

Scope of Work

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I. SCOPE OF SOLICITATION

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15 Clemson University is seeking a vendor to provide a comprehensive compensation
16 benchmarking and analysis solution to support compensation market analysis, forecasting,
17 planning, and reporting needs to help maintain a competitive compensation structure for the
18 University. Clemson University is comprised of 4,909 faculty/staff and 18,317 enrolled students.
19 There are six colleges and six non-academic divisions with a total of 113 departments. Some of
20 these departments are located across the State of South Carolina.

21 This RFP seeks compensation services to significantly enhance the current market analysis and
22 forecasting capabilities, and to improve the integration of market data with recruitment and
23 performance management processes. Clemson University is seeking full life-cycle assistance for
24 the scope of this RFP. The scope of the vendor services required includes, but is not limited to:

- 25
- 26 **1. Technical requirements**
- 27 **2. Application hosting**
- 28 **3. System/Integration Testing**
 - 29 **▪ Interface development (if necessary)**
 - 30 **▪ Transfer of knowledge for importing data for comparison purposes**
- 31 **4. Deployment support**
- 32 **5. Security**
- 33 **6. Reporting**
- 34 **7. Go live and post go live support**
- 35 **8. End user training and change management support**
- 36 **9. Upgrade support considerations**
- 37 **10. Ongoing maintenance**

38 **11. Production support, including Service Desk**

39 **12. Disaster Recovery/Business Continuity Planning**

40 **AWARD**

41 Award will be made to one Offeror. Award will be made to the highest ranked, responsive and
42 responsible Offeror whose offer is determined to be the most advantageous to the University.
43 The contract will be a one-time purchase of the product and all external components, a one year
44 contract for maintenance with four one-year renewals, and professional services for
45 implementation.

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47 **MAXIMUM CONTRACT PERIOD – ESTIMATED**

48 Start date: 07/31/2012. End date: 07/30/2017. Dates provided are estimates
49 only. Any resulting contract will begin on the date specified in the notice of award.

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51 **Timeline for Project Implementation:**

52 We are looking for a product that can be integrated into our processes in an 8-12 week
53 timeframe. Clemson will retain control in the selection of the start date for project
54 implementation, which will be specified in the notice of award.

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56 **Deadline for Receipt of Questions:** All questions must be emailed to Tammy Crooks at
57 duncant@clemson.edu prior to July 2, 2012, 12:00 Noon ET.

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60 **II. INSTRUCTIONS TO OFFERORS**

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

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

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76 **REQUIRED PROPOSAL CONTENT:** Qualified Offerors are encouraged to submit a
77 proposal for the Compensation Solution outlined within this solicitation specification. Each
78 proposal must meet the minimum requirements contained within this solicitation to be
79 considered for a contract award.

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

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1. Cover Letter

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2. Table of Exceptions

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3. Executive Summary

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4. Corporate Overview

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

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A. Contractor Identification and Information

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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.

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B. The Contractor must disclose any and all judgments, pending or expected litigation, or other real or potential financial reversals, which might materially

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127 affect the viability or stability of the organization, or state that no such
128 condition is known to exist.

129 C. Change of Ownership

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

135 D. Office Location

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

138 E. Contract Documents

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

143 **5. References**

144 The Contractor shall provide a minimum of 4 references with contact information
145 including email addresses. Three of these references should be from higher education
146 clients. Clemson reserves the right to check any reference(s), regardless of the source
147 of the reference information, including but not limited to, those that are identified by
148 the company in the proposal, those indicated through the explicitly specified contacts,
149 those that are identified during the review of the proposal, or those that result from
150 communication with other entities involved with similar projects.

151
152 Information to be requested and evaluated from references may include, but is not
153 limited to, some or all of the following: project description and background, job
154 performed, functional and technical abilities, communication skills and timeliness,
155 cost and schedule estimates and accuracy, problems (poor quality deliverables,
156 contract disputes, work stoppages, etc.), overall performance, and whether or not the
157 reference would rehire the firm or individual. Only top scoring Contractors may
158 receive reference checks and negative references may eliminate Contractors from
159 consideration for award.

