Scope of Work

I. Scope of Solicitation

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

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

1. Technical requirements
2. Application hosting
3. System/Integration Testing
   ▪ Interface development (if necessary)
   ▪ Transfer of knowledge for importing data for comparison purposes
4. Deployment support
5. Security
6. Reporting
7. Go live and post go live support
8. End user training and change management support
9. Upgrade support considerations
10. Ongoing maintenance
11. Production support, including Service Desk

12. Disaster Recovery/Business Continuity Planning

**AWARD**

Award will be made to one Offeror. Award will be made to the highest ranked, responsive and responsible Offeror whose offer is determined to be the most advantageous to the University.

The contract will be a one-time purchase of the product and all external components, a one year contract for maintenance with four one-year renewals, and professional services for implementation.

**MAXIMUM CONTRACT PERIOD – ESTIMATED**

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

**Timeline for Project Implementation:**

We are looking for a product that can be integrated into our processes in an 8-12 week timeframe. Clemson will retain control in the selection of the start date for project implementation, which will be 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 July 2, 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 Compensation Solution outlined within this solicitation specification. Each proposal must meet the minimum requirements contained within this solicitation to be considered for a contract award.
INFORMATION FOR OFFERORS TO SUBMIT - In addition to information requested elsewhere in this solicitation, Offerors should submit the following information for purposes of evaluation:

1. **Cover Letter**
   Offeror’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 Compensation Solution.

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

3. **Executive Summary**
   The Executive Summary shall condense and highlight the contents of the solution being proposed by the 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.

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

C. Change of Ownership
If any change in ownership or control of the company is anticipated during the twelve (12) months following the proposal due date, the 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.

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

E. 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 4 references with contact information including email addresses. Three of these references should be from higher education clients. 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.

7. Installation/Implementation Plan/Timeline
The successful Offeror, as part of the Cost Proposal price, will be responsible for configuration and implementation of the proposed product as may be requested by Clemson University. Such assistance shall include telephone, e-mail and minimum of three (3) days on-site support, if requested by Clemson University. All other work required to complete the implementation must be included in the fixed price cost, this should include a detailed implementation timeline. Cost must include travel, meals, lodging and all expenses. As part of the implementation the offeror will keep Clemson University personnel informed of the steps required to implement and utilize the solution through a formal knowledge transfer. Offeror must provide detailed information on prerequisite knowledge requirements to use the compensation software.
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. Maintenance/Support Agreement
Maintenance/Support Agreement must include, but not limited to, any upgrades, updates, enhancements, new releases, etc. to the product released during the term of the contract. Offeror’s must detail what is contained in their maintenance/support agreement.

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

11. Risk Management Plan
The Contractor must develop a Risk Management Plan that includes risk identification and risk mitigation strategies.

12. Quality Assurance Plan
The Contractor must develop and submit a Quality Assurance Plan that supports all core responsibilities of this RFP, including but not limited to, the practices of reviewing products and/or services before delivery, installation, utilization, testing, and corrective action practices. The plan must describe how the Contractor will ensure the quality of services being provided, how it will identify inappropriate
service, how it will correct identified problems, and how it will respond to issues of service and quality identified by CLEMSON.

13. Third Party Use
Identify any use or reliance on third-parties related to product development, implementation, on-going use, and/or technical support.

14. Documentation of Product
Online or electronic materials.

15. Appended Software
Identify and describe in detail any appended software needed for data validation, data conversion, migration, reporting and training.

16. Conversion/Migration/Integration
Identify and describe in detail plan for conversion/migration of data and integration with existing systems.

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

18. 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 responsibility for the software until it has been installed and accepted by Clemson University.

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

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

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

Please provide the following in the separate cost proposal:

- In the submitted proposals please list the initial cost of software as a service, license renewal and/or maintenance and support for years 1-5, additional costs for appended software needed for data validation, data conversion, migration, and training. 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

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

IV. TERMS AND CONDITIONS – SPECIAL

1. MINIMAL REQUIRED QUALIFICATIONS:
The vendor’s client base should include both public and private sector entities. The data
sets maintained by the vendor should reflect both national and regional comparison sets,
as well as have the ability to target comparison against both for-profit and non-profit
industries. These data sets should be updated on a regular basis and have quality checks
in place to ensure the validity of the data.

2. PRODUCT DEMONSTRATION:
The apparent successful vendor may be requested to demonstrate its product so that
Clemson University may verify the claims made in the vendor's proposal. This is a
pass/fail evaluation. Due to that fact that demonstrations are not part of the initial evaluation, it is critical that proposals contain detailed and complete responses. Do not rely on providing a response as part of a demonstration.

3. **AWARD CRITERIA:** 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.

   **A. Technical Proposal:** The degree, completeness, and suitability of the Offeror's proposed technical solutions to meet or exceed the requirements of this RFP. **60%**
   - Benchmarking, market surveys, and market analysis – 30%
   - Capability to import and export data sets for comparison purposes – 20%
   - Capability to identify and analyze various components of pay – 10%

   **B. 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. **20%**

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

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

<table>
<thead>
<tr>
<th>Cost Component</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Service Fee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costs for Additional Professional Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.