

Scope of Work

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- I. Scope of Solicitation
- II. Instructions to Offerors
- III. Scope of Work / Specifications
- IV. Terms and Conditions - Special

I. SCOPE OF SOLICITATION

The Clemson ADA Task Force is seeking the expertise of an external consultant to provide a roadmap for compliance with applicable accessibility requirements.

The scope of the vendor services required includes, but is not limited to:

- A recommendation for automated testing tools, both open source and COTS
- A recommendation for long-term monitoring software, both open source and COTS
- A recommendation on employee training to understand and address applicable accessibility requirements
- A recommended timeline for employee training
- A recommendation of a phased approach to bringing the University into full compliance
- A recommendation of an initial budget and expected long-term budget
- A recommendation for a governing body made up of Clemson employees that will provide guidance and over site for compliance long-term
- A recommendation on how to apply accessibility requirements to online learning
- A recommendation on how to enforce future compliance by faculty and staff
- A recommendation on continuous monitoring and auditing of all applicable sites, applications, software and data
- A recommended Accessibility statement and policy
- A summary report of all of the findings and recommendations
- A sample web accessibility review compatibility review with examples of problems and solutions for a Clemson public facing website, an internal application and a Clemson mobile website

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

Any resulting contract will begin on the date specified in the notice of award.

42 **Deadline for Receipt of Questions:** All questions must be emailed to Tammy Crooks at
43 duncant@clemson.edu prior to January 16, 12:00 NOON ET.

46 **II. INSTRUCTIONS TO OFFERORS**

- 47
- 48 1. **DESCRIPTIVE LITERATURE – LABELLING:** Include Offeror’s name on the cover
49 of any specifications or descriptive literature submitted with your proposal.
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- 51 2. **SUBMITTING YOUR PROPOSAL:** Regardless of specific requirements below or in
52 this document, Offerors are required to submit their proposal electronically through the
53 Clemson University online bidding system. To do so you must login (registering first) at
54 <https://sciquest.ionwave.net/prod/default.aspx?company=clemson>, and follow specific
55 instructions for this solicitation. Do NOT simply email or mail in proposals based on this
56 scope of work document. You must attach your complete proposal response as two
57 separate .pdf files in the online bidding system - one file as a technical only (i.e. no cost
58 information) and one file as a cost proposal. Submit any additional files if required as
59 redacted proposals. These attachments must address all the specific requirements outlined
60 in Section II, Instructions to Offerors, as well as Section III, Scope of
61 Work/Specifications.
62
- 63 3. **INFORMATION FOR OFFERORS TO SUBMIT** - In addition to information
64 requested elsewhere in this solicitation, Offerors should submit the following information
65 for purposes of evaluation:
66
- 67 A. Offerors must submit a Technical Proposal that is complete and detailed. It must
68 address each section using identical section titles and must follow the order and use
69 the numbering scheme contained herein. Offerors must discuss their approach and
70 methodology for each of the activities and deliverables in the proposal and identify
71 key dates. Do not include cost in your Technical Proposal. These should be
72 submitted as two separate documents via PDF attachments in the online bidding
73 system.
 - 74 1) Detail and address specific Requirements as described in Section III, 6.
 - 75 2) Detail how Offeror will accomplish the Requirements identified in Section III,
76 6, in order to complete the required service. Each section must be
77 documented and provide detailed responses. Cost must be included
78 separately.
 - 79 3) Experience and Qualifications of Proposer as referenced in Section III, 7.
 - 80 4) Detail and address Approach as identified in Section III, 8.
 - 81 5) Detail Payment Plan as identified in Section III, 10.
 - 82 6) Detail Acceptance as referenced in Section III, 11.
 - 83 7) Detail Project Assumptions and Constraints as referenced in Section III, 12.
 - 84 8) Detail value-added options as referenced in Section III, 13.
 - 85 9) Detail Assessment Impact Requirements as referenced in Section III, 14.
- 86
- 87 B. Include Cost Proposal as separate attachment as identified in Section III, 9.

