Scope of Work

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I. SCOPE OF SOLICITATION

1. BACKGROUND

Overview

Clemson University, located in Clemson, South Carolina, is requesting proposals to furnish and install a fully integrated recreation management system for the Department of Campus Recreation. The department provides a full line of programs and services to meet the needs of over 19,000 undergraduate and graduate students, 4,500 faculty and staff, and a local community of more than 14,000 residents.

Campus Recreation currently has 24,000+ members and offers state-of-the-art fitness equipment and programs. In addition to serving the campus population, membership is open to faculty, staff and residents of the Clemson community and the Center provides recreation facilities and services for a variety of sporting activities. The center schedules over 100 leagues per semester.

Campus Recreation includes the Fike Recreation Center, Campus Beach & Recreation Area, Underground Recreation Center, 25 acres of outdoor recreation space and several small satellite facilities throughout campus. The Department’s main facility is approximately 220,000 square feet.

Scope of Work

Campus Recreation requires a comprehensive solution that would include implementation, training and a complete support program. The vendor will be required to provide on-site training for University employees on the system proposed as well as on-going support and service including all system upgrades, fixes, and enhancements to the system installed.

Proposals should specify all software and hardware required for the system to function in the manner described. Existing campus applications with which the system must integrate or be compatible are listed within this document.

Clemson University prefers that the Solution provide all functions described in this RFP as a fully integrated solution and may not consider proposals suggesting a combination of various modules that individually address the requirements described in this RFP.
The objectives in implementing the Solution are:

1) Maximize efficiency, accuracy, effectiveness, and minimizing cost of administering campus recreation services;

2) Provide management with computerized access to membership, programs, and services and the capability to generate fully customizable management reports;

3) Provide customers computerized access to the system to enhance the customer experience and achieve administrative efficiencies;

4) Provide a flexible system that is widely compatible and can easily integrate with current systems but that are compatible with the widest possible use of information captured by and stored within the system.

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

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

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

**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.

**MAXIMUM CONTRACT PERIOD - ESTIMATED**

**Software Product**

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

**License and Maintenance**

Start date: 03/23/2013 End date: 03/22/2017. 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@clemson.edu prior to Monday, January 30, 2012, 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 Campus Recreation 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, Offeror’s must include the following information for purposes of evaluation:

A. 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 a Campus Recreation Management solution.

B. 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.
C. 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 by implementing a new system, 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.

D. Implementation & Training

1) Proposals must include an implementation plan with timeline for a project of similar scope to ours including all significant milestones and the amount of time required for completion of each milestone event

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

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

E. Vendor Qualifications

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

1) Vendor must provide a work history in successfully deploying the proposed solution in similar environments.

2) Vendor must provide a customer list of current deployments to include at minimum a contact name, position/title, email, phone, business name.

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

F. Insurance

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

G. Agreements

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

H. Shipping/Handling

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

Provide a technical proposal with a detailed description of how your product/service meets the requirements documented in this section as well as 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 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.

J. 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 aide 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, meals, lodging, and other expenses.

Costs identified in Cost Proposal section must accommodate unlimited
users with 50 concurrent users.” Additional costs may be detailed/itemized
as each vendor’s licensing model dictates; however, evaluation will be
based on the costs to accommodate unlimited users with 50 concurrent
users. This cost must be clearly identified in Cost Proposal for evaluation
purposes.

Please provide the following in the separate cost proposal:

Detailed pricing for all items and services required to implement a turn-key system as
described in this RFP should be broken down into the categories listed below as applicable.
A total firm fixed price of Categories A-H listed below (base solution) must be indicated in
Bid Line Item Pricing in online bidding system for evaluation purposes.

A. Hardware
B. Software
C. Implementation Services
D. Customization Services
E. Training
F. Annual Maintenance and Support for years 1 - 5
G. Licensing
H. Other (provide details)
I. Please include, if applicable, the hourly rate for future consulting services, or needed assistance once installation and training has occurred.

III. SCOPE OF WORK / SPECIFICATIONS

Campus Recreation requires a comprehensive solution that would include implementation, training and a complete support program. The vendor will be required to provide on-site training for University employees on the system proposed as well as on-going support and service including all system upgrades, fixes, and enhancements to the system installed.

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

1. SYSTEM FEATURES

Recreational Management Software

The general list of system features is listed below with more specific requirements outlined in each individual subsection.