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161 **6. Qualifications:**

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

168

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

- 172 1) The time period of the project;
- 173 2) The scheduled and actual completion dates;
- 174 3) Staff-months expended;
- 175 4) The contractor's responsibilities;
- 176 5) For reference purposes, a customer name (including the name of a contact
177 person, a current telephone number, a facsimile number and e-mail
178 address);
- 179 6) Each project description shall identify whether the work was performed as
180 the prime contractor or as a subcontractor. If a Contractor performed as
181 the prime contractor, the description must provide the originally scheduled
182 completion date and budget, as well as the actual (or currently planned)
183 completion date and actual (or currently planned) budget.
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185 Contractor and subcontractor(s) experience must be listed separately. Narrative
186 descriptions submitted for subcontractors must be specifically identified as
187 subcontractor projects.
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- 190 **B. Contractor Key Staff:** The Contractor is expected to propose sufficient staff
191 with the requisite skills and abilities to meet all requirements in this RFP. The
192 Contractor must identify the personnel and provide resumes and references for the
193 identified key staff. If the Contractor's methodology deems other staff as key, the
194 Contractor must identify the positions, provide representative job descriptions,
195 identify the personnel and provide resumes and references. In addition, the
196 Contractor must provide representative job descriptions for any other positions
197 identified in the Contractor's proposed staffing plan.
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199 The Contractor's proposal must describe policies, plans and intentions with regard
200 to maintaining continuity of key staff assigned to the project and avoiding and
201 minimizing the impact of necessary staff changes.
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203 **7. Installation/Implementation Plan/Timeline**

204 The successful Offeror, as part of the Cost Proposal price, will be responsible for
205 configuration and implementation of the proposed product as may be requested by
206 Clemson University. Such assistance shall include telephone, e-mail and minimum of
207 three (3) days on-site support, if requested by Clemson University. All other work
208 required to complete the implementation must be included in the fixed price cost, this
209 should include a detailed implementation timeline. Cost must include travel, meals,
210 lodging and all expenses. As part of the implementation the offeror will keep
211 Clemson University personnel informed of the steps required to implement and utilize
212 the solution through a formal knowledge transfer. Offeror must provide detailed
213 information on prerequisite knowledge requirements to use the compensation
214 software.

215
216 Provide a detailed implementation plan that includes a timeline with dates of
217 initiation and completion. Include all requirements, if any, for university resources
218 that must be used for each step of the implementation.

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

228 The successful Offeror shall provide satisfactory evidence of all required insurance
229 coverage and licenses PRIOR TO PERFORMANCE or AS PART OF TECHNICAL
230 PROPOSAL.
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232 **9. Maintenance/Support Agreement**

233 Maintenance/Support Agreement must include, but not limited to, any upgrades,
234 updates, enhancements, new releases, etc. to the product released during the term of
235 the contract. Offeror's must detail what is contained in their maintenance/support
236 agreement.
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238 **10. Training Plan**

239 The Contractor must develop and submit a *Training Plan* that supports all
240 responsibilities of this RFP. The Contractor must supply initial technical training on
241 the proper use of any software installed as a solution. The training must be sufficient
242 to enable technical individuals designated by CLEMSON to fully understand, test,
243 validate, use tools for, and operate and instruct others as to the features, functions,
244 capabilities and maintenance (e.g., trouble identification) of the software so as to
245 perform all functions effectively and without error. The successful vendor must plan
246 to conduct one (1) initial comprehensive training session for all users. This session
247 must be performed on-site at Clemson University, and all travel, meals, lodging and
248 expenses must be included in Cost Proposal as base solution.
249

250 **11. Risk Management Plan**

251 The Contractor must develop a Risk Management Plan that includes risk
252 identification and risk mitigation strategies.
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254 **12. Quality Assurance Plan**

255 The Contractor must develop and submit a *Quality Assurance Plan* that supports all
256 core responsibilities of this RFP, including but not limited to, the practices of
257 reviewing products and/or services before delivery, installation, utilization, testing,
258 and corrective action practices. The plan must describe how the Contractor will
259 ensure the quality of services being provided, how it will identify inappropriate

260 service, how it will correct identified problems, and how it will respond to issues of
261 service and quality identified by CLEMSON.

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263 **13. Third Party Use**

264 Identify any use or reliance on third-parties related to product development,
265 implementation, on-going use, and/or technical support.

266 **14. Documentation of Product**

267 Online or electronic materials.

268 **15. Appended Software**

269 Identify and describe in detail any appended software needed for data validation, data
270 conversion, migration, reporting and training.

271 **16. Conversion/Migration/Integration**

272 Identify and describe in detail plan for conversion/migration of data and integration
273 with existing systems.

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275 **17. Agreements**

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

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279 **18. Shipping/Handling**

280 The Cost Proposal price must include all costs associated with shipping, handling, and
281 delivery of the proposed Product to Clemson University, Clemson, SC. The successful
282 Offeror will be responsible for insurance of software during shipping and installation,
283 and until acceptance by Clemson University. As such, Clemson University assumes
284 no ownership or responsibility for the software until it has been installed and accepted
285 by Clemson University.