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89 4. Please follow submittal requirements outlined in the Bid Attributes in the online bidding
90 system for breakdown of proposals and number of copies that must be submitted.
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94 III. SCOPE OF WORK / SPECIFICATIONS

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96 1. **Objective:**

97 The objective of the Section 508 Compliance Project is to determine the best route for
98 Clemson University's initial phase of bringing itself into compliance with the South
99 Carolina state mandate that all state funded institutions must abide by the provisions set
100 forth in the federal government's Rehabilitation Act of 1973 as amended in 1998,
101 specifically Section 508 of this act.

102

103 2. **Scope:**

104 The Clemson University ADA Task Force is seeking the expertise of an external
105 consultant to provide a roadmap for compliance with applicable accessibility
106 requirements.

107

108 3. **Background**

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110 Clemson University aspires to create a diverse community that welcomes people of
111 different races, cultures, ages, genders, sexual orientation, religions, socioeconomic
112 levels, political perspectives, abilities, opinions, values and experiences. Clemson
113 University will strive to reflect these differences in its decisions, curriculum, programs
114 and actions. The institution will seek to ensure that underrepresented groups have equal
115 access to the education and resource opportunities available at the University. Policy and
116 procedures are carefully scrutinized to sustain an inclusive and productive environment.

117

118 The ADA Compliance Task Force was established on March 15, 2010 and was charged
119 to conduct a thorough review of both our physical plant and programs to ensure
120 compliance, identify any areas of non-compliance or deficiency, recommend changes to
121 existing policies or procedures, propose new policies or procedures as necessary, and
122 make recommendations as the Task Force deems appropriate. The rationale for an ADA
123 Plan is to identify and respond to urgent accommodation needs, prioritize accommodation
124 and compliance action steps, determine funding necessary to improve the core campus,
125 and address high traffic areas with the potential for the greatest campus impact. By 2012,
126 completed projects included the Fluor Daniel Plaza, accessible entry signs for all core
127 campus buildings, door operator survey, Daniel/Kinard Parking area repaved with new
128 signage, Cooper Library Plaza renovation with repaved parking and sidewalks, Sikes Hall
129 Parking Lot with ADA parking improved for slope compliance and raised pedestrian
130 crosswalk. Active projects for 2013 include Holtzendorff Hall with new ramp, loggia
131 extension, barrier free route to parking area, and new signage along with campus signage
132 for accessible routes and entrances. Active projects for 2013-2014 include Hardin-
133 Brackett Hall site survey and concept design.

134 **4. Organizational Structure**

135

136 **4.1 Faculty**

137 Clemson has 1398 faculty members, 82% (1150) of which are full-time. Ninety-
138 eight percent of all tenure-line faculty hold doctorate or equivalent degrees.
139 Clemson has a 16 to 1 student to faculty ratio. The average class size for Spring
140 Term 2011 is fewer than 20 students.

141

142 **4.2 Academic Programs**

143

144 Students can select from approximately 80 undergraduate and 110 graduate
145 degree programs offered by five colleges: Agriculture, Forestry and Life
146 Sciences; Architecture, Arts and Humanities; Business and Behavioral Science;
147 Engineering and Science; and Health, Education and Human Development.

148

149 Clemson is well known for its prominent athletic programs and for the spirit of its
150 fans. Another important aspect of Clemson is its dedication to improving the
151 world through public service, which is why the University encourages faculty to
152 engage their classes through service learning. With its college-town, lakefront
153 setting against a backdrop of mountains and forests, Clemson is characterized by
154 a strong sense of community, a commitment to service and a love of winning —
155 in academics, in athletics and in life.

156

157 **4.3 Students**

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159 With a student population of 19,453 at Clemson University, classes are carefully
160 managed to ensure small sizes with 51% of its undergraduate classes having fewer
161 than 20 students, a 16-to-1 student-to-faculty ratio, and high retention and
162 graduation rates. Student engagement and satisfaction score well above the
163 national average.

164

165 The university recently earned national recognition for its living learning
166 communities, Creative Inquiry undergraduate research program, and student
167 participation in service-learning and civic engagement.

168

169 Clemson University has a total undergraduate enrollment of 15,459, with a gender
170 distribution of 54.3 percent male students and 45.7 percent female students.

