Scope of Work

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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.
II. INSTRUCTIONS TO OFFERORS

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

2. 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.

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

   A. Offerors must submit a Technical Proposal that is complete and detailed. It must address each section using identical section titles and must follow the order and use the numbering scheme contained herein. Offerors must discuss their approach and methodology for each of the activities and deliverables in the proposal and identify key dates. Do not include cost in your Technical Proposal. These should be submitted as two separate documents via PDF attachments in the online bidding system.

   1) Detail and address specific Requirements as described in Section III, 6.
   2) Detail how Offeror will accomplish the Requirements identified in Section III, 6, in order to complete the required service. Each section must be documented and provide detailed responses. Cost must be included separately.
   3) Experience and Qualifications of Proposer as referenced in Section III, 7.
   4) Detail and address Approach as identified in Section III, 8.
   5) Detail Payment Plan as identified in Section III, 10.
   6) Detail Acceptance as referenced in Section III, 11.
   7) Detail Project Assumptions and Constraints as referenced in Section III, 12.
   8) Detail value-added options as referenced in Section III, 13.
   9) Detail Assessment Impact Requirements as referenced in Section III, 14.

   B. Include Cost Proposal as separate attachment as identified in Section III, 9.
4. Please follow submittal requirements outlined in the Bid Attributes in the online bidding system for breakdown of proposals and number of copies that must be submitted.

III. SCOPE OF WORK / SPECIFICATIONS

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

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

3. Background

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

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

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

4.2 Academic Programs
Students can select from approximately 80 undergraduate and 110 graduate degree programs offered by five colleges: Agriculture, Forestry and Life Sciences; Architecture, Arts and Humanities; Business and Behavioral Science; Engineering and Science; and Health, Education and Human Development.
Clemson is well known for its prominent athletic programs and for the spirit of its fans. Another important aspect of Clemson is its dedication to improving the world through public service, which is why the University encourages faculty to engage their classes through service learning. With its college-town, lakefront setting against a backdrop of mountains and forests, Clemson is characterized by a strong sense of community, a commitment to service and a love of winning — in academics, in athletics and in life.

4.3 Students
With a student population of 19,453 at Clemson University, classes are carefully managed to ensure small sizes with 51% of its undergraduate classes having fewer than 20 students, a 16-to-1 student-to-faculty ratio, and high retention and graduation rates. Student engagement and satisfaction score well above the national average.
The university recently earned national recognition for its living learning communities, Creative Inquiry undergraduate research program, and student participation in service-learning and civic engagement.
Clemson University has a total undergraduate enrollment of 15,459, with a gender distribution of 54.3 percent male students and 45.7 percent female students.

5. Current Environment
Clemson University’s ADA Task Force has been extremely successful in its work to improve the accessibility of the University’s core campus. The members of the Task Force are pleased with the progress which has been made. At the same time the Task
Force members realize that there is much work to be done to comply fully with the standards of the Americans with Disabilities Act. Foremost among the challenges which the Task Force plans to address as it continues its work include campus signage improvements, University website compliance, elevator accessibility, and non-core campus assessment and compliance initiative.

6. **Requirements**

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

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

6.1 A recommendation for automated testing tools, both open source and COTS

6.2 A recommendation for long-term monitoring software, both open source and COTS

6.3 A recommendation on employee training to address applicable accessibility requirements.

6.4 A recommended timeline for employee training

6.5 A recommendation of a phased approach to bringing the University into full compliance

6.6 A recommendation of an initial budget and expected long-term budget

6.7 A recommendation for a governing body made up of Clemson employees that will provide guidance and over site for compliance long-term

6.8 A recommendation on how to adapt applicable accessibility requirements

6.9 A recommendation on how to enforce future compliance by faculty and staff

6.10 A recommendation on continuous monitoring and auditing of all applicable sites, applications, software and data

6.11 A recommended Accessibility statement and policy

6.12 A summary report of all of the findings and recommendations
6.13 A sample accessibility compatibility review with examples of problems and solutions for a Clemson public facing website, an internal application and a Clemson mobile website

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

6.15 The external consultant will need to sign non-disclosure and confidentiality agreements as supplied by Clemson's legal department prior to beginning work and being given access to necessary sites, applications and information that they will need in order to complete their objective. The facilitation of the expert's research should be accomplished by the assignment of a Project Manager that is familiar with the site, application and data owners that will need to assist in assigning access to the expert.

6.16 All recommended solutions must be compliant with CCIT IT architecture standards.

7. **Experience and Qualifications of the Proposer:**

7.1 Offeror’s Qualifications - The Offeror's Qualifications information should include, but not limited to, the following:

7.1.1 Corporate Overview

a) Offeror must provide the full company or corporate name, address of the company’s headquarters, entity organization (corporation, partnership, proprietorship), state in which the Offeror is incorporated or otherwise organized to do business, year in which the Offeror first organized to do business, and whether the name and form of the organization has changed since first organized.

b) Offeror 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) If any change of ownership or control of the company is anticipated during the twelve (12) months following the proposal due date, the Offeror 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) Offeror’s office location responsible for performance pursuant to an award of a contract with Clemson University must be identified.

e) Offeror 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.

7.1.2 Corporate Experience

a) Offeror should describe their experience in the consulting industry specifically to large research institutions and large public universities. Include successful projects of similar scope and size for reference. Offeror 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. A customer name (including the name of a contact person, a current telephone number, and an email address.);

Each project description shall identify whether the work was performed as the prime contractor or as a subcontractor. If an Offeror 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) Offeror is expected to propose sufficient staff with the requisite skills and abilities to meet all requirements in this RFP. Offeror must identify the personnel and provide resumes and references for the identified key staff. If the Offeror’s methodology deems other staff as key, the Offeror must
identify the positions, provide representative job descriptions, identify the personnel and provide resumes and references. In addition, Offeror must provide representative job descriptions for any other positions identified in the Offeror’s proposed staffing plan. Offeror’s proposal must describe policies, plans and intentions with regard to maintaining continuity of key staff assigned to the project and avoiding and minimizing the impact of necessary staff changes.

c) Offeror should provide demonstrated experience listening to the voice of the customer and customizing a solution to exceed customer expectations and meet savings targets.

d) Offeror must provide examples of data driven change management.

e) Offeror must provide proven experience implementing IT in Higher Education.

f) Offeror must provide proven examples of successful change techniques/Change Management Planning documentation:
   1. Change management project plans
   2. Communication and training strategies
   3. Issue resolution with contingency plans for initial and ongoing support

7.1.3 References
   a) Offeror shall provide a minimum of three (3) references, preferably from higher educational institutions with contact information including email addresses. Clemson reserves the right to check any reference(s), regardless of the source of the reference information, including but not limited to, those that are identified by the company in the proposal, those indicated through the explicitly specified contacts, those that are identified during the review of the proposal, or those that result from communication with other entities involved with similar projects. Information to be required 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 capabilities, 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.

7.1.4 Insurance
   a) The successful Offeror shall provide satisfactory evidence of all required insurance coverage and licenses prior to performance or as part of the Technical Proposal.
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.
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.
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)*