

## Scope of Work

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### I. SCOPE OF SOLICITATION

Provide all services associated with a national, paper-based survey that will be sent to approximately 150 locations, with at least 12,000 responses expected. This includes survey design and printing, distribution of surveys to 150 locations, data capture services, transfer of all data, and one overall report. This is a one-time contract for approximately 3 months. Award will be made to one Offeror.

### MAXIMUM CONTRACT PERIOD - ESTIMATED

Start date: 08/22/2011 End date: 11/21/2011. Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award.

**Deadline for Receipt of Questions:** All questions must be emailed to Tammy Crooks at [duncant@clemsun.edu](mailto:duncant@clemsun.edu) prior to Monday, August 8, 2011, 12:00 Noon ET.

### II. INSTRUCTIONS TO OFFERORS

- A. **DESCRIPTIVE LITERATURE – LABELLING:** Include Offeror's name on the cover of any specifications or descriptive literature submitted with your proposal.
- B. **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. You should register several days in advance of the bid closing date so you can be approved and login in time to submit a response. 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.

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

D. **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's 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 survey services.

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 Contractor in such a way as to provide the Evaluation Committee with a broad understanding of the Contractor's Technical Proposal. Contractor's must present their understanding of the problems being addressed, the objectives and intended results of the project, and the scope of work. Contractor's 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. Contractor Identification and Information

The Contractor must provide the full company or corporate name, address of the company's headquarters, entity organization (corporation, partnership, proprietorship), state in which the Contractor is incorporated or otherwise

organized to do business, year in which the Contractor first organized to do business, whether the name and form of organization has changed since first organized, and Federal Employer Identification Number.

b. 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 Contractor 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.

c. Office Location

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

d. Contract Documents

The Contractor 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 Contractor shall provide a minimum of 3 references with contact information including email addresses. 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. Only top scoring Contractors may receive reference checks and negative references may eliminate Contractors from consideration for award.

**6. Qualifications:**

A. **Summary of Contractor's Corporate Experience:** The Contractor shall provide a summary matrix listing the Contractor's 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 Contractor during its evaluation of the proposal.

The Contractor 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 contractor'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 a Contractor 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.

Contractor and subcontractor(s) experience must be listed separately. Narrative descriptions submitted for subcontractors must be specifically identified as subcontractor projects.

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

The Contractor'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.

- C. **QUALIFICATIONS - MANDATORY MINIMUM:** (a) In order to be qualified to receive award, you must meet the following mandatory minimum qualifications: The project manager must demonstrate previous experience with paper-based surveys with at least 10,000 respondents. Please provide references to confirm this. (b) The Procurement Officer may, in his discretion, consider (1) the experience of a predecessor firm or of a firm's key personnel which was obtained prior to the date offeror was established, and/or (2) any subcontractor proposed by offeror. (c) Provide a detailed, narrative statement providing adequate information to establish that you meet all the requirements stated in subparagraph (a) above. Include all appropriate documentation.

### 7. **Implementation Plan/Timeline**

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

Along with the implementation plan, timeline, provide a detailed work plan. The detailed work plan should include a complete work breakdown structure with all tasks having work forecasts, clear deliverables, and appropriate dependencies (predecessors, successors). The plan should prove that the target dates are achievable and support is provided. Any on-site visits required to perform the services herein must be included in the cost of the base solution. This must include all travel, meals, lodging and expenses.

### 8. **Insurance**

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

### 9. **Technical Proposal**

Provide a technical proposal with a detailed description of how your product/service meets the requirements documented in Section III/Scope of Work/Specifications. 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". It is the intent of Clemson University to acquire the best base solution possible and for evaluation purposes, it is imperative that Offeror's 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. Offeror's must demonstrate a thorough understanding of the project purpose, 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 Purpose and Scope of Work. Offeror's must discuss their approach and methodology for each of the activities and deliverables in the proposal and identify key dates.

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, Offeror's **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 aid 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.