171

172 **5. Current Environment**

173 Clemson University's ADA Task Force has been extremely successful in its work to
174 improve the accessibility of the University's core campus. The members of the Task
175 Force are pleased with the progress which has been made. At the same time the Task

176 Force members realize that there is much work to be done to comply fully with the
177 standards of the Americans with Disabilities Act. Foremost among the challenges which
178 the Task Force plans to address as it continues its work include campus signage
179 improvements, University website compliance, elevator accessibility, and non-core
180 campus assessment and compliance initiative.

181

182 **6. Requirements**

183 Clemson University has outlined specific requirements for the Offeror to
184 develop the proposed solution. Offerors must describe how the proposal will
185 meet the requirements outlined below, in sufficient detail for the Evaluation
186 Committee to be able to ascertain the proposer's ability to comply with the stated
187 requirements.

188

189 The external experts should provide Clemson with the following minimal
190 deliverables:

- 191 6.1 A recommendation for automated testing tools, both open source and
192 COTS
- 193 6.2 A recommendation for long-term monitoring software, both open source
194 and COTS
- 195 6.3 A recommendation on employee training to address applicable
196 accessibility requirements.
- 197 6.4 A recommended timeline for employee training
- 198 6.5 A recommendation of a phased approach to bringing the University into
199 full compliance
- 200 6.6 A recommendation of an initial budget and expected long-term budget
- 201 6.7 A recommendation for a governing body made up of Clemson employees
202 that will provide guidance and over site for compliance long-term
- 203 6.8 A recommendation on how to adapt applicable accessibility requirements
- 204 6.9 A recommendation on how to enforce future compliance by faculty and
205 staff
- 206 6.10 A recommendation on continuous monitoring and auditing of all
207 applicable sites, applications, software and data
- 208 6.11 A recommended Accessibility statement and policy
- 209 6.12 A summary report of all of the findings and recommendations

210 6.13 A sample accessibility compatibility review with examples of problems
 211 and solutions for a Clemson public facing website, an internal application
 212 and a Clemson mobile website

213 6.14 In order to meet the needs of the task force, the expert should plan to be on
 214 campus at the beginning of the project to meet key personnel, set
 215 expectations and begin gathering information. After an initial visit the
 216 consultant does not need to be on campus for gathering information or
 217 preparing the final documentation unless no other means of work can
 218 provide the expert with information in a timely fashion. Once the
 219 requested information has been compiled into a summary, the consultant
 220 will be required to present these findings and recommendations to the
 221 ADA Task Force and other University personnel in person.
 222

223 6.15 The external consultant will need to sign non-disclosure and
 224 confidentiality agreements as supplied by Clemson's legal department
 225 prior to beginning work and being given access to necessary sites,
 226 applications and information that they will need in order to complete their
 227 objective. The facilitation of the expert's research should be accomplished
 228 by the assignment of a Project Manager that is familiar with the site,
 229 application and data owners that will need to assist in assigning access to
 230 the expert.
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232 6.16 All recommended solutions must be compliant with CCIT IT architecture
 233 standards.
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236 **7. Experience and Qualifications of the Proposer:**

237
 238 7.1 Offeror's Qualifications - The Offeror's Qualifications information should
 239 include, but not limited to, the following:
 240

241 7.1.1 Corporate Overview

- 242 a) Offeror must provide the full company or corporate name,
 243 address of the company's headquarters, entity organization
 244 (corporation, partnership, proprietorship), state in which the
 245 Offeror is incorporated or otherwise organized to do
 246 business, year in which the Offeror first organized to do
 247 business, and whether the name and form of the
 248 organization has changed since first organized.
- 249 b) Offeror must disclose any and all judgments, pending or
 250 expected litigation, or other real or potential financial
 251 reversals, which might materially affect the viability or
 252 stability of the organization, or state that no such condition
 253 is known to exist.