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287 **19. Additional Functionality/Services**

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

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293 **20. Consulting/Development/Customization/Programming Services**

294 Detail plan for future consulting, development, customization and programming
295 services based on fixed hourly rate to include travel, meals, lodging and all
296 expenses. Clemson University would like to determine what consulting services are
297 offered by the vendor and its associated costs should Clemson need to supplement
298 initial implementation training on the tool with more in-depth assistance as the
299 compensation philosophy, policies, and processes are defined. This cost will not be
300 used in evaluation but may be negotiated.

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21. 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.

22. 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

348 acquire the best base solution possible and for evaluation purposes, it is imperative
349 that Offeror's completely and carefully word and convey all of the information
350 requested. For each requirement, the Offeror's response to the item must be
351 presented, along with which product/service addresses the requirement. At the end of
352 the document in the Cost Proposal, the Offeror must present all products/services
353 identified as necessary to fulfill the requirements of the RFP document and the cost of
354 each must be listed separately as the "base solution". Again, the base solution **must**
355 describe/identify/include all products/services to fulfill the scope of this RFP
356 document. However, there may be additional products/services/enhancements/add-
357 ons that have **not** been requested in the scope of the RFP document but **will be**
358 **required** for Offeror's product to fulfill the scope of the RFP document. If this is the
359 case, Offeror's **must** identify/describe/include these additional products/services in
360 their Cost Proposal as the "base solution". If your offer includes any additional
361 enhancements and/or add-on components or services that is **not required** to fulfill the
362 scope of the RFP, these products/services **must** be identified and described in your
363 Cost Proposal and labeled as Appendix A so that Clemson University can easily and
364 clearly identify what is included in your cost base solution. Including a separate
365 appendix for products **not** included in the base solution will aide in our evaluation
366 process along with providing a complete understanding of your offer contents. All
367 costs must be included in the Cost Proposal. Cost Proposal must be separate from the
368 Technical Proposal as stated above in RFP Submittal section. **Do not include cost in**
369 **Technical Proposal. These should be submitted as two separate documents via**
370 **.PDF attachments in the online bidding system. Total cost to fulfill requirements**
371 **specified herein must also be indicated in Bid Line Item Pricing in online**
372 **bidding system.** Your separate cost proposal may go into more detail in terms of
373 cost breakdown, options, etc..., but it must also clearly indicate the cost you enter
374 into the online system. This is the cost that will be used for evaluation purposes and
375 should reflect the cost for the base technical proposal you are offering in response to
376 this solicitation. If there are conflicts in the costs you propose or Clemson cannot
377 clearly determine a total cost for your proposal, your response may be deemed non-
378 responsive.

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

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382 Costs identified in Cost Proposal section must accommodate 5 to 10 users.

383
384 ***Please provide the following in the separate cost proposal:***

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386 ***In the submitted proposals please list the initial cost of software as a service, license***
387 ***renewal and/or maintenance and support for years 1-5, additional costs for***
388 ***appended software needed for data validation, data conversion, migration, and***
389 ***training. Please include if applicable the hourly rate for future consulting services,***
390 ***or needed assistance once installation and training has occurred.***

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III. SCOPE OF WORK / SPECIFICATIONS

Functional Requirements: The compensation software and services offered should be able to provide the following functionality:

1. Benchmarking – matching Clemson University and/or State of South Carolina position descriptions to market position descriptions
2. Salary survey loading
3. Market Analysis, including indicating variances based upon ability to define market target rate at various percentiles depending upon discipline. Target to specific market percentile.
4. Forecasting ability, including costing at various aggregate levels and individual employee level. Forecast specific disciplines to specific market percentiles.
 - a) Ex. If Clemson University wants to award all employees receiving an “exceeds” performance rating a 2% raise, what would that look like?
 - b) If Clemson wants to determine a specific function/discipline at a specific percentile different from other functions/disciplines, what would it look like?
5. Compensation dashboard to show various components of pay
6. Ability to define various components of pay
7. Ability to show where individual is in relationship to data at the national, regional, local and university level
8. Ability to identify how specific skill sets are valued at the national, regional, local and university level
9. Ability to compare compensation to other non-profit and for-profit entities
10. Ability to import market data
11. Ability to export data to Excel as needed
12. Graphical capabilities, including charts and tables to display data in various formats for presentation purposes
13. Reporting Analytics:
 - a) Allows demographic analysis
 - b) Assigns value to competencies
 - c) Identifies outliers
 - d) Provides insight into total compensation package
14. Provides ability to assess whether compensation practices are aligned with compensation strategies and philosophy
15. Provides individual employee total compensation statement as well as aggregate University compensation statement, allowing for market comparisons on total compensation, including benefits
16. Provides ability to develop compensation structures (similar to the Pay Bands used by the State) and recommend market hiring ranges