Items marked with an (R) are mandatory minimum requirements that the proposed solution must meet in order to be considered. Please acknowledge in your proposal your adherence to each of these requirements.

A. Point of Sale
B. Series Sales
C. Equipment Checkout/Inventory
D. Program Registration
E. League Scheduler
F. Member Management / Front Desk Check-in
G. Locker Management
H. Facility Reservation/Event Management
I. Accounts Receivable/Billing
J. Reports

A. Point of Sale

The Point of Sale functionality will have the ability to transact sales and accept various forms of payment such as debit/PIN and credit card, cash, checks etc., in a safe and secure manner. Additional functionality of user account POS management, cross module management, and advanced reporting. Other functionality includes but not limited to:

1. (R) Ability to have multiple POS stations
2. (R) Ability and option to combine/separate/customize POS stations based on function and/or location
3. Ability to setup multilevel category menus and item buttons
4. (R) Ability to setup account as manager with override capabilities over other POS users.
5. Ability to have unlimited staff user accounts
6. Point of Sale registers may be grouped together in multiple locations
7. Ability to see member picture in POS from imported pictures
8. (R) Ability to create pricing schemes
9. **(R)** Ability to define multiple tender types, i.e., Cash, check, credit card, TigerStripe—the university’s declining balance account

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

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

12. Ability to discount an item

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

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

15. Ability to accept payment on member’s account

16. Ability to post payments to external accounts receivable system—the university uses PeopleSoft Financials

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

18. Ability to check inventory levels and generate reorder notices

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

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

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

22. Ability to create customized receipts with logo

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

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

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

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

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

28. Audit trail of all transactions processed

**B. Series Sales**

The Series Sales functionality allows the sales of group items such as personal training, massage therapy sessions, swim lessons, and tender them over time. Determine original purchase date and when each session used. Other functionality includes but not limited to:

1. Ability to place expiration dates on packages sold
C. Equipment Checkout/Inventory Management

The equipment check out functionality allows for the rental of equipment and tracking of rented equipment such as sports balls, racquets, canoes, life jackets etc. Program allows employees to track useful life of equipment by querying the number of times a piece of equipment has been used. System will allow for charging of damaged or unreturned items. Other functionality includes but not limited to:

1. **(R)** Ability to track inventory with unlimited equipment rental items
2. **(R)** Ability to reserve equipment and charge a reservation fee that can be applied to the final balance at time of pickup
3. **(R)** Ability to integrate with POS & Member Management in case of lost/damaged equipment allowing the ability to block access until item is returned or paid for
4. **(R)** Ability to manage both internal program use and rental/reservation use of equipment
5. Ability to set up duration-based price calculation
6. Ability to use SKU bar code associated with multiple types of equipment by inventory number
7. Ability to determine set points for reorder
8. Ability read UPC codes
9. **(R)** Ability to generate reports: summary of inventory adjustments, count sheets by product category, ability to display units in stock as examples; Vendor should provide samples of available reports
10. **(R)** Automatically decrement units in stock
11. **(R)** Fully integrated with POS module
12. Inventory tracking should allow an individual piece of equipment to be toggled as active or inactive.
13. Ability to comp a piece of rental equipment
14. Ability to create rental packages (canoe, life jacket and paddle) or rent individual piece of equipment (life jacket only).

15. Ability to manage multiple set of inventory based on functional area or location (i.e. outdoor equipment rental separate from front desk equipment checkout)

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

1. (R) Registration start and end dates
2. Manage various registration start and end dates based on member type
3. (R) Online registration
4. (R) Ability to manage multiple registration fees, deposits, balances for any single program
5. (R) Member/non-member fees
6. (R) Email and print enrollment confirmations
7. (R) Maximum and minimum class sizes and wait list
8. Ability to utilize hardware such as card readers or biometrics for course check-in
9. (R) Integrate hardware and program registration with member management system for accurate eligibility
10. Ability to create and implement on-line user defined waivers for each program
11. (R) Ability to generate established and customized reports; Vendor should provide samples of available reports
12. Ability to create roster reports with contact information
13. Ability to generate email lists for individual programs or for a group of programs.
14. Ability to track and view rosters in real time.
15. Ability to generate reports that show total participant data that is collected or pulled from a member database.