- 254 c) If any change of ownership or control of the company is
255 anticipated during the twelve (12) months following the
256 proposal due date, the Offeror must describe the
257 circumstances of such change and indicate when the change
258 will likely occur. Any change of ownership to an awarded
259 vendor(s) will require notification to Clemson.
260 d) Offeror's office location responsible for performance
261 pursuant to an award of a contract with Clemson University
262 must be identified.
263 e) Offeror shall provide copies of all contract documents.
264 Contract documents may include, but not be limited to:
265 software license agreements, professional services
266 agreements, master services agreements, maintenance
267 agreements, support and service level agreements, etc.
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270 7.1.2 Corporate Experience

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- 272 a) Offeror should describe their experience in the consulting
273 industry specifically to large research institutions and large
274 public universities. Include successful projects of similar
275 scope and size for reference. Offeror must provide narrative
276 descriptions to highlight the similarities between their
277 experience and this Request for Proposal. These descriptions
278 must include:
- 279 1. The time period of the project;
 - 280 2. The scheduled and actual completion dates;
 - 281 3. Staff-months expended;
 - 282 4. The contractor's responsibilities;
 - 283 5. A customer name (including the name of a
284 contact person, a current telephone number, and
285 an email address.);
- 286 Each project description shall identify whether the work was
287 performed as the prime contractor or as a subcontractor. If an
288 Offeror performed as the prime contractor, the description must
289 provide the originally scheduled completion date and budget,
290 as well as the actual (or currently planned) completion date
291 and actual (or currently planned) budget. Contractor and
292 Subcontractor(s) experience must be listed separately.
293 Narrative descriptions submitted for subcontractors must be
294 specifically identified as subcontractor projects.
- 295 b) Offeror is expected to propose sufficient staff with the requisite
296 skills and abilities to meet all requirements in this RFP.
297 Offeror must identify the personnel and provide resumes and
298 references for the identified key staff. If the Offeror's
299 methodology deems other staff as key, the Offeror must

300 identify the positions, provide representative job descriptions,
 301 identify the personnel and provide resumes and references. In
 302 addition, Offeror must provide representative job descriptions
 303 for any other positions identified in the Offeror’s proposed
 304 staffing plan. Offeror’s proposal must describe policies, plans
 305 and intentions with regard to maintaining continuity of key
 306 staff assigned to the project and avoiding and minimizing the
 307 impact of necessary staff changes.

- 308 c) Offeror should provide demonstrated experience listening to
- 309 the voice of the customer and customizing a solution to exceed
- 310 customer expectations and meet savings targets.
- 311 d) Offeror must provide examples of data driven change
- 312 management.
- 313 e) Offeror must provide proven experience implementing IT in
- 314 Higher Education.
- 315 f) Offeror must provide proven examples of successful change
- 316 techniques/Change Management Planning documentation:
- 317 1. Change management project plans
- 318 2. Communication and training strategies
- 319 3. Issue resolution with contingency plans for
- 320 initial and ongoing support

321 7.1.3 References

- 322 a) Offeror shall provide a minimum of three (3) references,
- 323 preferably from higher educational institutions with contact
- 324 information including email addresses. Clemson reserves the
- 325 right to check any reference(s), regardless of the source of the
- 326 reference information, including but not limited to, those that
- 327 are identified by the company in the proposal, those indicated
- 328 through the explicitly specified contacts, those that are
- 329 identified during the review of the proposal, or those that result
- 330 from communication with other entities involved with similar
- 331 projects. Information to be required and evaluated from
- 332 references may include, but is not limited to, some or all of the
- 333 following: project description and background, job performed,
- 334 functional and technical capabilities, communication skills and
- 335 timeliness, cost and schedule estimates and accuracy, problems
- 336 (poor quality deliverables, contract disputes, work stoppages,
- 337 etc.), overall performance, and whether or not the reference
- 338 would rehire the firm or individual.

340 7.1.4 Insurance

- 341 a) The successful Offeror shall provide satisfactory evidence of
- 342 all required insurance coverage and licenses prior to
- 343 performance or as part of the Technical Proposal.

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8. Approach

8.1 Management Approach

The Offeror will detail the project management processes and tools that will be used to successfully manage this project. The Offeror must use a customer-approved, industry standard project management framework and processes to manage all aspects of the project. Additionally, the Offeror will provide documentation regarding the work approach for the project.

