) and non-chargeable activities (e.g. annual
439 leave). Allow for comments to be included with the non-chargeable activities.
- 440 ii) Capture time by project with the ability to report on actual versus budgeted time and
441 export the data and/or report.
- 442 i) Can be used simultaneously, with record locking so there is no simultaneous update to a
443 particular project.
- 444 j) The solution must run on CU servers. It must have serve side software.
- 445 k) Must keep up with time spent for each person (vs. budget spent)
- 446 l) Ability to string project tasks together as MS Project does.
- 447 m) A company who will sign a HIPAA agreement.
- 448 n) Resource Allocation Management Reporting

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- 449 i) Provide standard reports for common inquires such as Resource Allocation
450 Management planning, project tracking, outstanding issues, and time reports
451 ii) Ability to customize the standard Resource Allocation Management report and other
452 ad-hoc reports
453 iii) Allow for custom reports to be saved in Word, Excel, or PDF formats
454 iv) Allow for distribution of reports via email.
455
- 456 3) Hardware.
- 457 a) As specified in Section II, #23, Hardware, above, Clemson University will host the
458 Resource Allocation Management system on equipment provided by the University's IT
459 organization in a local data center. We are requesting, however, that Offeror specify all
460 software and hardware required for the system to function in the manner described. Be
461 specific if any particular software versions are required.
- 462
- 463 4) Environments
- 464 a) Clemson University is requiring two environments that consist of production and test.
465 All costs for both environments must be included in Cost Proposal.

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

467

468 1. **AWARD CRITERIA:**

469

470 **EVALUATION FACTORS -- PROPOSALS**

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

475

476 **Offerors responding to this RFP will be evaluated based on the information**
477 **provided in the Offeror's proposal (Phase I) and Demonstration (Phase**
478 **II). Evaluation will be conducted by an Evaluation Panel on the basis of the**
479 **following criteria, which are listed in order of importance:**

480

481

482 **PHASE I - Evaluation Criteria:**

- 483
- 484 1. Technical Proposal: The degree, completeness, and suitability of the
485 Offeror's proposed technical solutions to meet or exceed the
486 requirements of this RFP. **60%**
- 487
- 488 2. Offeror's Qualifications: The Offeror's experience, references and key
489 staff must provide evidence of its depth and breadth of experience, and
490 evidence of successful past performance with projects of this similar
491 size and scope. **20%**
- 492

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- 493 3. Cost Proposal: The total cost of ownership for the base solution for the
494 potential five year contract period. **20%**
495
496

PHASE II - DEMONSTRATIONS

497
498
499 After the evaluation of Phase I criterion, all Offerors' proposals ranked close
500 enough to the highest scoring Offeror where the award of points allowed for a
501 demonstration could shift the final ranking, will be asked to provide a
502 demonstration and to be evaluated in Phase II.
503

504 If multiple Offerors are invited to demonstrate, their proposal will be evaluated in
505 Phase II as presented below.
506

507 If after the evaluation of Phase I, the point spread is too wide to be bridged by a
508 second ranking during a demonstration phase, then only the top ranked Offeror
509 will be asked to provide a demonstration which will be evaluated on a pass/fail
510 basis only.
511

512 If only one Offeror is invited to demonstrate, its demonstration will be evaluated
513 according to Phase II criterion and if the Offeror passes, then negotiations may
514 take place with the offeror. If the demonstration "fails", then the next offeror in
515 line along with any other Offerors(s) within a 10 point range from the next highest
516 ranked offeror will be invited to demonstrations.
517

518 Demonstrations are tentatively set for April 22, 2013 – April 24, 2013. Each
519 offeror(s) invited to demonstrate will be required to furnish all equipment, items,
520 and services they need to present their demonstration. Only power and Internet
521 access will be made available to the Offeror. Further instructions and directions
522 will be provided to those Offeror(s) invited to provide a demonstration.
523

524 The following specifications should apply to all live demos on-Site or web based
525 given by the Offeror. Whether live demo on-site at Clemson University or web
526 based demo, all demos will be provided at vendor's expense.
527