E. League Scheduler
The League Scheduler component will have the ability to manage the organization of a comprehensive collegiate intramural program including the registration process of team’s and individuals, integrated scheduling of leagues, facilities, and officials (if necessary) as well as integrating with the member management system for participant eligibility.
1. Schedule games and tournaments
2. Unlimited leagues, division and teams
3. Manage statistics and standings
4. Manage teams, captains, players, and referees
5. Create and edit brackets
6. Ability to manage eligibility of individual participants
7. Ability to integrate participant check-in with member management system
8. Online Registration
   a) Ability to set time parameters on registration period
   b) Open to faculty, staff, undergraduate, graduate, and bridge students, Fike members and spouses.
   c) Ability to verify current status of membership with University (not enrolled, fees not paid, etc.) with minimum daily updates
   d) Directly connected to student/employee/member id number.
   e) Ability to register team(s) and participants
   f) Ability to monitor the number of teams person is on
   g) Ability to provide Waiting List option
   h) Ability to add divisions, leagues, teams, participants, etc. throughout process
   i) Ability for users to add/remove players
   j) Ability for administrator to set timeframe for roster changes
   k) Ability for administrator to set roster limits per sport
   l) Ability to register Free Agents by sports and divisions
   m) Ability to offer messages and updates on registration pages
   n) Ability to integrate waiver acknowledgement to registration or game check-in process
9. Reports; Vendor should provide samples of available reports
   a) Multiple Roster Report
   b) Divisions Report with Team Name, Captain, Contact Information and Date/Time added
c) Waiting List Report that lists Team Name, Captain, Contact Information, Date/Time Entered, Days/Time Team is Available/Not Available to play

d) Captains List Report with All Captains and Contact List and ability to pull specific divisions

e) Participation reports by sport, league, overall including ability to customize by user-defined fields

f) Ability to provide unique participation reports by sport and overall

**F. Member Management/Facility Access**

The Member Management functionality will have the ability make membership related operations efficient and easily managed. The Member Management functionality must have the ability to view member type, status of membership, add family memberships, medical limitations, and store notes/comments. The Front Desk Check-in functionality should have physical access controls that interact with software and hardware, allowing or denying physical access to the facility. Other functionality includes but not limited to:

1. *(R)* Unlimited membership types
2. *(R)* User defined fields
3. Email capabilities including HTML and attachments
4. Take / store photos
5. Track history of use
6. Ability to track and maintain notes
7. Ability to use signature capture
8. Ability to track member activity reports
9. Ability to report member demographics by any user defined field
10. *(R)* Payments integrated with access control for immediate updating
11. *(R)* Minimum of daily updates of student/member information and status – current data feed originates on the mainframe – future integration will be with Banner or other designated data source
12. Ability to send member letters via email automatically as set by user
13. Ability to automatically generate and send reports in csv format
14. Device must be capable of reading from track 1 or track 2 of a magnetic stripe badge
15. Ability to display notes and pending expiration dates for renewal
16. *(R)* Ability to check in members by swiping or scanning ID card
17. **(R)** Ability to integrate or control entry gates
18. Ability to handle biometric check-ins
19. Functionality for customers to access their account online, showing all activity including program registration, participation and payments
20. **(R)** Selective encryption of certain fields according to role-based security levels
21. Ability to update member data with managerial over ride
22. PDA Remote validation (Methods for participation tracking)
23. Guest Pass Management (determine # of visits, # per member, etc)
24. Ability to capture waiver and/or registration forms with each customer / program
   (strongly prefer online option for capturing signatures)

**G. Locker Management**
The Locker Management functionality will have the ability to keep track of locker inventory, locker assignment, combinations and other pertinent information. It should have the ability to set up numbering system according to our facility/locker configuration up to 600 lockers. Ability to integrate with POS so lockers can be sold at touch of a button during the membership sale or added to waiting list. Other functionality includes but not limited to:

1. Color coded grid for easy viewing of available and unavailable lockers
2. Integrated sale capability with POS system
3. Lock and combination management
4. **(R)** Ability to manage waiting list
5. Set up locker banks

**H. Facility Reservation/Event Management**
The facility reservation/event management functionality allows the facility scheduler to manage all use of rooms and spaces in one system. It will allow for prep time and tear down. System must be able to be configured to our specific facilities, and must allow for initial contact through final billing. Other functionality includes but not limited to:

1. Allows for complicated pricing structures (multi-tier and variable pricing structures)
2. **(R)** Ability to email confirmation of bookings/reservations
3. **(R)** Ability to setup users for POS via secure interface
4. Ability to allow for minimum and maximum bookings
540  5. (R) Ability to attach ‘resources’ (tables, chairs, etc) to reservations and manage
     inventory of those resources
542  6. (R) Ability to invoice for reservations
543  7. (R) Ability to notify in case of double booking or multiple requests (with option to
     approve double-booking or change)
545  8. (R) Ability to move/change reservations/bookings
546  9. Ability to pull reservation clients from membership database.
547 10. (R) Allows for cancellations
548 11. (R) Ability to track all reservations/bookings with user defined fields
549 12. (R) Ability to generate and send user defined emails to patrons regarding their
     reservation
     (e.g., 7 days from reservation for confirmation and reminders)
552 13. Option for online reservations and payments by customers
553 14. (R) Option for online reservation requests by customers
554 15. (R) Ability to change rooms/facilities
555 16. (R) Ability to make overnight reservations
556 17. (R) Ability to combine individual rooms/spaces for larger reservations (reserve whole
     gym, makes individual courts unavailable
558 18. (R) Ability to handle organizations as reservation customers
559 19. Option to link individual member to organization and/or reservation

I. Accounts Receivable/Billing
The Accounts Receivable and Billing will integrate with all other functions of the program.
Function(s) should allow for billing by credit card draft, EFT or by statement. Other
functionality includes but not limited to:
565 1. (R) Defer revenue management – to assign fees charged and collected to the
     appropriate fiscal year
568 2. (R) No third party process fees
569 3. (R) Online Account management and payment
570 4. Bank direct EFT and credit card processing
571 5. (R) Fully integrated with POS module
572 6. (R) Ability to export data to/from PeopleSoft system
J. Reports

The Reports section allows for user defined and custom reports regarding facility use and program participation on individual and aggregate levels. In addition to the predefined reports and the functions listed below, vendor should describe in detail the capabilities of the solution related to the creation of unlimited custom reports. Other functionality includes but not limited to:

1. (R) Ability to create unlimited custom reports including member, facility, revenue, credit card, program, and equipment usage and availability etc.
2. Ability to create participation reports for unique users as well as overall users
3. Ability to create reports across multiple programs and/or facilities
4. (R) Ability to create mailings/letters and mailing labels
5. (R) Built-in Query Builder
6. Reporting tool has the ability to schedule reports for automatic email delivery to users (e.g., the first day of each month, every Monday at 8:00AM).
7. Reporting tool has the ability to be edited by a user to meet their specific report requirements.
8. A user is able to define and save personalized reports.
9. (R) Reporting tool has the ability to reflect data in real-time.
10. (R) Reporting tool has the ability to filter on date ranges in report results.
11. Ability to create ageing reports
12. Vendor should identify and describe the pre-defined and custom reporting capabilities applicable to the modules listed in modules A through I.

2. OPERATING ENVIRONMENT

A. System Integration and Technical Environment

A number of university systems are in place in which this system will share data. The vendor is required to outline the full interface capabilities of their solution such that we can determine options.

1. (R) Vendor must provide and support a flexible bi-directional interface to a number of university systems and/or data sources to include but not limited to:
   a) Current Student Information System (Mainframe)
   b) Banner (Future SIS)
   c) CBORD (ID Card Solution)
d) PeopleSoft (Financials and Human Resources)
e) Student Affairs Database (MySQL)
f) University Data Vault

2. **(R)** Vendor must describe in detail the proposed methodology for interfacing with other university systems and data sources

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

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

5. **(R)** The solution must provide a fully functional World Wide Web (web) interface that works with commonly used Web browsers

6. **(R)** The proposal must state any version requirements for the browsers and operating systems or any version or plug-in requirements for the browsers

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

8. **(R)** Components available only from the vendor or not directly available to the university must be specifically identified

**B. Security**

1. **(R)** All data transfers must be utilizing a minimal of HTTPS 128 bit SSL encryption. All data in transit must be encrypted. All data must be stored on secure servers

2. **(R)** 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, ADA 508 compliance.

**FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT (FERPA):** (a) Vendor warrants that it will not make available or distribute any student education records it receives from Clemson University in violation of the federal Family Educational Rights and Privacy Act (FERPA) 20 U.S.C. section 1232g. Vendor agrees to limit access to records provided by Clemson University to its employees with a legitimate need to know in order for Vendor to fulfill its obligations under this agreement. Vendor warrants that it has procedures in place to prevent unauthorized access to data provided by Clemson University, and the procedures will be documented and available to Clemson University upon request. Vendor will notify Clemson University
immediately in the event of a security breach that could or does impact Clemson University records or data. (b) Vendor agrees that Clemson University data will not be shared or sold to third parties without prior written authorization from Clemson University. Vendor agrees to notify Clemson University immediately if it receives a subpoena, court order or other request for Clemson University data so Clemson University can take appropriate action if needed.

3. **(R)** Ability to support Role Based Access Control (RBAC) and have robust levels of granular security for supervisors and employees. Some examples but not limited to are:
   - Basic user, someone who operationally needs access and functionality is limited to carry out daily duties of their job
   - Advanced user, might be someone who serves multiple functions or is a supervisor over a particular area
   - Super User, might be the site administrator, creates users and grants rights to others, performs audits, other admin functions

4. **(R)** Individual functions can be turned on and off for individual employees and/or managers to support utilizing a least privilege methodology

5. **(R)** Unavailable functions and tabs removed from screen and drop down menus, i.e. the employee won’t see an option if they don’t have access to it

6. **(R)** Screen timeout/lockout when inactive for a certain amount of time – time of lockout must be variable and controlled locally within the system

7. **(R)** The system must maintain an audit trail of events that tracks access, data changes (successful and unsuccessful), elevation or changes in user rights, and retain original data and user name of the person modifying or viewing an item. Vendor must specify scope audit capabilities to customer

8. **(R)** Any use of passwords, passphrases, or other identifying authentication methods must be accomplished in an obfuscated secure manner

C. **Implementation & Training**

1. **(R)** The Vendor will work with various department contacts to ensure that all required interfaces with other university systems are configured and tested prior to system implementation
2. **(R)** Bidder must provide both online and onsite training for system functions and modules.

### D. Technical Support and System Maintenance

1. **(R)** System Support/Maintenance must include major and minor bug fixes and all system upgrades and enhancements.
2. **(R)** Upgrades handled automatically with no need for manual efforts on each workstation.
3. **(R)** Support must be available via toll-free telephone.
4. **(R)** Support must be available 24x7.
5. **(R)** Bidder must provide fixes for critical system “bugs” within 72 hours after notification.
6. **(R)** Critical fixes are defined as rendering the entire system inaccessible or any interference with POS operations.
7. **(R)** Bidder must provide fixes for non-critical within 60 days after notification.
8. **(R)** Proposal must include details of the software upgrade migration including costs if not included in support and maintenance contracts.

### IV. TERMS AND CONDITIONS – SPECIAL

#### PAYMENT

Payment for implementation costs will not be made until system is tested by Clemson University and deemed up and running successfully.

#### EVALUATION FACTORS -- PROPOSALS

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.

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

#### PHASE I Evaluation Criteria:

1. **Proposed Solution** (Technical Proposal) - The degree, completeness and suitability of the Offeror's proposed technical solution to meet or exceed the requirements of this RFP.
   (45 points)
2. **Cost Proposal** – The total cost of ownership for the base solution for the potential five year contract period. (30 points)

3. **Qualifications** – The Offeror’s experience and references must provide evidence of successful past performance with projects of similar size and scope. (25 points)

**PHASE II - DEMONSTRATIONS**

After the evaluation of Phase I criterion, based on the weights assigned to each individual criteria, 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 and evaluated in Phase II.

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

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

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

Demonstrations are tentatively set on February 27 – March 2, 2012. 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 demos given by the Offeror

1. The demo should not last more than 2 hours.
2. All demo components in the Offeror’s solution must be with existing solution software and live servers.
3. All data used by all demo components in the Offeror’s solution must use existing live data and servers.

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

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

1. Proposed Solution (Technical Proposal): The degree, completeness and suitability of the Offeror's proposed technical solutions to meet or exceed the requirements of this RFP. (35 points)

2. Cost Proposal: The total cost of ownership for the base solution for the potential five year contract period. (25 points)

3. Qualifications: The Offeror's experience and references must provide evidence of successful past performance with projects of similar size and scope. (20 points)

4. On-Site Demonstration: The offeror’s solution demonstrated capabilities and functionality of use to meet or exceed the functions identified in this RFP. (20 points)

V. APPENDICES TO SCOPE OF WORK

N/A