A project issues log will be used to record any problems related to timing, scope, quality of deliverables, or staffing. This tool will be used by Clemson University management and vendors to resolve any risk to delivery of project scope of work.

8.2 Change Management

The Offeror will detail the change management process that will be used. The change procedure will be used in instances such as but not limited to:

- a) Any change to the Scope of Work
- b) Addition of any deliverable that is not mentioned in the Scope of Work
- c) Additional activity not defined in the Scope of Work for a planned deliverable
- d) Any changes to accepted deliverables or their acceptance criteria
- e) Any of the critical dependencies not met by the time allocated in the Scope of Work
- f) Time lost due to reasons beyond the project team's control
- g) Vendor staffing changes during any phase of the project

9. Cost Proposal

Offerors must submit a Cost Proposal (in a separate attachment) that includes the cost of the proposed services outlined throughout the proposal document. This cost must be a fixed price cost for the project. Costs should be itemized to include labor, travel, living and other expenses. Costs must be based on milestones and deliverables.

Cost Proposal must be separate from the Technical Proposal. **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.

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10. Payment

Offerors must submit an estimated payment plan for the project based on deliverables acceptance. Payment will be made based on milestones and deliverables. Offerors must invoice Clemson University monthly based on deliverables acceptance. No invoices should be issued nor will they be paid for deliverables that have not been accepted in writing.

11. Acceptance

Acceptance is a written approval by Clemson University that the in-scope deliverables meet the requirements set forth in the Clemson University Scope of Work and Offerors Statement of Work.

Written acceptance shall occur on a timely basis to avoid project delays, normally within five business days following receipt unless an alternative timeframe is mutually agreed in writing. Acceptance via email is permissible if it explicitly details deliverables approved.

When acceptance is not provided by the agreed-upon date, the deliverable will be added to the issues log and managed through the issues management process. Typically, dependent tasks start after the expiration of the acceptance timeframe. Therefore, a delay in acceptance may impact other activities and result in a criterion for change.

Once deliverables are accepted, Clemson University will provide the Offeror written final acceptance for all work delivered pursuant to this Scope of Work. No payment will be made for deliverables until Clemson University has accepted the deliverable in writing.

In performing the services to be provided hereunder, the Offeror will perform all services in a professional and workmanlike manner, in accordance with the professional or technical standards applicable to such services, and use individuals of suitable training and skill.

The terms and conditions apply in full to the services and products provided under this Scope of Work.

12. Project Assumptions and Constraints

Both Clemson University and the Offeror will fulfill their roles and responsibilities as defined in this Scope of Work. Failure to do so may result in schedule delays and increase costs.

The Offeror may shift estimated hours to complete each phase/task as needed to ensure that resources are effectively used. This may result in reduced cost and/or hours required to complete the project. If the Offeror makes misjudgments or miscalculations in time restructuring which would result in increases to the cost of the project, Clemson University will not be responsible for any payments over the contractually agreed totals.

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Any requested modifications to the accepted deliverables will be subject to the change control process (to be defined in the Offeror’s response and approved by Clemson University).

13. Value Added Options - Offerors are encouraged to propose any value added options available when responding. Each Offeror is requested to provide details on what features, functions, or other considerations exclusive of the specified needs that may be requested by an end user that may provide a distinct value to Clemson University.

13.1 Value added options must be separated from basic required functionality on the Cost Proposal and the Technical Proposal and will not be included in the cost evaluation.

14. Assessment Impact Requirements – Offerors expectations of man hours from Clemson University’s various levels of staff and various levels of IT staff.

IV. TERMS AND CONDITIONS – SPECIAL

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.

Evaluation Criteria:

- 1. Technical Proposal:** The degree, completeness, and suitability of the Offeror’s proposed technical solutions to meet or exceed the requirements of this RFP. **(50 pts)**
- 2. Cost Proposal:** The total cost of services provided. **(25 pts)**
- 3. 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 pts)**
- 4. Proposed Plan/Timeline:** Proposed plan with timeline to complete the initiatives described in Section III to include any value added options. **(5 pts)**