#### **10. Cost Proposal**

The cost of the proposed products/services must be itemized by Offeror in the Technical Proposal as well as the Cost Proposal, addressing the requirements listed throughout 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". It is the intent of Clemson University to acquire the best base solution possible and for evaluation purposes, it is imperative that Offeror's completely and carefully word and convey all of the information requested. For each requirement, the Offeror's response to the item must be presented, along with which product/service addresses the requirement. At the end of the document in the Cost Proposal, the Offeror must present all products/services identified as necessary to fulfill the requirements of the RFP document and the cost of each must be listed separately as the "base solution". 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 to fulfill the scope of the RFP document. If this is the case, Offeror's **must** identify/describe/include these additional products/services in their Cost Proposal as 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 Cost Proposal and labeled as Appendix A so that Clemson University can easily and clearly identify what is included in your cost base solution. Including a separate appendix for products **not** included in the base solution will aid in our evaluation process along with providing a complete understanding of your offer contents. All costs must be included in the Cost Proposal. Cost Proposal must be separate from the Technical Proposal as stated above in RFP Submittal section. **Do not include cost in Technical Proposal. These should be submitted as two separate documents via**

**.PDF attachments in the online bidding system. Total cost to fulfill requirements specified herein must also be indicated in Bid Line Item Pricing in online bidding system.** Your separate cost proposal may go into more detail in terms of cost breakdown, options, etc..., but it must also clearly indicate the cost you enter into the online system. This is the cost that will be used for evaluation purposes and should reflect the cost for the base technical proposal you are offering in response to this solicitation. If there are conflicts in the costs you propose or Clemson cannot clearly determine a total cost for your proposal, your response may be deemed non-responsive.

Cost must be all inclusive of all to include any travel, lodging, and other expenses.

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

- Survey Setup, Including report programming (lump sum)
- Printing of approximately 16,500 surveys (unit price)
- Shipping to approximately 150 locations evenly distributed across the U.S. (unit price)
- Paper data collection, including return shipping, and scanning of approximately 12,000 surveys (unit price)
- Project reporting of all data and secure file transfer of all data (lump sum)
- Project management (lump sum), including qualifications requested above
- Total firm fixed price based on estimated quantities

### III. SCOPE OF WORK / SPECIFICATIONS

#### ***A. Survey Development***

Develop a 2-color, 12-page scannable survey booklet. All questions are closed-ended, with the exception of a few open-ended questions that do not need to be coded (must provide Clemson with access to the responses to open-ended questions).

#### ***B. Materials Development***

- Develop a 2-sided, 8½" x 11" personalized cover letter, with instructions printed on the back side.
- Obtain return pre-paid shipping labels.

#### ***C. Printing***

Print the following volumes of surveys and materials:

- 12-Page Surveys (16,500)
- Personalized Cover Letters with Instructions on the Back Side (150)

- Prepaid UPS Return Labels (150)

***D. Distribution & tracking***

- Distribute surveys to list of 150 schools provided by Clemson. An average of 110 surveys will be sent to each school. Some will be more, some less.
- Provide return postage and packaging for completed surveys.
- Track which surveys have been sent/returned by each school. Provide list, updated daily, of schools who have not responded to Clemson.

***E. Data collection/scanning***

- Receive and scan approximately 12,000 surveys. Must be able to demonstrate at least 95% scannability.
- Separate the “white mail” (non-survey correspondence) and send it back to Clemson on a one-time basis upon completion of processing.

***F. Reporting and Results***

- Return raw data by provide the scanned data in .csv format via secure on-line data transfer site.
- This includes creating, formatting, and quality-checking the data.
- Provide 1 overall report in PDF format via secure on-line data transfer site.

***G. Project Management***

Appoint an individual to manage the Services (the “Project Manager”), who will function as the single point of contact for Clemson.

***H. Property Retention***

Retain all data and materials for a minimum of 1 year after completion of this contract.

**Estimated Timeline:**

Mandatory due dates are in bold.

Clemson to provide provider with final survey content	August 15, 2011
Provider to provide final pdf image of survey to Clemson for sign-off ( <b>within 10 business days of receipt of final survey content</b> )	August 25, 2011
Clemson to approve final pdf	August 26, 2011
Provider prints, batches and ships to schools ( <b>begin within 2 business days of approved pdf, complete within 2 business days of final distribution list sent by Clemson</b> )	August 29 - September 9, 2011
Surveys received to provider, scan and process	September 9-23, 2011
Final data file delivered to Clemson ( <b>within 5 business days of all surveys received</b> )	September 30, 2011

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

##### **EVALUATION FACTORS -- PROPOSALS (JAN 2006)**

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

1. 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.
2. Technical Proposal: The degree, completeness, and suitability of the Offeror's proposed technical solutions to meet or exceed the requirements of this RFP.
3. Cost Proposal: The total cost of ownership for the base solution.

#### **V. APPENDICES TO SCOPE OF WORK**

Not Applicable

#### **VI. Cost Proposal (see instructions in Section II)**