- 528 1) The demo should not last more than 3 hours for demo and questions.
529
530 2) A brief outline of the components to be covered in the demo must be
531 provided at least 1 day before the Offeror's demo.
532
533 3) All components covered in the demo must be components necessary to
534 fulfill the requirements of the scope of the RFP document. It is
535 understood that any components covered in the demonstration phase are
536 included in the Offeror's Technical and Cost Proposal as the base
537 solution with no additional costs incurred. Any Offeror's including add-
538 ons or additional enhancements that are **not** part of the base solution
539 **must** clearly point this out during the demonstration phase so that the
540 evaluation team understands that the components are **not** part of the base

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541 solution and may incur additional costs. These components would be
542 considered additional enhancements as outlined in Section II,
543 Information for Offerors to Submit, #18, #21 and #22, which requires
544 these components to be included as a separate appendix labeled
545 “Appendix A”. Although it is strictly prohibited to discuss costs in the
546 demonstration phase, Offeror’s must clearly identify any components
547 covered in the demo that are part of this separate appendix.
548

549 NOTE: Offeror(s) will be totally re-evaluated for Phase II. The highest Total scorer in Phase II
550 will be the apparent winner, subject to negotiations and validation by Clemson University
551 Procurement Services Procurement Officer.
552

553 Based on the above, the top ranked offeror(s) will be scheduled for an on-site or web based
554 demonstration. The criterion upon which Phase II evaluation will be made is listed below in
555 order of importance:
556

Phase II - Evaluation Criteria:

- 557
- 558 1. Technical Proposal: The degree, completeness, and suitability of the Offeror’s
559 proposed technical solutions to meet or exceed the requirements of this
560 RFP. **50%**
561
 - 562 2. On-Site or Web Based Demonstration: The offeror’s demonstrated functionality
563 and ease of use to meet or exceed the functions identified in this RFP. **30%**
564
 - 565 3. Offeror’s Qualifications: The Offeror’s experience, references, and key staff must
566 provide evidence of its depth and breadth of experience, and evidence of
567 successful past performance with projects of this similar size and scope. **10%**
568
 - 569 4. Cost Proposal: The total cost of ownership for the base solution for the
570 potential five year contract period. **10 %**
571
- 572
573
574

V. APPENDICES TO SCOPE OF WORK

575 N/A
576

VI. COST PROPOSAL

577 See following page
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579
580

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VI. COST PROPOSAL

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

Vendor Name: _____ **Fax #:** _____

Contact Person: _____ **Telephone #:** _____

Delivery Time: _____

| <i>Cost Component</i> | <i>Cost</i> | | | | | <i>Total Cost</i> |
|--|---------------|---------------|---------------|---------------|---------------|-------------------|
| | <i>Year 1</i> | <i>Year 2</i> | <i>Year 3</i> | <i>Year 4</i> | <i>Year 5</i> | |
| Initial Cost of Software (year 1 only) for 80 users, includes production and test environment. | | | | | | |
| Software Maintenance & Support (years 1- 5) | | | | | | |
| Appended Software (if applicable) | | | | | | |
| Training Costs | | | | | | |
| Implementation Costs | | | | | | |
| Documentation & Training Materials | | | | | | |
| Costs for Additional Professional Services Integration with Sage Timesheets, Outlook, SharePoint | | | | | | |
| Additional Costs | | | | | | |
| TOTAL | | | | | | |

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Total for years 1-5 above will be used for evaluation purposes and considered to be the “Base Solution” costs as referenced throughout the RFP document.

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598 **Offeror should clearly list optional items and any other charges associated with any item in**
599 **their cost proposal. Breakdown of this cost may be included in separate Cost Proposal by**
600 **attaching .pdf file as indicated in Scope of Work above.**

601

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

603

604

605 **Optional Items:**

606 ***(This cost will not be used in the evaluation but may be negotiated.)***

607

| | | | | | |
|-----|-----|---|-----|---|-------------|
| 608 | 001 | 1 | Day | Optional Item - This item will not 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. | \$_____/day |
|-----|-----|---|-----|---|-------------|

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| | | | | | |
|-----|-----|---|-----|--|-------------|
| 610 | 002 | 1 | Day | Optional Item - This item will not 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. | \$_____/day |
|-----|-----|---|-----|--|-------------|

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| | | | | | |
|-----|-----|---|----|---|------------|
| 612 | 003 | 1 | HR | Optional Item – This item will not 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. | \$_____/hr |
|-----|-----|---|----|---|------------|

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