- 434 **17.** Ability to assess internal equity as well as any potential disparate pay practices
- 435 **18.** Ability to load in additional data for comparison purposes
- 436 **19.** Provides data integrity for national and regional information
- 437 **20.** Integration Requirements: The proposal should include recommended methodology for
- 438 importing data for comparison purposes. At this time, Clemson University anticipates
- 439 that the compensation system will need to be able to:
- 440 a) input employee data from PeopleSoft and input data from various market data
- 441 sources for comparison purposes
- 442 b) Interface with PeopleSoft to maintain any salary adjustments
- 443 c) Integrate with performance system and/or allow input from the performance
- 444 system to run forecasting analytics.
- 445 **21.** Implementation Services:
- 446 a) Implementation/Installation/Setup
- 447 b) Project Timeline
- 448 c) Service Levels and associated roles and responsibilities
- 449 d) Invoicing approach
- 450 e) Training – onsite or at vendor’s facility, timeframe
- 451 f) Warranty
- 452 g) Service/Support – onsite, online, by phone, response time, etc. This section
- 453 should address:
- 454 i. Backups
- 455 ii. Disaster Recovery
- 456 iii. Storage
- 457 iv. Security
- 458 v. Downtimes
- 459 vi. Approach for applying patches and/or upgrades
- 460 h) Define any plug-ins/pagelets/web offerings that can be published to a portal
- 461 i) Identify any single sign-on offerings, if available
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- 463 **22.** Proposal should also include documentation of how any data Clemson University
- 464 provides to a hosted solution will be used.
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467 **IV. TERMS AND CONDITIONS – SPECIAL**

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469 **1. MINIMAL REQUIRED QUALIFICATIONS:**

470 The vendor’s client base should include both public and private sector entities. The data

471 sets maintained by the vendor should reflect both national and regional comparison sets,

472 as well as have the ability to target comparison against both for-profit and non-profit

473 industries. These data sets should be updated on a regular basis and have quality checks

474 in place to ensure the validity of the data.

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476 **2. PRODUCT DEMONSTRATION:**

477 The apparent successful vendor may be requested to demonstrate its product so that

478 Clemson University may verify the claims made in the vendor's proposal. This is a

479 pass/fail evaluation. Due to that fact that demonstrations are not part of the initial
480 evaluation, it is critical that proposals contain detailed and complete responses. Do not
481 rely on providing a response as part of a demonstration.
482

- 483 **3. AWARD CRITERIA:** Offers will be evaluated using only the factors stated below.
484 Evaluation factors are stated in the relative order of importance, with the first factor being
485 the most important. Once evaluation is complete, all responsive Offertory will be ranked
486 from most advantageous to least advantageous.

487 **A. Technical Proposal:** The degree, completeness, and suitability of the Offeror's
488 proposed technical solutions to meet or exceed the requirements of this RFP. **60%**

489 A Benchmarking, market surveys, and market analysis – 30%

490 b. Forecasting ability, costing at various aggregate and individual levels,
491 capability to import and export data sets for comparison purposes – 20%

492 c. Capability to identify and analyze various components of pay – 10%

493 **B. Offeror's Qualifications:** The Offeror's experience, references and key staff must
494 provide evidence of its depth and breadth of experience, and evidence of successful past
495 performance with projects of this similar size and scope. **20%**

496 **C. Cost Proposal:** The total cost of ownership for the base solution for the potential five
497 year contract period. **20%**
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VI. BIDDING SCHEDULE

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

	<i>Cost</i>					
<i>Cost Component</i>	<i>Year 1</i>	<i>Year 2</i>	<i>Year 3</i>	<i>Year 4</i>	<i>Year 5</i>	<i>Total</i>
Annual Service Fee						
Training Costs						
Implementation Costs						
Costs for Additional Professional Services						
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. This Base Solution Cost (years 1-5) must be transferred to Total Price in Online Bidding document as well.

Offeror should clearly list optional items and any other charges associated with any item in their cost proposal.

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